



System User Guide

Line Manager Guide to Family Leave

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Introduction

This guide covers key tasks for Line Managers 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](#)

Please familiarise yourself with the [Family Leave Policies](#). Please note, Partner Leave was previously 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 on the [A-Z of Policies webpage](#).

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.

Managers will always be aware when an employee has submitted leave. For all types of leave, they will receive a notification, other than unpaid parental leave where the manager will be required to approve or reject the request. More details on how to do that can be found in the line manager guide '[Line Manager Guide to Absence & Leave](#)' (Under Human Resources > Absence and leave heading).

To read supporting guidance on all aspects of all absence processes, please review the relevant [End to End Process User Guides](#).

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 for further information surrounding KIT/SPLIT days entitlement and conditions. These policies can be found on the [A-Z of Policies webpage](#).

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 Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Search for the employee.
3. Select **Maternity** from the **Absence Type** drop-down list and enter the **Expected or Actual Childbirth Date** and **Planned or Actual start and End dates**, as known. If the employee does not plan to return to work, click on the **Won't return to work** toggle.
4. Select which pay option the employee has chosen from the **Reason** drop-down list and the **Notification Date**.
5. Add any relevant notes in the **Comments** section.
6. Add a scanned copy of the MATB1 to the **Attachments** box.
7. 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.
8. There is no need to complete the Legislative Information section or the SMP1 Issue Date.
9. Click on the **Submit** button.

How to Record a Maternity Risk Assessment

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.
2. Search for the employee.
3. Click on the **pencil icon** against the maternity absence.
4. Scroll down to the **Attachments** section and upload the risk assessment document.
5. Within the **Additional Information** section, put a tick in the field **Risk Assessment Done** box and complete the **Date carried out** field.
6. Click on the **Submit** button.

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

How to Attach a MATB1 to a Maternity Record

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.
2. Search for the employee.
3. Click on the **pencil icon** against the maternity absence.
4. Scroll down to the **Attachments** section and upload the MATB1.

5. Click on the **Submit** button.

How to Record Adoption or Surrogacy Leave

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Search for the employee.
3. Select **Surrogacy or Adoption** from the **Absence Type** drop-down list.
4. Enter the **Expected Placement Date**, the **Placement Match Date**, the **Planned Start Date** and the **Planned End Date**. If the employee does not plan to return to work, click on the **Won't return to work** toggle.
5. Select which pay option the employee has chosen from the **Reason** drop-down list.
6. Add any relevant notes in the **Comments** section.
7. Add any documentation to the **Attachments** section.
8. Click on the **Submit** button.

How to Record Partner Leave

Partner Adoption

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Search for the employee.
3. Select **Partner Adoption** the **Absence Type** drop-down list
4. Enter the **Expected** or **Actual Placement Date** (if known), **Planned** or **Actual Start** and **End Date**, as known.
5. Add any appropriate **Comments** or **Attachments**.
6. Click on the **Submit** button.

If you have only entered **planned** or **expected dates** for this absence, you **must** go back in to the absence to add the employee's **Actual Placement Date**, **Actual Start Date** and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

Partner Birth

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Search for the employee.
3. Select **Partner Birth** the **Absence Type** drop-down list
4. Enter the **Expected** or **Actual Childbirth Date** and the **Planned** or **Actual Start** and **End Dates**, as known.
5. Add any appropriate comments or attachments
6. Click on the **Submit** button.

If you have only entered **planned** or **expected dates** for this absence, you **must** go back in to the absence to add the employee's **Actual Childbirth Date**, **Actual Start Date** and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

How to Record Unpaid Parental Leave

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Search for the employee.
3. Select **Unpaid Parental Leave** from the **Absence Type** drop-down list.
4. Enter the **Start** and **End Dates**. Parental Leave can only be taken in blocks of 7 days. Please refer to the [policy](#) for further details.
5. Add any relevant notes in the **Comments** section.
6. Click on the **Submit** button.

How to Amend Leave

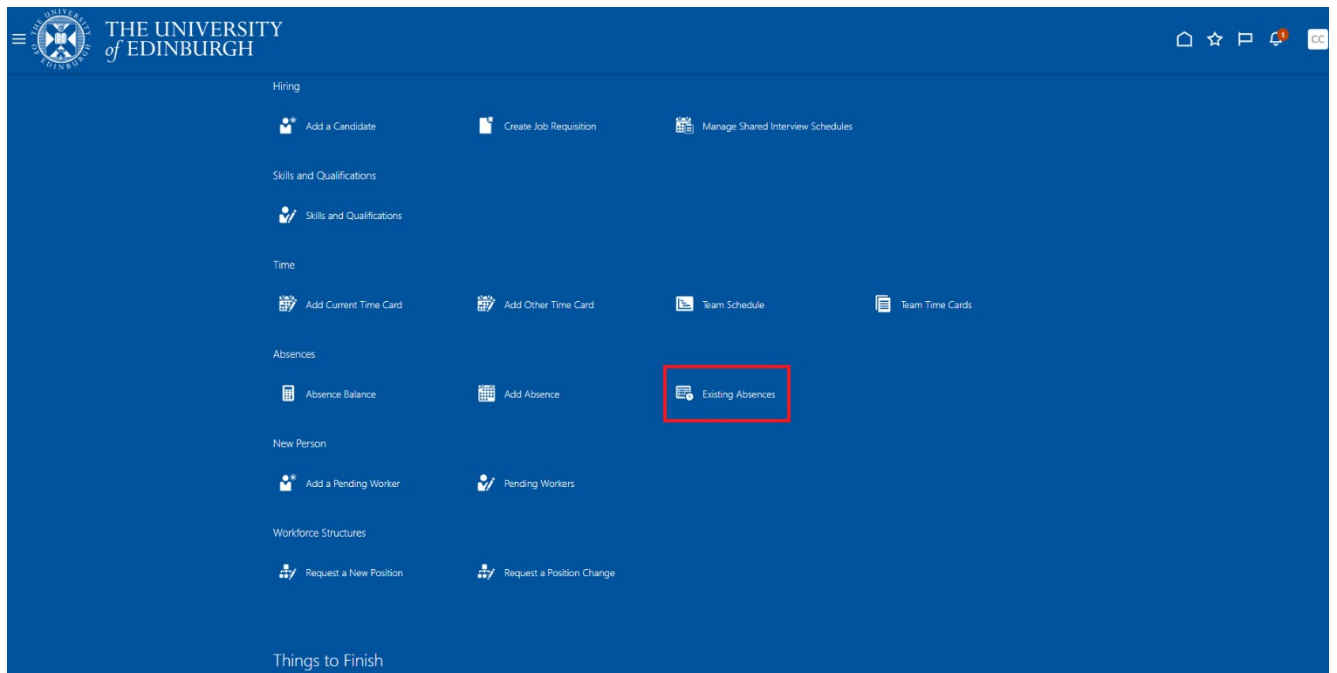
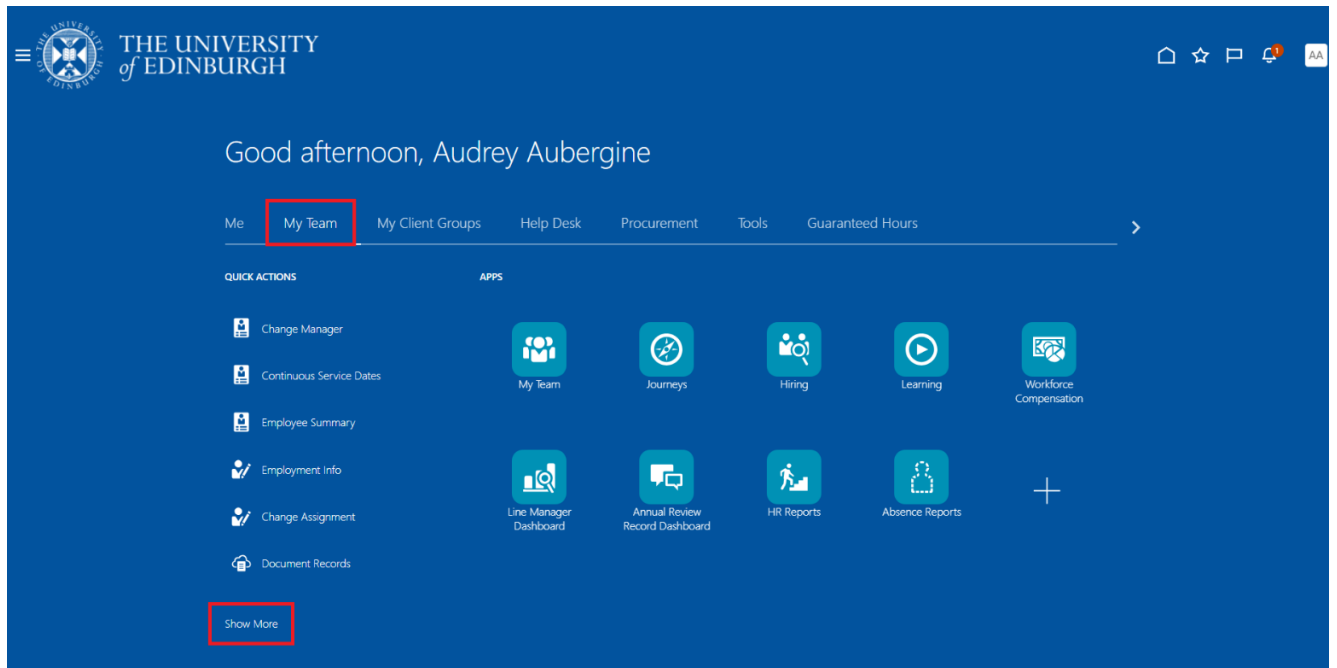
1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.
2. Search for the employee.
3. Click on the **pencil icon** against the absence.
4. Make the necessary changes to the leave dates or confirm the Actual Childbirth Date/Actual Placement Date/Placement Match Date, etc. if known.
5. Click on the **Submit** button. Alternatively, if you want to delete the whole absence, you can click on the **Withdraw** button.

In Detail

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

How to Record Maternity Leave

1. Before you can enter the employee's maternity leave, you will need to check whether there are any existing absence records on the employee's People and Money record. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

Existing Absences

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	Employee	@ed.ac.uk
Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU18

3. Look for any absences that will overlap with the proposed maternity dates. If you need to amend or delete an absence, please see the [How to Amend Leave](#) section of this guide.
4. If you are still in the **Existing Absences** screen, you can click the **Add Absence** button below the search bar to create a new absence.

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Existing Absences
Hilary Haricot-Bean

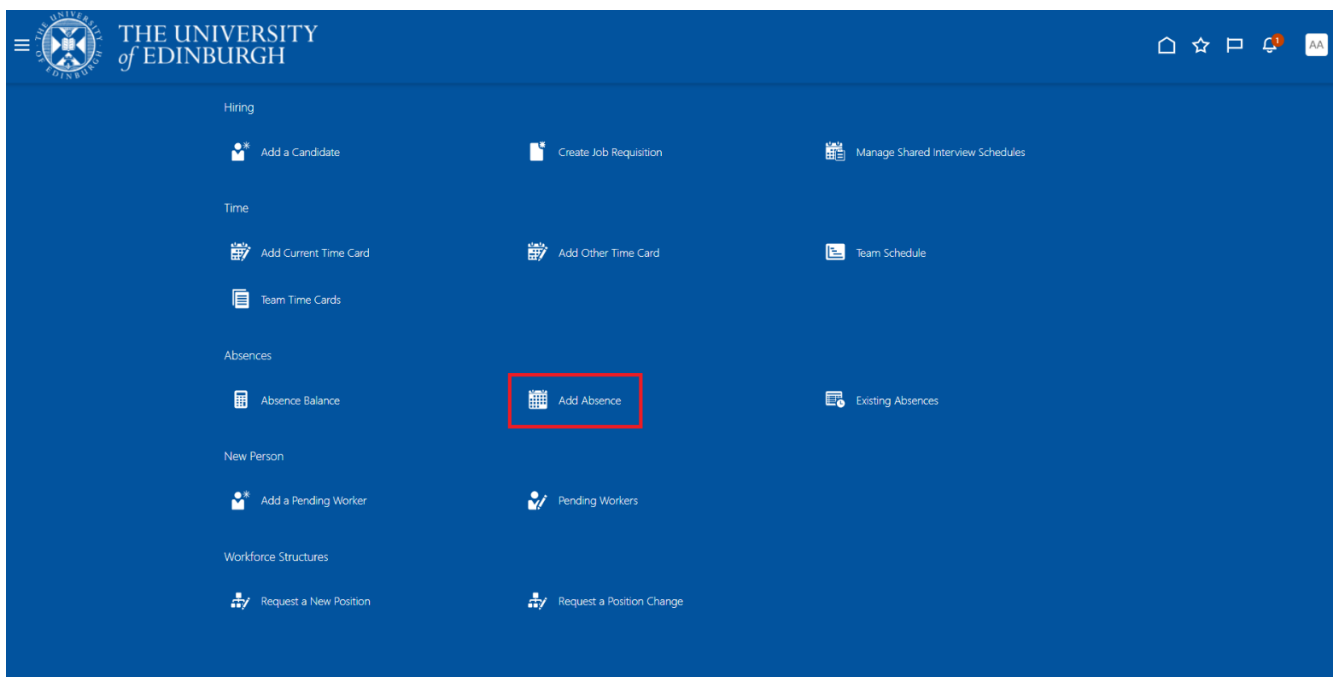
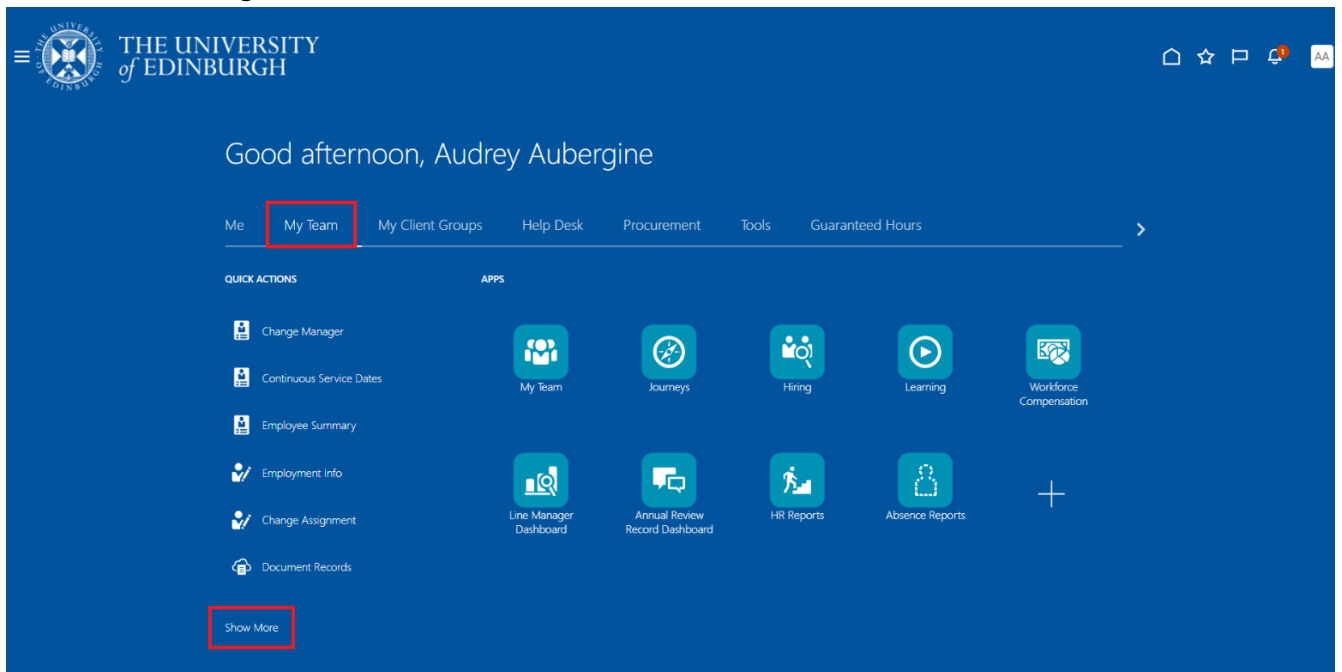
Search by type

Date 3/12/2024 X Status Clear (1)

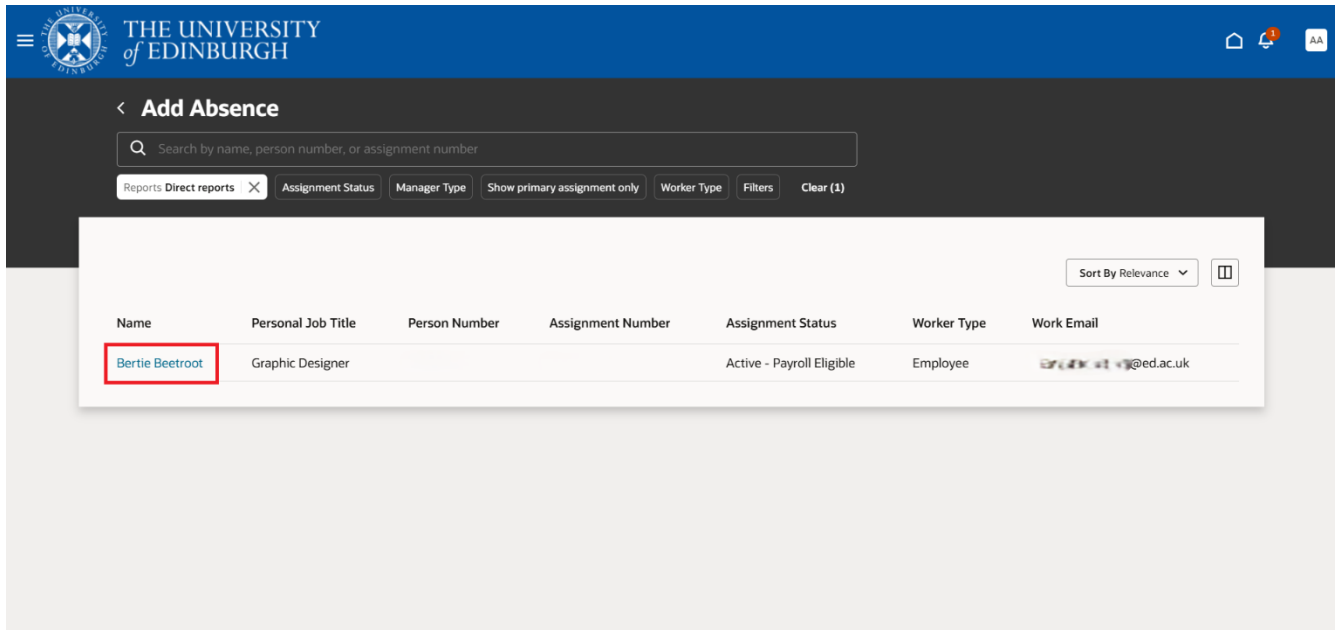
Add Absence Sort By

Unpaid Parental Leave	3/08/2026 - 9/08/2026 7 Calendar Days	Denied	
Maternity	5/01/2026 - 30/06/2026 177 Calendar Days	Scheduled	
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025 5 Hours	Scheduled	
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025 3 Hours	Scheduled	
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025 3 Hours	Scheduled	
Annual Leave Domestic Assistant	30/12/2025 - 30/12/2025 5 Hours	Scheduled	
Annual Leave Domestic Assistant	29/12/2025 - 29/12/2025 5 Hours	Scheduled	

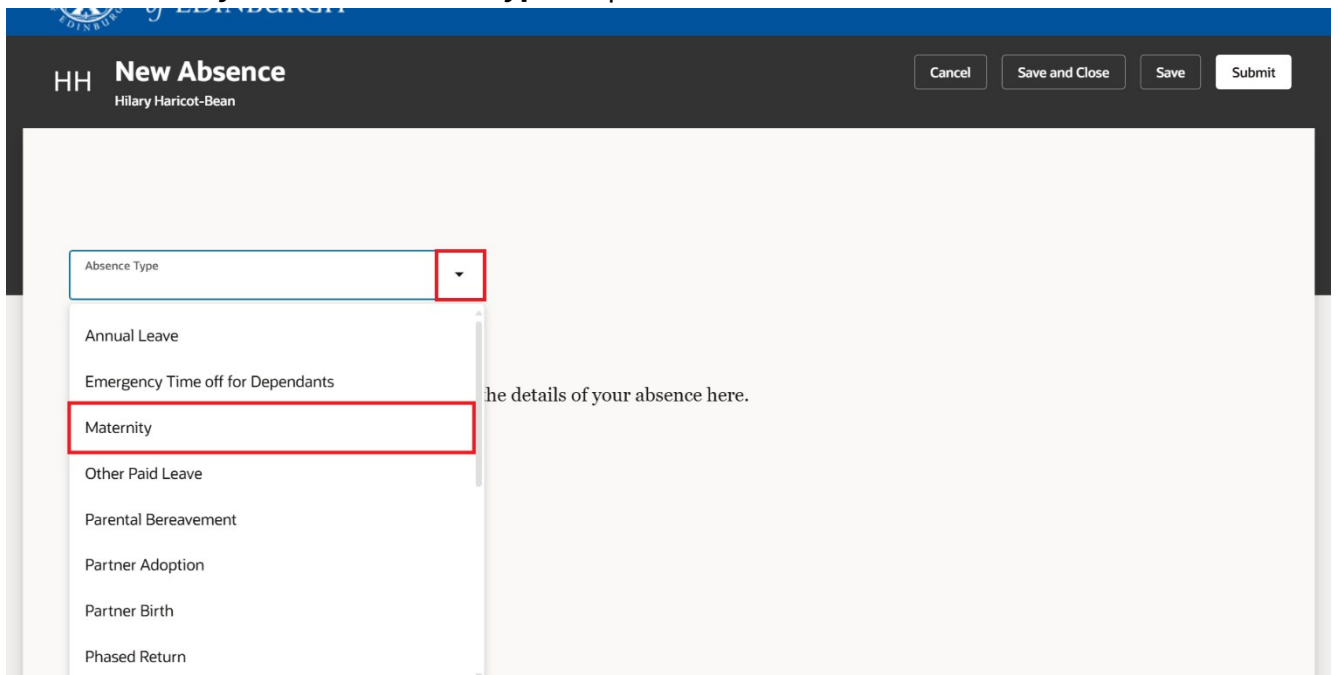
Alternatively, from the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



5. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



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



7. In the **Dates** section, complete the following fields:
 - a. **Expected Childbirth Date** – Using the drop-down calendar enter the estimated due date as per the employee’s MATB1.
 - b. **Actual Childbirth Date** – Can be completed at a later date if currently not known. This field is not mandatory at time of request.

- c. **Planned Start Date/Planned End Date** – Enter the employee’s current planned start and end date, these can be changed at a later date if needed (please refer to the ‘[How to Amend Leave](#)’ section in this guide). If you do not currently know the end date enter 52 weeks from the start date as this is the maximum time allowed.
- d. **Actual Start Date/Actual End Date** – Should the employee’s planned start and end date change you can override them by entering the definite dates here. Payroll use these dates to manage the employee’s maternity pay. It is not mandatory to complete these fields at the time of requesting leave.
- e. Where the employee does not intend to return to work after the maternity leave, click on the **Won’t return to work** toggle instead of entering a **Planned End Date**.

The screenshot shows a web form titled "New Absence" for Hilary Haricot-Bean. At the top right are buttons for "Cancel", "Save and Close", "Save", and "Submit". Below the header, there is a dropdown menu for "Absence Type" currently set to "Maternity". A section titled "Dates" is highlighted with a red border and contains several date selection fields: "Expected Childbirth Date", "Actual Childbirth Date", "Planned Start Date", "Planned End Date", and "Actual End Date". Each field has a calendar icon. Below these fields is a "Won't return to work" toggle switch, which is currently turned off.

8. In the **Details** section:

- a. Select Option 1, 2 or 3 from the **Reason** drop down menu (**note**, the system will default to Option 3, so please ensure this is updated as applicable).

These correlate to the options around how the employee wishes to receive their maternity pay. 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](#).

- b. Enter the **Notification Date** that the employee made their selection on.
- c. Add any relevant **Comments** as applicable.

- d. If a Risk Assessment has already been carried out this can be added to the **Attachments** section and the tick box and **Date Carried out** field can be completed in the **Additional Information** section at the bottom of the page. More detail can be found on this in the '[How to Record a Risk Assessment](#)' section of this guide.

The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. At the top, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the user name, there is a date field for 'Actual End Date' set to '201 Calendar Days'. The 'Details' section is highlighted with a red box and contains a dropdown menu for 'Reason' (set to 'Option 3'), a 'Notification Date' field with a calendar icon, a 'Comments' text area, an 'Attachments' section with a 'Drag and Drop' area and 'Add URL' button, and a 'URL' field.

9. Click on the **Submit** button to complete the absence.

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

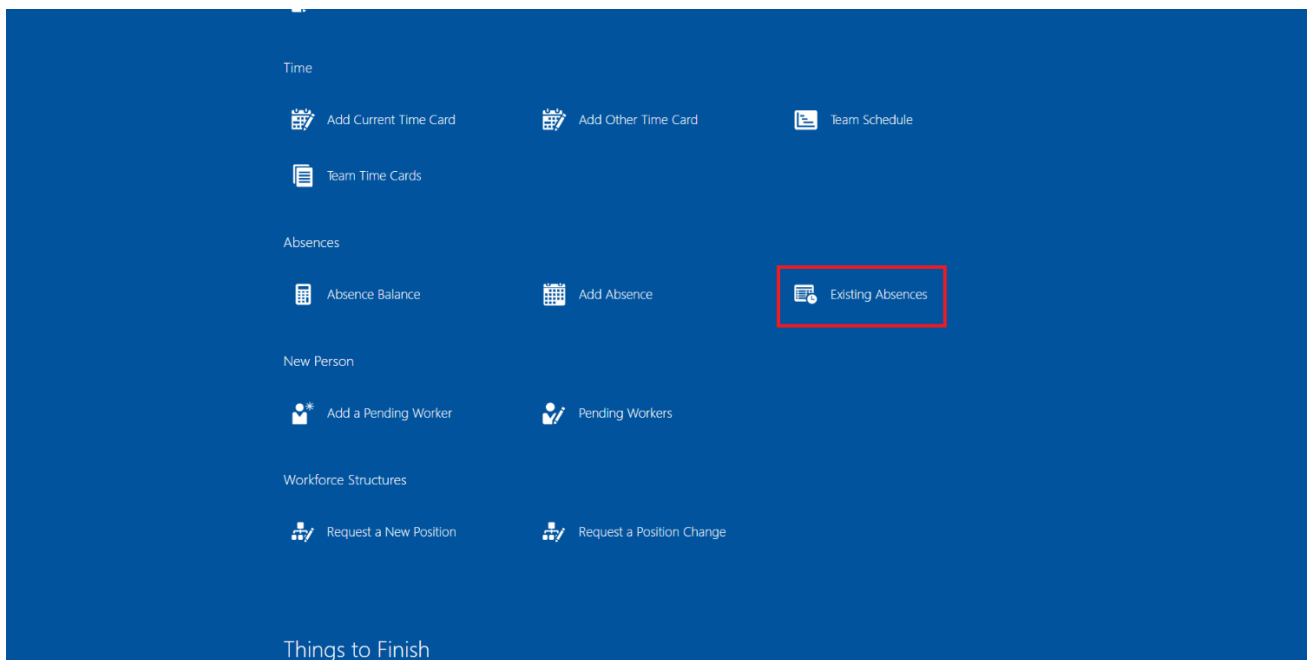
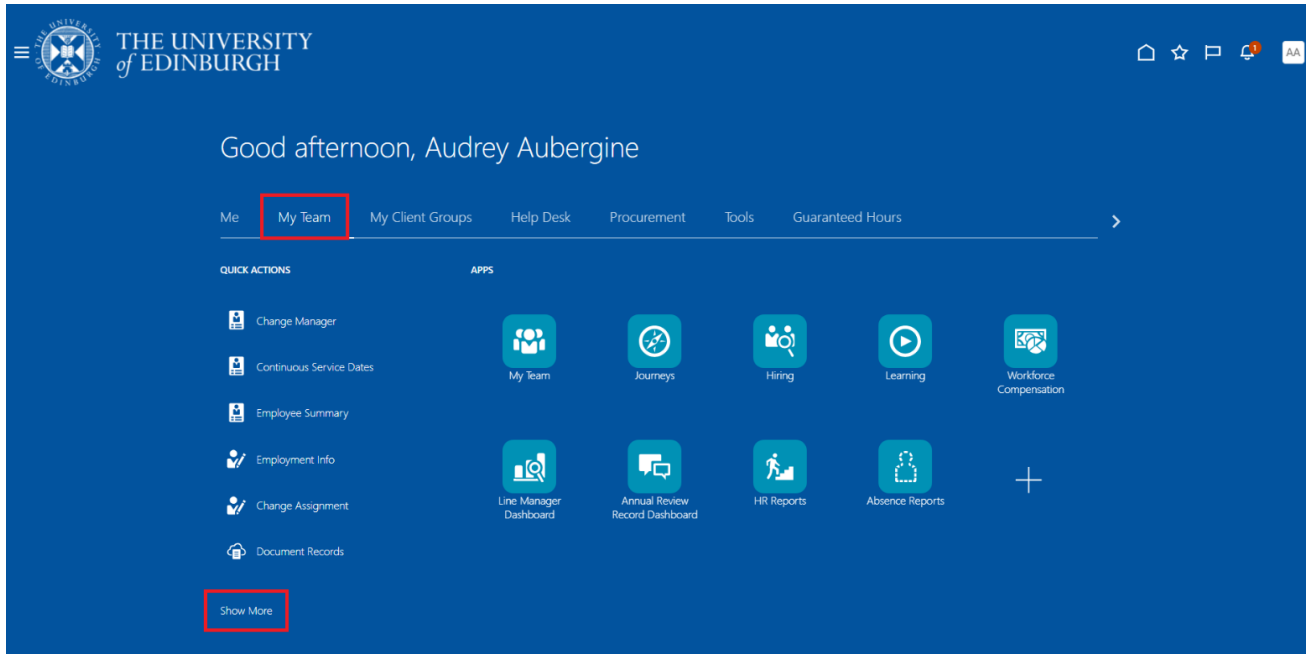
The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. At the top, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The 'Submit' button is highlighted with a red box. Below the user name, there is a dropdown menu for 'Absence Type' set to 'Maternity'. The 'Dates' section contains several date fields: 'Expected Childbirth Date' (12/01/2026), 'Actual Childbirth Date', 'Planned Start Date' (12/12/2025), and 'Planned End Date' (30/06/2026). There is also a 'Won't return to work' toggle switch.

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 Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

The screenshot shows a search interface for 'Existing Absences'. At the top, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar are several filter buttons: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. The main content is a table listing employees. The row for 'Hilary Haricot-Bean' is highlighted with a red box. The table columns include job title, status, and email address.

Job Title	Status	Employee
Domestic Assistant	Active - Payroll Eligible	...@exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	...@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	...@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	...@exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	...@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	...@ed.ac.uk
Domestic Assistant-2	Active - Payroll Eligible	...@exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	...@exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	...@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	...@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	...@ed.ac.uk-DNU18

3. Click on the **pencil icon** against the Maternity absence.

Note: if you change the **Date** filter, you must enter a start date **and** an end date.

The screenshot shows the 'Existing Absences' page for Hilary Haricot-Bean. The header includes the University of Edinburgh logo and navigation icons. The page title is 'Existing Absences' with the user's name 'Hilary Haricot-Bean' below it. There is a search bar and filter buttons for 'Date 27/11/2024', 'Status', and 'Clear (1)'. The main content is a table of absences. The 'Maternity' absence is highlighted with a red box, and its pencil icon is also highlighted. The table columns include absence type, dates, duration, and status.

Absence Type	Dates	Duration	Status	Action
Maternity	5/01/2026 - 30/06/2026	177 Calendar Days	Scheduled	
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025	5 Hours	Scheduled	
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025	3 Hours	Scheduled	
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025	3 Hours	Scheduled	

4. Scroll down to the bottom of the screen. Upload the risk assessment into the **Attachments** section.

The screenshot shows the 'Edit Absence' form for Hilary Haricot-Bean. The form includes fields for 'Actual Start Date', 'Planned End Date' (30/06/2026), 'Actual End Date', and 'Planned Duration' (177 Calendar Days). Below these are 'Actual Duration' (0 Calendar Days), 'Details' (Reason: Option 1, Notification Date: 28/05/2025), and a 'Comments' field. The 'Attachments' section is highlighted with a red box and contains a 'Drag and Drop' area with the text 'Select or drop files here.' and an 'Add URL' button. The 'Entitlements' section is partially visible at the bottom.

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

The screenshot shows the 'Edit Absence' form with the 'Additional Information' section highlighted. This section includes a table of entitlements, 'Legislative information' (Qualifying Week: 28/09/2025, Override Average Weekly Earnings), and 'Additional information' fields. The 'Risk Assessment Done?' checkbox and the 'Date carried out' field are highlighted with red boxes.

Period	Entitlement Status
11/05/2026 - 30/06/2026	Entitlement exceeded
11/05/2026 - 30/06/2026	Entitlement exceeded
5/01/2026 - 10/05/2026	126 Calendar Days at 100%
5/01/2026 - 10/05/2026	126 Calendar Days at 100%
Statutory Maternity Plan	
5/01/2026 - 30/06/2026	177 Calendar Days at 0%

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

HH Edit Absence
Hilary Haricot-Bean

Cancel Withdraw **Submit**

11/05/2026 - 30/06/2026	Entitlement exceeded
11/05/2026 - 30/06/2026	Entitlement exceeded
5/01/2026 - 10/05/2026	126 Calendar Days at 100%
5/01/2026 - 10/05/2026	126 Calendar Days at 100%

Statutory Maternity Plan

5/01/2026 - 30/06/2026	177 Calendar Days at 0%
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Legislative information

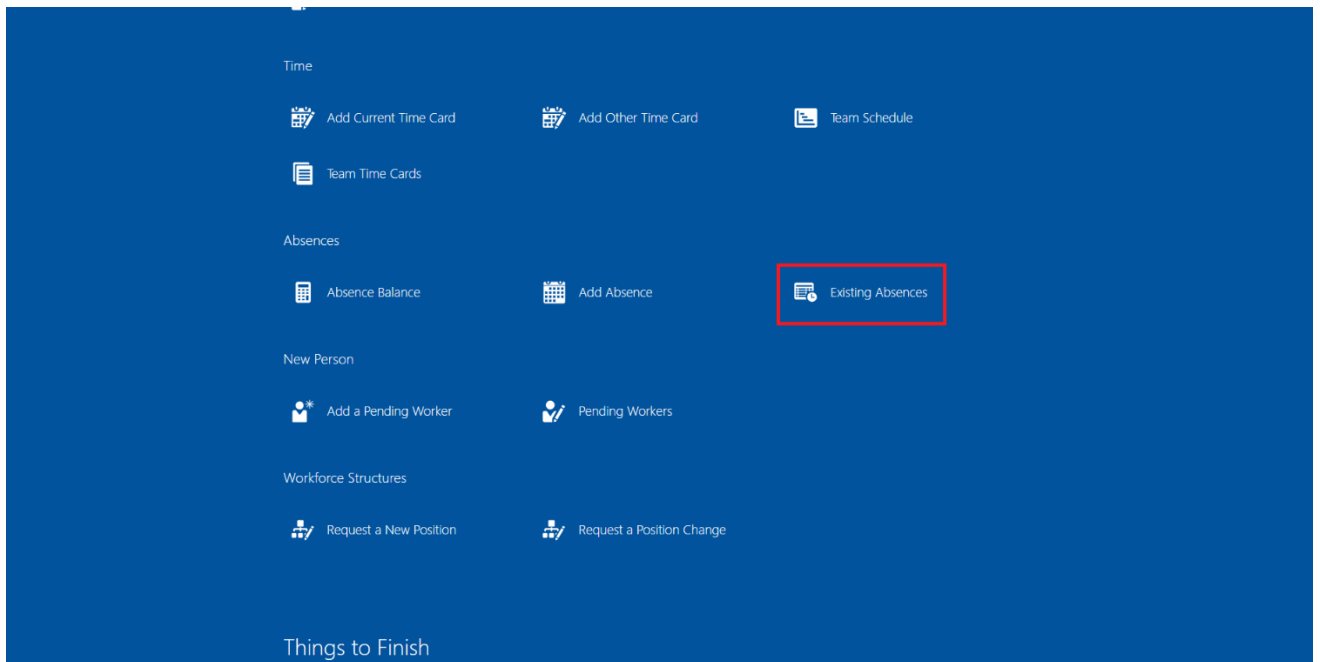
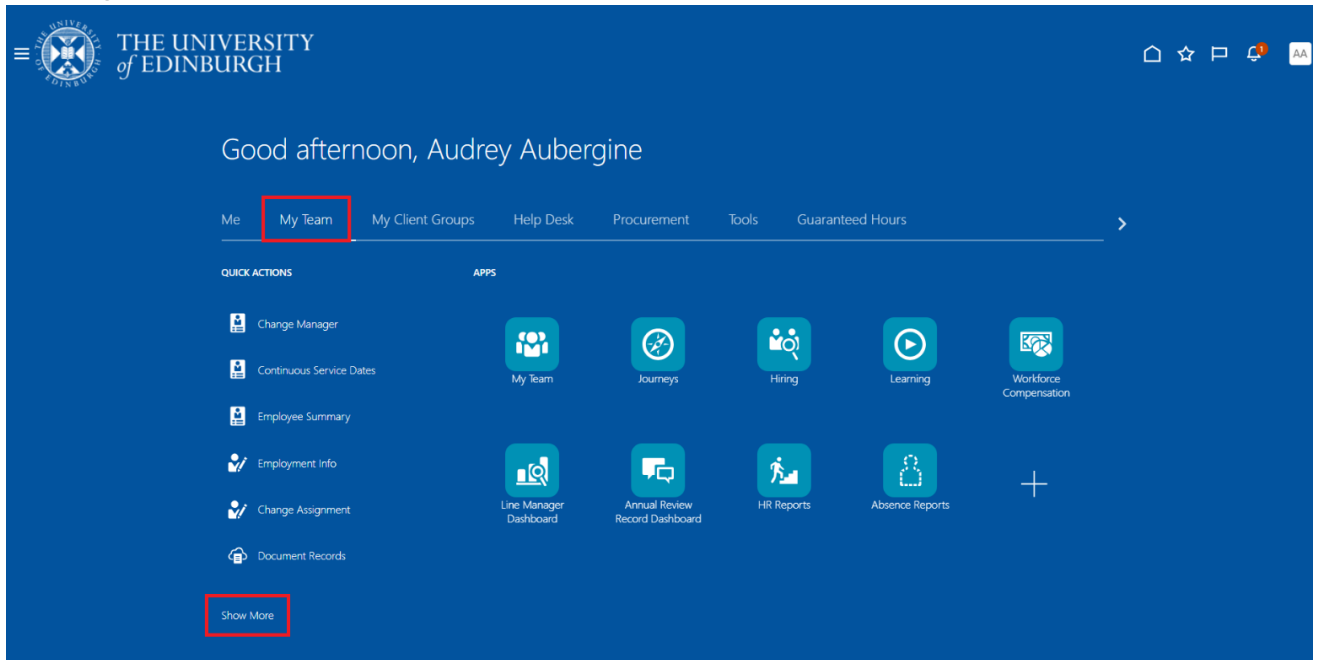
Qualifying Week 28/09/2025	Override Average Weekly Earnings
-------------------------------	----------------------------------

Additional information

SMP1 Issue Date	Risk Assessment Done? <input type="checkbox"/>
Date carried out	

How to Attach a MATB1 to a Maternity Record

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



- Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

< Existing Absences

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	Employee	...@ed.ac.uk
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU18

- Click on the **pencil icon** against the maternity absence.

Note: if you change the **Date** filter, you must enter a start date **and** an end date.

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HH Existing Absences
Hilary Haricot-Bean

Search by type

Date 27/11/2024 X Status Clear (1)

Add Absence Sort By

Maternity	5/01/2026 - 30/06/2026 177 Calendar Days	Scheduled	
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025 5 Hours	Scheduled	
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025 3 Hours	Scheduled	
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025 3 Hours	Scheduled	

4. Scroll down to the **Attachments** section and upload the MATB1 either by dragging the file into the **Drag and Drop** box or clicking on the box.

The screenshot shows the 'Edit Absence' form for Hilary Haricot-Bean. At the top right, there are buttons for 'Cancel', 'Withdraw', and 'Submit'. The form contains a 'Reason' dropdown menu set to 'Option 1' and a 'Notification Date' field set to '28/05/2025'. Below these is a 'Comments' text area. The 'Attachments' section features a 'Drag and Drop' box with the text 'Select or drop files here.', which is highlighted with a red border. Below this is a 'URL' input field and an 'Add URL' button. The 'Entitlements' section shows 'Maternity Plan' with the dates '11/05/2026 - 30/06/2026' and the status 'Entitlement exceeded'.

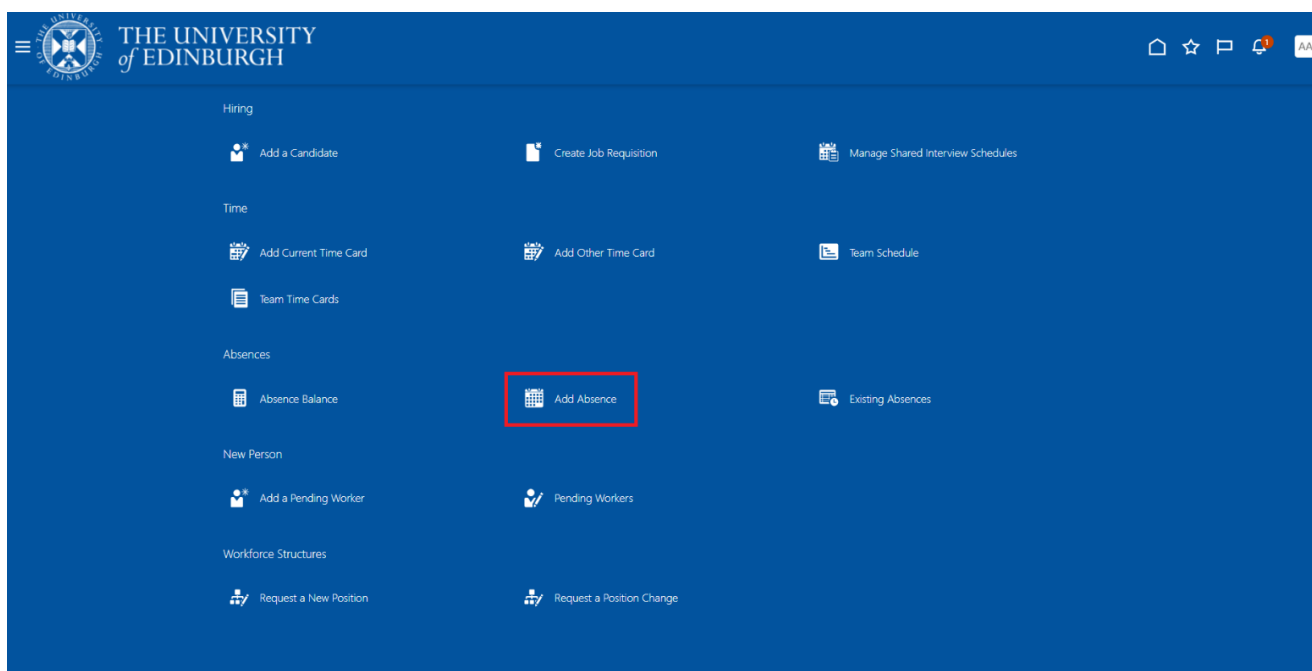
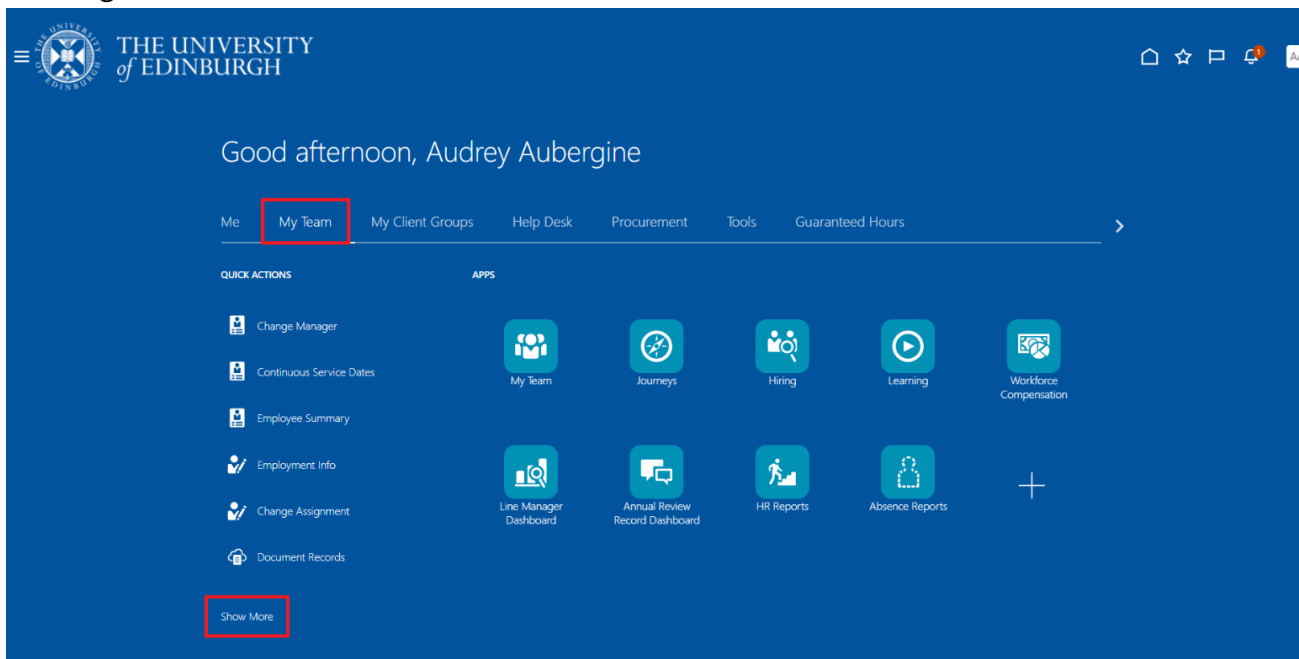
5. Click on the **Submit** button.

This screenshot is identical to the previous one, showing the 'Edit Absence' form. The only difference is that the 'Submit' button in the top right corner is now highlighted with a red border, indicating it is the next step in the process.

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](#).

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

The screenshot shows the 'Add Absence' page in the University of Edinburgh system. The page header includes the University of Edinburgh logo and name. Below the header, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar, there are several filter buttons: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. Below the filters, there is a table of employees. The table has columns for Name, Personal Job Title, Person Number, Assignment Number, Assignment Status, Worker Type, and Work Email. The employee 'Bertie Beetroot' is highlighted with a red box. The table data is as follows:

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
Bertie Beetroot	Graphic Designer			Active - Payroll Eligible	Employee	bertie.beetroot@ed.ac.uk

3. Select **Surrogacy or Adoption** from the **Absence Type** drop-down list.

The screenshot shows the 'New Absence' page in the University of Edinburgh system. The page header includes the University of Edinburgh logo and name. Below the header, there is a user profile section with the name 'HH Hilary Haricot-Bean'. Below the profile section, there are several buttons: 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the buttons, there is a form with a drop-down menu for 'Absence Type'. The drop-down menu is open, and the option 'Surrogacy and Adoption' is selected and highlighted with a red box. The other options in the drop-down menu are: Partner Birth, Phased Return, Sickness, Special Paid Leave, Unauthorised Leave, Unpaid Leave, and Unpaid Parental Leave. Below the drop-down menu, there is a text input field with the placeholder text 'the details of your absence here.'

4. In the **Dates** section:

- a. Complete the **Expected Placement Date**, **Planned Start Date** and the **Planned End Date** fields. These dates can be changed at a later date if needed (please refer to the '[How to Amend Leave](#)' section in this guide).
- b. If the employee does not plan to return to work, click on the **Won't return to work** toggle instead of the **Planned End Date**.

Absence Type
Surrogacy and Adoption

Dates

Expected Placement Date

Actual Placement Date

Won't return to work

Planned Start Date

Actual Start Date

Planned End Date

Actual End Date

Placement Match Date

Details

Reason
Option 3

Notification Date

5. In the **Details** section:

- a. Select Option 1, 2 or 3 from the **Reason** drop down menu (**note**, the system will default to Option 3, so please ensure this is updated as applicable).
- b. Enter the **Notification Date** that the employee made their selection on.
- c. Add any relevant notes in the **Comments** section.
- d. Attach relevant documentation in the **Attachments** section either by dragging the file into the **Drag and Drop** box or clicking on the box.

Actual End Date

Placement Match Date

Planned Duration
96 Calendar Days

Details

Reason
Option 3

Notification Date

Comments

Attachments

Drag and Drop
Select or drop files here.

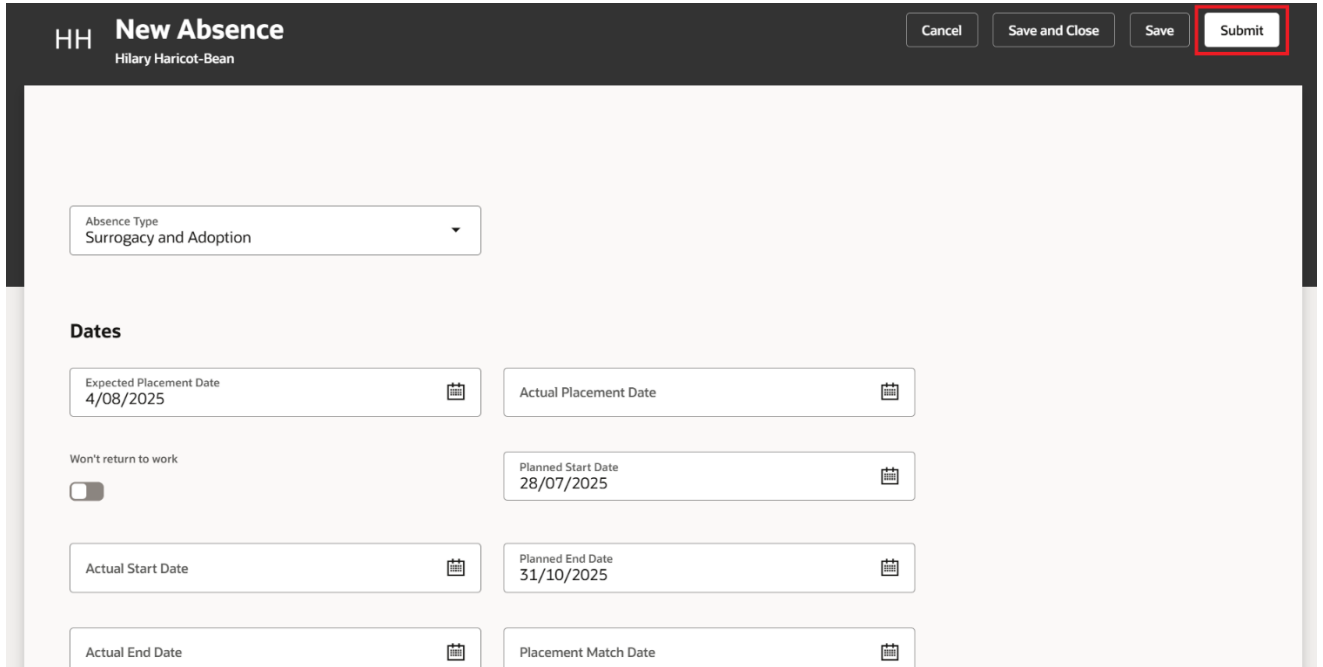
URL

Add URL

Legislative information

6. Click on the **Submit** button to complete the absence.

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



HH **New Absence**
Hilary Haricot-Bean

Cancel Save and Close Save **Submit**

Absence Type
Surrogacy and Adoption

Dates

Expected Placement Date
4/08/2025

Actual Placement Date

Won't return to work

Planned Start Date
28/07/2025

Actual Start Date

Planned End Date
31/10/2025

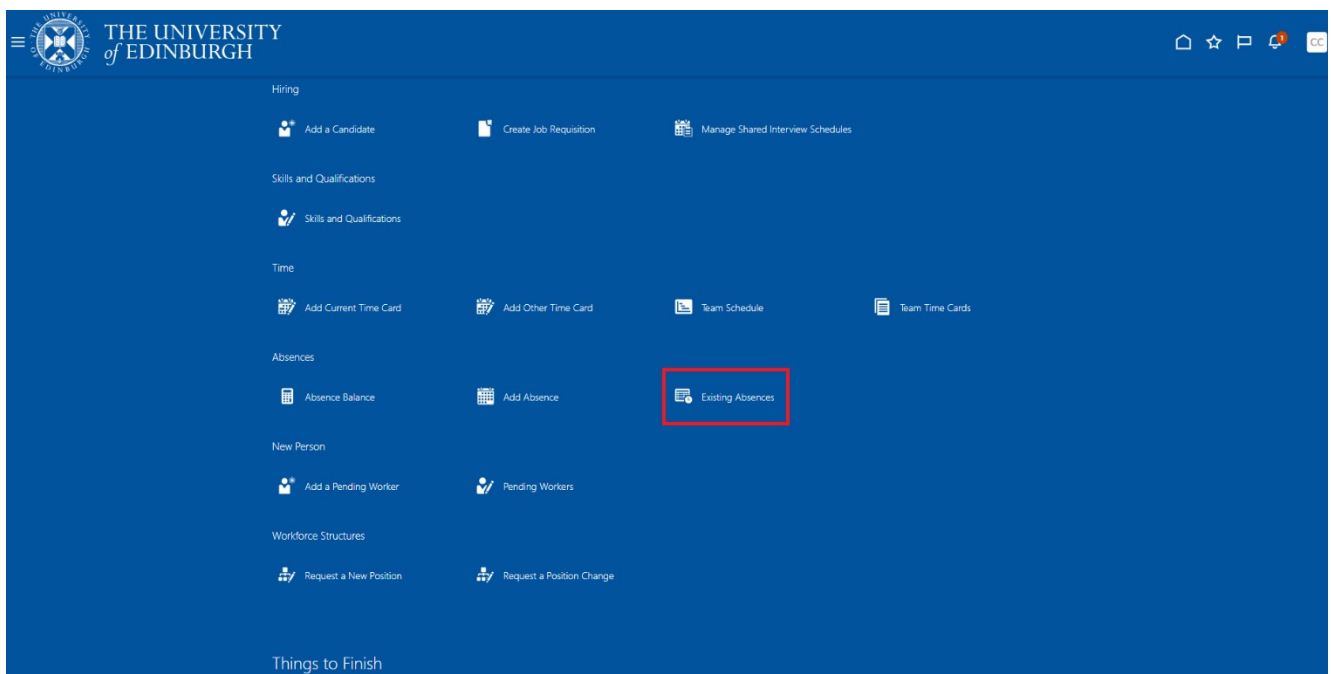
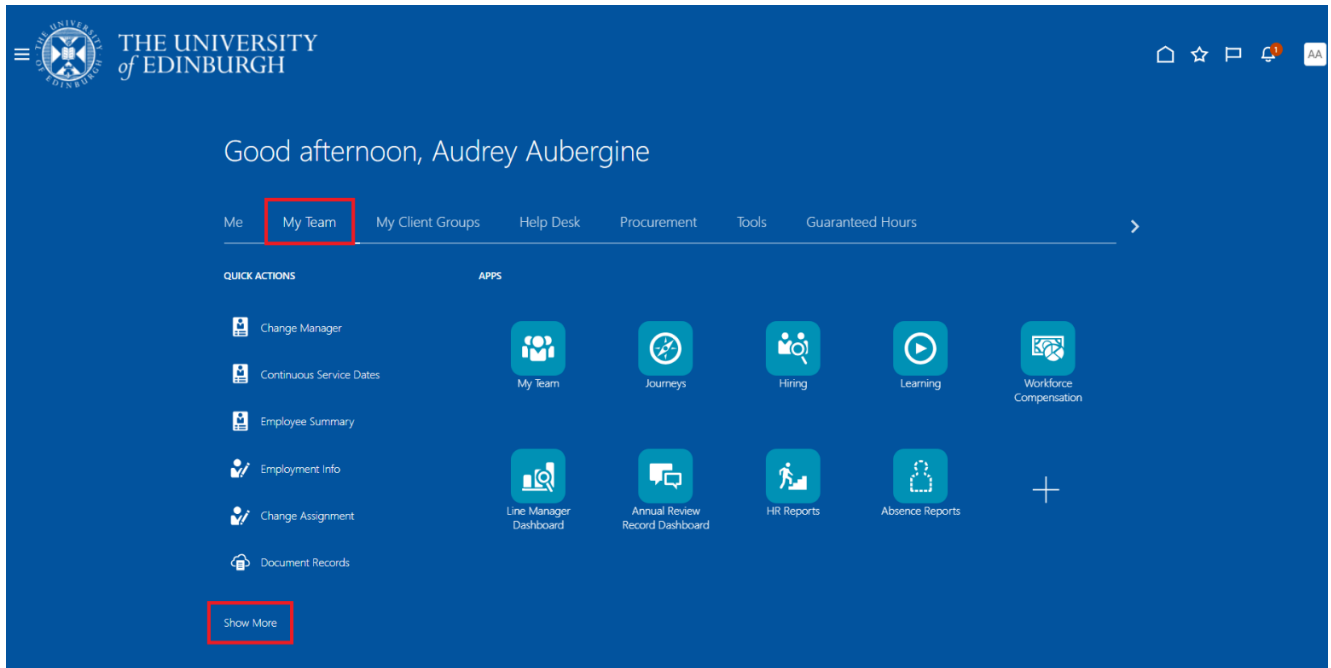
Actual End Date

Placement Match Date

How to Record Partner Leave

Partner Adoption

1. Before you can enter the employee's partner leave, you will need to check whether there are any existing absence records on the employee's People and Money record. From the home page, click on the **My Team tab** and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



- Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

Existing Absences

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	Employee	@ed.ac.uk
Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU18

- Look for any absences that will overlap with the proposed partner leave dates. If you need to amend or delete an absence, please see the [How to Amend Leave](#) section of this guide.
- If you are still in the **Existing Absences** screen, you can click the **Add Absence** button below the search bar to create a new absence.

Existing Absences
Hilary Haricot-Bean

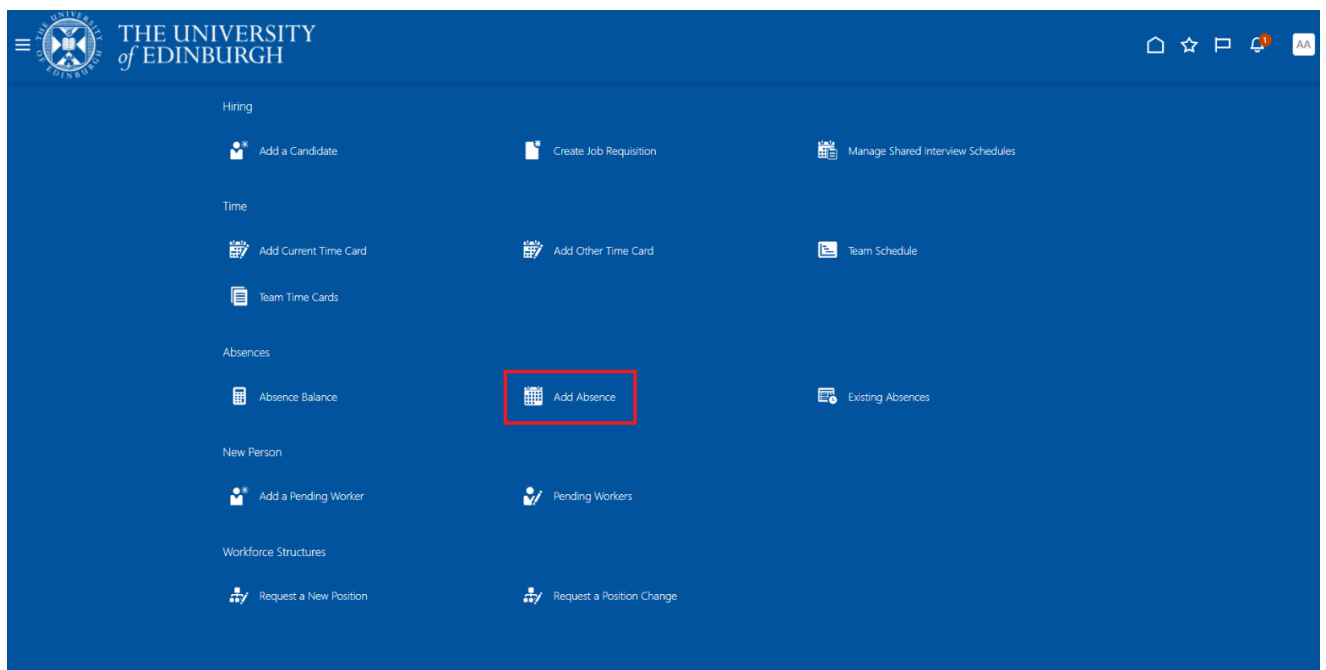
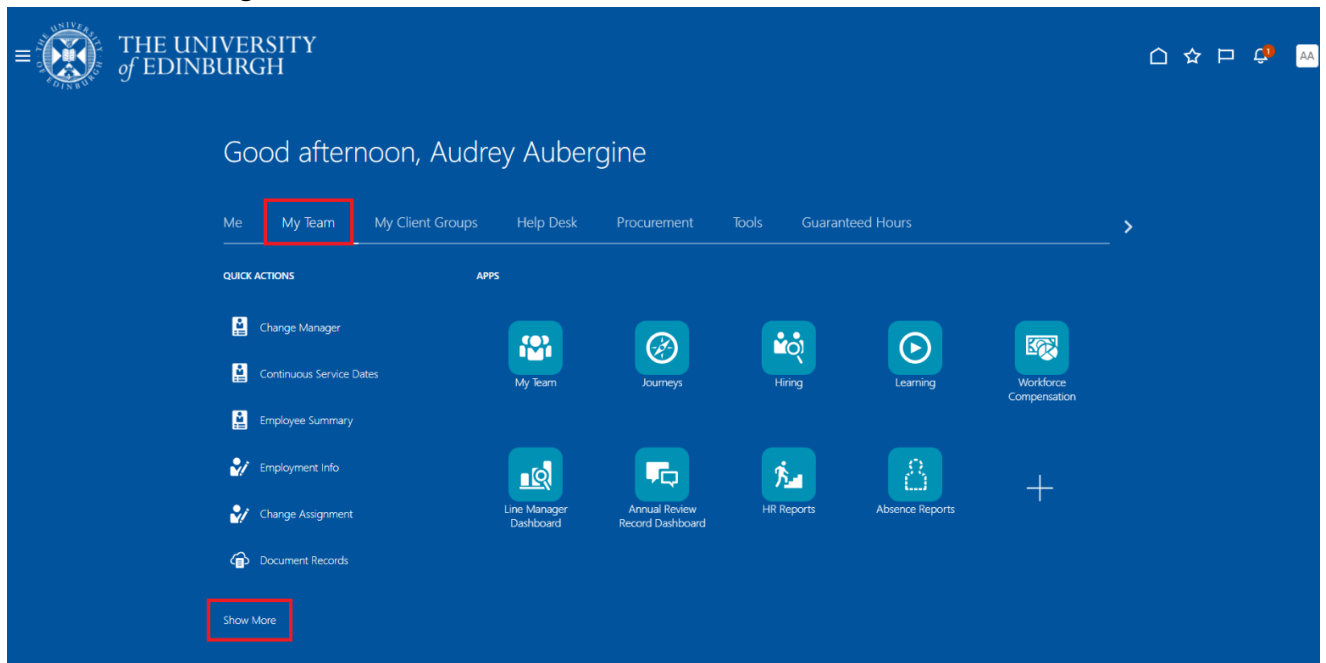
Search by type

Date 3/12/2024 X Status Clear (1)

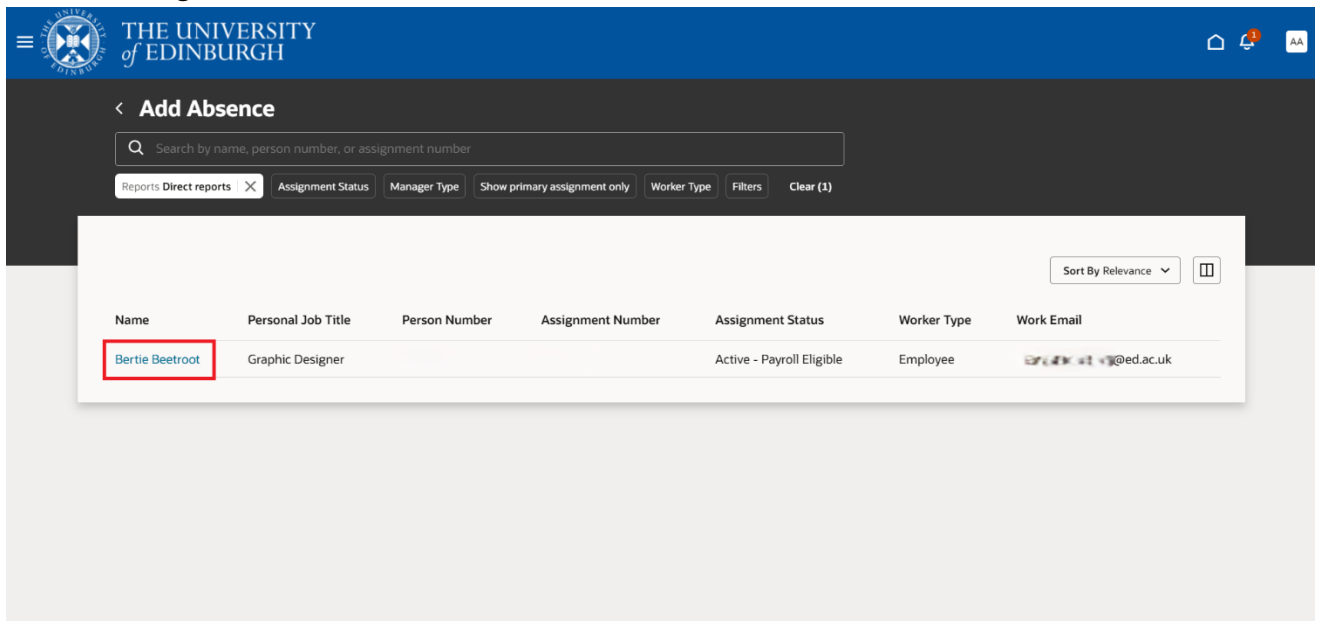
Add Absence Sort By

Unpaid Parental Leave	3/08/2026 - 9/08/2026 7 Calendar Days	Denied	
Maternity	5/01/2026 - 30/06/2026 177 Calendar Days	Scheduled	
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025 5 Hours	Scheduled	
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025 3 Hours	Scheduled	
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025 3 Hours	Scheduled	
Annual Leave Domestic Assistant	30/12/2025 - 30/12/2025 5 Hours	Scheduled	
Annual Leave Domestic Assistant	29/12/2025 - 29/12/2025 5 Hours	Scheduled	

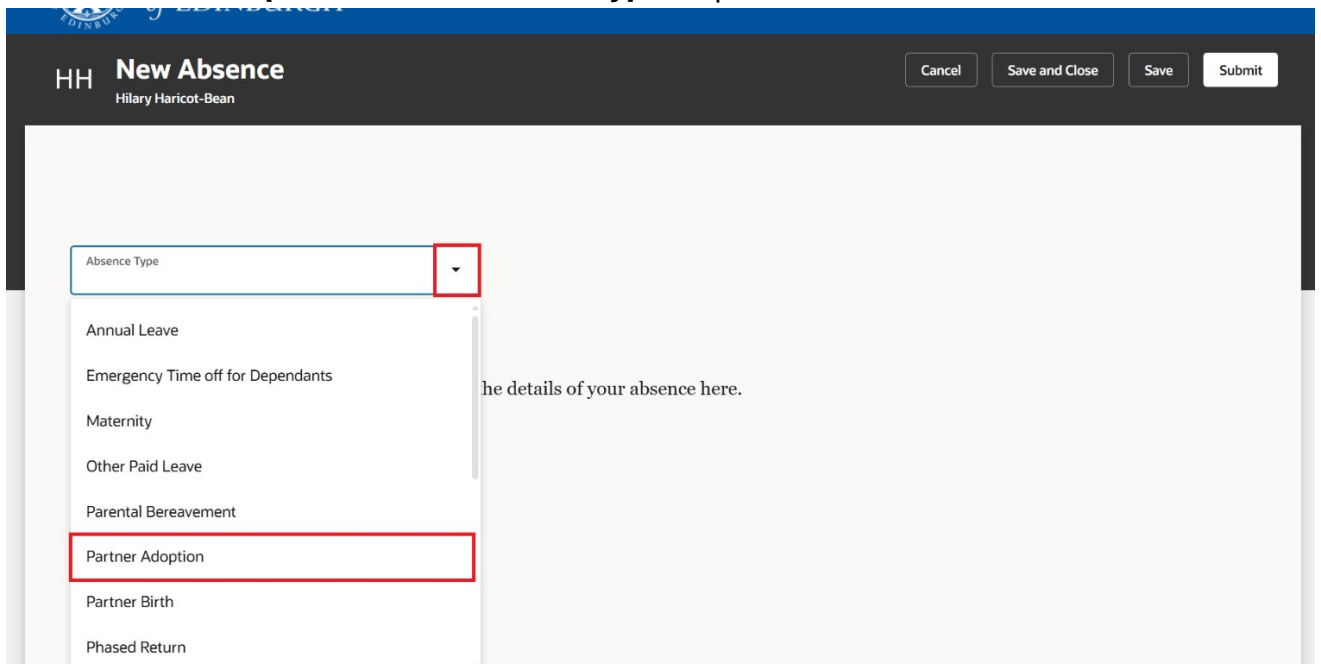
Alternatively, from the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



5. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



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



7. In the **Dates** section:
 - a. Complete the **Expected Placement Date** field **or**, if known, the **Actual Placement Date** field.
 - b. Complete the **Planned Start Date** field **or**, if known, the **Actual Start Date** field.
 - c. Complete the **Planned End Date** field. The Planned Duration field will automatically calculate the full duration of the absence.

These can be changed at a later date if needed. If you have only entered **planned** or **expected dates**, you **must** go back in to the absence to add the employee's **Actual Placement Date, Actual Start Date** and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. At the top, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The 'Absence Type' is set to 'Partner Adoption'. The 'Dates' section is highlighted with a red box and contains the following fields:

- Expected Placement Date
- Actual Placement Date
- Planned Start Date
- Actual Start Date
- Planned End Date
- Actual End Date
- Placement Match Date

8. In the **Details** section:
 - a. Add any appropriate **Comments**.
 - b. Upload any relevant **Attachments** either by dragging the file into the **Drag and Drop** box or clicking on the box.

The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. At the top, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The 'Placement Match Date' field is visible, along with 'Planned Duration' of 14 Calendar Days. The 'Details' section is highlighted with a red box and contains the following fields:

- Special Conditions
- Comments
- Attachments: Drag and Drop (Select or drop files here.)
- URL
- Add URL

9. Click on the **Submit** button to complete the absence.

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

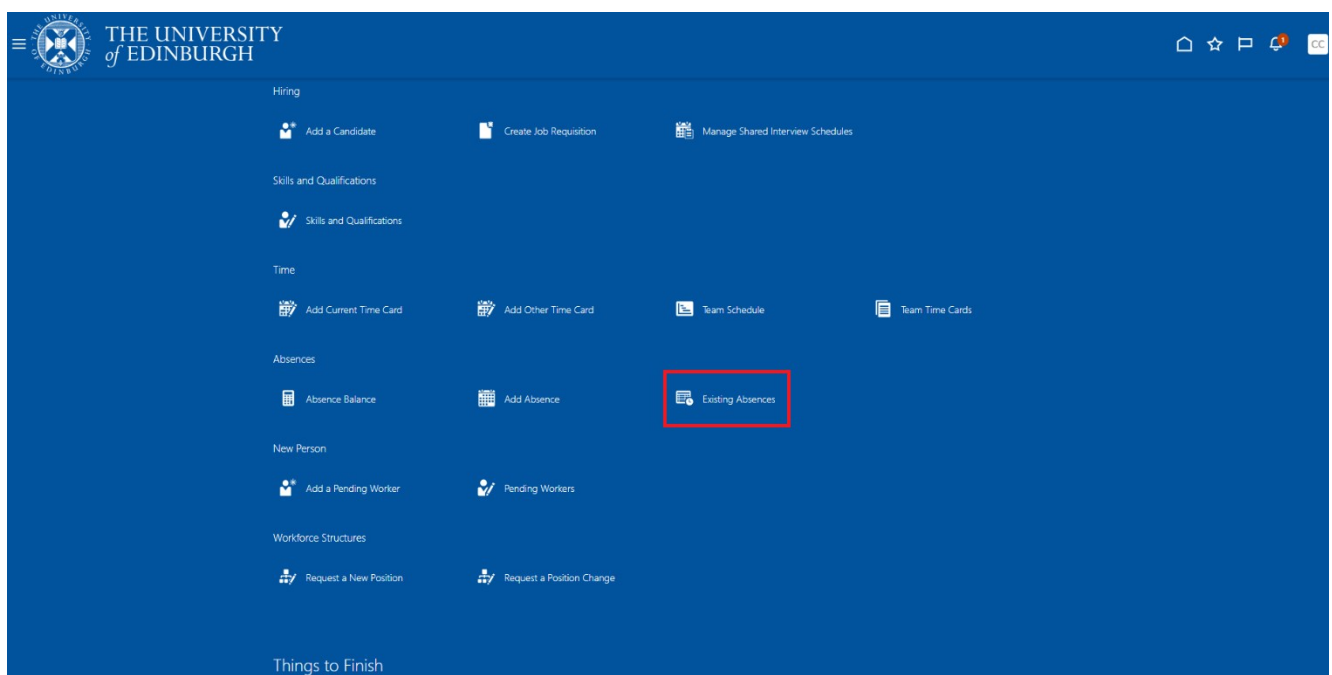
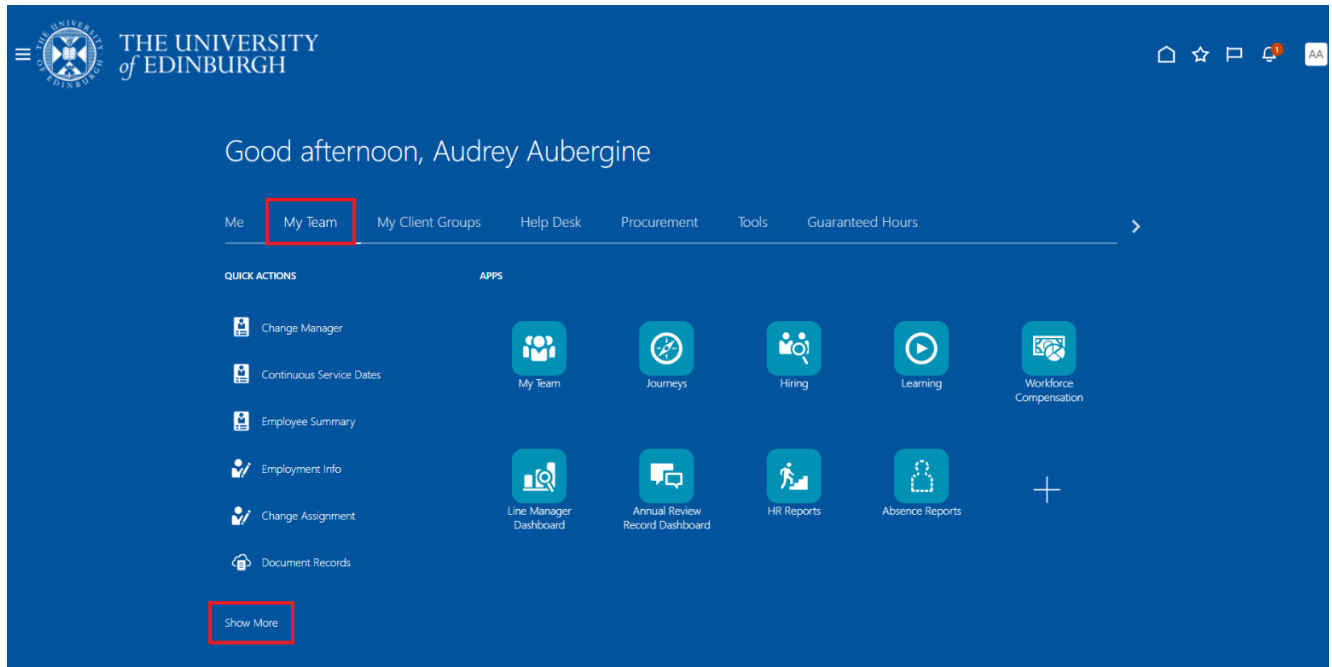
The screenshot shows a web form titled "New Absence" for a user named Hillary Haricot-Bean. The form is set against a dark header with the user's initials "HH". In the top right corner, there are four buttons: "Cancel", "Save and Close", "Save", and "Submit". The "Submit" button is highlighted with a red rectangular border. The main form area is light gray and contains several sections: a "Placement Match Date" field with a calendar icon, a "Planned Duration" field showing "14 Calendar Days", a "Details" section with a "Special Conditions" text area, a "Comments" text area, an "Attachments" section with a "Drag and Drop" area and the instruction "Select or drop files here.", and a "URL" field with an "Add URL" button.

What's Next

If you have only entered **planned** or **expected dates** for this absence, you **must** go back in to the absence to add the employee's **Actual Placement Date**, **Actual Start Date** and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

Partner Birth

1. Before you can enter the employee's partner leave, you will need to check whether there are any existing absence records on the employee's People and Money record. From the home page, click on the **My Team tab** and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

The screenshot shows the 'Existing Absences' interface. At the top, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar are several filter buttons: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. The main area contains a table of employees. The row for 'Hilary Haricot-Bean' is highlighted with a red rectangular box. The table columns include job title, status, and email address.

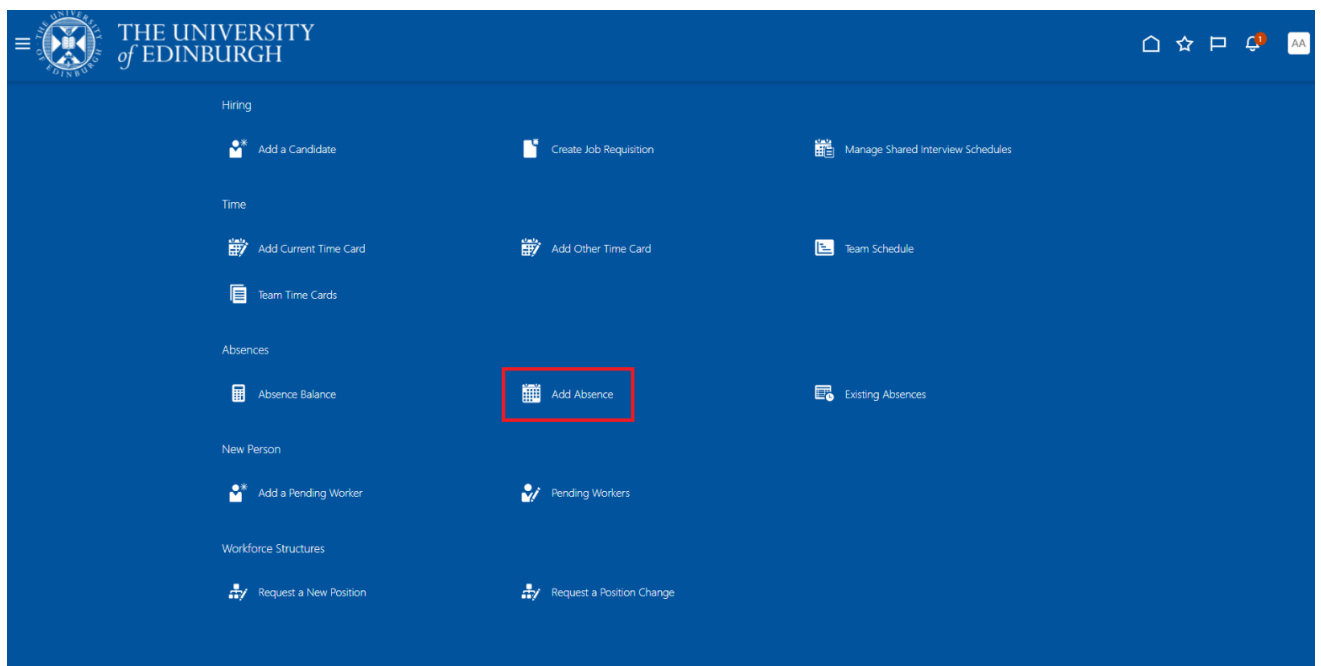
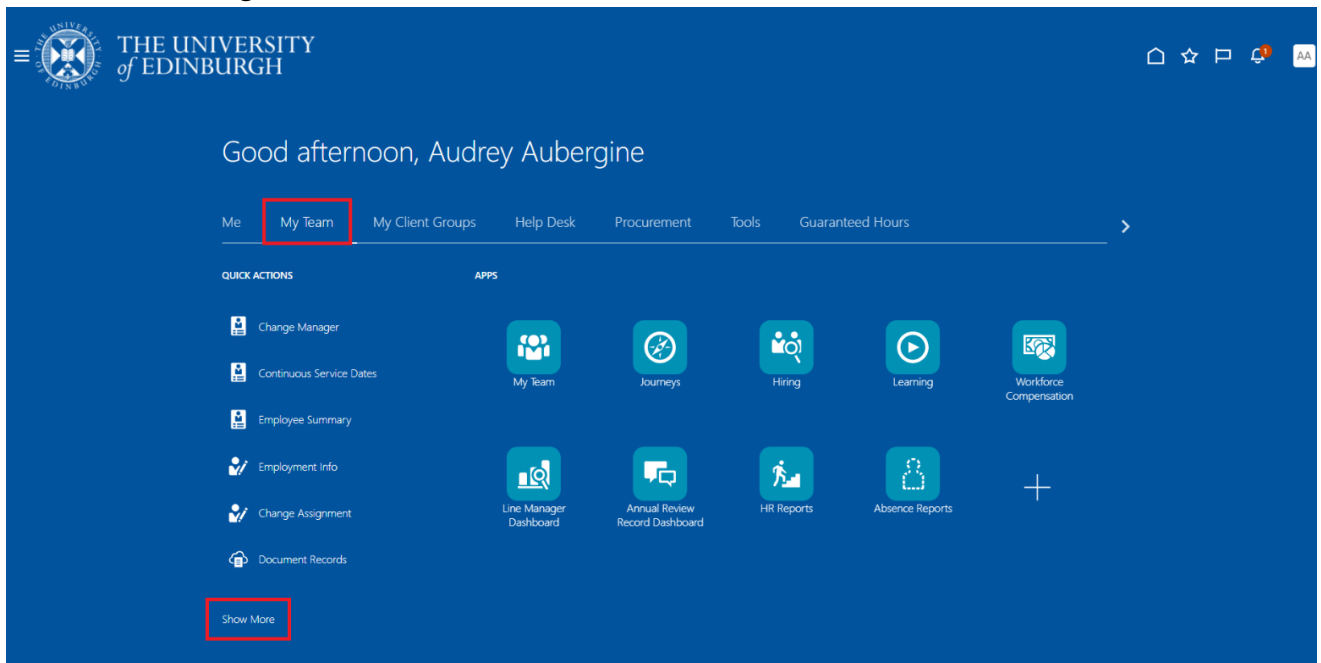
Job Title	Status	Employee Type	Email
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	Employee	@ed.ac.uk
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU18

3. Look for any absences that will overlap with the proposed partner leave dates. If you need to amend or delete an absence, please see the [How to Amend Leave](#) section of this guide.
4. If you are still in the **Existing Absences** screen, you can click the **Add Absence** button below the search bar to create a new absence.

The screenshot shows the 'Existing Absences' screen for Hilary Haricot-Bean. The header includes the University of Edinburgh logo and the user's name. Below the search bar, there are buttons for 'Date 3/12/2024', 'Status', and 'Clear (1)'. The 'Add Absence' button is highlighted with a red rectangular box. Below this is a table of existing absences with columns for type, dates, status, and an edit icon.

Type	Dates	Status	Action
Unpaid Parental Leave	3/08/2026 - 9/08/2026 7 Calendar Days	Denied	Edit
Maternity	5/01/2026 - 30/06/2026 177 Calendar Days	Scheduled	Edit
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025 5 Hours	Scheduled	Edit
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025 3 Hours	Scheduled	Edit
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025 3 Hours	Scheduled	Edit
Annual Leave Domestic Assistant	30/12/2025 - 30/12/2025 5 Hours	Scheduled	Edit
Annual Leave Domestic Assistant	29/12/2025 - 29/12/2025 5 Hours	Scheduled	Edit

Alternatively, from the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



5. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

The screenshot shows the 'Add Absence' page in the University of Edinburgh system. The page header includes the University of Edinburgh logo and name. Below the header, there is a search bar with the text 'Search by name, person number, or assignment number'. Below the search bar, there are several filter buttons: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. Below the filters, there is a table of employees. The table has columns for Name, Personal Job Title, Person Number, Assignment Number, Assignment Status, Worker Type, and Work Email. The employee 'Bertie Beetroot' is highlighted with a red box. The table data is as follows:

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
Bertie Beetroot	Graphic Designer			Active - Payroll Eligible	Employee	bertie.beetroot@ed.ac.uk

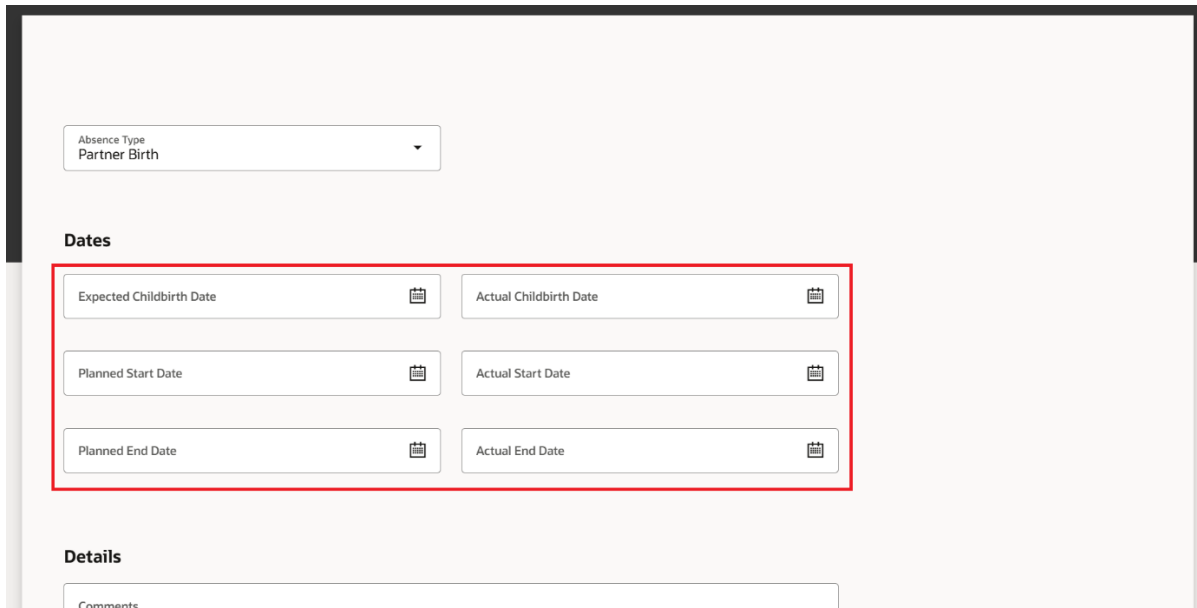
6. Select **Partner Birth** from the **Absence Type** drop-down list.

The screenshot shows the 'New Absence' page in the University of Edinburgh system. The page header includes the University of Edinburgh logo and name. Below the header, there is a user profile section with the name 'HH Hilary Haricot-Bean'. Below the profile section, there are several buttons: 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the buttons, there is a form with a section titled 'Absence Type'. The 'Absence Type' drop-down menu is open, and 'Partner Birth' is selected and highlighted with a red box. The other options in the drop-down menu are: Annual Leave, Emergency Time off for Dependants, Maternity, Other Paid Leave, Parental Bereavement, Partner Adoption, and Phased Return. Below the drop-down menu, there is a text field with the placeholder text 'the details of your absence here.'

7. In the **Dates** section:
- Complete the **Expected Childbirth Date** field **or**, if known, the **Actual Childbirth** Date field.
 - Complete the **Planned Start Date** field **or**, if known, the **Actual Start Date** field.
 - Complete the **Planned End Date** field. The Planned Duration field will appear and automatically calculate the full duration of the absence.

These can be changed at a later date if needed. If you have only entered **planned** or **expected dates**, you **must** go back in to the absence to add the employee's **Actual Childbirth Date, Actual**

Start Date and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

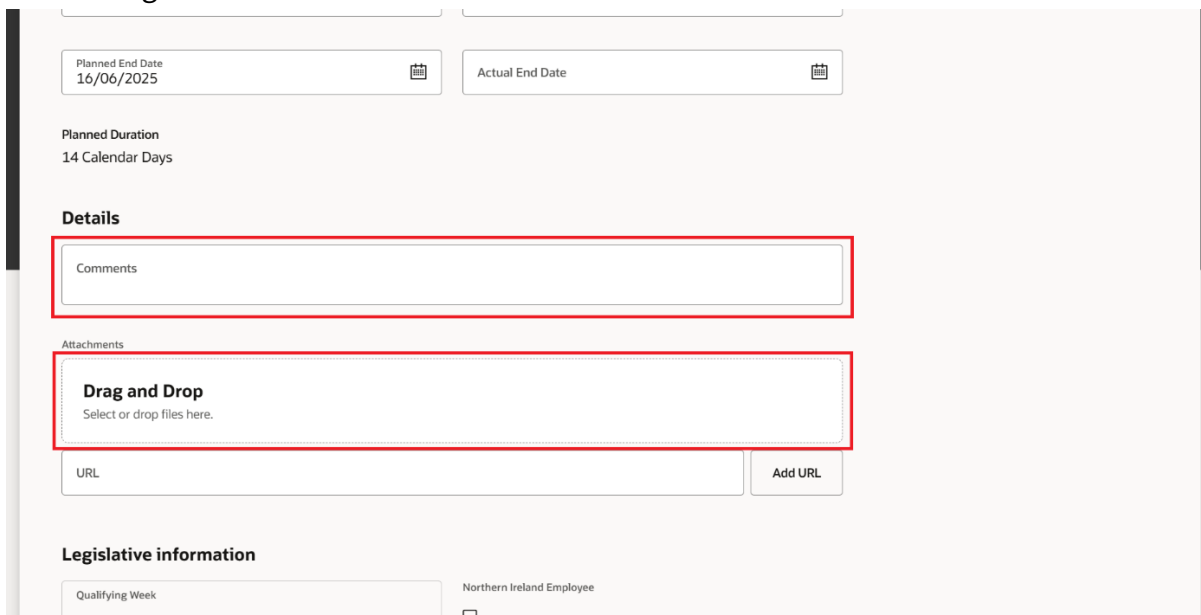


The screenshot shows a form for an absence type of 'Partner Birth'. The 'Dates' section is highlighted with a red box and contains the following fields:

Expected Childbirth Date	Actual Childbirth Date
Planned Start Date	Actual Start Date
Planned End Date	Actual End Date

Below the 'Dates' section is the 'Details' section, which includes a 'Comments' field.

8. In the **Details** section:
 - a. Add any appropriate **Comments**.
 - b. Upload any relevant **Attachments** either by dragging the file into the **Drag and Drop** box or clicking on the box.



The screenshot shows the 'Details' and 'Attachments' sections of the form. The 'Details' section is highlighted with a red box and contains a 'Comments' field. The 'Attachments' section is also highlighted with a red box and contains a 'Drag and Drop' box with the text 'Select or drop files here.' Below this is a 'URL' field and an 'Add URL' button. The 'Legislative information' section is partially visible at the bottom, showing a 'Qualifying Week' field and a 'Northern Ireland Employee' checkbox.

9. Click on the **Submit** button to complete the absence.

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

HH **New Absence**
Hilary Haricot-Bean

Cancel Save and Close Save **Submit**

3/06/2025 Actual Start Date

Planned End Date
16/06/2025 Actual End Date

Planned Duration
14 Calendar Days

Details

Comments

Attachments

Drag and Drop
Select or drop files here.

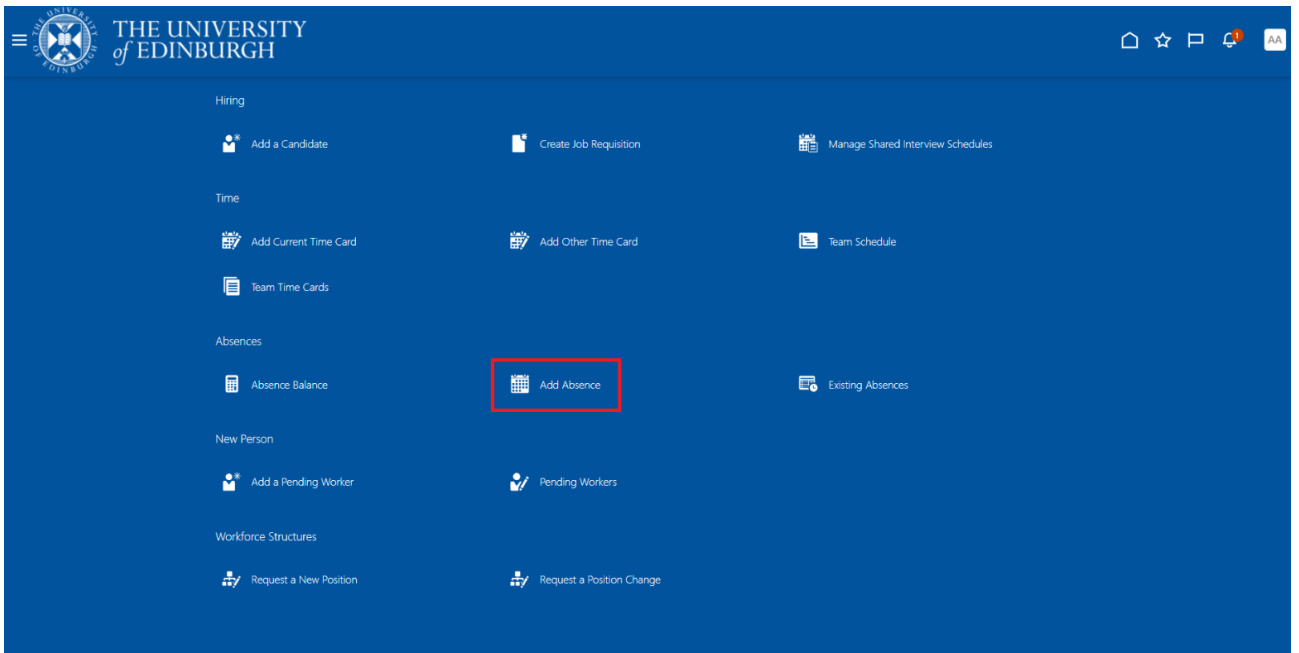
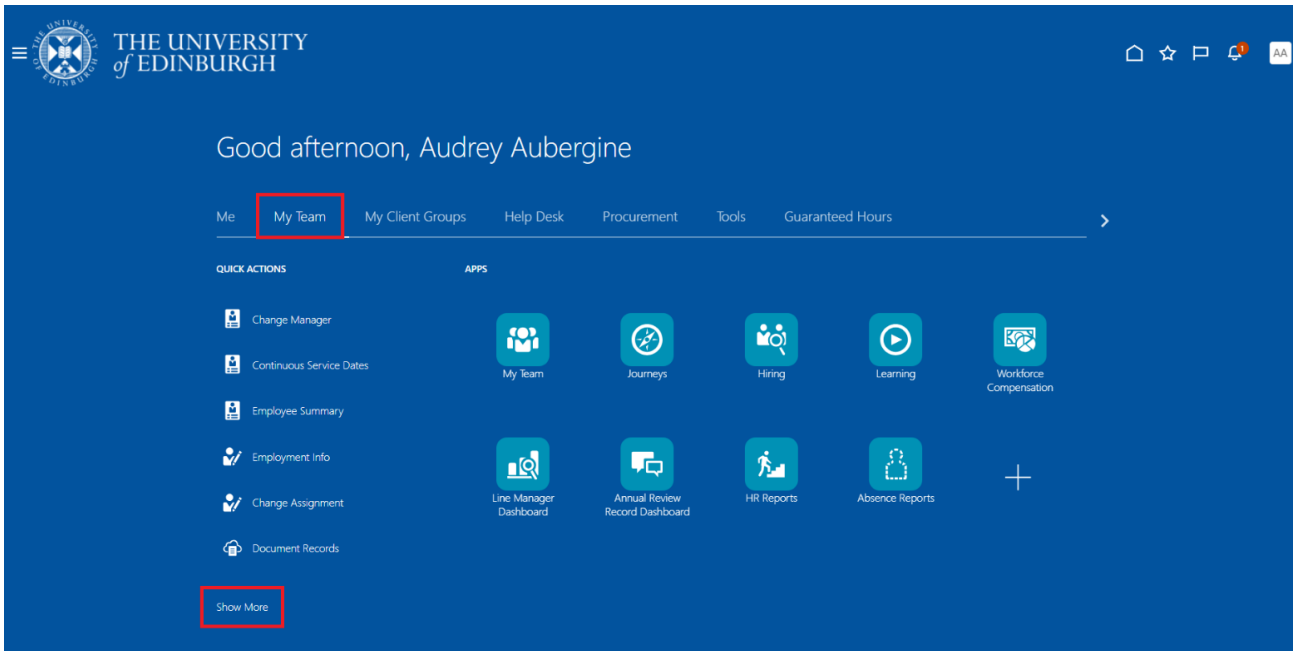
URL Add URL

What's Next

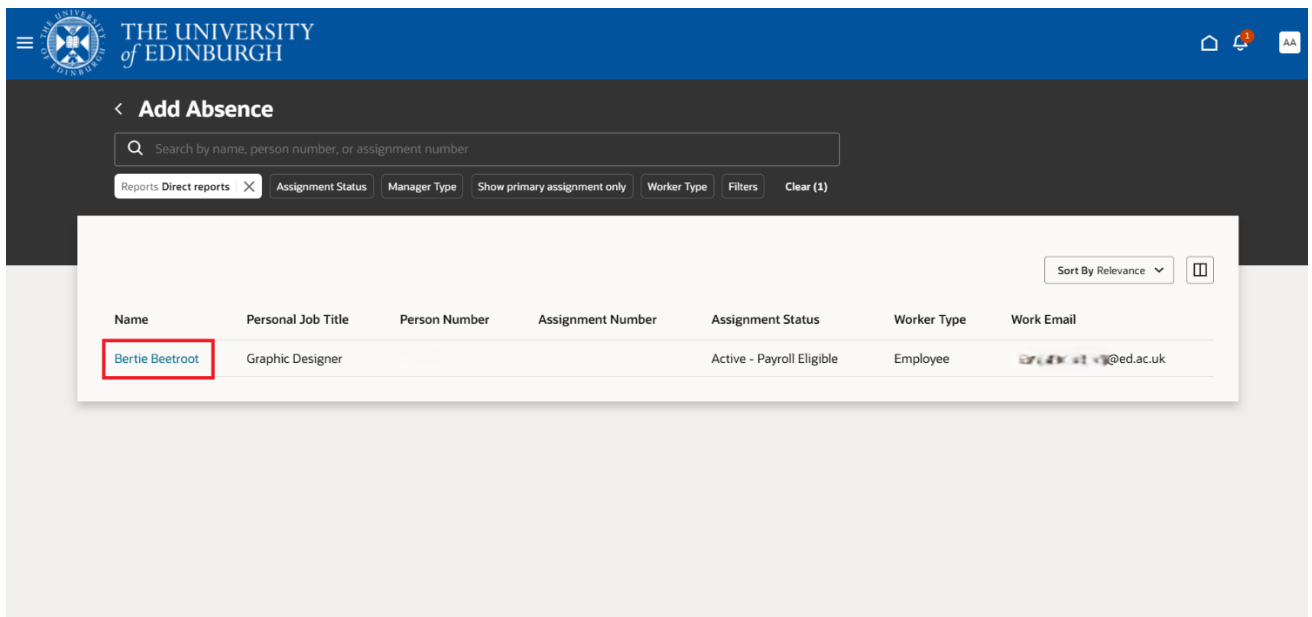
If you have only entered **planned** or **expected dates** for this absence, you **must** go back in to the absence to add the employee's **Actual Childbirth Date**, **Actual Start Date** and **Actual End Date** once known (for further guidance, please refer to the '[How to Amend Leave](#)' section in this guide).

How to Record Unpaid Parental Leave

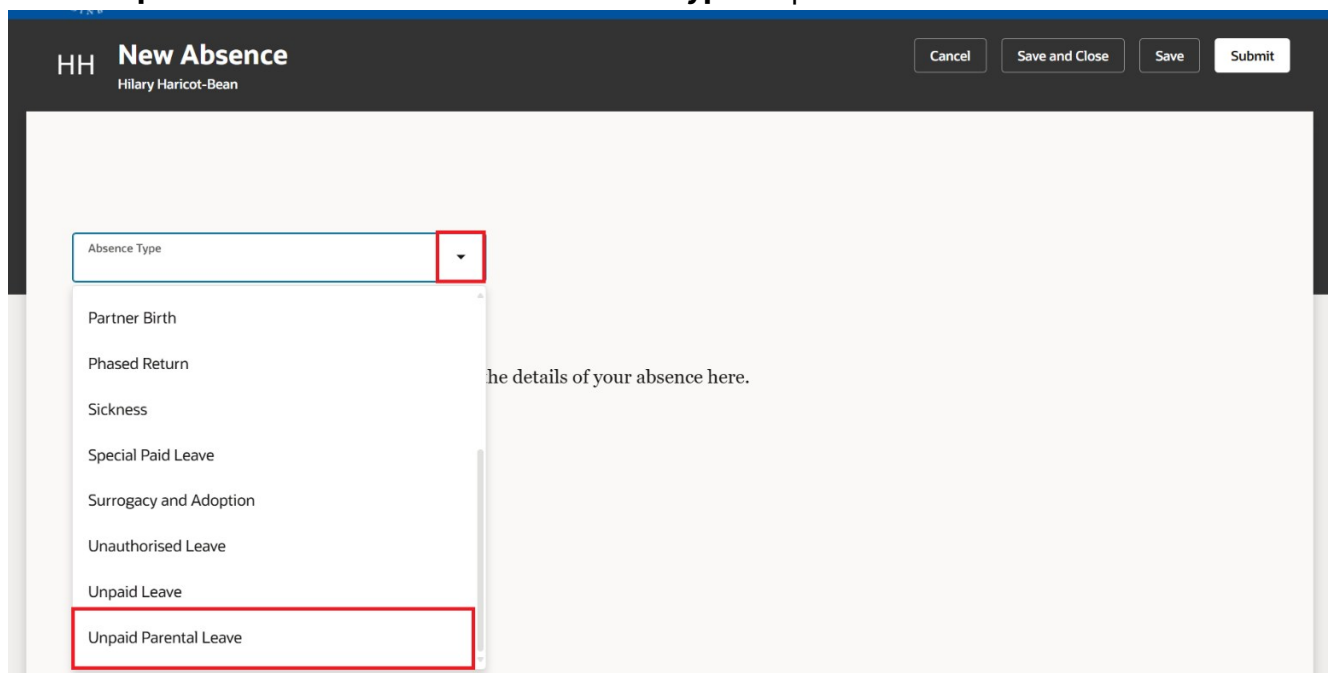
1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



3. Select **Unpaid Parental Leave** from the **Absence Type** drop-down menu.



- In the **Dates** section, complete the **Start Date** and the **End Date** fields. These can be changed at a later date if needed (please refer to the '[How to Amend Leave](#)' section in this guide).

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

HH **New Absence**
Hilary Haricot-Bean

Cancel Save and Close Save Submit

Absence Type
Unpaid Parental Leave

Dates

Start Date Required

End Date Required

Start Date Duration

Projected Balance 0 Calendar Days
As-of

- In the **Details** section, add any relevant notes in the **Comments** box.

Start Date 9/06/2025

Start Date Duration Full day

End Date 13/06/2025

End Date Duration Full day

Duration
5 Calendar Days

Projected Balance 0 Calendar Days
As-of 13/06/2025 Calculate

Details

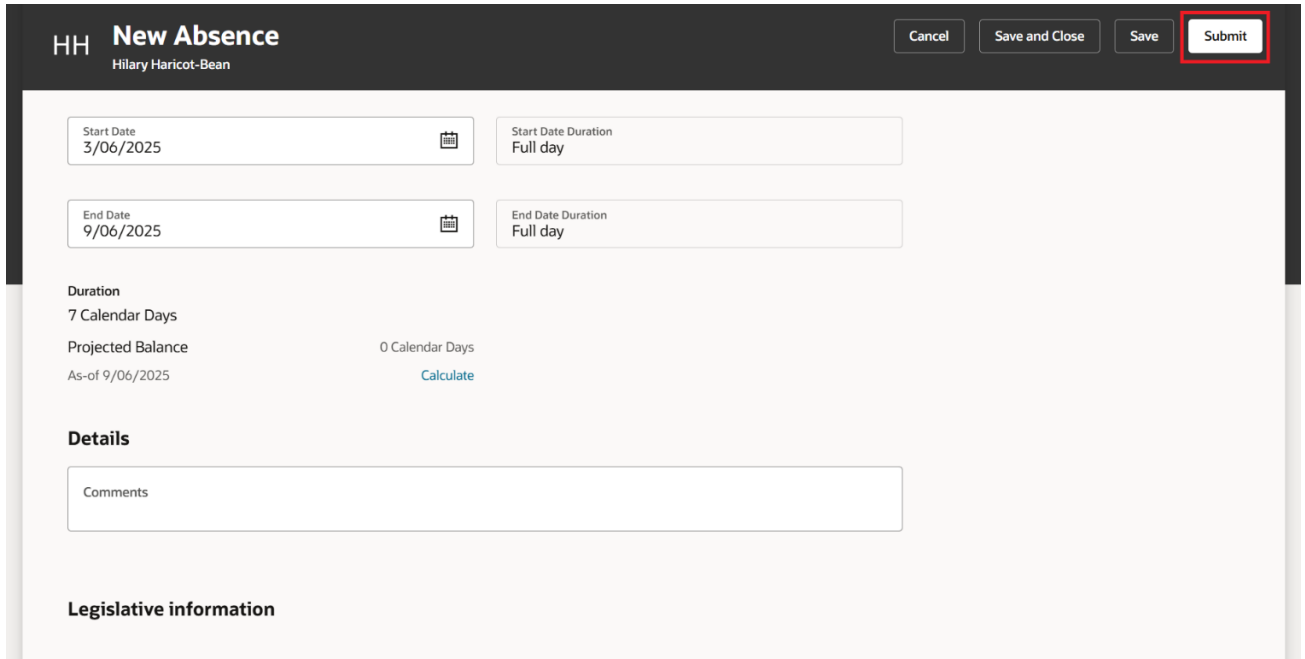
Comments

Legislative information

Additional information

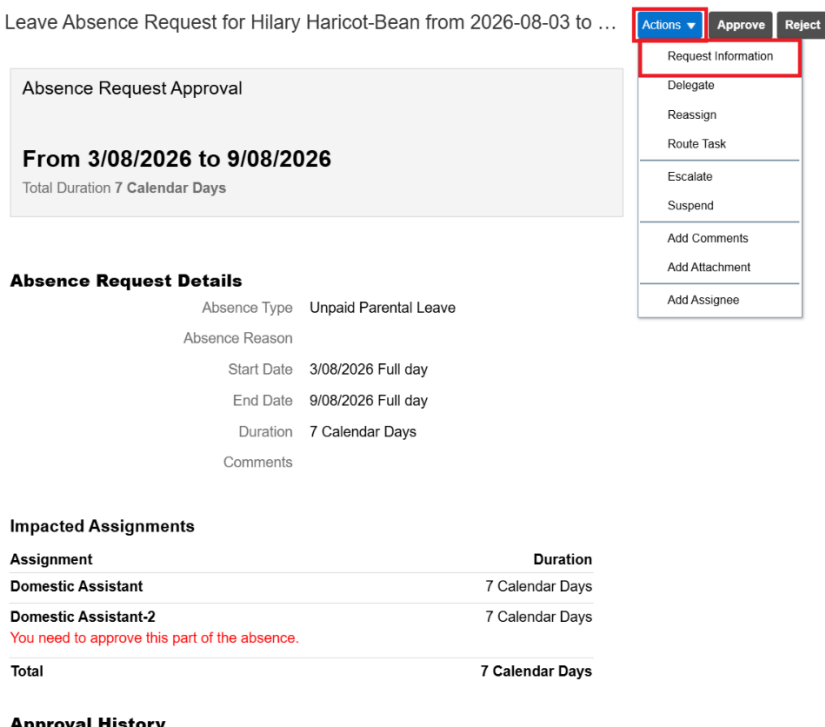
6. Click on the **Submit** button.

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



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 from the approval notification within People and Money by clicking on the **Actions** button, then selecting the **Further Information** option, **not** Reject.

Approval of Unpaid Parental Leave Absence Request for Hilary Haricot-Bean from 2026-08-03 to ...



Absence Request Approval

From 3/08/2026 to 9/08/2026
Total Duration 7 Calendar Days

Absence Request Details

Absence Type	Unpaid Parental Leave
Absence Reason	
Start Date	3/08/2026 Full day
End Date	9/08/2026 Full day
Duration	7 Calendar Days
Comments	

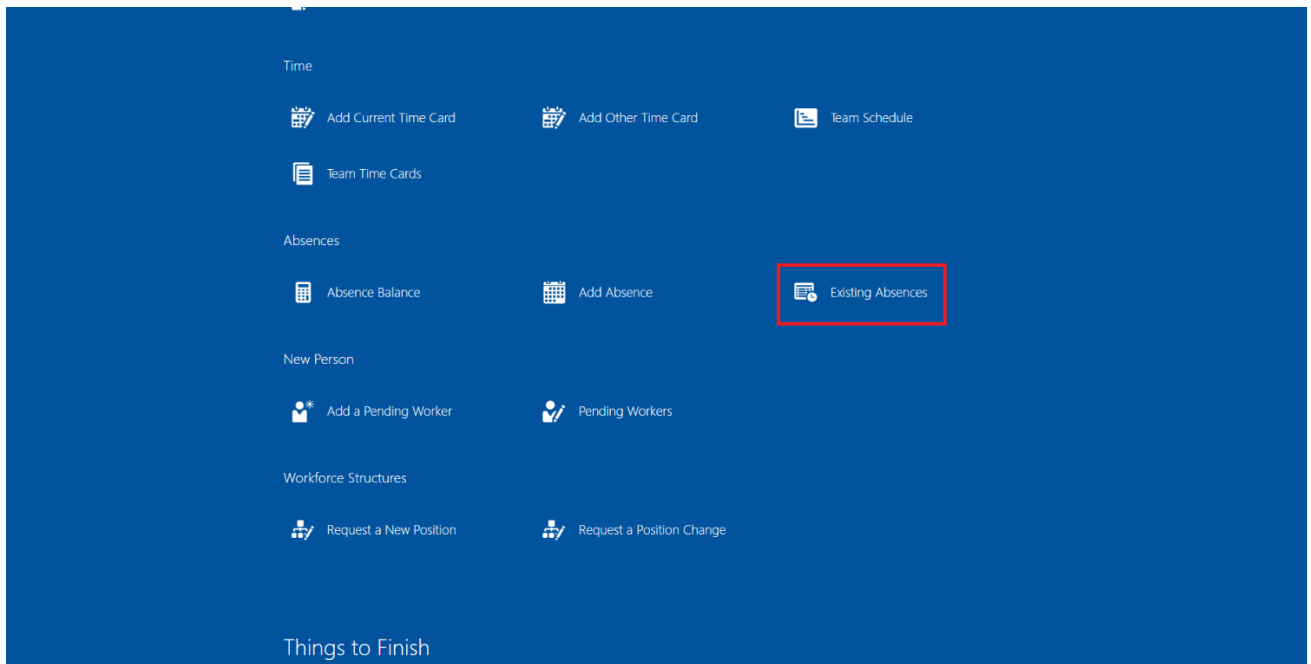
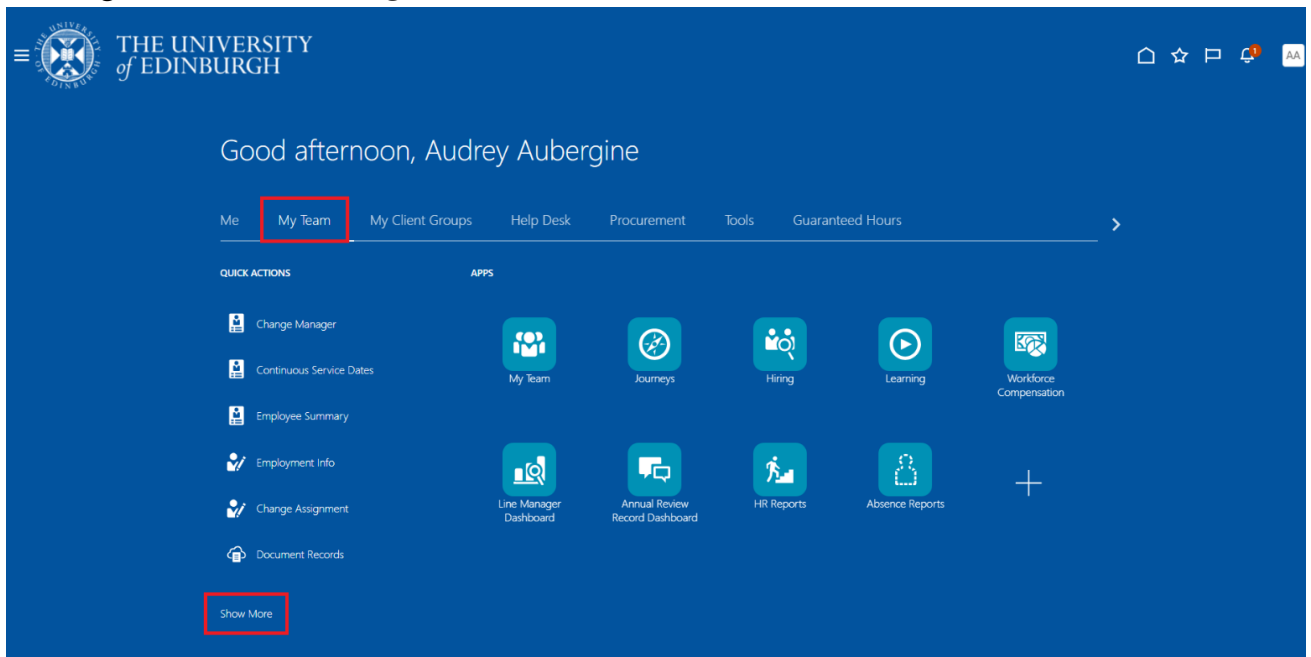
Impacted Assignments

Assignment	Duration
Domestic Assistant	7 Calendar Days
Domestic Assistant-2	7 Calendar Days
<i>You need to approve this part of the absence.</i>	
Total	7 Calendar Days

Approval History

How to Amend Leave

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



- Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

The screenshot shows a search results page for 'Existing Absences'. At the top, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar are several filter buttons: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. The main content is a table listing employees. The row for 'Hilary Haricot-Bean' is highlighted with a red box. The table columns include job title, status, employee type, and email address.

Job Title	Status	Employee Type	Email
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU6
Domestic Team Leader	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU20
Hilary Haricot-Bean	Active - Payroll Eligible	Employee	...@ed.ac.uk
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU17
Domestic Assistant-2	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU4
Domestic Team Leader	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU12
Domestic Assistant	Active - Payroll Eligible	Employee	...@exseed.ed.ac.uk-DNU18
Senior Domestic Assistant	Active - Payroll Eligible	Employee	...@ed.ac.uk-DNU18

- Click on the **pencil icon** against the absence.

Note: if you change the **Date** filter, you must enter a start date **and** an end date.

The screenshot shows the 'Existing Absences' page for Hilary Haricot-Bean. At the top, there is a header for 'THE UNIVERSITY of EDINBURGH'. Below the header, there is a search bar with the placeholder text 'Search by type'. Below the search bar are several filter buttons: 'Date 27/11/2024', 'Status', and 'Clear (1)'. The main content is a table listing absences. The row for 'Maternity' is highlighted with a red box. The table columns include absence type, dates, duration, status, and a pencil icon for editing.

Absence Type	Dates	Duration	Status	Action
Maternity	5/01/2026 - 30/06/2026	177 Calendar Days	Scheduled	
Annual Leave Domestic Assistant	31/12/2025 - 31/12/2025	5 Hours	Scheduled	
Annual Leave Domestic Assistant-2	31/12/2025 - 31/12/2025	3 Hours	Scheduled	
Annual Leave Domestic Assistant-2	30/12/2025 - 30/12/2025	3 Hours	Scheduled	

4. Make the necessary changes to the leave dates or confirm the Actual Childbirth Date/Actual Placement Date/Placement Match Date, etc. if known. Press **Submit** when the changes are made.

HH **Edit Absence**
Hilary Haricot-Bean

Cancel Withdraw **Submit**

Reason
Option 1

Notification Date
28/05/2025

Comments

Attachments

Drag and Drop
Select or drop files here.

URL Add URL

Entitlements

Maternity Plan

11/05/2026 - 30/06/2026 Entitlement exceeded

5. Alternatively, you can delete the absence completely by clicking on the **Withdraw** button at the top of the page.

THE UNIVERSITY of EDINBURGH

HH **Edit Absence**
Hilary Haricot-Bean

Cancel **Withdraw** Submit

Absence Type
Maternity

Dates

Expected Childbirth Date
12/01/2026

Actual Childbirth Date

Won't return to work

Planned Start Date
5/01/2026

Actual Start Date

Planned End Date
30/06/2026

Actual End Date

Planned Duration
177 Calendar Days

Appendix

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 at least 28 days in advance of your anticipated leave start date.	This information should be input and submitted within 28 days of getting notification of the estimated date of arrival in the UK. The actual date the child arrives in the UK can be input at a later date, within 28 days of the arrival date.	This information should be input and submitted at least 15 weeks before the baby's due date.

Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated guide to new format. Content and screenshots updated to reflect new Redwood screens. 'How to record partner leave' section split in to separate sections for 'Partner Adoption' and 'Partner Birth'.	ME
2.1	21 July 2025	Additional guidance for the Date filter within the Existing Absences screen.	ME
2.2	30 March 2026	Added instruction to 'How to Submit an application for Partner Leave' section to remind employees to enter 'actual' dates once known.	HH/RM

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.