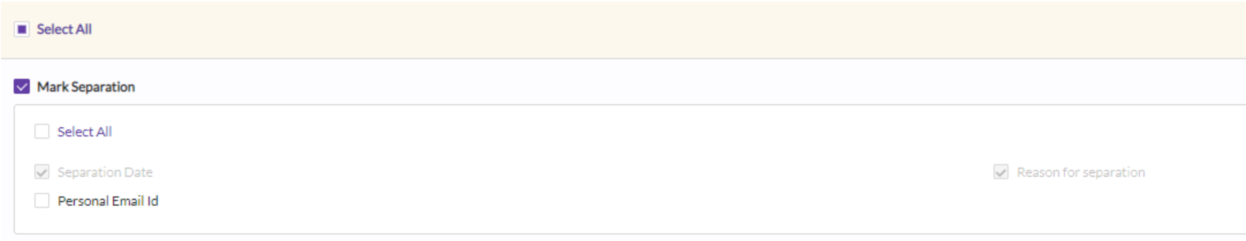
Mark Separation in Bulk Upload

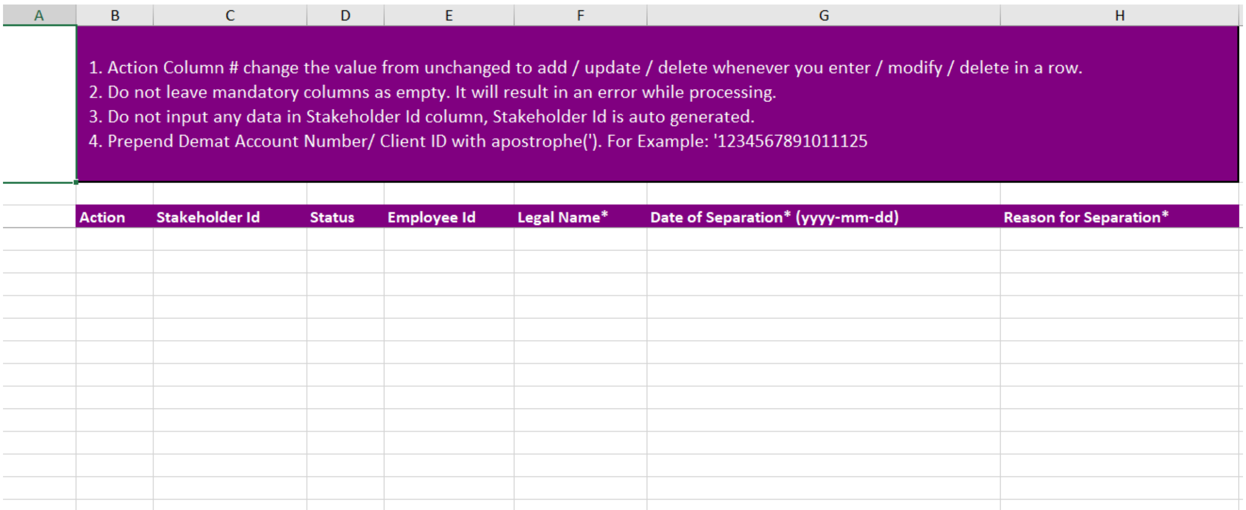
Modified on: Thu, 23 Jun, 2022 at 7:06 PM

In an event a large number of your have left the organization and you wish to update their separation/termination data in the system, utilize our Bulk Upload functionality to complete the task efficiently. Alternatively, you are able to process each separation individually.

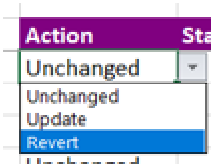
1. Sign in to your Qapita Account
2. Click **Settings** on the left menu and select **Bulk Upload**
3. Select **Mark Separation**
4. Select all the options or you may unselect **Personal Email ID**



5. Scroll down and always Click **Download Template with Data**



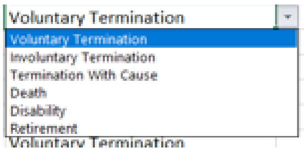
A. Click on **Action** dropdown and select "Unchanged/Update/Revert"



i. Unchanged: When no changes are required for the existing stakeholder
ii. **Update** – When you must change the separation details for the selected stakeholder
iii. **Revert** – To reverse the termination for the stakeholder

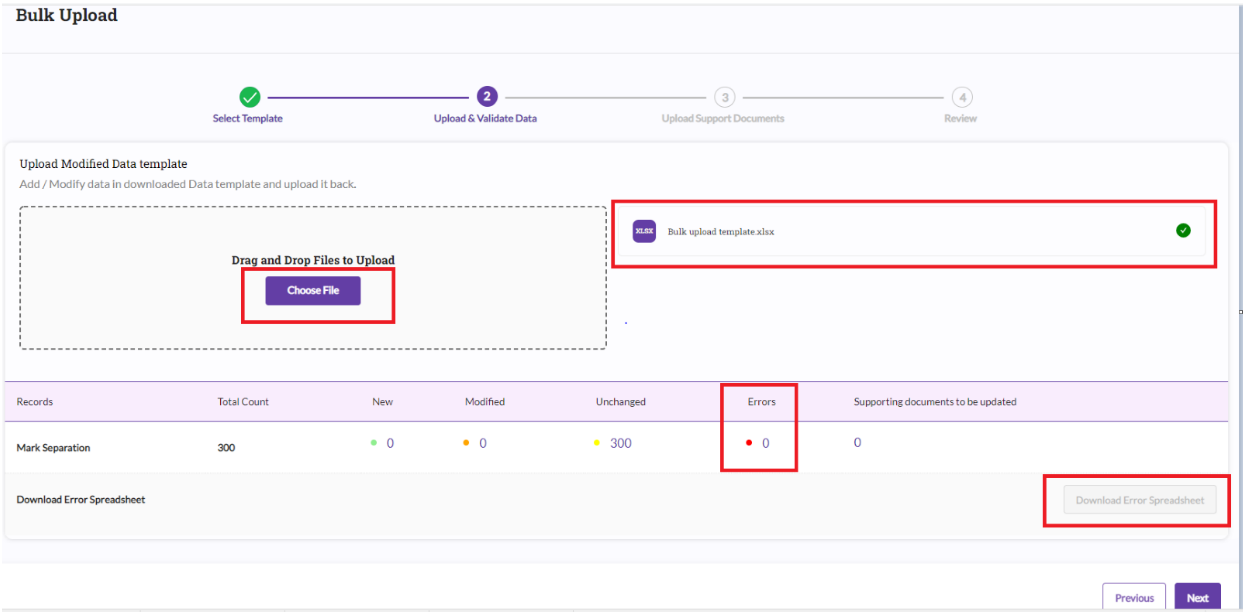
B. Stakeholder ID – Please do not make any changes to the Stakeholder ID as it is auto generated
C. Status – Mark it as "**Inactive**"
D. Employee ID – Do not make any changes.
E. Legal Name – Do not make any changes.
F. Date of Separation – Enter the date of Separation for the selected Stakeholder in the format (yyyy-mm-dd)

G. Reason for Separation – Choose appropriate reason from the dropdown



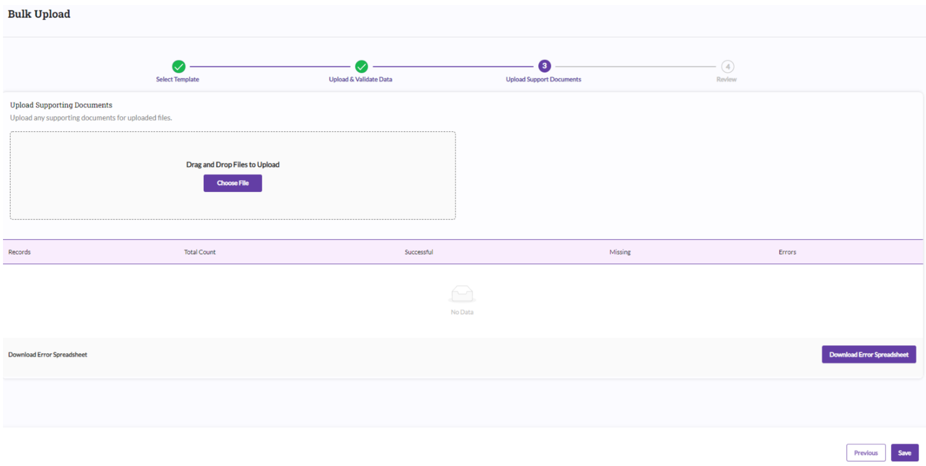
i. **Voluntary Termination:** When an employee voluntarily leaves the job (e.g. resignation)
ii. **Involuntary Termination:** When an employee is terminated from their job (e.g. redundancy).
iii. **Termination with Cause:** When an employee is terminated due to misconduct.
iv. **Death:** When an employee passes away while in service.
v. **Disability:** When an employee is disabled due to an injury.
vi. **Retirement:** When an employee retires.

6. Save the File
7. On the Bulk Upload page of your Qapita Account, please click on **Upload File** at the bottom right of the page
Click on **Choose File** and upload the saved file for Mark Separation

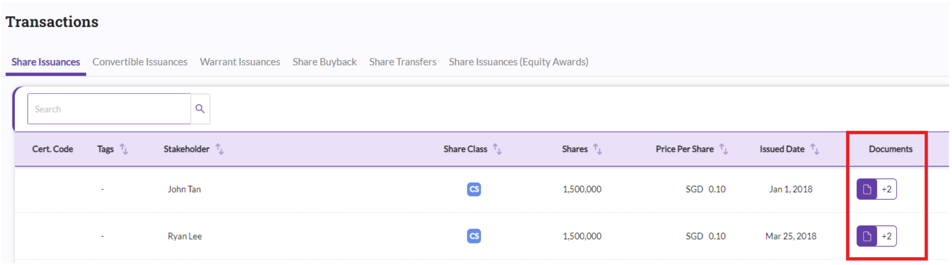


i. When the file is uploaded you can see the green dot against the file.
ii. If there are any errors on the Spreadsheet, you can see the number of errors on the sheet under **Errors** and click on **Download Error Spreadsheet** to make the changes and upload it back.

8. Click on **Next**
9. Upload **Support Documents** if any, please mention the file name of the supporting document(s). You can view these documents uploaded in the transactions against the respective stakeholder.



To view these documents uploaded on the application, click **Ownership** on the left menu and select Transactions.



10. Click on **Save**
11. **Review** all the details and click on **Close.**