



System User Guide

School/Department Administrator Guide to Family Leave

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

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Introduction

This guide covers key tasks for School/Department Administrators in the recording family leave system process. It is related to the Process User Guides for:

- [Guide to Maternity Leave](#)
- [Guide to Partner, Parental and Special Leave](#)
- [Guide to Adoption and Surrogacy Leave](#)

The Process User Guides provide supporting guidance on all aspects of every absence process.

Please familiarise yourself with the [Family Leave Policies](#).

Partner leave has previously been known as Paternity Leave.

Any family leave dates should not clash with any other planned absence types such as for annual leave. Where a planned absence already exists within these timeframes it should be deleted before adding the family leave. For further details on how to remove an absence, please refer to the '[How to Amend Leave](#)' section of this guide.

Please review the relevant HR policy for the absence type being processed and work within the guidelines stated. The HR absence policies can all be reviewed [here](#).

Family leave will normally be input into the People and Money system by the employee (and this should always be encouraged), however there may be some situations where the Line Manager or School Department Administrator is required to input leave.

Keeping in Touch (KIT) Days/Shared Parental Leave Keeping in Touch (SPLIT) Days:

KIT and SPLIT days must be processed by the payroll team. To request this, the Line Manager must submit a Service Request detailing whether the employee would like to either be paid for the time or alternatively to take it as Time Owed in Lieu (TOIL).

Please refer to the Maternity, Shared Parental Leave or the Adoption and Surrogacy Leave Policies on the [A to Z of HR Policies](#) webpage for further information surrounding KIT/SPLIT days entitlement and conditions.

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

How to Record Maternity Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **Add** button.
4. Select **Maternity** from the **Absence Type** drop-down list.
5. Enter the **Expected** or **Actual Date of Childbirth** and **Planned** or **Actual Start** and **End Dates**, as known. If the employee does not plan to return to work, put a tick against the **Won't Return to Work** field.
6. Select which pay option the employee has chosen from the **Reason** drop down list and enter the **Notification Date**.
7. Click on **Add Attachment** to upload a scanned copy of the MAT B1.
8. Add any relevant notes in the **Comments** section.
9. If a Risk Assessment has already been carried out this can also be added to the **Attachments** and the **tick box** and **Date carried out** field can be completed in the **Descriptive Information** section.
10. There is no need to complete the Legislative Information section or the SMP1 Issue Date.
11. Click on the **Submit** button.

How to Record a Maternity Risk Assessment

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the maternity absence dates.
4. Click on **Add Attachment** to upload the **Maternity Risk Assessment**.
5. Scroll to the bottom of the screen and complete the tick box next to **Risk Assessment Done** and enter the date it was carried out.
6. Click on the **Submit** button.

How to Attach a MATB1 to a Maternity Record

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the maternity absence dates.
4. Click on **Add Attachment**.

5. Add the scanned copy of the MATB1 and give it a description – usually the employee's name and MATB1 will suffice e.g.: 'Jane Smith MATB1'.
6. Click **OK**.
7. Click on the **Submit** button.

How to Record Adoption or Surrogacy Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee
3. Under **Existing Absences**, click on the **Add** button.
4. Select **Surrogacy and Adoption** from the **Absence Type** drop down list.
5. Enter the **Expected Date of Placement**, **Placement Match Date**, and the **Planned Start** and **End Dates** as known. If the employee does not plan to return to work, put a tick against the **Won't Return to Work** field.
6. Select which pay option the employee has chosen from the **Reason** drop down list and enter the **Notification Date**.
7. Add any relevant notes in the **Comments** section.
8. There is no need to complete the Legislative Information section or the SAP1 Issue Date.
9. Click on the **Submit** button.

How to Record Partner Leave

Partner Adoption

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee
3. Under **Existing Absences**, click on the **Add** button.
4. Select **Partner Adoption** from the **Absence Type** drop down list.
5. Enter the **Expected** or **Actual Date of Placement**, **Placement Match Date**, and the **Planned** or **Actual Start** and **End Dates** as known.
6. Add any relevant notes in the **Comments** section.
7. There is no need to complete the Legislative Information section.
8. Click on the **Submit** button.

Partner Birth

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee
3. Under **Existing Absences**, click on the **Add** button.
4. Select **Partner Birth** from the **Absence Type** drop down list.
5. Enter the **Expected** or **Actual Date of Childbirth** and **Planned** or **Actual Start** and **End Dates**, as known.
6. Add any relevant notes in the **Comments** section.
7. There is no need to complete the Legislative Information section.
8. Click on the **Submit** button.

How to Record Unpaid Parental Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More** and then select the **Absence Records** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **Add** button.
4. Select **Unpaid Parental Leave** from the **Absence Type** drop down list.
5. Enter the **Start** and **End Dates**.
6. Add any relevant **Comments**.
7. Click on the **Submit** button.

Parental Leave does not require approval when submitted by a line manager or SDA, only when an employee submits the request does a manager have to approve it.

How to Amend Leave

1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.
2. Search for the employee and select their name to continue.
3. Under **Existing Absences**, find the absence you would like to amend and click on the absence dates (blue text) to open the absence.

Alternatively, if you would like to **delete** the absence, click on the orange Actions button and select Withdraw.

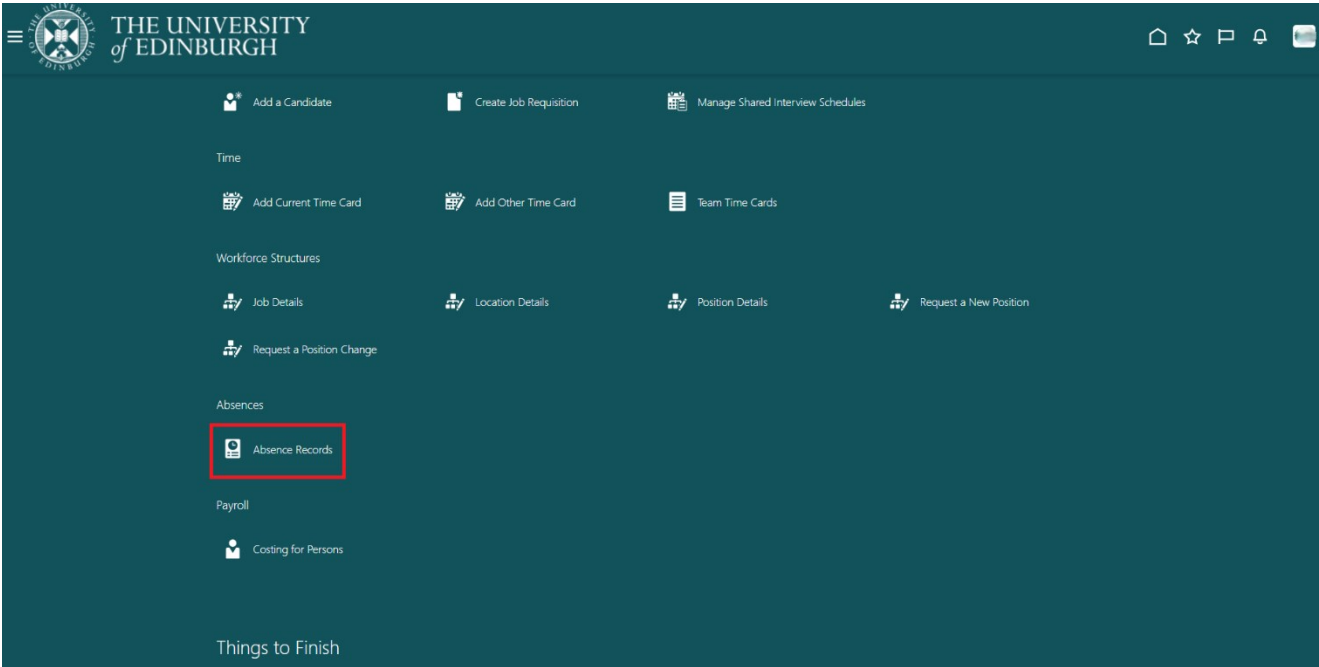
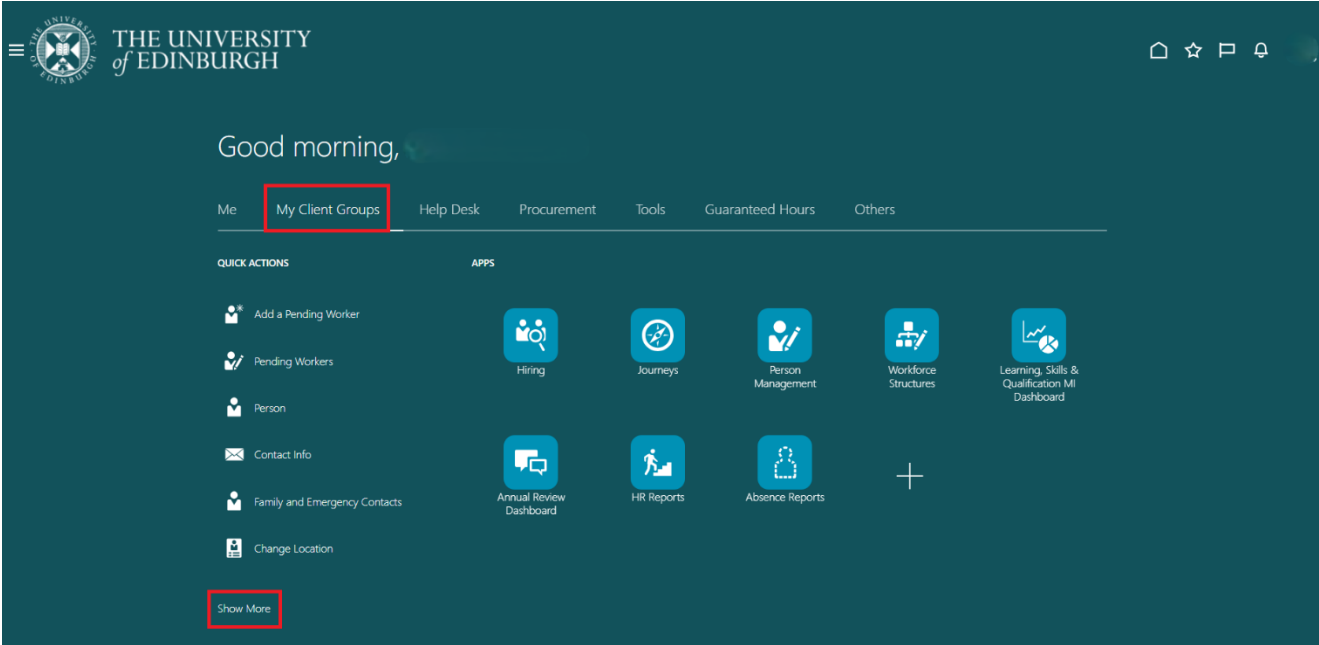
4. Make the necessary changes to the leave dates or confirm the **Actual Date of Childbirth/Actual Placement Date/Actual Start** and **End dates** if known.
5. Click on the **Submit** button.

In Detail

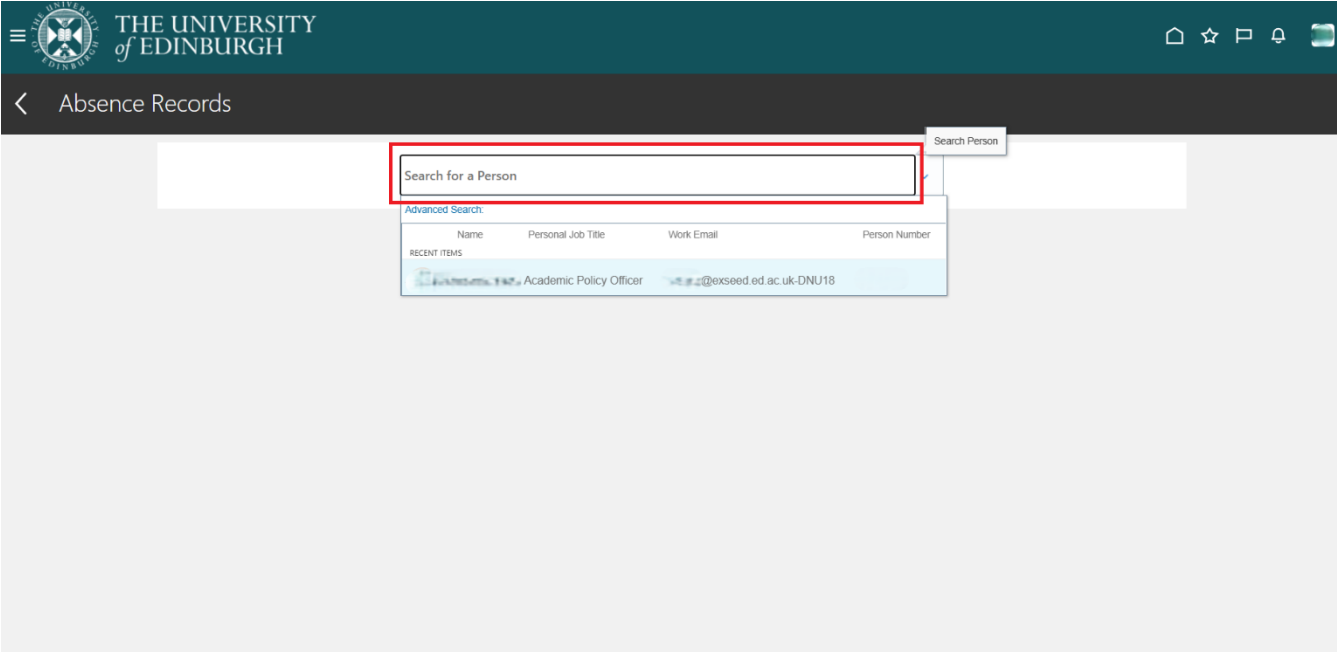
This section provides the detailed steps and includes relevant screenshots from the system.

How to Record Maternity Leave

- 1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.



2. Search for the employee and select their name to continue.

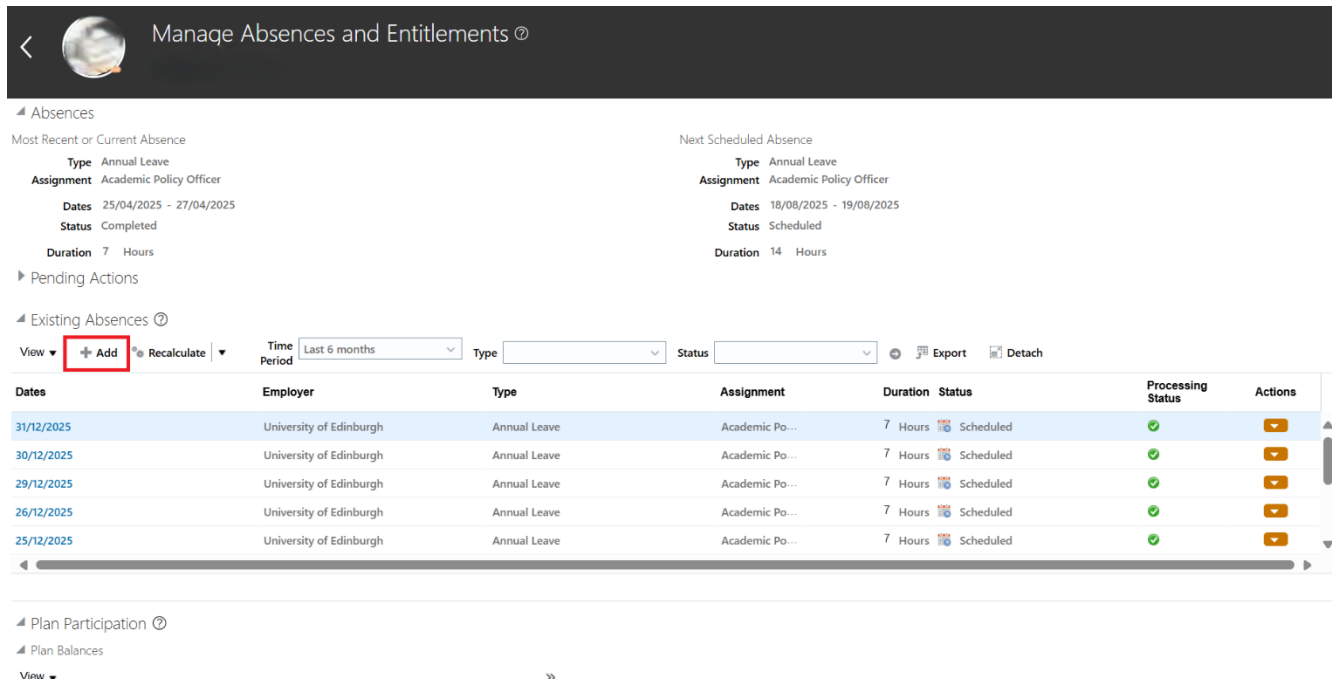


3. Under **Existing Absences**, check whether there are any existing absences that are scheduled to happen during the proposed **Maternity Leave** dates. If there are any existing absences during that period, click on the **Actions** button and select **Withdraw**.

The screenshot displays the 'Manage Absences and Entitlements' page. The 'Existing Absences' section is highlighted with a red box. It contains a table with the following columns: Dates, Employer, Type, Assignment, Duration, Status, and Actions. The table lists several absences for the University of Edinburgh, all of which are 'Annual Leave' and 'Scheduled'. The 'Actions' column for each row contains a dropdown menu with 'Withdraw' selected. The page also includes sections for 'Absences' and 'Pending Actions'.

Dates	Employer	Type	Assignment	Duration	Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw

- Click on the **Add** button.



Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 25/04/2025 - 27/04/2025
Status: Completed
Duration: 7 Hours

Next Scheduled Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 18/08/2025 - 19/08/2025
Status: Scheduled
Duration: 14 Hours

Pending Actions

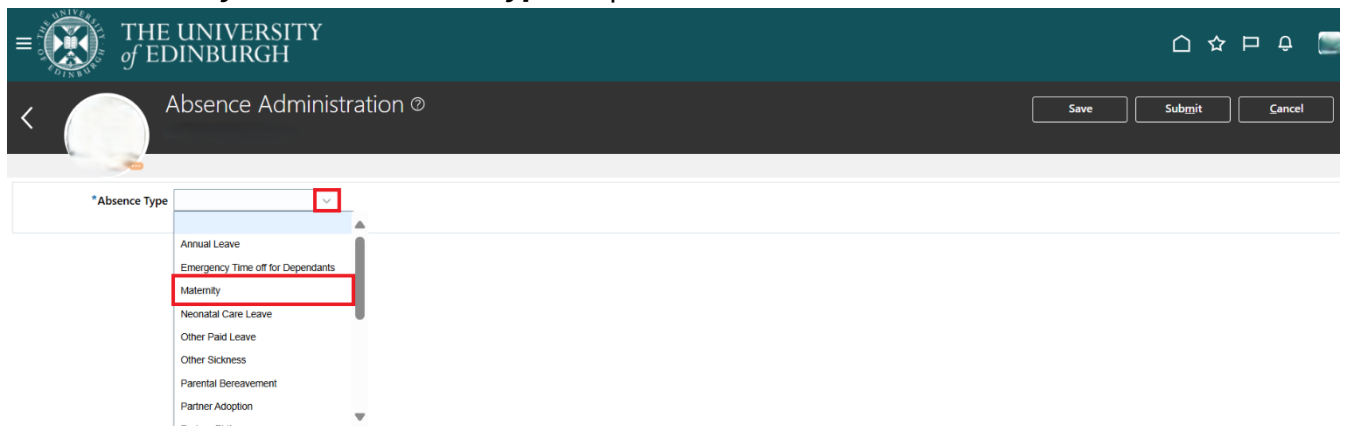
Existing Absences

View **Add** Recalculate Time Period: Last 6 months Type: Status: Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	

Plan Participation
Plan Balances
View

- Select **Maternity** from the **Absence Type** drop-down menu.



THE UNIVERSITY of EDINBURGH

Absence Administration

Save Submit Cancel

Absence Type

- Annual Leave
- Emergency Time off for Dependents
- Maternity**
- Neonatal Care Leave
- Other Paid Leave
- Other Sickness
- Parental Bereavement
- Partner Adoption
- Discretionary Sick Leave

- Enter the **Expected Date of Childbirth**, the **Planned Start Date** for the absence and the **Planned End Date**. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

Where the employee does not intend to return to work after the maternity leave, tick the **Will not return to work** field instead of entering a **Planned End Date**.

Absence Administration

*Absence Type: Maternity

Details

Planned Dates

Expected Date of Childbirth: dd/mm/yyyy

Planned Start Date: dd/mm/yyyy

Planned End Date: dd/mm/yyyy

Planned Duration: Calendar Days

Actual Dates

Actual Date of Childbirth: dd/mm/yyyy

Actual Start Date: dd/mm/yyyy

Actual End Date: dd/mm/yyyy

Actual Duration: Calendar Days

Won't return to work: ☐

*Reason: Option 3

Comments:

Add Attachment: None

Notification Date: 29/05/2025

- The University of Edinburgh pays enhanced maternity pay. This is referred to as UEMP (University of Edinburgh Maternity Pay). The employee can decide how this is paid during the maternity leave, choosing from options 1-3. Full information on the 3 different options can be found in the HR Maternity Policy which can be reviewed [here](#). Select which option the employee has selected from the **Reason** list. Enter the **Notification Date** that the employee made their selection on.

Note: The system will default to **Option 3**, so please ensure this is updated as applicable.

Absence Administration

*Absence Type: Maternity

Details

Planned Dates

Expected Date of Childbirth: dd/mm/yyyy

Planned Start Date: dd/mm/yyyy

Planned End Date: dd/mm/yyyy

Planned Duration: Calendar Days

Actual Dates

Actual Date of Childbirth: dd/mm/yyyy

Actual Start Date: dd/mm/yyyy

Actual End Date: dd/mm/yyyy

Actual Duration: Calendar Days

Won't return to work: ☐

*Reason: Option 3

Comments:

Add Attachment: None

Notification Date: 29/05/2025

Legislative Information

Qualifying Week

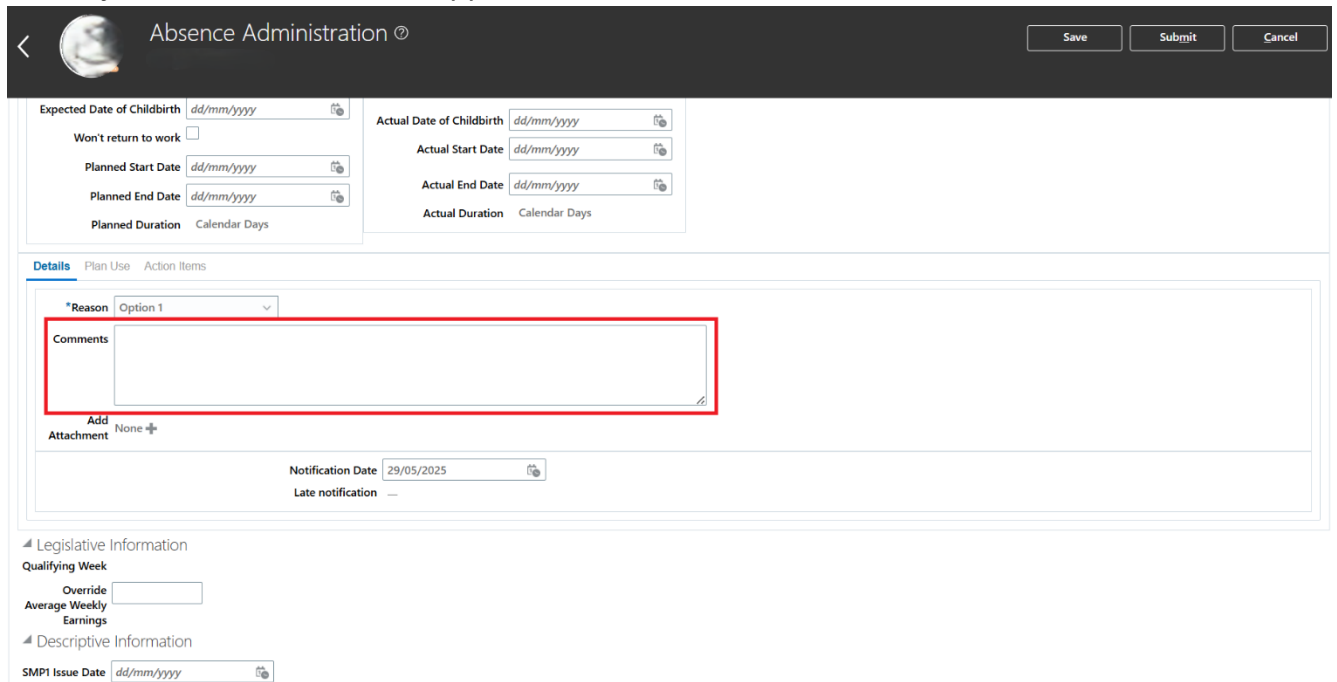
Override:

Average Weekly Earnings

Descriptive Information

SMPI Issue Date: dd/mm/yyyy

8. Add any relevant **Comments** as applicable.



The screenshot shows the 'Absence Administration' form. At the top, there are tabs for 'Details', 'Plan Use', and 'Action Items'. The 'Details' tab is active. Below the tabs, there are two columns of date fields: 'Expected Date of Childbirth', 'Planned Start Date', 'Planned End Date', and 'Planned Duration' on the left; 'Actual Date of Childbirth', 'Actual Start Date', 'Actual End Date', and 'Actual Duration' on the right. A 'Comments' field is highlighted with a red box. Below the 'Comments' field is an 'Add Attachment' button. At the bottom, there are sections for 'Legislative Information' and 'Descriptive Information'.

Absence Administration

Expected Date of Childbirth Won't return to work ☐ Planned Start Date Planned End Date Planned Duration

Actual Date of Childbirth Actual Start Date Actual End Date Actual Duration

Details Plan Use Action Items

*Reason

Comments

Add Attachment

Notification Date Late notification

Legislative Information

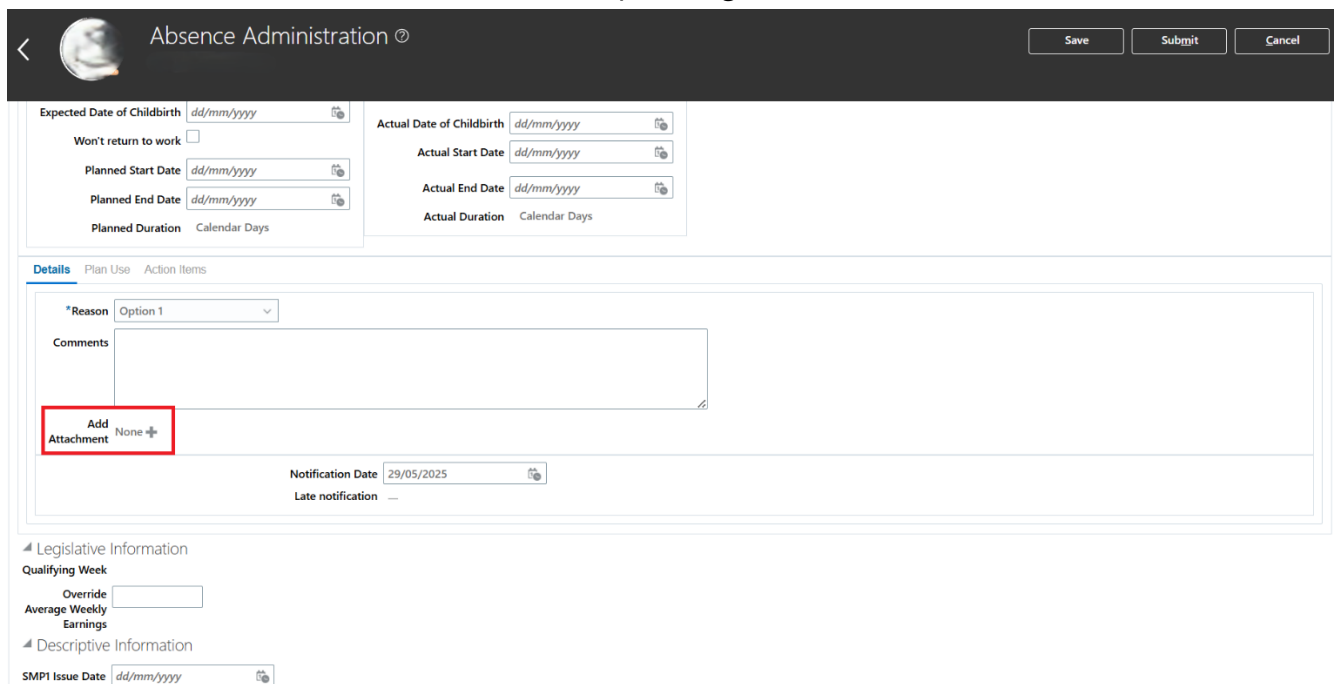
Qualifying Week

Override

Descriptive Information

SMP1 Issue Date

9. To upload the employee's MATB1, click on **Add Attachment** and **Choose File**. Select the MATB1 document and click **Open**. Click **OK** to finish uploading the document.



This screenshot is identical to the one above, but the 'Add Attachment' button is highlighted with a red box instead of the 'Comments' field.

Absence Administration

Expected Date of Childbirth Won't return to work ☐ Planned Start Date Planned End Date Planned Duration

Actual Date of Childbirth Actual Start Date Actual End Date Actual Duration

Details Plan Use Action Items

*Reason

Comments

Add Attachment

Notification Date Late notification

Legislative Information

Qualifying Week

Override

Descriptive Information

SMP1 Issue Date

10. If a Risk Assessment has already been carried out this can also be added to the attachments and the tick box and **Date carried out** field can be completed in the **Additional Information** section at the bottom of the page.

The screenshot shows the 'Absence Administration' form. At the top, there are tabs for 'Planned Duration' and 'Actual Duration', both showing 'Calendar Days'. Below these are buttons for 'Save', 'Submit', and 'Cancel'. The main form area has a 'Details' tab selected. It contains a '*Reason' dropdown menu set to 'Option 1', a 'Comments' text area, and an 'Add Attachment' section with a 'None' button. Below this is a 'Notification Date' field set to '29/05/2025' and a 'Late notification' field. At the bottom, there is a section for 'Legislative Information' with 'Qualifying Week' and 'Override' fields, and 'Average Weekly Earnings'. Below that is a section for 'Descriptive Information' with 'SMP1 Issue Date' (dd/mm/yyyy), a 'Risk' checkbox, an 'Assessment Done?' checkbox, and a 'Date carried out' field (dd/mm/yyyy). The 'Date carried out' field and the 'Risk' and 'Assessment Done?' checkboxes are highlighted with a red box.

11. Click on the **Submit** button at the top of the page to complete the absence.

Note: the **Save** button will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

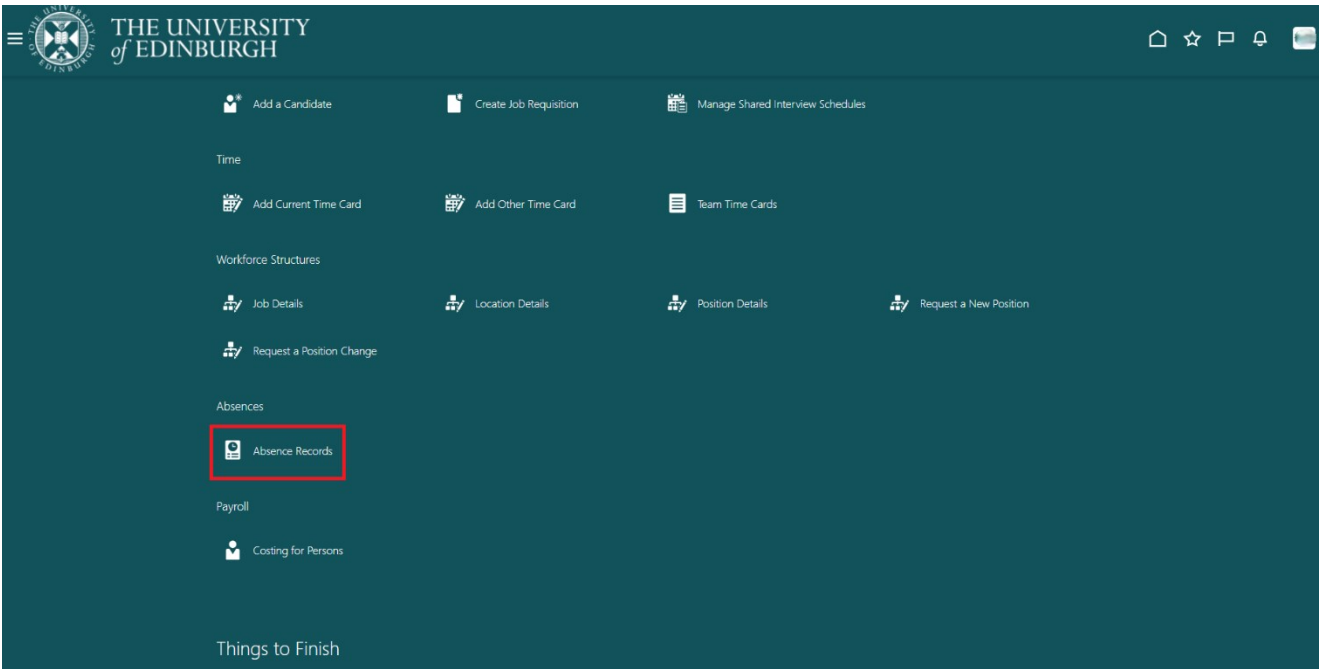
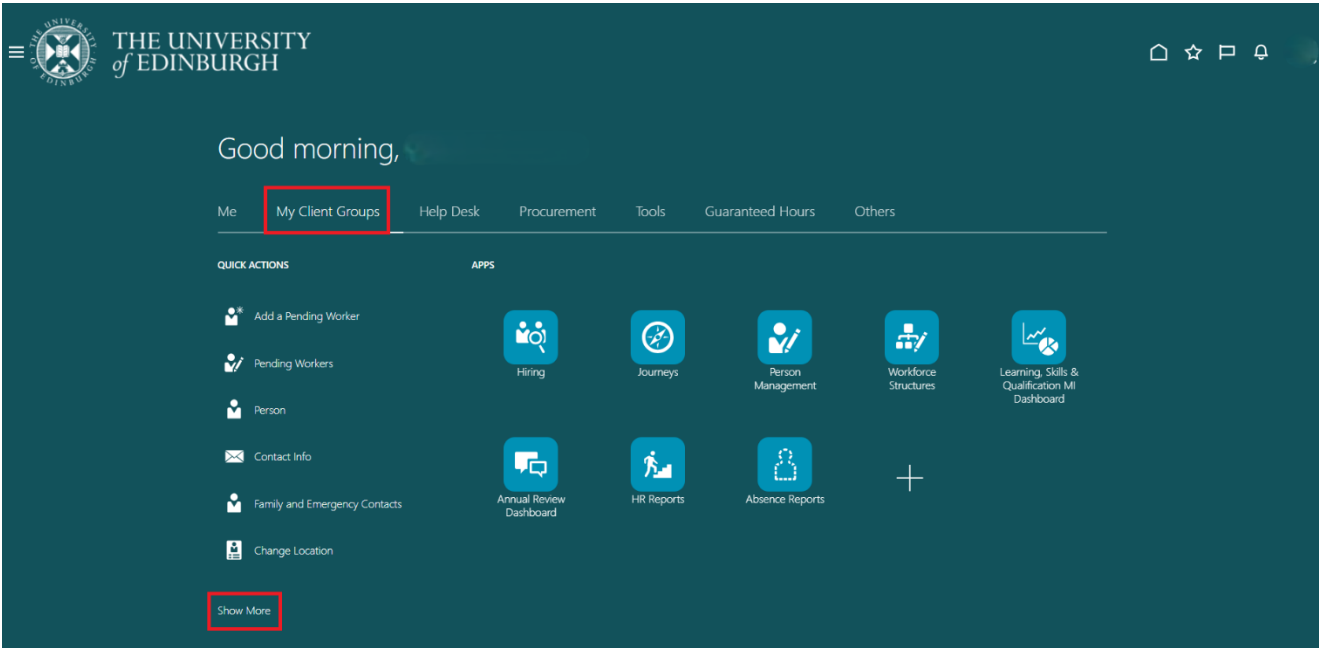
This screenshot is identical to the previous one, showing the 'Absence Administration' form. However, in this version, the 'Submit' button at the top right is highlighted with a red box, indicating the next step in the process.

How to Record a Maternity Risk Assessment


When a Line Manager has been informed that a Direct Report is pregnant, a risk assessment must be carried out. Once completed, the planned maternity absence must be updated to reflect this.

Please note more than one Risk Assessment can be added if required.

- 1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.



2. Search for the employee and select their name to continue.



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of EDINBURGH

Home

Star

Calendar



Notifications

Profile

← Absence Records

Search for a Person

Advanced Search:

Name	Personal Job Title	Work Email	Person Number
RECENT ITEMS			
	Academic Policy Officer		@exseed.ed.ac.uk-DNU18

3. Find the maternity absence under **Existing Absences**. Click on the absence dates (blue text) to open the absence.

← Manage Absences and Entitlements ⓘ

▸ Absences

Most Recent or Current Absence

Type

Annual Leave

Assignment

Academic Policy Officer

Dates

25/04/2025 - 27/04/2025

Status

Completed

Duration

7 Hours

Next Scheduled Absence

Type

Annual Leave

Assignment

Academic Policy Officer

Dates

18/08/2025 - 19/08/2025

Status

Scheduled

Duration

14 Hours

▸ Pending Actions

▸ Existing Absences ⓘ

View ▾

⊕ Add

⚙ Recalculate
















Time Period ▾ Last 6 months

Type ▾

Status ▾

⚙ Export

🔗 Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
8/05/2026 - 30/04/2027	University of Edinburgh	Maternity		358 Calendar Days	 Awaiting approval		
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	 Scheduled		
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	 Scheduled		
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	 Scheduled		
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	 Scheduled		

▸ Plan Participation ⓘ

▸ Plan Balances

View ▾

⊕ Add

⚙ Recalculate

Time Period ▾ Last 6 months


Type ▾



Status ▾


⚙ Export



🔗 Detach


4. Click on **Add Attachment** and **Choose File**. Select the Risk Assessment document and click **Open**. Click **OK** to finish uploading the document.

Absence Administration 

Expected Date of Childbirth  **Actual Date of Childbirth** 

Won't return to work ☐ **Actual Start Date** 

Planned Start Date  **Actual End Date** 


Planned End Date  **Actual Duration**


Planned Duration

Details **Plan Use** **Action Items**

***Reason**

Comments

Add Attachment 

Notification Date 

Late notification


Legislative Information

Qualifying Week


Override

Average Weekly Earnings

Descriptive Information

SMPI Issue Date 

5. Within the **Additional Information** section, put a tick in the field **Risk Assessment Done** box and update the **Date carried out** field.


Absence Administration 


Planned Duration **Actual Duration**

Details **Plan Use** **Action Items**

***Reason**

Comments

Add Attachment 

Notification Date 

Late notification


Legislative Information

Qualifying Week


Override

Average Weekly Earnings

Descriptive Information

SMPI Issue Date 

Risk Assessment Done? ☐

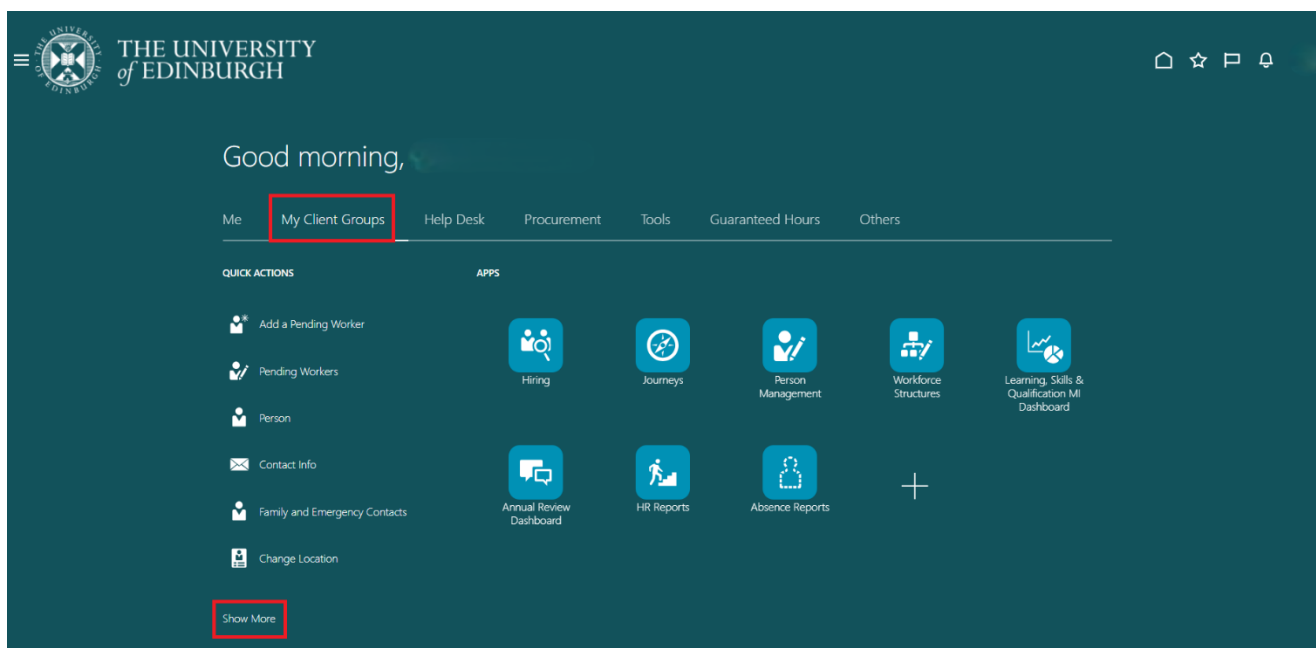
Date carried out 

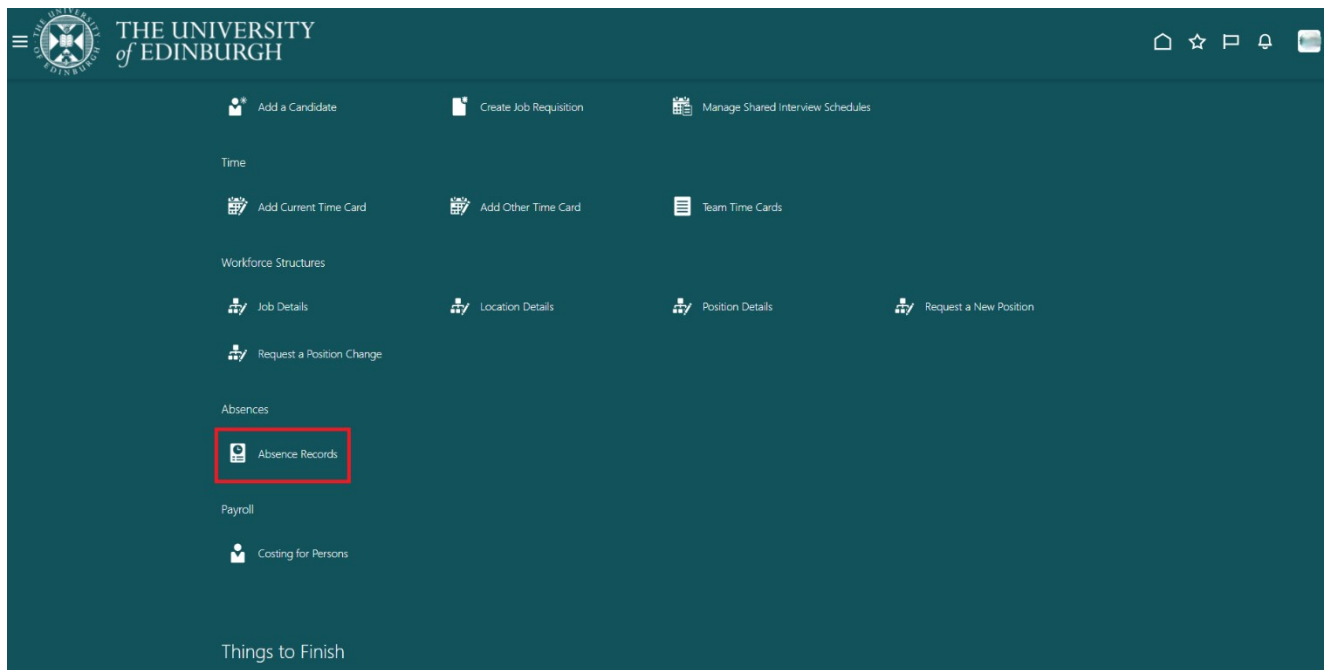
- Click on the **Submit** button at the top of the page to complete the update.

The screenshot shows the 'Absence Administration' form. At the top, there are 'Save', 'Submit' (highlighted with a red box), and 'Cancel' buttons. Below these are tabs for 'Planned Duration' (358 Calendar Days) and 'Actual Duration' (Calendar Days). The main form area has tabs for 'Details', 'Plan Use', and 'Action Items'. Under 'Details', there is a dropdown for '*Reason' (Option 1), a text area for 'Comments', and an 'Add Attachment' section with a 'None' button. Below this is a 'Notification Date' field set to '29/05/2025' and a 'Late notification' field. At the bottom, there are sections for 'Legislative Information' (Qualifying Week: 1/02/2026, Override, Average Weekly Earnings) and 'Descriptive Information' (SMPI Issue Date: dd/mm/yyyy, Risk: checked, Assessment Done?, Date carried out: 29/05/2025).

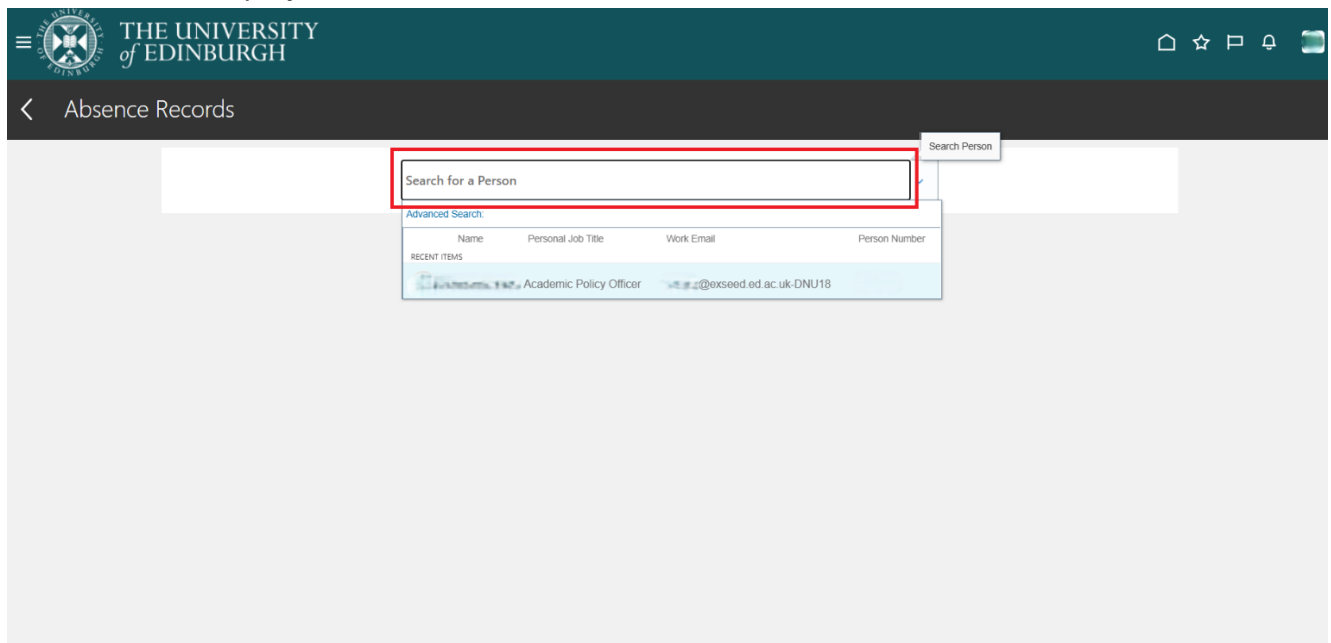
How to Attach a MATB1 to a Maternity Record

- From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.





2. Search for the employee and select their name to continue.



3. Find the maternity absence under **Existing Absences**. Click on the absence dates (blue text) to open the absence.

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

TypeAnnual Leave

AssignmentAcademic Policy Officer

Dates25/04/2025 - 27/04/2025

StatusCompleted

Duration7 Hours

Next Scheduled Absence

TypeAnnual Leave

AssignmentAcademic Policy Officer

Dates18/08/2025 - 19/08/2025

StatusScheduled

Duration14 Hours

Pending Actions

Existing Absences

ViewAddRecalculateTime PeriodLast 6 monthsTypeStatusExportDetach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
8/05/2026 - 30/04/2027	University of Edinburgh	Maternity		358 Calendar Days	Awaiting approval		
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		

Plan Participation

Plan Balances

ViewAssessEvaluate and AdjustmentsStatusAction

4. Click on **Add Attachment** to upload the MATB1.

Absence Administration

Save

Submit

Cancel

Expected Date of Childbirthdd/mm/yyyy

Actual Date of Childbirthdd/mm/yyyy

Won't return to work

Planned Start Datedd/mm/yyyy

Planned End Datedd/mm/yyyy

Planned DurationCalendar Days

Actual Start Datedd/mm/yyyy

Actual End Datedd/mm/yyyy

Actual DurationCalendar Days

DetailsPlan UseAction Items

*ReasonOption 1

Comments

Add AttachmentNone

Notification Date29/05/2025

Late notification

Legislative Information

Qualifying Week

Override

Average Weekly Earnings

Descriptive Information

SMP1 Issue Datedd/mm/yyyy

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PM3768
25B V2.0 June 2025

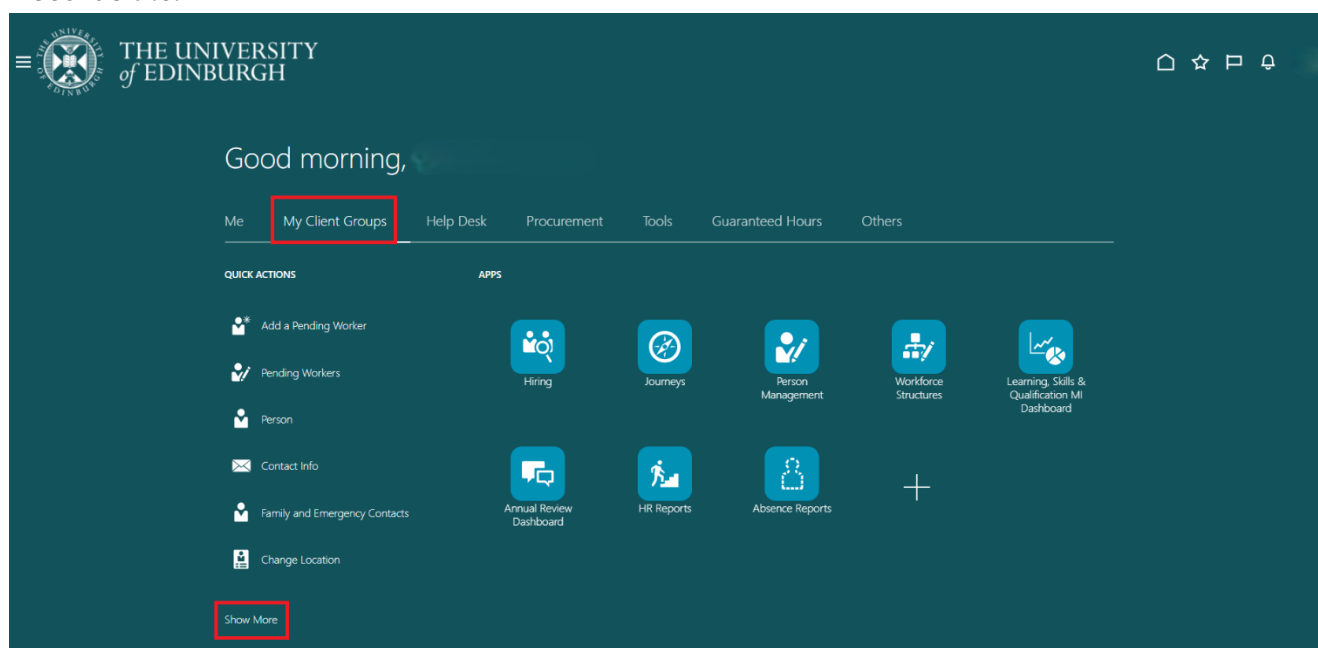
- Click on the **Submit** button at the top of the page.

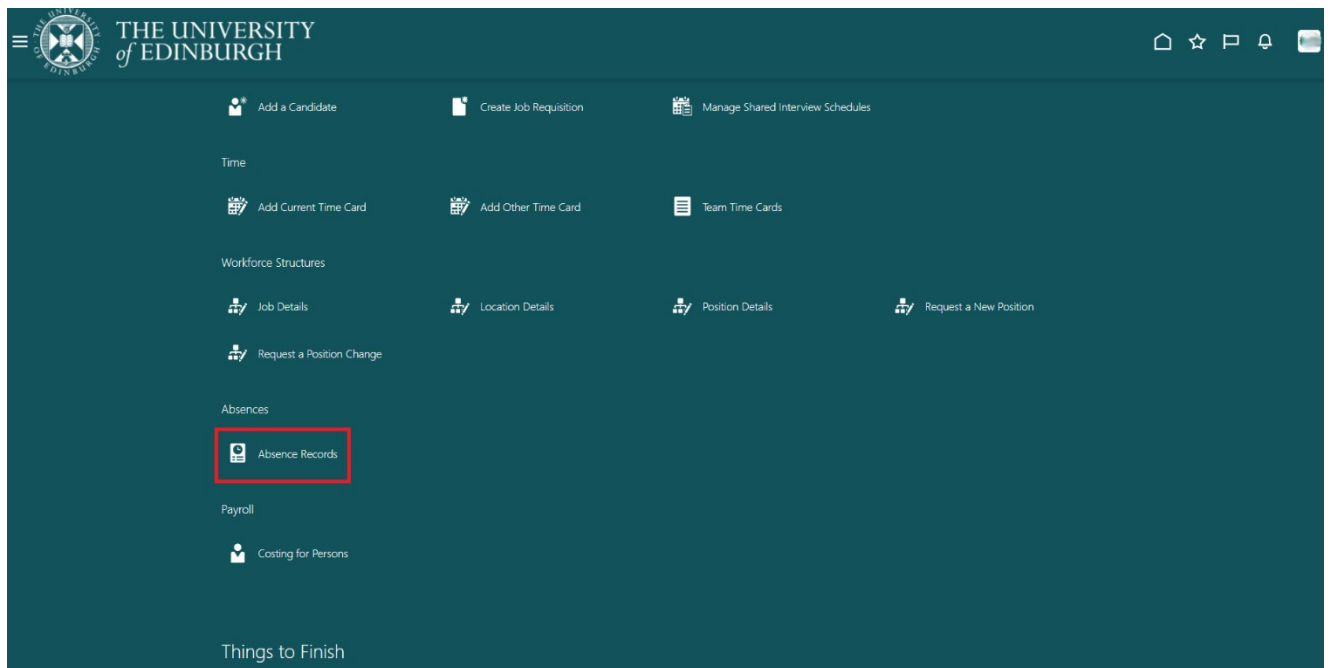
The screenshot shows the 'Absence Administration' form. At the top right, there are three buttons: 'Save', 'Submit' (highlighted with a red box), and 'Cancel'. Below these are tabs for 'Planned Duration' (358 Calendar Days) and 'Actual Duration' (Calendar Days). The main form area has tabs for 'Details', 'Plan Use', and 'Action Items'. Under 'Details', there is a dropdown for 'Reason' (Option 1), a text area for 'Comments', and an 'Add Attachment' section with a file named 'MATB1.docx'. Below this is a 'Notification Date' field set to '29/05/2025' and a 'Late notification' field. At the bottom, there are sections for 'Legislative Information' (Qualifying Week: 1/02/2026, Override, Average Weekly Earnings) and 'Descriptive Information' (SMPI Issue Date: dd/mm/yyyy, Risk: checked, Assessment: Done?, Date carried out: 29/05/2025).

How to Record Adoption or Surrogacy Leave

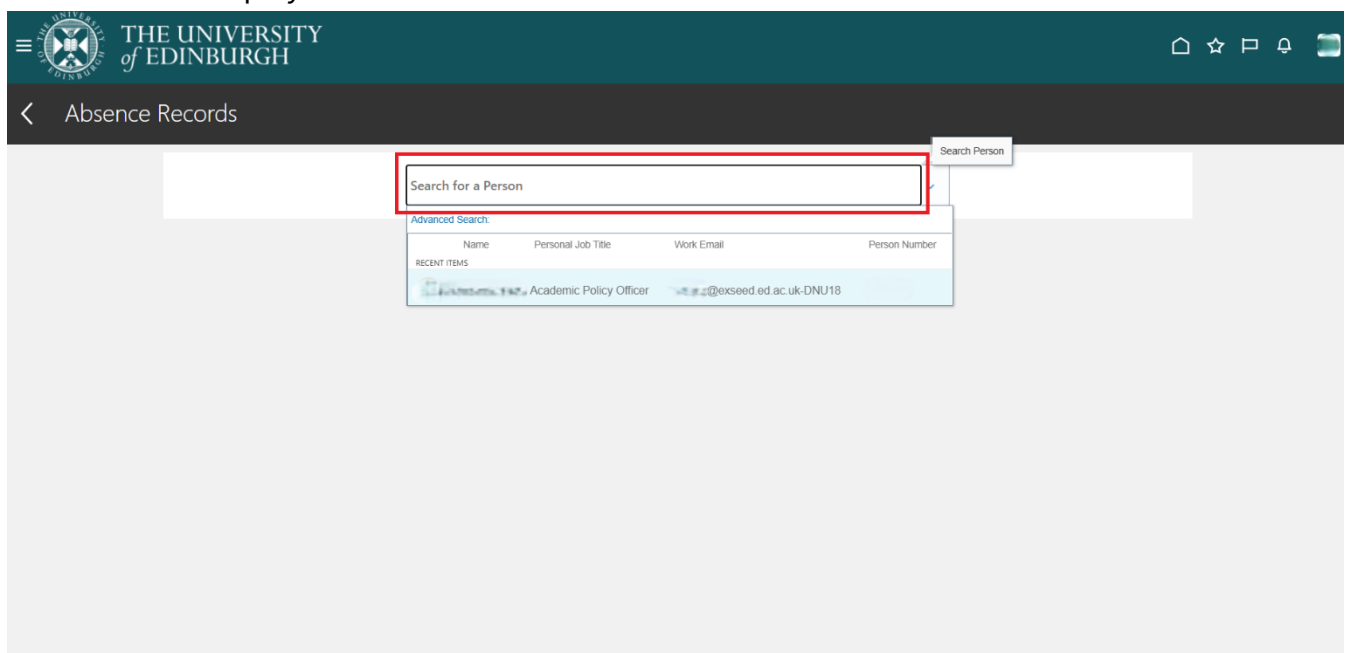
We are aware that the field names within the Adoption and Surrogacy Leave screens may not fit the employee's individual circumstances. Please refer to the [Appendix](#) as well as the [Guide to Adoption and Surrogacy Leave](#).

- From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.





2. Search for the employee and select their name to continue.



3. Under **Existing Absences**, check whether there are any existing absences that are scheduled to happen during the proposed **Adoption/Surrogacy Leave** dates. If there are any existing absences during that period, click on the **Actions** button and select **Withdraw**.

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 25/04/2025 - 27/04/2025
Status Completed
Duration 7 Hours

Next Scheduled Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 18/08/2025 - 19/08/2025
Status Scheduled
Duration 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw

4. Click on the **Add** button.

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 25/04/2025 - 27/04/2025
Status Completed
Duration 7 Hours

Next Scheduled Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 18/08/2025 - 19/08/2025
Status Scheduled
Duration 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw

5. Select **Surrogacy or Adoption** from the **Absence Type** drop-down menu.

The screenshot shows the 'Absence Administration' page of the University of Edinburgh. The 'Absence Type' dropdown menu is open, and 'Surrogacy and Adoption' is highlighted with a red box. The menu options are: Phased Return, Shared Parental Adoption, Shared Parental Birth, Sickness, Special Paid Leave, Surrogacy and Adoption, Unauthorised Leave, Unpaid Leave, and Unpaid Parental Leave. The 'Save', 'Submit', and 'Cancel' buttons are visible at the top right.

6. Enter the **Expected** or **Actual Date of Placement**, the **Placement Match Date**, the **Planned** or **Actual Start** and **End Dates**. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

If the employee does not plan to return to work, put a tick against the field **Will not return to work** instead of the **Planned End Date**.

The screenshot shows the 'Details' section of the 'Absence Administration' page for 'Surrogacy and Adoption'. The 'Planned Dates' section is highlighted with a red box. It contains the following fields: 'Expected Date of Placement' (dd/mm/yyyy), 'Placement Match Date' (dd/mm/yyyy), 'Won't return to work' (checkbox), 'Planned Start Date' (dd/mm/yyyy), 'Planned End Date' (dd/mm/yyyy), and 'Planned Duration' (Calendar Days). The 'Actual Dates' section contains: 'Actual Date of Placement' (dd/mm/yyyy), 'Actual Start Date' (dd/mm/yyyy), 'Actual End Date' (dd/mm/yyyy), and 'Actual Duration' (Calendar Days). The 'Reason' dropdown is set to 'Option 3'. The 'Comments' field is empty. The 'Add Attachment' button is at the bottom left.

7. Select which pay option the employee has selected from the **Reason** drop-down list and enter the **Notification Date** that the employee made their selection on.

Absence Administration

Planned Start Date: dd/mm/yyyy Actual End Date: dd/mm/yyyy
Planned End Date: dd/mm/yyyy Actual Duration: Calendar Days
Planned Duration: Calendar Days

Details Plan Use Action Items

*Reason: Option 3
Comments: [Text Area]
Add Attachment: None
Special Conditions: [Dropdown] Notification Date: 29/05/2025
Late notification: [Dropdown]

Legislative Information
Birth Date of Child: dd/mm/yyyy
Disrupted Placement Date: dd/mm/yyyy
Matching Week: [Text Field]
Override Average Weekly Earnings: [Text Field]

Descriptive Information
SAP1 Issue Date: dd/mm/yyyy

8. Add any relevant notes in the **Comments** section.

Absence Administration

Planned Start Date: dd/mm/yyyy Actual End Date: dd/mm/yyyy
Planned End Date: dd/mm/yyyy Actual Duration: Calendar Days
Planned Duration: Calendar Days

Details Plan Use Action Items

*Reason: Option 1
Comments: [Text Area]
Add Attachment: None
Special Conditions: [Dropdown] Notification Date: 29/05/2025
Late notification: [Dropdown]

Legislative Information
Birth Date of Child: dd/mm/yyyy
Disrupted Placement Date: dd/mm/yyyy
Matching Week: [Text Field]
Override Average Weekly Earnings: [Text Field]

Descriptive Information
SAP1 Issue Date: dd/mm/yyyy

9. Attach relevant documentation in the Attachments section.

Absence Administration

Save

Submit

Cancel

Planned Start Date

dd/mm/yyyy

Planned End Date

dd/mm/yyyy

Planned Duration

Calendar Days

Actual End Date

dd/mm/yyyy

Actual Duration

Calendar Days

Details

Plan Use

Action Items

*Reason

Option 1

Comments

Add Attachment

None

Special Conditions

Notification Date

29/05/2025

Late notification

Legislative Information

Birth Date of Child

dd/mm/yyyy

Disrupted Placement Date

dd/mm/yyyy

Matching Week

Override Average Weekly Earnings

Descriptive Information

SAPI Issue Date

dd/mm/yyyy

10. Click on the **Submit** button at the top of the page to complete the absence.

Absence Administration

Save

Submit

Cancel

Planned Start Date

dd/mm/yyyy

Planned End Date

dd/mm/yyyy

Planned Duration

Calendar Days

Actual End Date

dd/mm/yyyy

Actual Duration

Calendar Days

Details

Plan Use

Action Items

*Reason

Option 1

Comments

Add Attachment

None

Special Conditions

Notification Date

29/05/2025

Late notification

Legislative Information

Birth Date of Child

dd/mm/yyyy

Disrupted Placement Date

dd/mm/yyyy

Matching Week

Override Average Weekly Earnings

Descriptive Information

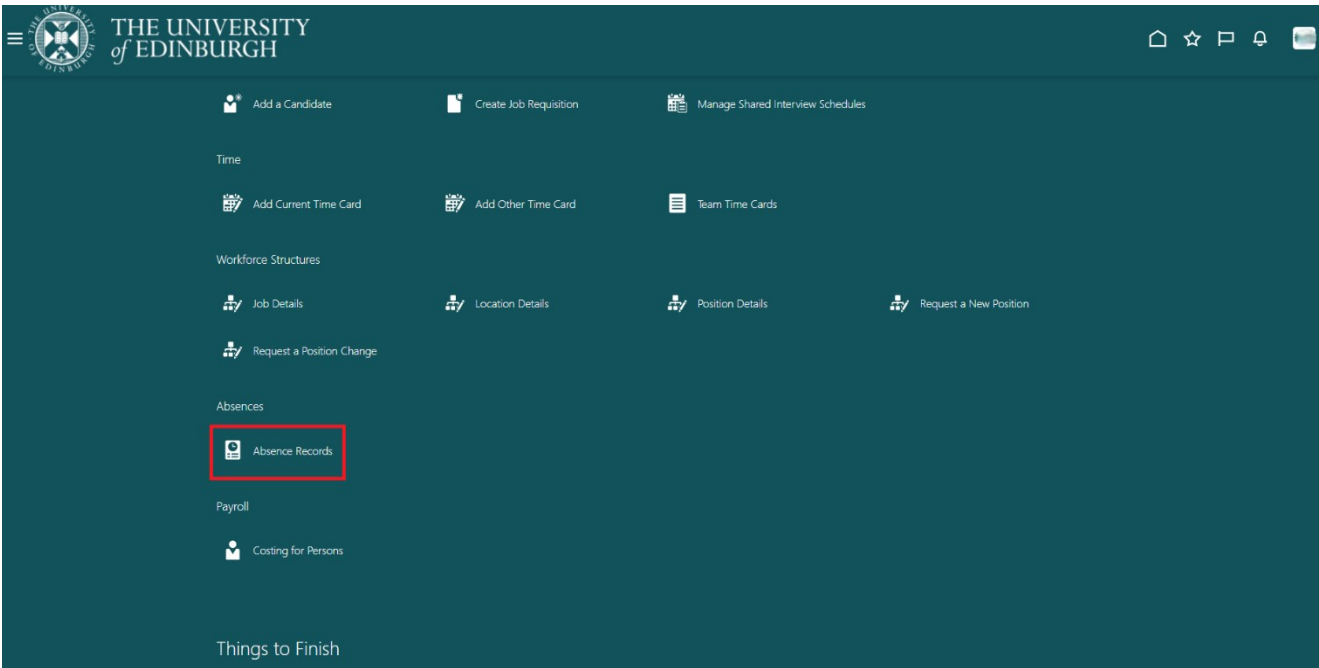
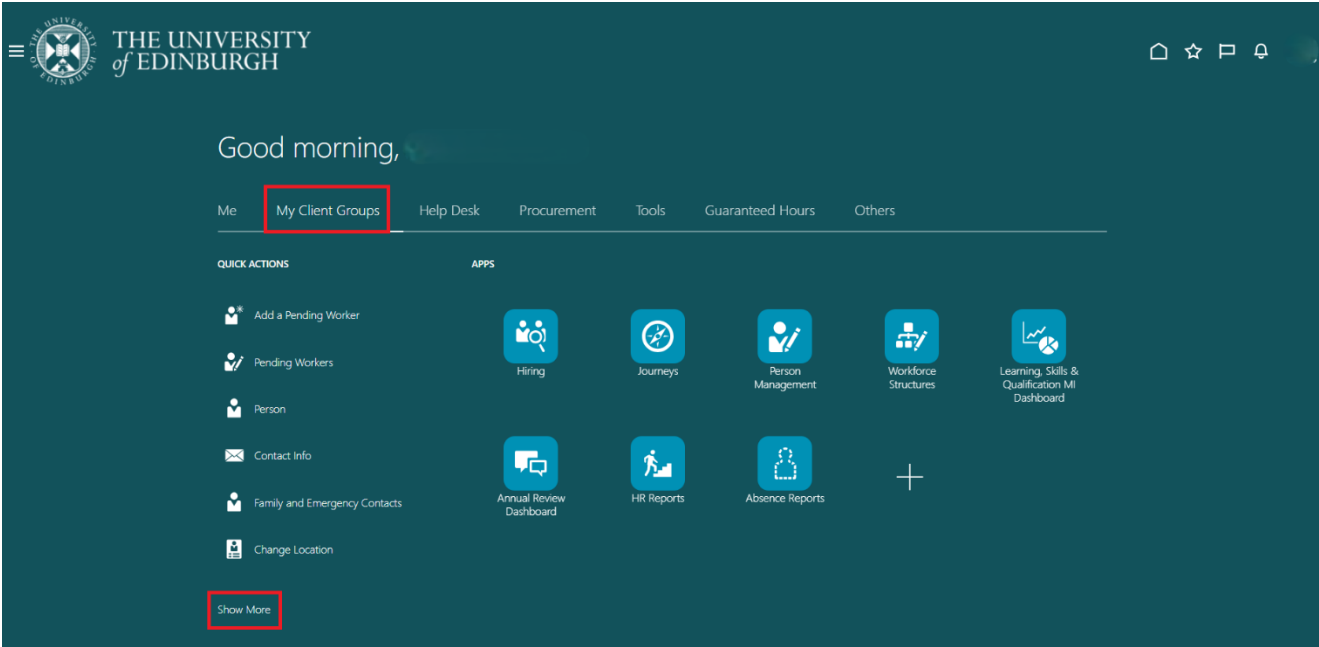
SAPI Issue Date

dd/mm/yyyy

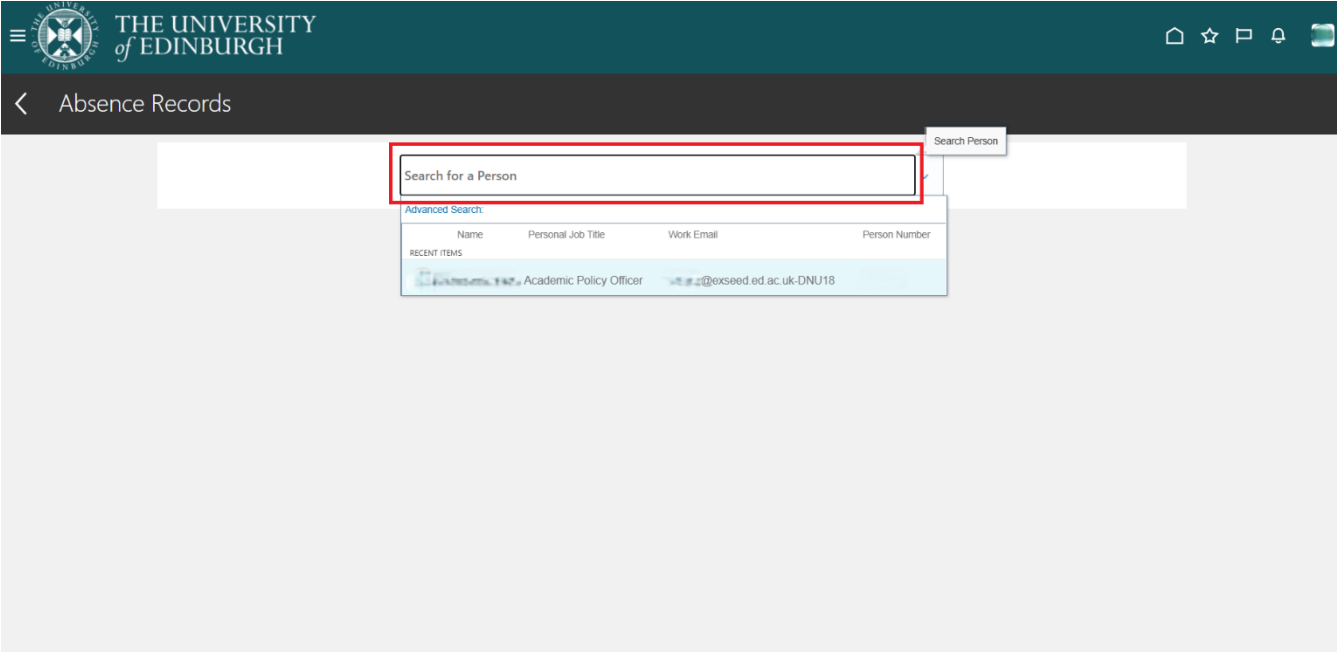
How to Record Partner Leave

Partner Adoption

1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.



2. Search for the employee and select their name to continue.



3. Under **Existing Absences**, check whether there are any existing absences that are scheduled to happen during the proposed leave dates. If there are any existing absences during that period, click on the **Actions** button and select **Withdraw**.

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 25/04/2025 - 27/04/2025
Status: Completed
Duration: 7 Hours

Next Scheduled Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 18/08/2025 - 19/08/2025
Status: Scheduled
Duration: 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

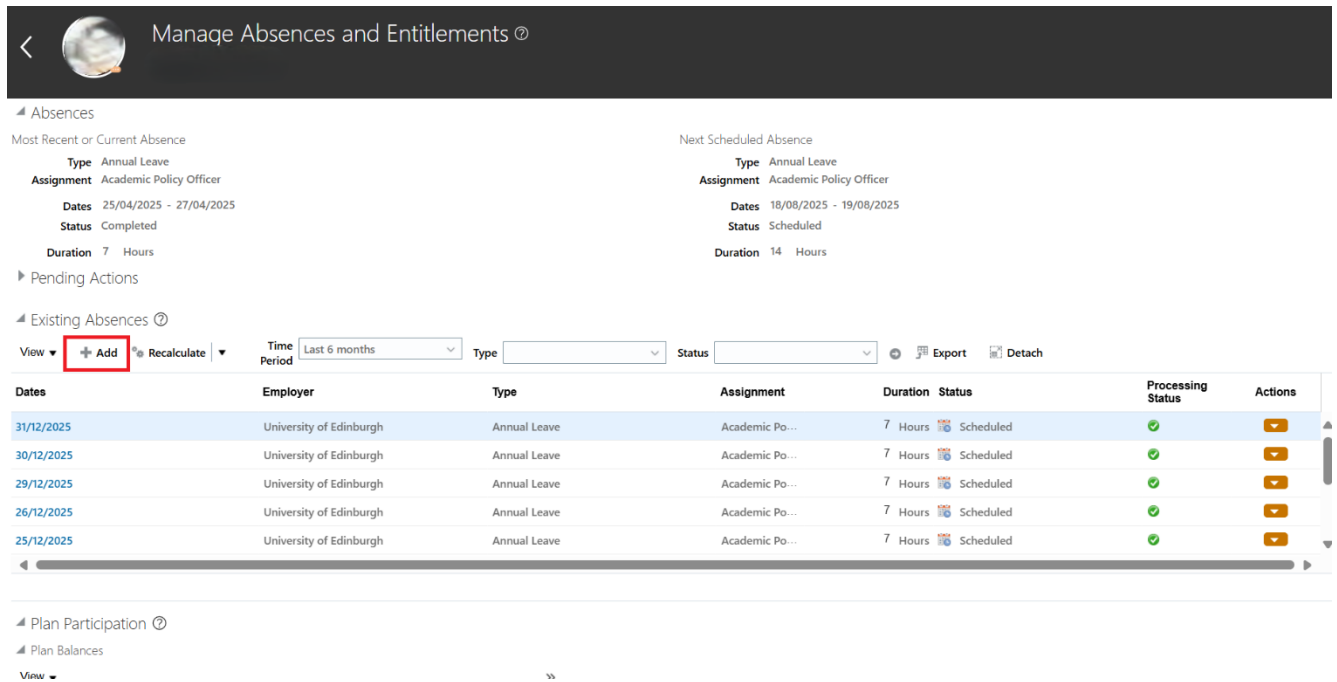
Dates	Employer	Type	Assignment	Duration	Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw

Plan Participation

Plan Balances

View

- Click on the **Add** button.



Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 25/04/2025 - 27/04/2025
Status: Completed
Duration: 7 Hours

Next Scheduled Absence

Type: Annual Leave
Assignment: Academic Policy Officer
Dates: 18/08/2025 - 19/08/2025
Status: Scheduled
Duration: 14 Hours

Pending Actions

Existing Absences

View **Add** Recalculate Time Period: Last 6 months Type: Status: Export Detach

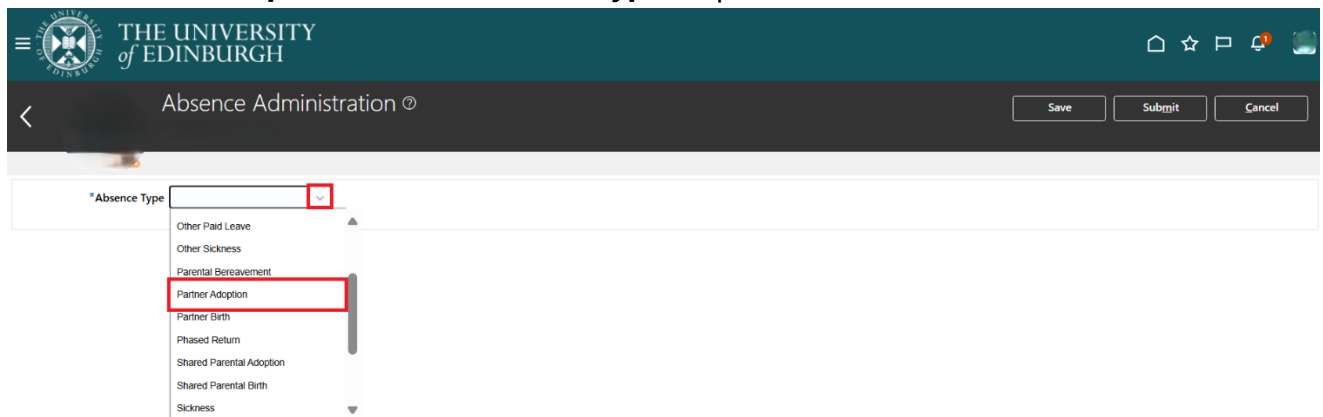
Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	

Plan Participation

Plan Balances

View

- Select **Partner Adoption** from the **Absence Type** drop-down menu.



THE UNIVERSITY of EDINBURGH

Absence Administration

Save Submit Cancel

Absence Type

- Other Paid Leave
- Other Sickness
- Parental Bereavement
- Partner Adoption**
- Partner Birth
- Phased Return
- Shared Parental Adoption
- Shared Parental Birth
- Sickness

- Enter the **Expected** or **Actual Date of Placement**, the **Placement Match Date**, the **Planned** or **Actual Start** and **End Dates**, as known. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

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of EDINBURGH

1

Absence Administration

Save

Submit

Cancel

*Absence Type

Partner Adoption

Details

Planned Dates

Expected Date of Placement

dd/mm/yyyy

Placement Match Date

dd/mm/yyyy

Planned Start Date

dd/mm/yyyy

Planned End Date

dd/mm/yyyy

Planned Duration

Calendar Days

Actual Dates

Actual Date of Placement

dd/mm/yyyy

Actual Start Date

dd/mm/yyyy

Actual End Date

dd/mm/yyyy

Actual Duration

Calendar Days

Details

Plan Use

Action Items

Comments

Add Attachment

None

Late notification

7. Add any appropriate **Comments** or click on **Add Attachment** to upload any documents.

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of EDINBURGH

1

Absence Administration

Save

Submit

Cancel

*Absence Type

Partner Adoption

Details

Planned Dates

Expected Date of Placement

dd/mm/yyyy

Placement Match Date

dd/mm/yyyy

Planned Start Date

dd/mm/yyyy

Planned End Date

dd/mm/yyyy

Planned Duration

Calendar Days

Actual Dates

Actual Date of Placement

dd/mm/yyyy

Actual Start Date

dd/mm/yyyy

Actual End Date

dd/mm/yyyy

Actual Duration

Calendar Days

Details

Plan Use

Action Items

Comments

Add Attachment

None

Late notification

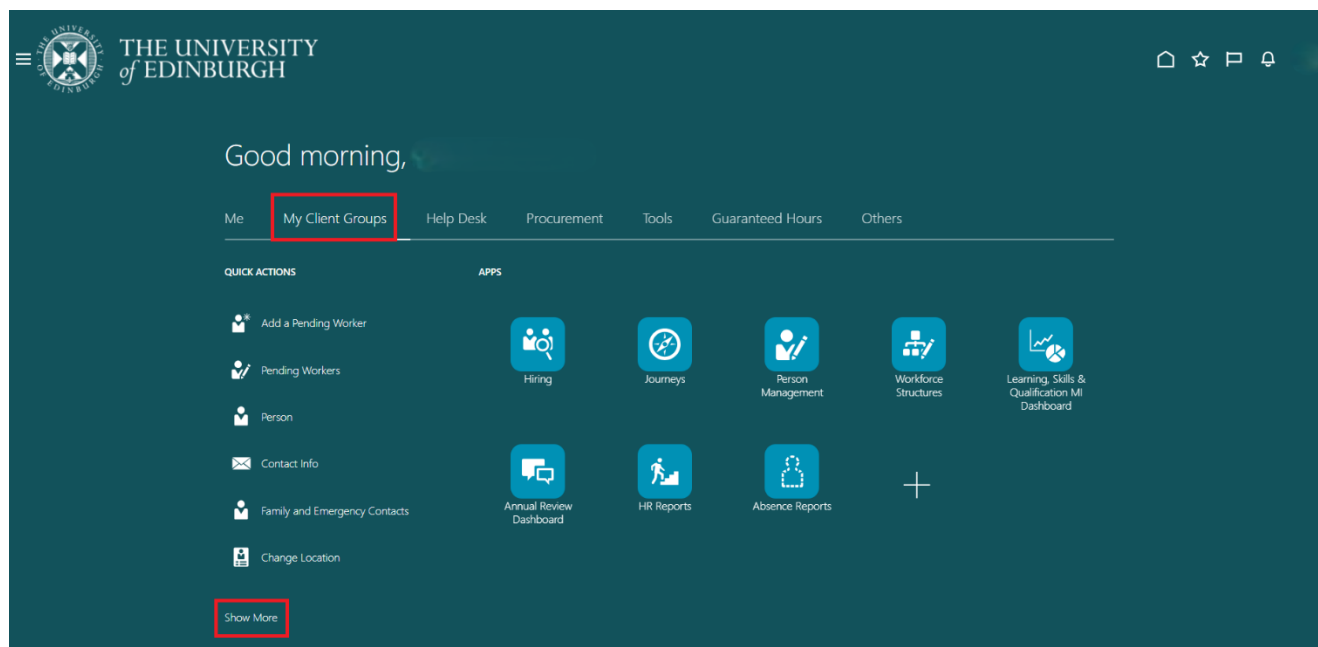
- Click on the **Submit** button at the top of the page.

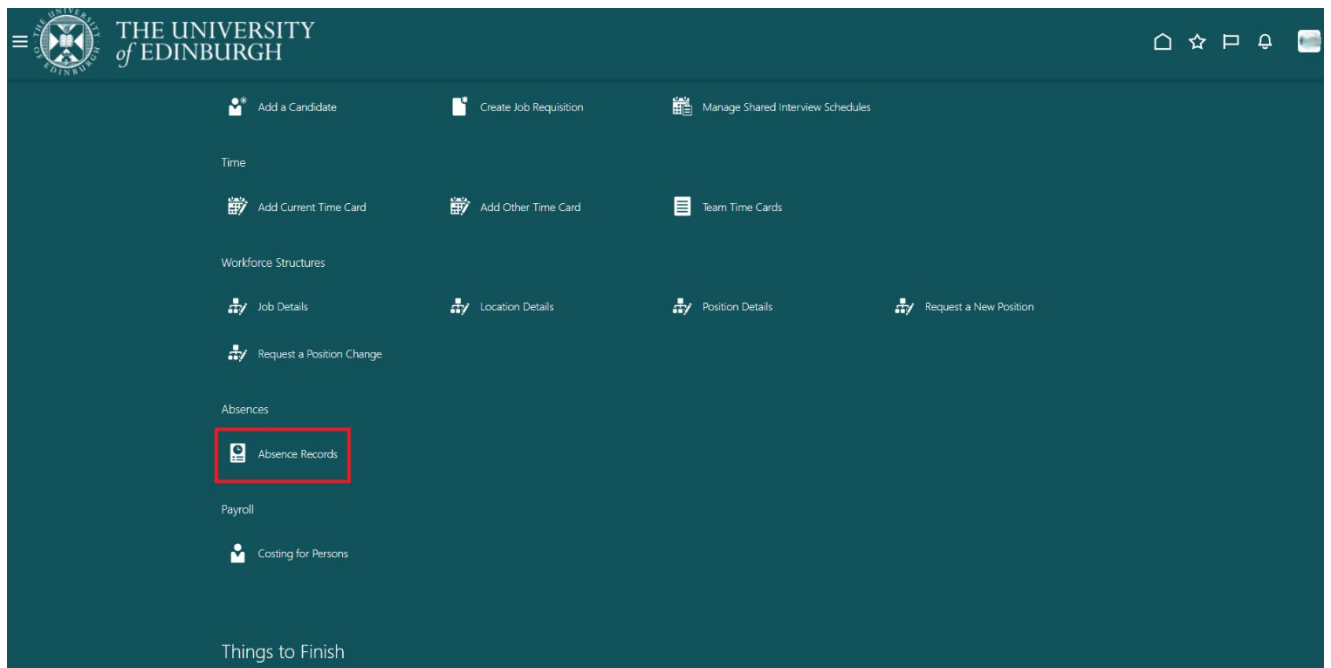
Note: the **Save** button will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

The screenshot shows the 'Absence Administration' interface. At the top, there's a header with the University of Edinburgh logo and navigation icons. Below the header, the title 'Absence Administration' is centered. To the right of the title are three buttons: 'Save', 'Submit' (highlighted with a red box), and 'Cancel'. The main form area has a dropdown for 'Absence Type' set to 'Partner Adoption'. Below this, there are two columns of date and duration fields. The 'Planned Dates' column includes 'Expected Date of Placement', 'Placement Match Date', 'Planned Start Date', 'Planned End Date', and 'Planned Duration' (set to 'Calendar Days'). The 'Actual Dates' column includes 'Actual Date of Placement', 'Actual Start Date', 'Actual End Date', and 'Actual Duration' (set to 'Calendar Days'). At the bottom, there's a 'Comments' section with a text area and an 'Add Attachment' button. A 'Late notification' section is also visible at the very bottom.

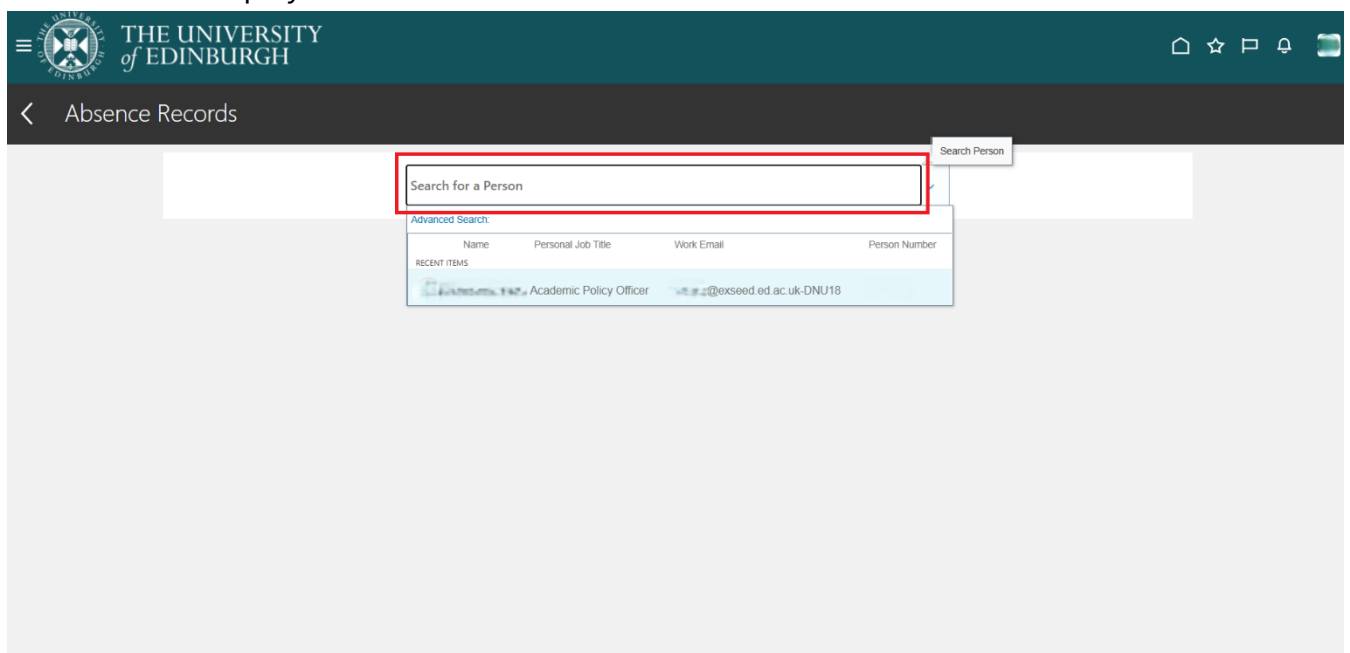
Partner Birth

- From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.





2. Search for the employee and select their name to continue.



3. Under **Existing Absences**, check whether there are any existing absences that are scheduled to happen during the proposed leave dates. If there are any existing absences during that period, click on the **Actions** button and select **Withdraw**.

Manage Absences and Entitlements

◀ Absences

Most Recent or Current Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 25/04/2025 - 27/04/2025
Status Completed
Duration 7 Hours

Next Scheduled Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 18/08/2025 - 19/08/2025
Status Scheduled
Duration 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw

4. Click on the **Add** button.

Manage Absences and Entitlements

◀ Absences

Most Recent or Current Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 25/04/2025 - 27/04/2025
Status Completed
Duration 7 Hours

Next Scheduled Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 18/08/2025 - 19/08/2025
Status Scheduled
Duration 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	Withdraw

5. Select **Partner Birth** from the **Absence Type** drop-down menu.

The screenshot shows the 'Absence Administration' page of the University of Edinburgh. The 'Absence Type' dropdown menu is open, displaying a list of options: Other Paid Leave, Other Sickness, Parental Bereavement, Partner Adoption, Partner Birth, Phased Return, Shared Parental Adoption, Shared Parental Birth, and Sickness. The 'Partner Birth' option is highlighted with a red box. The page header includes the University of Edinburgh logo and navigation icons. The top bar contains 'Save', 'Submit', and 'Cancel' buttons.

7. Enter the **Expected** or **Actual Date of Childbirth** and **Planned** or **Actual Start** and **End Dates**, as known. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave Dates](#)'.

The screenshot shows the 'Absence Administration' page with the 'Absence Type' dropdown set to 'Partner Birth'. The 'Details' section is expanded, showing two columns of date fields: 'Planned Dates' and 'Actual Dates'. Each column contains fields for 'Expected Date of Childbirth', 'Planned Start Date', 'Planned End Date', and 'Planned Duration' (set to 'Calendar Days'). The 'Actual Dates' column contains fields for 'Actual Date of Childbirth', 'Actual Start Date', 'Actual End Date', and 'Actual Duration' (set to 'Calendar Days'). All date fields have a 'dd/mm/yyyy' placeholder and a calendar icon. Below the date fields is a 'Comments' text area, an 'Add Attachment' button, and a 'Special Conditions' dropdown menu. The page header and top bar are consistent with the previous screenshot.

8. Add any appropriate **Comments** or click on **Add Attachment** to upload any documents.

The screenshot shows the 'Absence Administration' form for 'Partner Birth'. The 'Details' tab is active. The 'Planned Dates' section includes fields for 'Expected Date of Childbirth', 'Planned Start Date', 'Planned End Date', and 'Planned Duration'. The 'Actual Dates' section includes fields for 'Actual Date of Childbirth', 'Actual Start Date', 'Actual End Date', and 'Actual Duration'. Below these sections, the 'Comments' field is highlighted with a red box. Below the 'Comments' field, the 'Add Attachment' button is highlighted with a red box. The 'Special Conditions' dropdown is also visible.

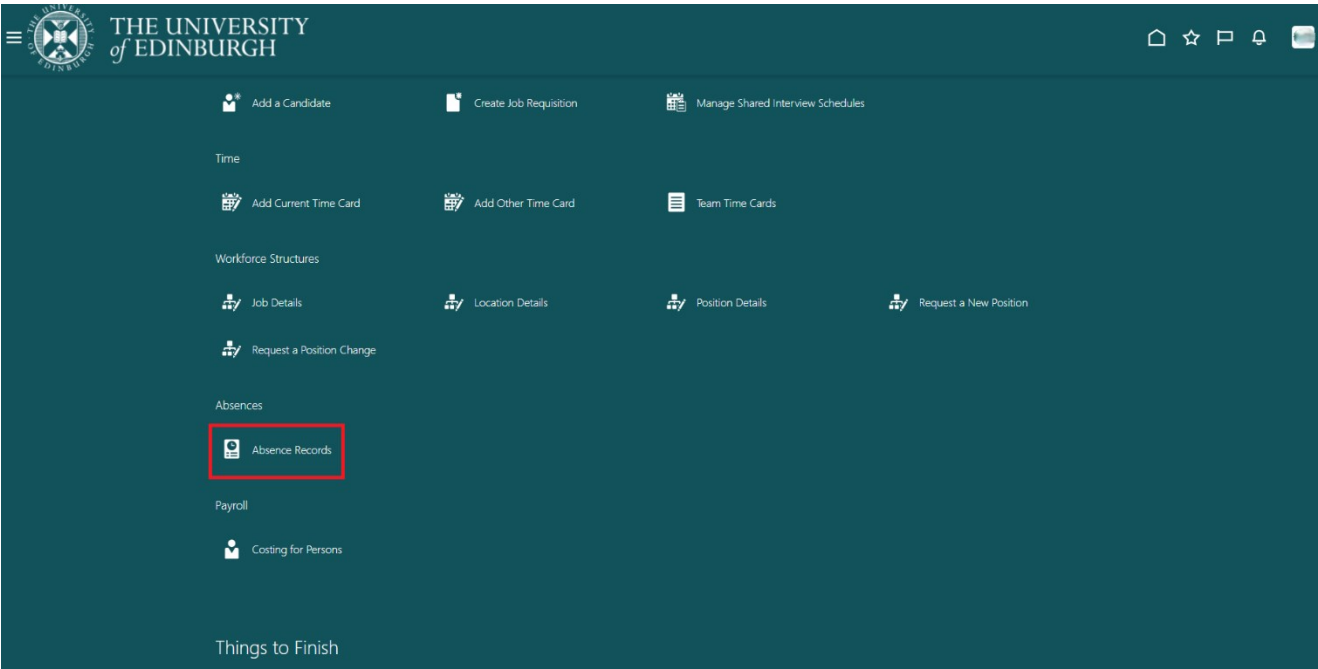
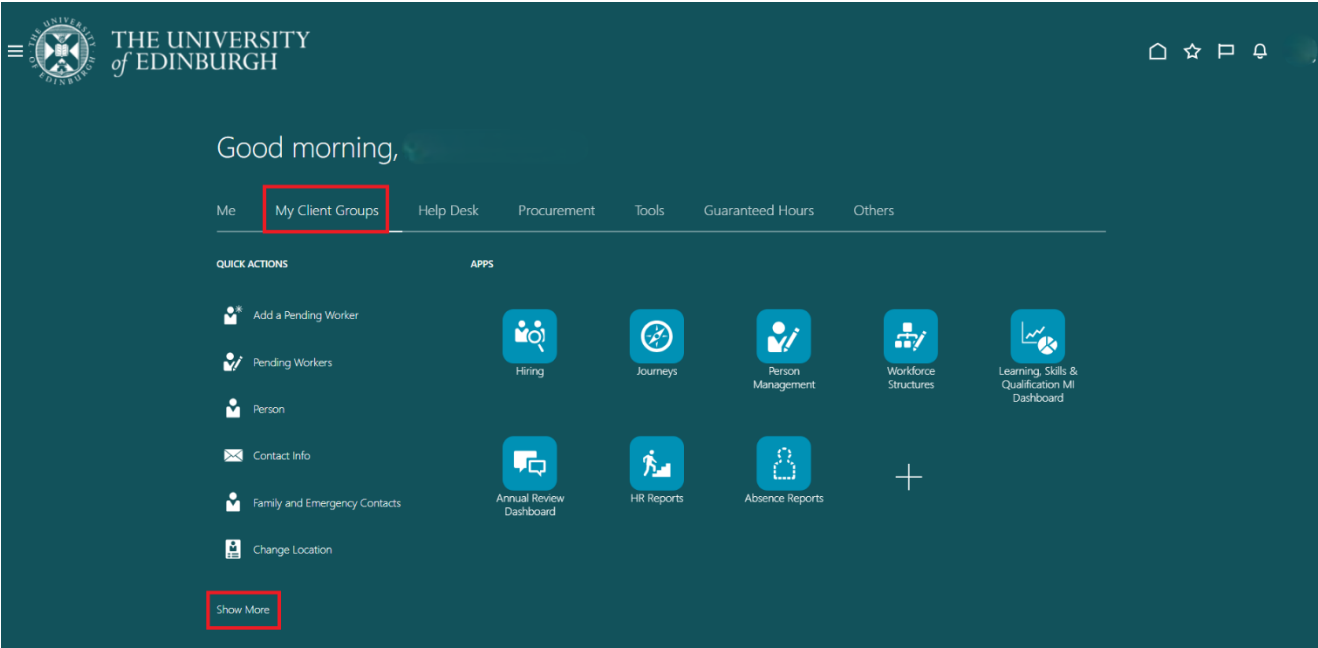
9. Click on the **Submit** button at the top of the page.

Note: the **Save** button will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

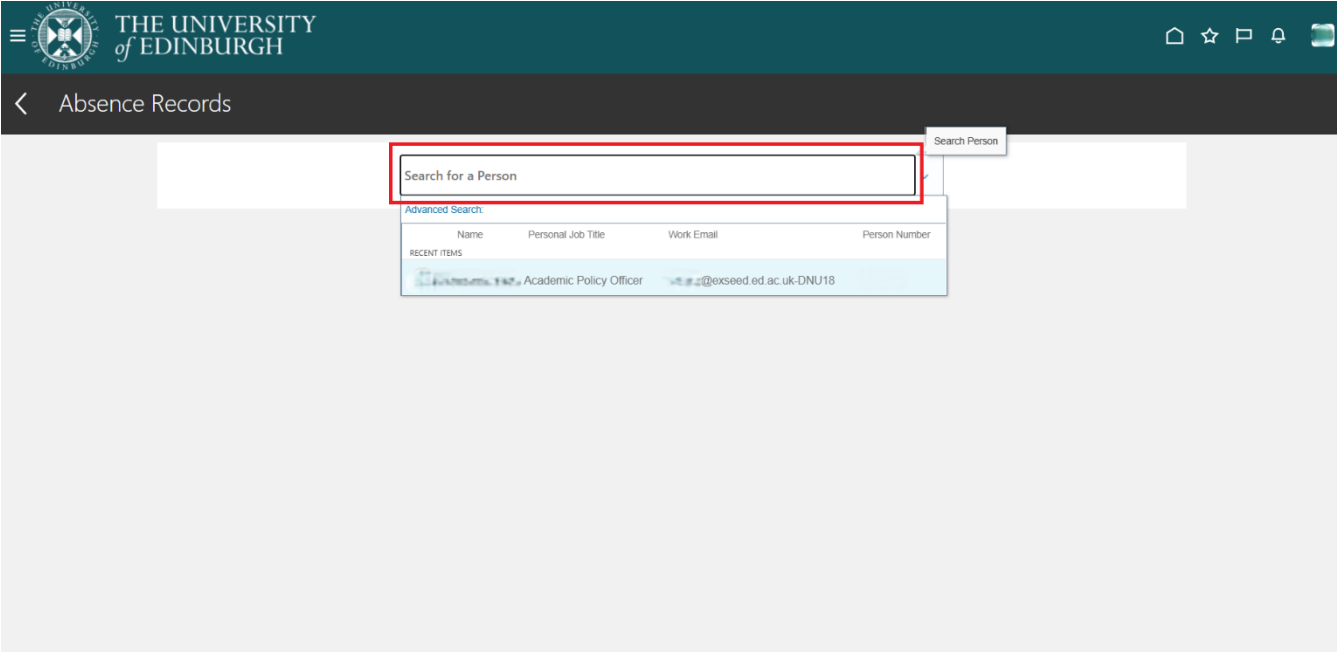
The screenshot shows the 'Absence Administration' form for 'Partner Birth'. The 'Details' tab is active. The 'Planned Dates' section includes fields for 'Expected Date of Childbirth', 'Planned Start Date', 'Planned End Date', and 'Planned Duration'. The 'Actual Dates' section includes fields for 'Actual Date of Childbirth', 'Actual Start Date', 'Actual End Date', and 'Actual Duration'. Below these sections, the 'Comments' field is visible. Below the 'Comments' field, the 'Add Attachment' button is visible. The 'Special Conditions' dropdown is also visible. At the top right of the form, the 'Submit' button is highlighted with a red box.

How to Record Unpaid Parental Leave

- 1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.



2. Search for the employee and select their name to continue.



3. Under **Existing Absences**, check whether there are any existing absences that are scheduled to happen during the proposed **Maternity Leave** dates. If there are any existing absences during that period, click on the **Actions** button and select **Withdraw**.

< Manage Absences and Entitlements

4 Absences

Most Recent or Current Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 25/04/2025 - 27/04/2025
Status Completed
Duration 7 Hours

Next Scheduled Absence

Type Annual Leave
Assignment Academic Policy Officer
Dates 18/08/2025 - 19/08/2025
Status Scheduled
Duration 14 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	Withdraw

Plan Participation

Plan Balances

View

4. Click on the **Add** button.

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

TypeAnnual Leave

AssignmentAcademic Policy Officer

Dates25/04/2025 - 27/04/2025

StatusCompleted

Duration7 Hours

Next Scheduled Absence

TypeAnnual Leave

AssignmentAcademic Policy Officer

Dates18/08/2025 - 19/08/2025

StatusScheduled

Duration14 Hours

Pending Actions

Existing Absences

ViewAddRecalculate

Time PeriodLast 6 months

Type

Status

ExportDetach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		
25/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled		

Plan Participation

Plan Balances

View

5. Select **Unpaid Parental Leave** from the **Absence Type** drop-down list.

THE UNIVERSITY of EDINBURGH

Absence Administration

SaveSubmitCancel

Absence Type

Phased Return

Shared Parental Adoption

Shared Parental Birth

Sickness

Special Paid Leave

Surrogacy and Adoption

Unauthorised Leave

Unpaid Leave

Unpaid Parental Leave

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PM3768
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6. Enter the **Start Date** and the **End Date**. These dates can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

Note: Parental leave can only be taken in periods of 7 days. Please refer to the [policy](#) for further details.

The screenshot shows the 'Absence Administration' form for 'Unpaid Parental Leave'. The 'Basic Mode' section is highlighted with a red box. It contains fields for '* Start Date' (dd/mm/yyyy), '* End Date' (dd/mm/yyyy), '* Start Date Duration', and '* End Date Duration'. The 'Duration' is currently set to '0 Calendar Days'. Below the 'Basic Mode' section, there is a 'Comments' text area. At the bottom, there are links for 'Legislative Information' and 'Descriptive Information'.

7. Add any relevant notes in the **Comments** section.

This screenshot is identical to the previous one, but the 'Comments' text area is now highlighted with a red box, indicating where the user should add relevant notes.

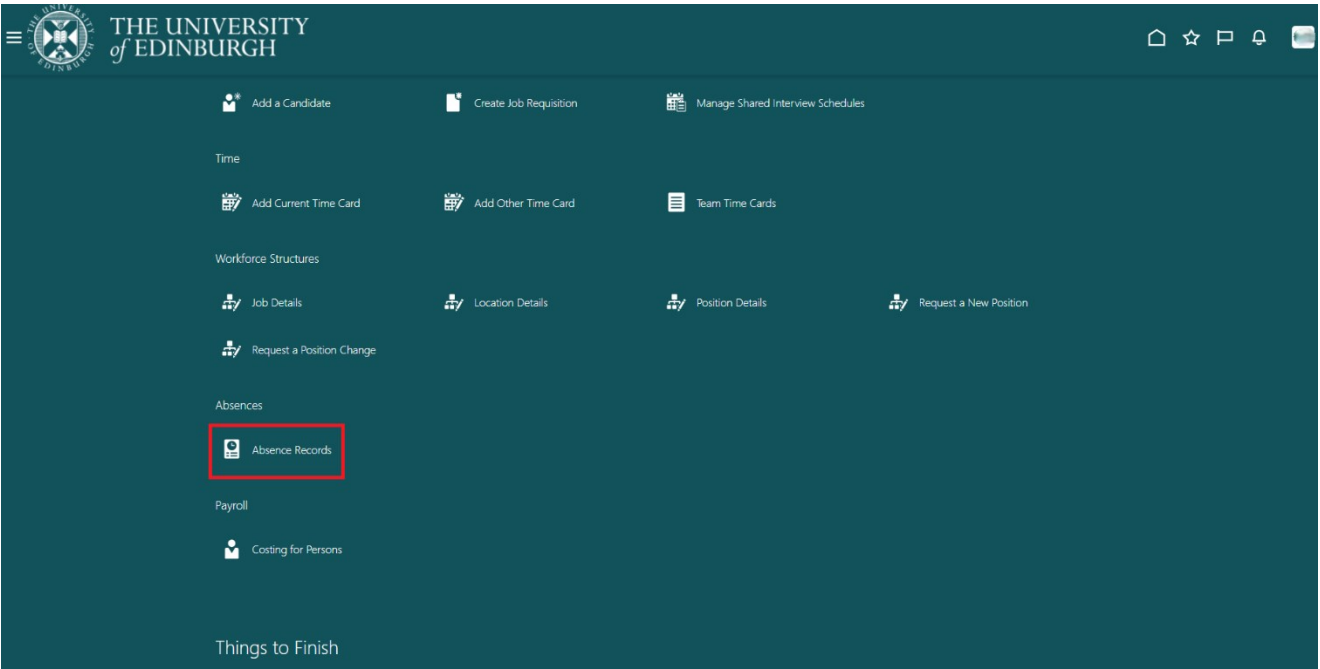
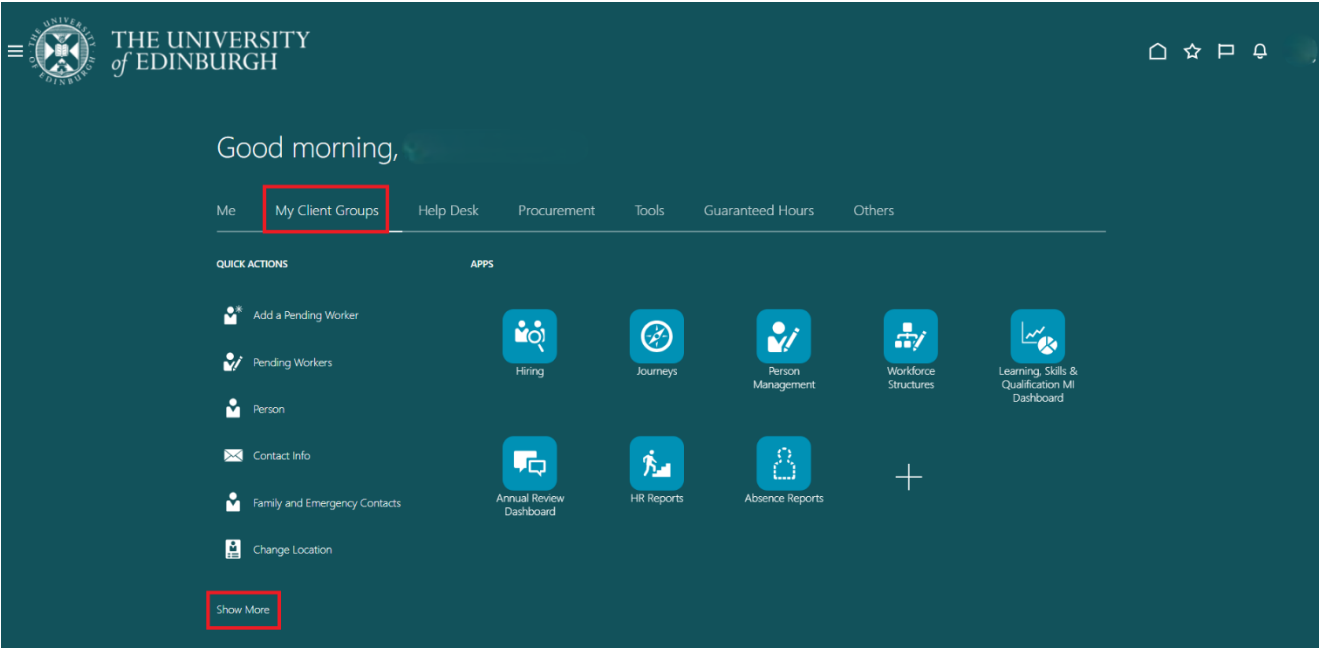
8. Click on the **Submit** button.

The screenshot shows the 'Absence Administration' interface for The University of Edinburgh. At the top, there is a dark teal header with the university's logo and name. Below the header, a navigation bar contains a back arrow, the title 'Absence Administration', and three buttons: 'Save', 'Submit' (highlighted with a red rectangle), and 'Cancel'. The main form area is titled '*Absence Type' with a dropdown menu set to 'Unpaid Parental Leave'. Under the 'Basic Mode' section, there are fields for 'Single day' (unchecked), '*Start Date' (dd/mm/yyyy), '*End Date' (dd/mm/yyyy), '*Start Date Duration', and '*End Date Duration'. A 'Duration' field shows '0 Calendar Days'. Below this, there are tabs for 'Details', 'Plan Use', and 'Action Items'. The 'Details' tab is active, showing a 'Comments' text area. At the bottom, there are links for 'Legislative Information' and 'Descriptive Information'.

Note: When an employee submits a parental leave request, the line manager will receive a request to approve or reject this. Policy states that Parental Leave requests cannot be rejected. Alternative dates can be suggested, although the employee is not obliged to agree to these. If proposing alternative dates, please ensure this is done within the **Actions>Further Information** option of the request and not **Reject**.

How to Amend Leave

- 1. From the home page, click on the **My Client Groups** tab, **Show More** and select the **Absence Records** tile.



2. Search for the employee and select their name to continue.

THE UNIVERSITY of EDINBURGH

Absence Records

Search for a Person

Advanced Search:

Name	Personal Job Title	Work Email	Person Number
Academic Policy Officer		@exseed.ed.ac.uk-DNU18	

3. Under **Existing Absences**, find the absence you would like to amend and click on the absence dates (blue text) to open the absence.

Alternatively, if you would like to **delete** the absence, click on the orange Actions button and select Withdraw.

THE UNIVERSITY of EDINBURGH

Manage Absences and Entitlements

Absences

Most Recent or Current Absence

Type	Assignment	Dates	Status	Duration
Sickness		30/05/2025 - Open ended	In progress	Open ended

Next Scheduled Absence

Type	Assignment	Dates	Status	Duration
Annual Leave	Academic Policy Officer	18/08/2025 - 19/08/2025	Scheduled	14 Hours

Pending Actions

Existing Absences

View + Add Recalculate Time Period Last 6 months Type Status Export Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
8/05/2026 - 30/04/2027	University of Edinburgh	Maternity		358 Calendar Days	Scheduled	✓	
31/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
30/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
29/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	
26/12/2025	University of Edinburgh	Annual Leave	Academic Po...	7 Hours	Scheduled	✓	

4. Make the necessary changes to the leave dates or confirm the **Actual Date of Childbirth/Actual Placement Date/Actual Start** and **End dates** if known.
5. Press **Submit** when the changes have been made.

Appendix

Appendix 1

We are aware that the field names within the Adoption and Surrogacy Leave screens may not fit your individual circumstances. Below is a table that outlines what information you should input into the fields, to suit your type of leave, and outlines the timeframe for submission within P&M.

**Rows in Blue are Optional Fields and can be input later if your circumstances change*

Field in P&M	Adoption	Overseas Adoption	Surrogacy
Expected Date of Placement	Expected Date of Placement	Estimated Date of Arrival in the UK	Expected Due Date of Baby
Placement Match Date	Expected Date of Placement? ¹	Official Notification Date	Expected Due Date of Baby
Planned Start Date	Planned Start Date of adoption leave	Planned Start Date of adoption leave	Planned Start Date of surrogacy leave
Planned End Date	Planned End Date of adoption leave	Planned End Date of adoption leave	Planned End Date of surrogacy leave
Reason – Option	Option 1, 2 or 3	Option 1, 2 or 3	Option 1, 2 or 3
Actual date of placement	Date of Placement if different from Expected Date	Actual Date of Arrival in the UK	Actual Birth Date of Baby
Actual start date	Actual start date if different from planned	Actual start date if different from planned	Actual start date if different from planned
Actual end date	Actual end date if different from planned	Actual end date if different from planned	Actual end date if different from planned
Time Frame for submission within P&M	This information should be input and submitted within seven days of being matched with a child, and	This information should be input and submitted within 28 days of getting notification of the estimated date of arrival in the UK.	This information should be input and submitted at least 15 weeks

	at least 28 days in advance of your anticipated leave start date.	The actual date the child arrives in the UK can be input at a later date, within 28 days of the arrival date.	before the baby's due date.
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Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated guide to new format and separated from Line Manager guide to family leave.	ME

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.