

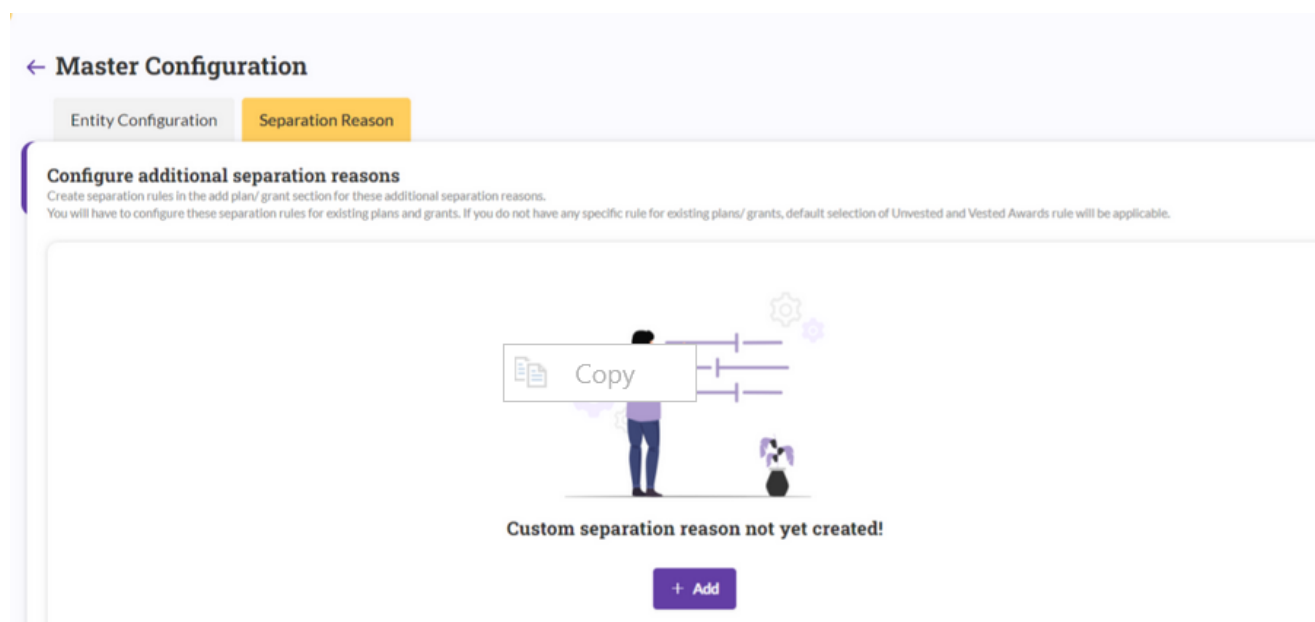
Add Customized Separation Rule

Modified on: Thu, 29 Jun, 2023 at 5:57 PM

Separation Reason allows you to configure additional separation reasons apart from the pre-existing separation rules (Resignation, Involuntary Termination, Termination with Cause, Retirement, Death, Disability)

How to Add a Custom Separation Reason?

1. Click on Settings on the Left Side Menu
2. Choose Issuer Settings - Master Configurations and select Separation Reason



3. Click on Add

Add Separation Reason

*Separation Reason Name
Enter Reason for Separation

Update same values for all existing plan(s) & grant(s)?
☒ Yes ☐ No

Note: The updated rules will be applied to all the existing plan(s) & grant(s). [View plan\(s\)](#)

Unvested Awards
Cancel on Separation Date

Vested Awards
Active Till Expiry Period

Cancel Save

- Selecting Yes, you can apply the same Unvested and Vested Awards rule for all existing plan(s) or grant(s)
- Selecting No, you can select the Unvested and Vested Awards rule for all existing plan(s) and their associated grant(s) individually.

Here, the selection of Unvested and Vested Awards rule applied for No Plan will reflect for all the grants that have been created without associating any Plan.

The screenshot shows the 'Add Separation Reason' form within the 'Master Configuration' section. The form is titled 'Add Separation Reason' and includes the following fields and options:

- *Separation Reason Name:** A text input field with a placeholder 'Enter Reason for Separation'.
- Update same values for all existing plan(s) & grant(s)?** A toggle switch with 'Yes' and 'No' options. The 'No' option is currently selected.
- Note:** Update separation rules for all existing plans. The plan wise rule will also apply to the grants that have been created. will be applied to all the existing plan(s) & grant(s). View plan(s)
- No Plan:** A section with two columns: 'Unvested Awards' and 'Vested Awards'. Each column has a dropdown menu. The 'Unvested Awards' dropdown is set to 'Cancel on Separation Date' and the 'Vested Awards' dropdown is set to 'Active Till Expiry Period'.
- Option Awards:** A section with a text input field containing 'ESOP Test 2' and a dropdown menu set to 'Unvested Awards'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

Once added successfully, the created Custom Separation Reason will be reflected accordingly based on the selection for all existing and newly created plan(s) and grant(s).

Note: Currently a maximum of 10 Custom Separation Reasons can be added.

Edit Custom Separation Reason

Clicking on Edit Icon, you will have the ability to Edit the name of the Custom Separation Reason selected. This will reflect accordingly for all existing and newly created plan(s) and grant(s).

Delete Custom Separation Reason

Clicking on Delete, you will have the ability to delete the selected Custom Separation.

Note: Custom Separation Reason cannot be deleted if it is used to separate a stakeholder.

← Master Configuration

Entity Configuration

Separation Reason

Configure additional separation reasons

Create separation rules in the add plan/ grant section for these additional separation reasons.
You will have to configure these separation rules for existing plans and grants. If you do not have any specific rule for existing plans/ grants, default selection of Unvested and Vested Awards rule will be applicable.

+ Add

Custom Reason 1

Permanent Disability



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