



Exit Procedures for Employees

Steps for a Smooth Transition for Exiting Employees and Their Departments

The Office of Human Resources (OHR) has designed an exit process to support the exiting employee and the department. This document outlines the steps that the exiting employee should complete before separation from County service to ensure a smooth transition for both the employee and the department, as well as the continuation of any benefits to which the employee may be entitled. Employee and supervisor exit checklists are also available:

- [Employee Exit Checklist](#)
- [Supervisor Exit Checklist](#)

Note: Employees and supervisors should follow internal departmental exit procedures, which for some departments may differ from the steps outlined below.

1. **Contact OHR Health Insurance Team**

Before leaving County employment, the employee should contact the Health Insurance Team by placing a service request with MC311 at 240-777-0311 and request a call back to discuss retirement group insurance matters. Retiring employees must also sign up to attend the class *Enrolling in Health Insurance Benefits at Retirement* no later than 60 days before their planned retirement date. Dates for classes can be found on the [OHR Retirement Planning Webpage](#).

2. **Contact Montgomery County Employee Retirement Plans (MCERP)**

The [MCERP website](#) has a checklist for employees concerning their retirement benefits upon separation from County employment. Employees can also contact: retirement@montgomerycountymd.gov. Employees planning to retire should also follow the steps below depending on which plan(s) they are enrolled in:

Employees' Retirement System (ERS) Pension: Register and attend the *ERS Planning for Retirement* seminar 90 days before your retirement date, run your pension estimate 90 days before your retirement date, and submit your retirement application through MCERP's online portal at least 60 days before your retirement date at <https://eportal.montgomerycountymd.gov/goto/ERSRetiree/>.

Retirement Savings Plan (RSP)/Guaranteed Retirement Income Program (GRIP): Register for OHR's *Enrolling in Health Insurance Benefits at Retirement* seminar at least 90 days before your retirement date to attend the seminar 60 days before your termination date. Make a one-on-one appointment with the Fidelity representative to discuss your distribution options with your retirement account. The OHR Retirement Planning Website is [Retirement Planning \(montgomerycountymd.gov\)](#).

3. **Write a Letter of Resignation**

All County employees who are resigning should submit a written letter of resignation, including those who are retiring. In unusual circumstances, an employee may submit an oral resignation (MCPR, 2001-Section 28). For your convenience, a sample letter, which should be modified to fit your circumstances, is on page three. All employees should give a minimum of two weeks' notice.

4. **Exit Meeting**

Prior to the employee's last day of work, a meeting should be held with the employee and the supervisor or a representative from the department. The purpose of this meeting is to facilitate a smooth transition for the employee and to ensure all exit process steps are completed.

5. **Financial Disclosure**

If an employee is required to file a financial disclosure statement under the provisions of the County Code, the employee must file the statement for the calendar year (up to the date of departure) during which the employee separates from the County. The Financial Disclosure Online Filing system is located at: www.montgomerycountymd.gov/financialdisclosure/. Failure to submit a financial disclosure statement upon resignation will cause a delay in processing the employee's final paycheck.

5. **Ethics Law Post-Employment Requirements for All Employees**

For those leaving County service, the ethics laws post-employment requirements are as follows:

Permanent Bar. Former County employees must not work on or otherwise assist any party, other than a County agency, in a case, contract, or other specific matter if the employee significantly participated in the matter as a public employee.

One Year Bar on Certain Employment. For one year after the effective date of termination from County employment, a former public employee must not enter into any employment understanding or arrangement (expressed, implied, or tacit) with any person or business if the public employee significantly participated during the previous 3 years: (1) in regulating the person or business; or (2) in any procurement or other contractual activity concerning a contract with person or business (except a non-discretionary contract with a regulated public utility).

Protection of Confidential Information. Also, former County employees may not disclose any confidential information relating to or maintained by a County agency that is not available to the public. Also, a former employee may not use confidential information for personal gain or the gain of another. For questions, please contact the Ethics Commission Office at 240-777-6670.

6. **Voluntary Training and Tuition Assistance Program Service Requirements and Outstanding Financial Obligations**

An employee's supervisor must ensure that the employee has met all service requirements and has no financial obligations after participating in external voluntary training or the County's tuition assistance program. For information about the tuition assistance program, visit the [Tuition Assistance Program webpage](#). For information about service requirements for voluntary external training, visit Montgomery County Personnel Regulations Employee Development Section 14-2(b): [MCPR Section 14 Employee Development](#).

7. **Property Separation Checklist**

The County's property in the employee's possession has been identified as noted on the separation checklist. Those items must be physically returned to the department at the time of the exit meeting or when requested. The employee and supervisor should both sign the completed checklist. A signed copy should be maintained by the department.

8. **Exit Survey**

Exiting employees may receive a link to complete an anonymous exit survey at their County email address from the following sender: Surveys@Pulse.gartner.com. As an exiting employee, participation in an exit survey is voluntary, but highly encouraged. It will provide valuable feedback regarding the work environment in the County. Feedback will assist the County in identifying changes that may be needed to improve the workplace.

9. **Change of Address**

If the exiting employee is moving, the employee should send the new mailing address via email to OHR Records Management at records.ohr@montgomerycountymd.gov. This change of address will enable County Payroll to send the employee's W-2 Form to the correct address the following January. If the employee is retiring, the employee should also complete and submit the Montgomery County Employee Retirement Plans (MCERP) [Change of Address or Name Form](#). MCERP will share the change of address with OHR Health Insurance to ensure that all insurance carriers are notified, and to verify if the retiree needs to change their medical insurance plan based on the new address.

Sample Resignation Letter

[DATE]
[RECIPIENT'S NAME]
[DEPARTMENT]
[ADDRESS]

Dear [NAME OF SUPERVISOR]

Please accept this letter as my formal resignation from the position of [TITLE], in the department of [DEPARTMENT] in Montgomery County Government, effective [DATE]. I am leaving my position due to [REASON].

Sincerely,

[EMPLOYEE NAME]