

**india VERSION**

**employee offboarding checklist**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **PREPARE**  **YOURSELF** | **ACTIONS BEFORE YOUR LAST DAY** | | | | | **ACTIONS AFTER YOUR LAST DAY** |
|  |  |  |  |  |  |  |
| DISCUSSION WITH LINE MANAGER | HR ONLINE | EXIT INTERVIEW SURVEY | HOUSE KEEPING AND CANCELLATIONS | IT OFF-BOARDING | REQUIRED TO PROVIDE TO LINE MANAGER | FOLLOW UP ACTIONS AFTER LEAVING SHELL |
|  |  |  |  |  |  |  |

|  |  |
| --- | --- |
| **EMPLOYEE NAME:** | Enter Full Name |

Please complete the Off-boarding Checklist before leaving Shell by ticking the boxes in the section below. Ensure that all actions are completed as required.

| **DISCUSSION WITH LINE MANAGER** |
| --- |
| Review the [Off-boarding site](https://eu001-sp.shell.com/sites/AAAAB5282/Employees/Pages/en_GL/Content/Tier0/Global/Off_Boarding/E_OB1_Introduction.aspx?RoleType=Home&CPTitle=Offboarding) to understand [the Off-boarding Process](https://eu001-sp.shell.com/sites/AAAAB5282/Employees/Pages/en_GL/Content/Tier0/Global/Off_Boarding/E_OB2_Process_Description.aspx?RoleType=Home&CPTitle=Process,%20Responsibilities).  For a resignation or retirement, submit supporting documentation to your Line Manager.  Finalise leave to be taken prior to Last Day on Payroll.  Review the [Knowledge Transfer](https://eu001-sp.shell.com/sites/AAAAB5282/Employees/Pages/en_GL/Content/Tier0/Global/Off_Boarding/Knowledge_Capture_and_Transfer.aspx) items with your Line Manager and who will be accountable for any actions.  Discuss the following Intellectual Property (IP) aspects with your Line Manager and confirm your awareness once you receive questionnaire in your Workday inbox:   * + Your obligations of confidentiality continue after you have left Shell employment.   + You are not allowed to use for any purpose whatsoever any proprietary or otherwise confidential information you acquired from Shell or as an employee of Shell.   + All information you generated during your employment which you consider, or which should reasonably be considered, to constitute an invention must be reported to IPS.   + You must return to Shell all documents containing proprietary Shell information or other proprietary information (including information received from third parties under confidentiality agreements between such third parties and Shell) which you received in the course of your employment including any copies (including soft copies and notes you prepared).   + All proprietary Shell information must be removed from any discs or electronic system you used during your employment with Shell.   + If you become aware of any proprietary Shell information in tangible form still in your possession, such information should be promptly returned to Shell.   + If you are ever unsure as to the scope of any such IP information after leaving, you should promptly seek Shell’s advice in writing. |

| **HR ONLINE** |
| --- |
| Review the cash compensation, pension, benefits, and other employee programs/policies in HR Online to understand what will happen to them after you leave.  If you participate in the [Global Employee Share Purchase Plan](https://eu001-sp.shell.com/sites/AAAAB5282/Public/Pages/en_GL/Content/Tier0/Global/SharePlans/GESPP_Leaving_Shell_GESPP.aspx), review the site to understand what happens to your shares when you leave.  If you have Performance Shares, review the [PSP site](https://eu001-sp.shell.com/sites/AAAAB5282/Public/Pages/en_GL/Content/Tier0/Global/SharePlans/Leaving_Shell.aspx) to understand what happens to your shares when leaving.  Ensure that contact details (email, address and phone number) are correct in Workday for future correspondence.   * You may also want to review any personal information you have voluntarily disclosed in Self-ID fields.   Create and submit leave requests via HR Online. |

| **EXIT INTERVIEW SURVEY** |
| --- |
| All Shell employees who leave voluntarily are asked to complete the Exit Interview Survey (takes approximately 3 minutes). The survey invitation will be sent to you via Workday. |

| **HOUSE KEEPING AND CANCELLATIONS** |
| --- |
| Please take note that prior to your last day in the Company, you are required to return all asset and confidential information belonging to Shell. In addition to IT assets (e.g. laptop and headset), Group Corporate Card (GCC) and GID card, it would also include physical, electronic and printed copies of documents containing Shell’s confidential information which you accessed, created, contributed or published. You are strictly not allowed to transfer, forward, transmit or send them to any third party, including your personal accounts, without explicit consent from Shell. Should you fail to comply with this, it may result in necessary action being taken by Shell.  Complete and submit all timesheets for approval.  Cancel attendance at future training classes.  Clean-up own mailbox and OneDrive for Business. Save guard any records by moving them to a location to file them as a record.  Make sure to delete all personal identifiable information off others when the use case has expired. If an appropriate use case is still applicable ensure the correct access restrictions and hand over the information to your successor.  Submit all expenses in Concur (Global Corporate Card, Disallowed, and Out-of-Pocket) no later than 15 days prior your leaving date. If under a paper country, submit all hardcopy expense reports along with original receipts to local [archiving location](https://eu001-sp.shell.com/:x:/r/sites/AAFAA2267/_layouts/15/Doc.aspx?sourcedoc=%7BCAECC402-F9E1-400B-BDF9-73A8413A83B8%7D&file=Archiving%20Document%20Locations.xls&action=default&mobileredirect=true) 5 days prior your leaving date. If you are unable to come to the office physically, please use mail/courier services to return thedocuments. [Delegate authority in Expense Management System](https://eu001-sp.shell.com/:p:/r/sites/AAFAA2267/_layouts/15/WopiFrame.aspx?sourcedoc=%7bBCE38C56-26A9-4E13-93A9-3750EB4EAB92%7d&file=Adding%20a%20Delegate%20Tip%20Sheet.pptx&action=default), [Concur](https://sso.shell.com/idp/startSSO.ping?PartnerSpId=https://emea.api.concursolutions.com/saml2/), or other expense system and [cancel account](https://eu001-sp.shell.com/sites/AAFAA4985/finance/global-corporate-card/Pages/Global-Corporate-Card--Staff-Movements.aspx).  Return all unused airline tickets/credits to your local Shell preferred travel agency. For any questions, please contact [Corporate Travel](mailto:S-RE-Travel@Shell.com).  Where Global Corporate Card has been stored in user profile with any merchants (e.g. Concur Travel, Book It/Carlson Wagonlit Travel, car hire companies, trade/professional subscription bodies etc) ensure this is removed/updated prior to leaving. GCC will be cancelled 2 days prior your leaving date.  Ensure any personal subscriptions including professional memberships, magazine subscriptions, motorway toll registrations and taxi services are cancelled.  Complete any required documents and return company leased vehicle, if applicable.  If you are a participant in one of Shell’s share plans, please act upon the email from HR Operations asking you to enter your correct personal email address as soon as possible on your [Computershare](http://www.computershare.com/employee/shellshareawards) account, where applicable, to ensure you can be contacted with relevant information about the plan(s).  If you are currently on an international assignment or you have been on an international assignment in the last 3 years, provide an alternative/personal email address to the [International Mobility Compliance Team](mailto:sssc-krw-im-tax-compliance-team@shell.com?subject=Leaving%20Shell%20-%20Alternative/Personal%20Email%20Address) to enable tax compliance and closing out of tax affairs.  Clear desk and storage cupboards or office. Return supplies to stationery and remove personal belongings.  Destroy visiting cards and confirm to line manager  Return books to library  Settle Advance/imprest amount with finance (3 weeks prior to Last Day on Payroll)  Make sure you take with you private information that belongs to you individually (e.g. payslips, tax-returns). More information and Shell approved means to transfer data can be found on [this](https://eu001-sp.shell.com/sites/AAFAA5088/Pages/rules-and-requirements/IM-Guidance-Private-information-and-corporate-information.aspx) Ethics and Compliance site. |

|  |
| --- |
| **IT OFF-BOARDING** |
| **JML will initiate your IT off boarding, and confirm any necessary actions prior to disabling your IT Access. In the event you are not notified up to 1 week prior to your planned departure please contact** [**JML Leave Team**](mailto:leave-IT-JML-Service@shell.com)**.**  Delete any Shell software and data from personal laptops or other devices.  If you deal with confidential or sensitive data please liaise with [Legal Team](mailto:shell-lig@shell.com) before deleting any Shell data from your laptop or mobile devices in order to comply with data preservation requirements.  Smartphone users must complete an enterprise wipe via Mobile Connect Portal (mobileconnect.shell.com) before suspending their number and raising a Mobile Connect - Delete ticket via [ServiceNow](https://shell2.service-now.com/now/nav/ui/home).  [Archive or Transfer](https://servicenow.shell.com/sp?sys_kb_id=335fd46d1b537010cbff997e0d4bcbf7&id=kb_article_view&sysparm_rank=1&sysparm_tsqueryId=d801972e1b27f45003b7740e1d4bcbac) any IT content or accounts you own (e.g. functional accounts or Sharepoint sites).  If you are the approver of business operations (e.g. supplier invoices) please transfer them accordingly.  If you are the Sponsor or line manager of a contractor – please contact [Contractor Service Desk](https://eu001-sp.shell.com/sites/AAFAA1715/ContractorServiceDesk/default.aspx) to transfer the contract owner and submit a [User Account – Change form](https://shell.service-now.com/sp?id=sc_cat_item&sys_id=b2429fc1db3a1300f16ef1951d96196d) in ServiceNow to reflect the new line manager.  Set email auto-reply informing last date in office and alternate person(s) to contact in future.  Log off for the last time and then shut down your computer (do not enter Sleep or Hibernate mode). |

| **REQUIRED TO PROVIDE TO LINE MANAGER** |
| --- |
| Confirm that all sensitive Intellectual Property (IP) data has been transferred.  Provide all receipts for any expense transactions not yet showing in [Concur](https://sso.shell.com/idp/startSSO.ping?PartnerSpId=https://emea.api.concursolutions.com/saml2/),e-approval or other Expense system. Where disallowed expenses will appear on those expense transactions, also provide the cheque for the disallowed amount for your line manager to submit concurrent with the receipt submissions.  Sign and hand-in any documents you are required to sign in adherence to policy.  Ensure that you have returned all that apply (including all [IT Assets in this list](https://servicenow.shell.com/sp?id=sh_asset)):   * + Office or furniture keys   + Parking pass/card,   + Security Pass and/or GI-D Smartcard   + Mobile Phone or other Mobile Device (including SIM card if Shell owned)   Note: For Iphone/Ipad kindly log-out of apple account prior to returning   * + Desktop and/or Laptop and respective cables / power supply   + Other Accessories - docking station, external drives, monitor, printer, web camera, Kensington lock   + Any other Shell approved equipment purchased using company funds (e.g. MiFi Device)   + Safety Equipment   + Handover Chemicals & Lab equipment   *Please refer to local offboarding checklist, where exist, for further unique requirements, if not listed above.*  ***If you are unable to come to the office physically, please use mail/courier services to return all company assets.*** *Please consult your local country checklist & procedures for detailed guidance in line with local regulations. Agree with your Line Manager when the assets will be returned and on how the cost should be covered.*  Confirm to line manager that all items from checklist have been completed. |

| **FOLLOW UP ACTIONS AFTER LEAVING SHELL** |
| --- |
| Ensure bank account remains open until final deposit is received. |