

ScotiaGBS

del grupo **Scotiabank**[®]



**SUMMER STUDENT
INSTRUCTIVE**

CONTRACTORS: OFFBOARDING PROCESS

SUMMER STUDENT HANDBOOK: Contractors Offboarding Process

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2 Nombre Actividad principal	¡Error! Marcador no definido.
3 Nombre actividad principal	¡Error! Marcador no definido.

PROCESS – OFFBOARDING

1. Participants of the process

The main objective of the contractor offboarding process is to schedule the delivery of the assets that were given to the contractor during his/her service time for ScotiaGBS. In this process the Contractor's Team reaches out to the Vendor (Globant, TCS or Tech Mahindra) to validate what assets the contractor must deliver and schedule a date to return the equipment. This process needs validation by all parties, that is, the Hiring Manager, the Vendor representative and by the GBS representative.

What you should know

- Next is described the participants of the offboarding process and the roles that the ones have.

General description of the participants

In this document you will find the offboarding process participants

SCOTIABANK GBS: Nelson Ortega - Director Finance Global Business Services (Nelson.Ortega@scotiabank.com)

SCOTIABANK GBS: Camilo Acevedo – Finance Manager (CamiloAndres.AcevedoContreras@scotiabank.com)

SCOTIABANK GBS: Laura Diaz - Financial Coordinator (lauramaria.diazmeza@scotiabank.com)

SCOTIABANK GBS: Ivan Martinez - Project Controller (ivan.martinezgarzon@scotiabank.com)

SCOTIABANK GBS: Ronny Castro – Summer Student (ronny.castro@scotiabank.com)

SCOTIABANK GBS: Lina Angel Hidalgo – CAS Officer (lina.angelhidalgo@scotiabank.com)

TCS: Brahandon Vergara – Pascal Project (vergarapinzon.brahandon@tcs.com)

GLOBANT: Edwin Castillo – Project Manager (e.castillo@globant.com)

Tech Mahindra: Carlos Mendez – Delivery Manager (CM00669309@TechMahindra.com)

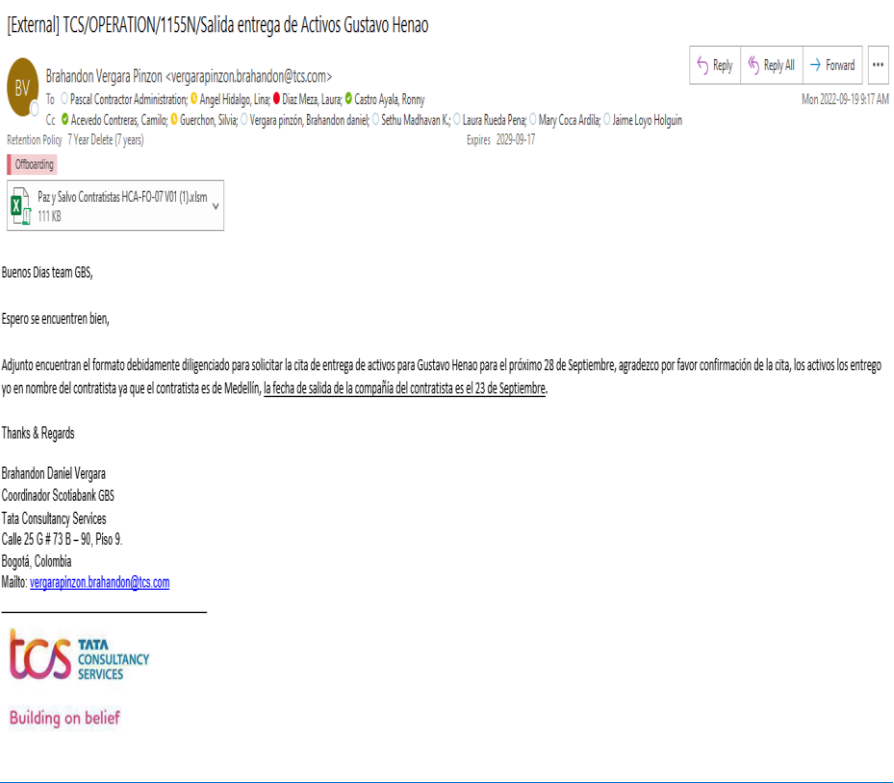

PROCESS – OFFBOARDING

2. Main dates of the process

ACTIVITY	PERSON IN CHARGE	MAXIMUN DATE OF IMPLEMENTATION	FOLLOW UP
Notification by Vendor via e-mail starting the Contractor ended his/her service provision	TCS: Brahandon Vergara. Globant: Edwin Castillo Tech Mahindra: Carlos Mendez	One week before of end the Contractor service.	Financial Coordinator/Summer Student
Approval by Hiring Manager	Summer Student	Two business days	Summer Student
Push 1 (If applicable)	Financial Coordinator	Two business days	Financial Coordinator
Push 2 (If applicable)	Finance Manager/ Director Finance Global Business Services	One business day	Financial Coordinator
Forward e-mail to GBS (CAS)	Summer Student	One business day	Summer Student

PROCESS – OFFBOARDING

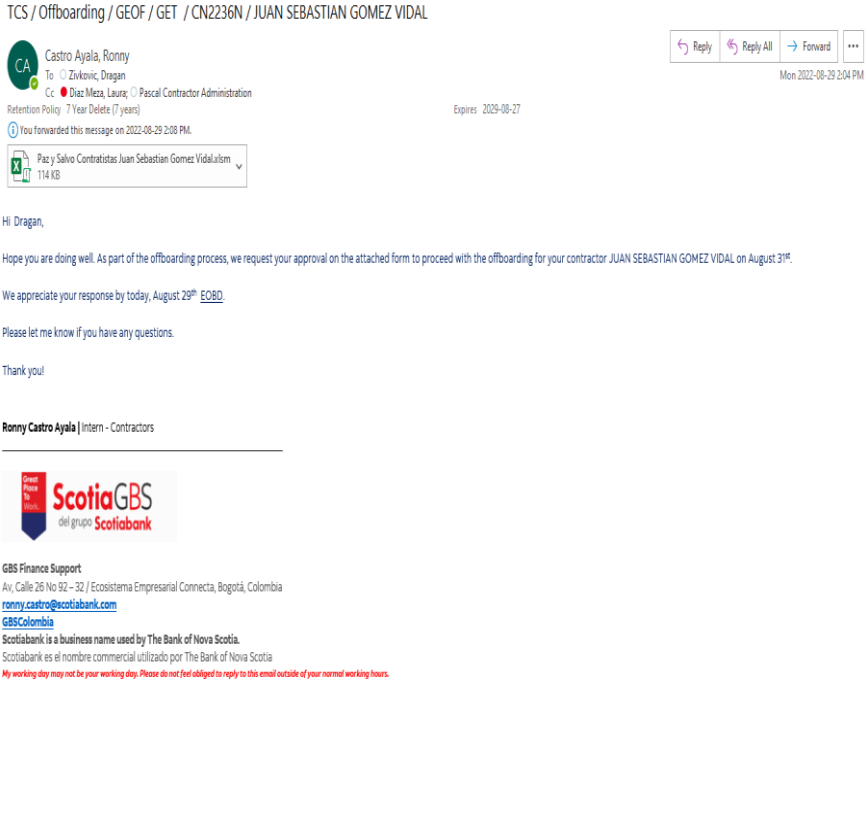
3. Process “Step by Step”

#	Step Detail	Screenshot	Supporting Documents
1.	<p>Vendors (Globant, TCS and Tech Mahindra)</p> <p>The Vendor sends an email to GBS Team notifying that the date the Contractor will be leaving the project. They request the approval and confirmation on the offboarding in order to notify the resource when he/she can go to GBS Campus.</p> <p>The following could be possible reasons:</p> <ol style="list-style-type: none"> No Renewal: The contractor will not be renewed, and a replacement is not needed. Performance: The Contractor is not having the expected results and a PIP plan was conducted with no improvement Abandonment: The contractor will leave before the Work Order or Amendment final date 	 <p>[External] TCS/OPERATION/1155N/Salida entrega de Activos Gustavo Henao</p> <p>Brahandon Vergara Pinzon <vergarapinzon.brahandon@tcs.com> To: Pascal Contractor Administration; Angel Hidalgo, Lina; Diaz Meza, Laura; Castro Ayala, Ronny Cc: Acevedo Contreras, Camilo; Guerchon, Silvia; Vergara pinzon, Brahandon daniel; Sethu Madhavan K; Laura Rueda Perez; Mary Coca Ardila; Jaime Loyo Holguin Retention Policy: 7 Year Delete (7 years) Expires: 2029-09-17</p> <p>Offboarding</p> <p>Paz y Salvo Contratistas HCA-FO-07 V01 (1).xlsm 111 KB</p> <p>Buenos Dias team GBS,</p> <p>Espero se encuentren bien,</p> <p>Adjunto encuentran el formato debidamente diligenciado para solicitar la cita de entrega de activos para Gustavo Henao para el próximo 28 de Septiembre, agradezco por favor confirmación de la cita, los activos los entrego yo en nombre del contratista ya que el contratista es de Medellín, la fecha de salida de la compañía del contratista es el 23 de Septiembre.</p> <p>Thanks & Regards</p> <p>Brahandon Daniel Vergara Coordinador Scotiabank GBS Tala Consultancy Services Calle 25 G # 73 B – 90, Piso 9. Bogotá, Colombia Mailto: vergarapinzon.brahandon@tcs.com</p> <p>tcs TATA CONSULTANCY SERVICES</p> <p>Building on belief</p>	 <p>Paz y Salvo Contratistas HCA-FO-07 V01_CamiloGantiva.xlsm 111 KB</p>

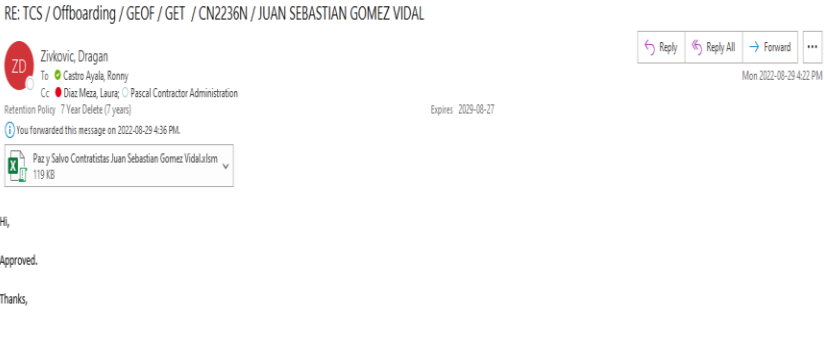
PROCESS – OFFBOARDING

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2.	<p>CLEARANCE FORM</p> <p>The Vendor (Globant, TCS and Tech Mahindra) sends an e-mail attaching the Clearance Form. This file includes the information from the contractor, the list of assets provided with a serial number, and the name of the Hiring Manager.</p>	<p>FORMATO DE PAZ Y SALVO CONTRATISTA</p> <p>LOGOS: GSGlobales (del grupo Scotiabank) and Scotiabank</p> <p>CÓDIGO: _____ FECHA DEL DOCUMENTO: _____ VERSIÓN: _____</p> <p>NOMBRE DEL CONTRATISTA: _____ CEDULA: _____ E-MAIL PERSONAL: _____ No. CELULAR: _____</p> <p>EMPRESA CONTRATISTA: _____ EMPRESA QUE: _____ UNIDAD Y CARGO: _____</p> <p>SCOTIA ID CONTRATISTA: _____</p> <p>MOTIVO DE RETIRO</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>TERMINACIÓN DEL CONTRATO DE TRABAJO CON LA PERSONA CONTRATISTA</td> <td>DÍA: [] MES: [] AÑO: []</td> </tr> <tr> <td><input type="checkbox"/></td> <td>REEMPLAZO DE LA PERSONA DESIGNADA PARA PRESTAR EL SERVICIO</td> <td>FECHA DE ELABORACION: [] [] []</td> </tr> <tr> <td><input type="checkbox"/></td> <td>RENUNCIA DEL CONTRATISTA AL CONTRATO DE TRABAJO</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>TERMINACIÓN DEL CONTRATO ENTRE GSB/GSG Y LA EMPRESA CONTRATISTA</td> <td>DÍA: [] MES: [] AÑO: []</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Otro ¿Cuál? _____</td> <td>FECHA ENTREGA ACTIVO: [] [] []</td> </tr> </table> <p>ACTIVOS A DEVOLVER</p> <table border="1"> <thead> <tr> <th>ACTIVOS</th> <th>SI</th> <th>NO</th> <th>N/A</th> <th>No. SERIAL</th> </tr> </thead> <tbody> <tr><td>TARJETA DE ACCESO</td><td></td><td></td><td></td><td></td></tr> <tr><td>LLAVE CASILLERO</td><td></td><td></td><td></td><td></td></tr> <tr><td>LLAVE CAJONERA o ESCRITORIO</td><td></td><td></td><td></td><td></td></tr> <tr><td>DIADEMA</td><td></td><td></td><td></td><td></td></tr> <tr><td>AUDIFONOS</td><td></td><td></td><td></td><td></td></tr> <tr><td>HARD TOKEN</td><td></td><td></td><td></td><td></td></tr> <tr><td>PORTATIL</td><td></td><td></td><td></td><td></td></tr> <tr><td>CARGADOR PORTATIL</td><td></td><td></td><td></td><td></td></tr> <tr><td>MALETIN PORTATIL</td><td></td><td></td><td></td><td></td></tr> <tr><td>PANTALLA</td><td></td><td></td><td></td><td></td></tr> <tr><td>CPU</td><td></td><td></td><td></td><td></td></tr> <tr><td>MOUSE</td><td></td><td></td><td></td><td></td></tr> <tr><td>TECLADO</td><td></td><td></td><td></td><td></td></tr> <tr><td>CABLES (CORRIENTE)</td><td></td><td></td><td></td><td></td></tr> <tr><td>OTROS</td><td></td><td></td><td></td><td></td></tr> </tbody> </table> <p>PAGO QUE DEBE REALIZAR EL CONTRATISTA</p> <table border="1"> <thead> <tr> <th>CONCEPTOS</th> <th>NO</th> <th>SI</th> <th>CONCEPTOS</th> <th>NO</th> <th>SI</th> </tr> </thead> <tbody> <tr><td>DESCUENTO TARJETA DE ACCESO</td><td></td><td></td><td>PORTATIL</td><td></td><td></td></tr> <tr><td>DIADEMA</td><td></td><td></td><td>CARGADOR PORTATIL</td><td></td><td></td></tr> <tr><td>AUDIFONOS</td><td></td><td></td><td>MALETIN</td><td></td><td></td></tr> <tr><td>CPU</td><td></td><td></td><td>MOUSE</td><td></td><td></td></tr> <tr><td>TECLADO</td><td></td><td></td><td>CABLES</td><td></td><td></td></tr> <tr><td>HARD TOKEN</td><td></td><td></td><td>PANTALLA</td><td></td><td></td></tr> </tbody> </table> <p>Valor total que deberá pagar o ser descontado al contratista: _____</p> <p>ELABORADO POR: _____</p> <p>HIRING MANAGER SCOTIA: _____</p> <p>RECIBIDO GSG/GBS: _____ Fecha Recibido GBS/GSG: _____</p> <p>COMENTARIO: _____</p>	<input type="checkbox"/>	TERMINACIÓN DEL CONTRATO DE TRABAJO CON LA PERSONA CONTRATISTA	DÍA: [] MES: [] AÑO: []	<input type="checkbox"/>	REEMPLAZO DE LA PERSONA DESIGNADA PARA PRESTAR EL SERVICIO	FECHA DE ELABORACION: [] [] []	<input type="checkbox"/>	RENUNCIA DEL CONTRATISTA AL CONTRATO DE TRABAJO		<input type="checkbox"/>	TERMINACIÓN DEL CONTRATO ENTRE GSB/GSG Y LA EMPRESA CONTRATISTA	DÍA: [] MES: [] AÑO: []	<input type="checkbox"/>	Otro ¿Cuál? _____	FECHA ENTREGA ACTIVO: [] [] []	ACTIVOS	SI	NO	N/A	No. SERIAL	TARJETA DE ACCESO					LLAVE CASILLERO					LLAVE CAJONERA o ESCRITORIO					DIADEMA					AUDIFONOS					HARD TOKEN					PORTATIL					CARGADOR PORTATIL					MALETIN PORTATIL					PANTALLA					CPU					MOUSE					TECLADO					CABLES (CORRIENTE)					OTROS					CONCEPTOS	NO	SI	CONCEPTOS	NO	SI	DESCUENTO TARJETA DE ACCESO			PORTATIL			DIADEMA			CARGADOR PORTATIL			AUDIFONOS			MALETIN			CPU			MOUSE			TECLADO			CABLES			HARD TOKEN			PANTALLA			
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PROCESS – OFFBOARDING

#	Step Detail	Screenshot	Supporting Documents
3.	<p>APPROVAL REQUEST FROM HIRING MANAGER</p> <p>Send a request for approval to HM, to receive the attestation that the contractor is leaving the company.</p> <p>EMAIL TEMPLATE.</p> <p>To: Hiring Manager</p> <p>CC: PascalContractorAdministration, Financial Coordinator, Pascal Project.</p> <p>Subject: Vendor / Offboarding / Business Unit / CN# / Contractor's Name</p> <p>Hi _____,</p> <p>Hope you are doing well. As part of the offboarding process, we request your approval on the attached form to proceed with the offboarding for your contractor _____ on _____.</p> <p>We appreciate your response by [date] EOBD.</p> <p>Please let me know if you have any questions.</p> <p>Thank you!</p>	 <p>TCS / Offboarding / GEOF / GET / CN2236N / JUAN SEBASTIAN GOMEZ VIDAL</p> <p>CA Castro Ayala, Ronny To: Zikovic, Dragan Cc: Diaz Mesa, Laura; Pascal Contractor Administration Retention Policy: 7 Year Delete (7 years) Expires: 2029-08-27 You forwarded this message on 2022-08-29 2:08 PM.</p> <p>Plaz y Salvo Contratistas Juan Sebastian Gomez Vidal.rfm 114 KB</p> <p>Hi Dragan,</p> <p>Hope you are doing well. As part of the offboarding process, we request your approval on the attached form to proceed with the offboarding for your contractor JUAN SEBASTIAN GOMEZ VIDAL on August 31st.</p> <p>We appreciate your response by today, August 29th EOBD.</p> <p>Please let me know if you have any questions.</p> <p>Thank you!</p> <p>Ronny Castro Ayala Intern - Contractors</p> <p>ScotiaGBS del grupo Scotiabank</p> <p>GBS Finance Support Av. Calle 26 No 92 - 32 / Ecosistema Empresarial Conecta, Bogotá, Colombia ronny.castro@scotiabank.com GBSColombia Scotiabank is a business name used by The Bank of Nova Scotia. Scotiabank es el nombre comercial utilizado por The Bank of Nova Scotia. <i>My working day may not be your working day. Please do not feel obliged to reply to this email outside of your normal working hours.</i></p>	


















PROCESS – OFFBOARDING

#	Step Detail	Screenshot	Supporting Documents
4.	<p>Push 1: (If applicable)</p> <p>In case that the HM does not reply by the end of the 2 business days, this needs to be escalated to the Financial Coordinator to send a reminder for the Hiring Manager with an SLA of 2 business days.</p>		
5.	<p>Push 2: (If applicable)</p> <p>In case that the HM does not reply to the Financial Coordinator an escalation needs to be done to the Finance Manager. Requesting for the approval within 1 business day.</p>		
6.	<p>APPROVAL BY HIRING MANAGER</p> <p>The HM approves and informs that is aware about contractor end service provision to continue with the Offboarding process.</p>	 <p>RE: TCS / Offboarding / GEOF / GET / CN2236N / JUAN SEBASTIAN GOMEZ VIDAL</p> <p>Zivkovic, Dragan To: Castro Ayala, Ronny Cc: Diaz Meza, Laura; Pascal Contractor Administration Retention Policy: 7 Year Delete (7 years) Expires: 2025-08-27 You forwarded this message on 2022-08-29 4:36 PM.</p> <p>Plaz y Salvo Contratos Juan Sebastian Gomez Vidal.xlsx 119 KB</p> <p>Hi, Approved. Thanks,</p>	

PROCESS – OFFBOARDING

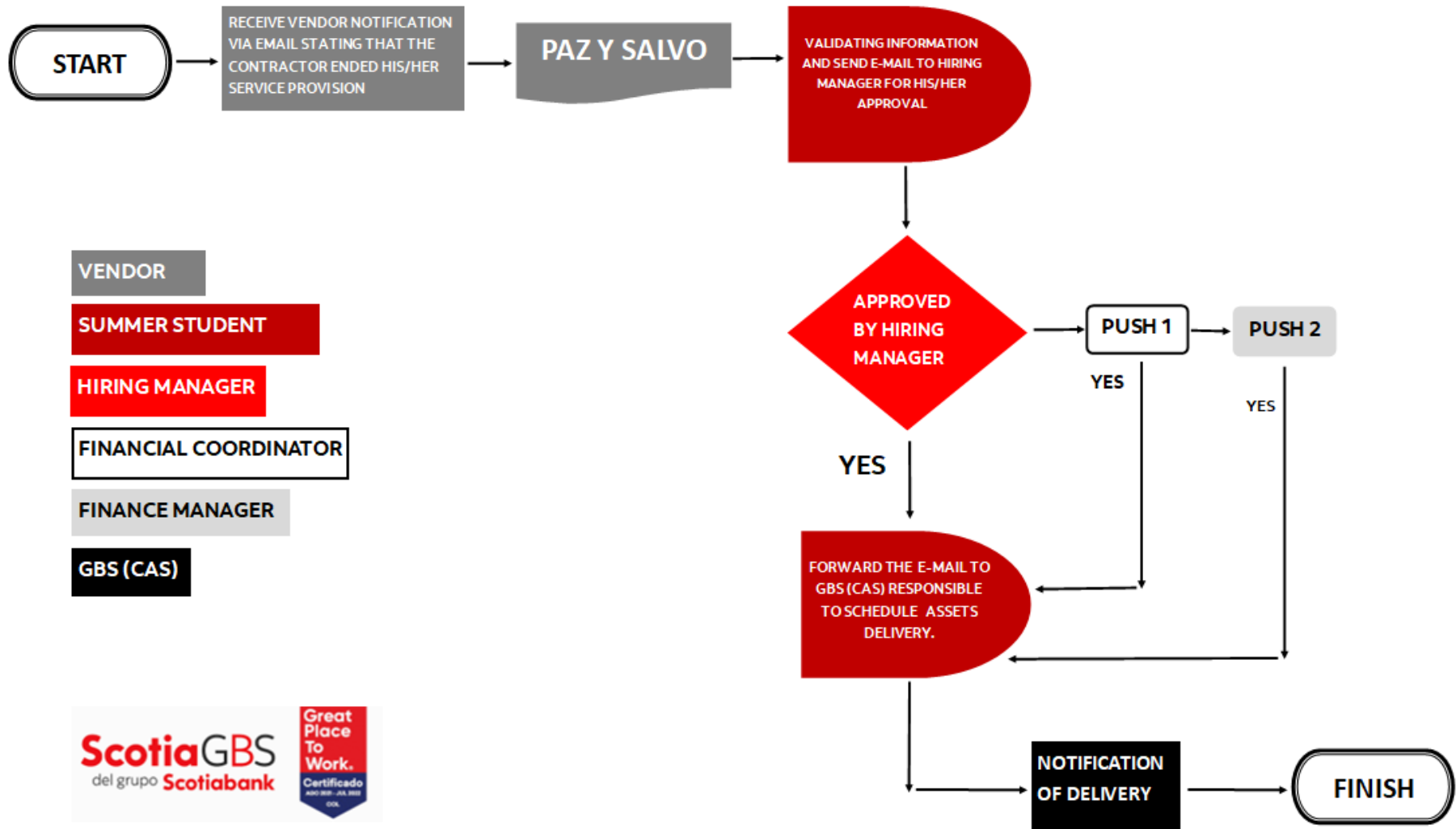
#	Step Detail	Screenshot	Supporting Documents
7.	<p>FORWARD TO CENTRO DE ATENCION Y SERVICIOS (CAS).</p> <p>Forward the e-mail in which the HM gave the offboarding approval to the CAS Officer to schedule the delivery of the assets that ScotiaGBS provided to the Contractor during the service time. The delivery is carried out in the CAS Office.</p> <p>This e-mail must be sent according to specified format inside of the e-mail template.</p> <p>EMAIL TEMPLATE.</p> <p>TO: CAS OFFICER</p> <p>CC: PASCALCONTRACTORADMINISTRACION, FINANCIAL COORDINATOR, PASCAL PROJECT.</p> <p><u>Subject:</u> Vendor / Operation / Notificación Entrega de Activos / Nombre</p> <p>Hola _____,</p> <p>Amablemente solicito la confirmación de la cita para [NOMBRE DEL CONTRATADOR], el día [día, mes de año] para realizar entrega de activos en el CAS. Adjunto envío el paz y salvo.</p> <p>Mil gracias,</p>	<p>FW: TCS / Offboarding / GEOFF / GET / CN2236N / JUAN SEBASTIAN GOMEZ VIDAL</p> <p>Castro Ayala, Ronny To: Angel Hidalgo, Lina Cc: Diaz Meza, Laura; Pascal Contractor Administration; Brahandon Vergara Pinzon Retention Policy: 7 Year Delete (7 years) Expires: 2029-08-27</p> <p>Paz y Salvo Contratistas Juan Sebastian Gomez Vidal.xlsx 119 KB</p> <p>Hola Lina,</p> <p>Amablemente solicito la confirmación de la cita para JUAN SEBASTIAN GOMEZ VIDAL, el día 31 de Agosto para realizar entrega de activos en el CAS. Adjunto envío el paz y salvo.</p> <p>Mil gracias,</p> <p>Ronny Castro Ayala Intern - Contractors</p>  <p>GBS Finance Support Av. Calle 26 No 92 - 32 / Ecosistema Empresarial Conecta, Bogotá, Colombia ronny.castro@scotiabank.com scotiabank.com.co</p> <p>Scotiabank is a business name used by The Bank of Nova Scotia. Scotiabank es el nombre comercial utilizado por The Bank of Nova Scotia. <i>My working day may not be your working day. Please do not feel obliged to reply to this email outside of your normal working hours.</i></p> <hr/> <p>From: Zivkovic, Dragan <dragan.zivkovic@scotiabank.com> Sent: August 29, 2022 4:22 PM To: Castro Ayala, Ronny <ronny.castro@scotiabank.com> Cc: Diaz Meza, Laura <lauramaría.diazmeza@scotiabank.com>; Pascal Contractor Administration <PascalContractorAdministration@scotiabank.com> Subject: RE: TCS / Offboarding / GEOFF / GET / CN2236N / JUAN SEBASTIAN GOMEZ VIDAL</p> <p>Hi,</p> <p>Approved.</p> <p>Thanks,</p>	

PROCESS – OFFBOARDING

#	Step Detail	Screenshot	Supporting Documents
8.	<p>NOTIFICATION OF DELIVERY OF THE CLEARANCE FORM(CAS):</p> <p>After the Contractor successfully delivers the assets, the CAS Officer attaches a format notifying that the assets were delivery correctly.</p> <p>This evidence needs to be saved in the following route:</p> <p>GBS Finance – Contractors > 6. Offboarding > Signed</p> <p>-----END OF THE PROCESS-----</p>	<p>RE: [External] TCS/OPERATION/Salida entrega de Activos Juan Sebastian Gomez</p> <p>  Angel Hidalgo, Lina To:  Brahandon Vergara Pinzon;  Pascal Contractor Administration;  Castro Ayala, Ronny Cc:  Acevedo Contreras, Camilo;  Diaz Meza, Laura;  Guerchon, Silvia;  Vergara pinzon, Brahandon daniel;  Sethu Madhavan K;  Laura Rueda Pena;  Mary Coca Ardila;  Retention Policy 7 Year Delete (7 years) Expires: 2029-08-29 </p> <p>Offboarding</p> <p>  Juan Gomez.pdf 777 KB </p> <p> Translate message to: English Never translate from: Spanish Translation preferences </p> <p>Buenas tardes!</p> <p>Adjunto envio paz y salvo correspondiente a Juan Sebastian Gomez.</p> <p>Quedo atenta a cualquier comentario.</p> <p>Regards Lina Angel Hidalgo CAS OFFICER</p> <p>    </p> <p> Recursos Humanos / Payroll & HR Administration Av. Calle 26 No 92 – 32 / Ecosistema Empresarial Conecta, Bogotá, Colombia T: + 571 4252330 Ext: 72765 novedadespbs@scotiabank.com GBSColombia Scotiabank is a business name used by The Bank of Nova Scotia. Scotiabank es el nombre comercial utilizado por The Bank of Nova Scotia </p>	<p>Paz ny salvo Gustavo Henao.pdf 796 KB</p> 

PROCESS – OFFBOARDING

4. Process Flow



PROCESS – OFFBOARDING

CONTROL DOCUMENTAL			
VERSION NUMBER	BY	REVIEWED BY	APPROVED BY
1.0	RONNY CASTRO SUMMER STUDENT	LAURA DIAZ MEZA FINANCIAL COORDINATOR	NELSON ORTEGA DIRECTOR FINANCE GLOBAL BUSINESS SERVICES CAMILO ACEVEDO FINANCE MANAGER