



Exit Process Checklist for Supervisors

The purpose of the exit process is to support the transition of employees leaving County employment. This section outlines the necessary steps the immediate supervisor (or department designee) must complete before an employee leaves County employment. The immediate supervisor is responsible for collecting all County property and completing this form prior to the employee's separation from County employment.

The following checklist is provided for supervisors:

Status	Action Steps for the Exiting Employee's Immediate Supervisor (or Department Designee)
	<p>1. Receive the Letter of Resignation. The supervisor receives a letter of resignation or a notification that an individual is leaving. The supervisor should note the date, time, and nature of the communication.</p>
	<p>2. Inform Your HR Liaison. <u>Immediately</u> notify the responsible Departmental HR Liaison that the employee is planning to separate from County service. The HR Liaison is responsible for initiating a timely Termination Assignment transaction and taking other appropriate steps to:</p> <ul style="list-style-type: none"> • Notify the department IT staff to deactivate the employee's access to department systems and remove any references to the employee in the departmental webpages; • Ensure that the employee's County-wide IT access rights and physical/badge access is terminated upon the employee's separation. [Note: Collection of the employee's badge is a separate action that the supervisor must complete – see <i>item 9</i> below.]
	<p>3. Remind the Employee to 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 <i>Enrolling in Health Insurance Benefits at Retirement</i> no later than 60 days before their planned retirement date. Dates for classes can be found on the OHR Retirement Planning Webpage.</p>
	<p>4. Remind the Employee to 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:</p> <p>Employees' Retirement System (ERS) Pension: Register and attend the <i>ERS Planning for Retirement</i> 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/.</p> <p>Retirement Savings Plan (RSP)/Guaranteed Retirement Income Program (GRIP): Register for OHR's <i>Enrolling in Health Insurance Benefits at Retirement</i> seminar at least 90 days before your retirement date to attend the seminar 60 days before your retirement 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).</p>

	<p>5. Remind the Employee of the Financial Disclosure Requirement. Before departure, remind the employee if they are required to file a final financial disclosure statement under the provisions of the County Code. The Financial Disclosure Online Filing system is located at: www.montgomerycountymd.gov/financialdisclosure/. Notify Finance, Payroll only for those positions that require filing financial disclosure statements.</p> <p>Immediately notify the HR Liaison that the employee is separating and must file a final financial disclosure statement so that the HR Liaison can immediately process the separation or retirement on the exiting employee and indicate eligibility for rehire in Oracle as soon as the employee gives notice.</p> <p>Note: HR Liaisons must ensure that performance appraisals are closed out in Oracle Workforce Performance Management (WPM) BEFORE processing the employee's separation or retirement in Oracle.</p>
	<p>6. Remind the Employee of the Ethics Laws Post-Employment Requirements:</p> <p>Permanent Bar. Former County employees must not work with or 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.</p> <p>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 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).</p> <p>Protection of Confidential Information. 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 for the gain of another.</p>
	<p>7. Check Service Requirements for Voluntary Participation in Training and the Tuition Assistance Program. 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. Contact the Office of Human Resources Training and Organizational Section at 240-777-5116 or email OLM.admin@montgomerycountymd.gov if the employee is currently using or has used Tuition Assistance Program funds within the last two years.</p>
	<p>8. Conduct Exit Meeting. Schedule a meeting with the employee prior to the last day of work to collect all pertinent County items and discuss other exit process matters.</p>
	<p>9. Complete Property Separation Checklist. Use the <i>Property Separation Checklist</i> to identify the County items the employee has in their possession. Collect all items identified on the <i>Property Separation Checklist</i> from the employee. The supervisor and employee must then sign the <i>Property Separation Checklist</i>. (The only exception is for Public Safety employees. Supervisors should follow established departmental procedures.)</p>
	<p>10. Return County-issued ID Card to the Security Services Division. Departments are responsible for returning ID cards within five (5) business days of the employee's separation from County service. The Department must return the ID card to the Security Services Division at one of the following locations:</p> <ul style="list-style-type: none"> • Security Services Division EOB: 101 Monroe Street, T-level, Rockville, MD 20850 • Security Services Division PSHQ: 100 Edison Park Drive, Rm 1113, Gaithersburg, MD 20878 <p>If returning the ID card via Interoffice mail, include your name and a note stating the reason you are returning the County ID Card.</p> <p>Contact Security Services with any questions about this procedure.</p>
	<p>11. Complete Final Time Sheet. Process the employee's final time sheet to Payroll.</p>
	<p>12. Change Office Pad Locks and Combinations. For security and safety, all office pad locks and combinations should be changed when an employee leaves County employment.</p>

For additional information on the exit process please contact your department HR Liaison.

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