

Mark Separation in Bulk Upload

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

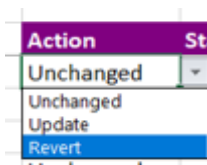
In an event a large number of your have left the organization and you wish to update their separation/termination data in the system, utilize our Bulk Upload functionality to complete the task efficiently. Alternatively, you are able to process each separation individually.

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	B	C	D	E	F	G	H
1. Action Column # change the value from unchanged to add / update / delete whenever you enter / modify / delete in a row. 2. Do not leave mandatory columns as empty. It will result in an error while processing. 3. Do not input any data in Stakeholder Id column, Stakeholder Id is auto generated. 4. Prepend Demat Account Number/ Client ID with apostrophe('). For Example: '1234567891011125							
Action	Stakeholder Id	Status	Employee Id	Legal Name*	Date of Separation* (yyyy-mm-dd)	Reason for Separation*	

- A. Click on **Action** dropdown and select “Unchanged/Update/Revert”



- Unchanged:** When no changes are required for the existing stakeholder
- Update** – When you must change the separation details for the selected stakeholder
- 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

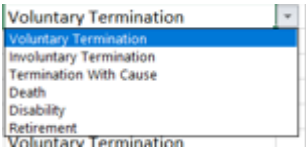
C. Status – Mark it as **“Inactive”**

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)

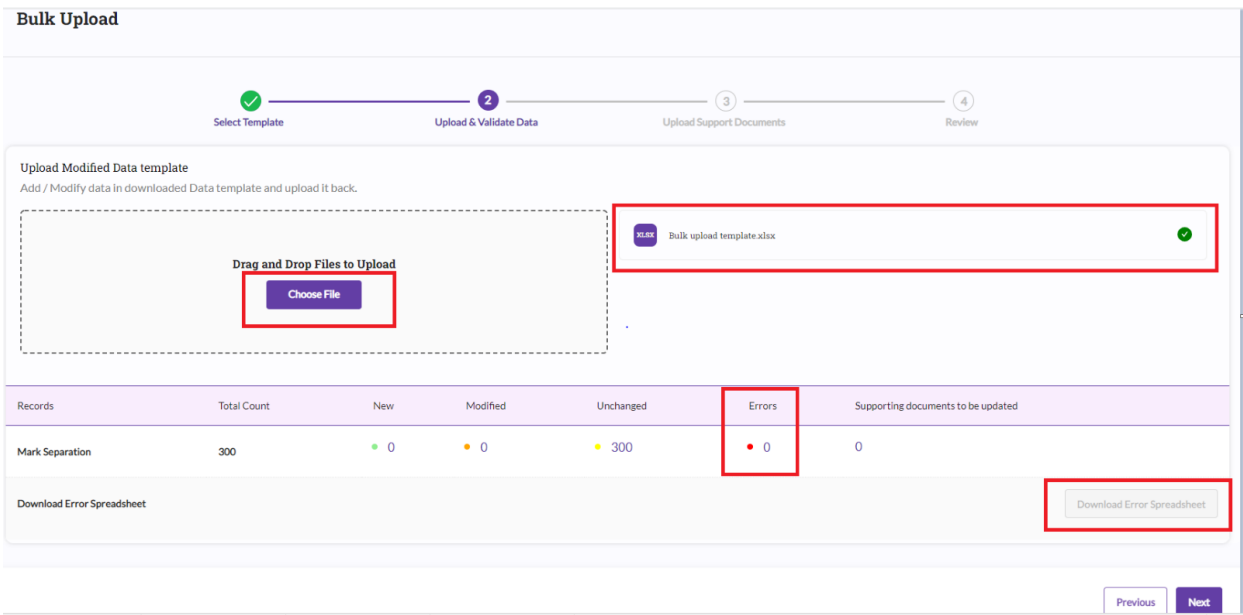
G. Reason for Separation – Choose appropriate reason from the dropdown



- 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

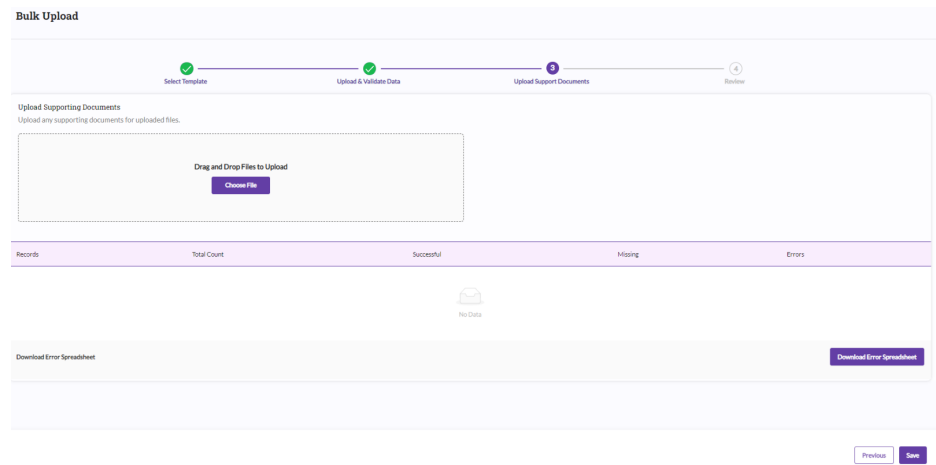
7. On the Bulk Upload page of your Qapita Account, please click on **Upload File** at the bottom right of the page
Click on **Choose File** and upload the saved file for Mark Separation



- 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.

Transactions

Share Issuances Convertible Issuances Warrant Issuances Share Buyback Share Transfers Share Issuances (Equity Awards)

Search

Cert. Code	Tags	Stakeholder	Share Class	Shares	Price Per Share	Issued Date	Documents
-		John Tan	CS	1,500,000	SGD 0.10	Jan 1, 2018	<div><div></div>+2</div>
-		Ryan Lee	CS	1,500,000	SGD 0.10	Mar 25, 2018	<div><div></div>+2</div>

10. Click on **Save**

11. **Review** all the details and click on **Close**.