

THE UNIVERSITY of EDINBURGH

People and Money system

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

Employee Guide to Family Leave

Contents

Introduction	2
In Brief	2
How to submit a Maternity Leave Request	2
How to amend Maternity Leave Dates	3
How to submit an application for Unpaid Parental Leave	3
How to submit an application for Partner Leave	3
How to submit an application for Adoption and Surrogacy Leave	4
Editing an Absence Before the Start Date	4
Withdrawing an Absence Request Before the Start Date	4
In Detail	5
How to submit a Maternity Leave request	5
How to amend Maternity Leave Dates	10
How to submit an application for Unpaid Parental Leave	11
How to submit an application for Partner Leave	13
How to submit an application for Adoption and Surrogacy Leave	15
Edit an Absence Date Before the Start Date	19
Withdrawing an Absence Request Before the Start Date	21
Appendix 1 – Adoption & Surrogacy Leave Fields in P&M	24

Introduction

Please familiarise yourself with the Family Leave Policies.

You can check what maternity options are available to you in the Maternity Calculator within People & Money without submitting a maternity leave request. To use the Maternity Calculator

- 1. Log into People and Money
- 2. Click on Me
- 3. Click on Maternity Calculator

Employees on Guaranteed Hours Contracts and those due to end employment due to redundancy should contact HR for pay options instead of using the calculator. You can contact HR by raising a Service Request in People and Money. Guidance on how to do that can be found <u>here.</u>

For all situations other than unpaid parental leave, once the application has been submitted the Line Manager will receive a notification of the application. For parental leave the Line Manager will not only receive a notification, they will need to approve the leave.

Line Managers may request you delay your parental leave.

Any existing absences (such as annual leave) that have dates that overlap with the leave request should be deleted prior to processing the absence. Please see the section, 'Edit an Absence before the Start Date' for further information.

To read supporting guidance please review the relevant <u>End to End Process User</u> <u>Guides</u>

In Brief ...

How to submit a Maternity Leave Request

Please do not start this task until you have ALL the information required including your MATB1.

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Choose **Existing Absences** and withdraw any absences that fall within the planned maternity dates.
- 3. Go back to **Time and Absences** and then **Add Absence**.
- 4. Add a request for maternity leave.

- 5. Enter expected date of childbirth, planned start and end dates.
- 6. Confirm your maternity payment choice by selecting 1, 2 or 3 from the **Reason** dropdown.
- 7. Upload the Mat B1 form to the Attachment section of the page and add any appropriate comments.
- 8. Press Submit.

How to amend Maternity Leave Dates

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Choose Existing Absences.
- 3. Choose the maternity absence record and click the **pencil icon**.
- 4. Edit the maternity dates then **Submit**

How to submit an application for Unpaid Parental Leave

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Click on **Add Absence**

3. Choose Absence Type **Unpaid Parental Leave** from the dropdown menu, add the **Start** and **End Dates** and any comments required and **Submit**.

How to submit an application for Partner Leave

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Click on **Add Absence**.
- 3. Choose **Partner Birth** or **Partner Adoption** (as appropriate) from the Type drop-down menu.
- 4. Enter the **Expected Date of Childbirth and the Planned Start and End Dates.** Add any appropriate comments or attachments.
- 5. Click Submit.

How to submit an application for Adoption and 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 Appendix 1 at the end of this document, as well as the <u>End to End Process User Guide</u>.

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Choose **Existing Absences** and withdraw any absences that fall within the planned maternity dates.
- 3. Go back to **Time and Absences** and then **Add Absence**.
- 4. Choose Surrogacy and Adoption from the Type drop-down list.
- 5. Enter the **Expected Date of Placement**.
- 6. Enter the **Placement Match Date**, **Planned Start Date** and **Planned End Date** for the leave request.
- 7. Select the **Reason** (pay option) from the drop-down list
- 8. Upload the MATB1 or evidence that you have been matched with a child to the attachments section and add any appropriate comments.
- 9. Click on the **Submit** button.

Editing an Absence Before the Start Date

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Choose **Existing Absences** and locate the relevant absence request.
- 3. Click the **pencil** icon, amend the leave dates and **Submit**.

Withdrawing an Absence Request Before the Start Date

- 1. From the Homepage navigate to **Me** and select the **Time and Absences** app
- 2. Choose Existing Absences and click on the pencil icon.
- 3. Click **Delete** to remove any unwanted planned absence.

How to submit a Maternity Leave request

Please do not start this task until you have ALL the information required including your MATB1.

1. From the Homepage navigate to **Me** then click **Time and Absences**.

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	Family and Emergency Contacts	Time and Absences		cills and Learning lifications	
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2. Choose **Existing Absences** and look for any planned absences that are scheduled during the proposed maternity leave.

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Current Time Card	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval	
Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Calendar View your shifts, absences, and public holidays	
Team Schedule			

3. In this example the employee has 24 hours of **Other** leave requested for March. To view the absence in more detail, click the **pencil** icon.

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	Search by type or status		Sort By Date ~			
	Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Awaiting approval	/			
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn				
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	1			
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	1			
	Sickness: 0 Calendar Days 24/10/2021 - Open ended	In progress				
			Load More Items 1-5 of 5 items			

4. Any absences (including annual leave) that are planned at the same time as proposed maternity leave need to be cancelled. Click **Delete** to remove the absence record.

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Details	
*Reason	

5. You will see the leave status changes to **Withdrawn**. Now the maternity request can be submitted.

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	Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Withdrawn				
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn				
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	1			
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	1			
	Sickness: 0 Calendar Days 24/10/2021 - Open ended	In progress				
			Load More Items 1-5 of 5 Items			

- 6. Go back to **Time and Absences** and then **Add Absence**.
- 7. From the drop-down list select Maternity.

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Legisla	Select a value Type Adoption and Surrogacy Emergency Time off for Dependants Leave Maternity R Other Paid Leave			

8. Complete the fields with as much detail as possible.

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Add Ab	sence	Save an	d Close Sub <u>m</u> it <u>C</u> ancel
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	Expected Date of Childbirth [22/11/2021] (%) Will not return to work: Planned Start Date [22/10/2021] (%) Planned End Date [2]/[10/2022] (%) Planned Duration 365 Calendar Days	Actual Date of Childbirth dd/mm/yyyy Actual Start Date Start Date Actual End Date End Date Actual Date O Calendar Days	à

Expected Date of Childbirth – Using the drop-down calendar enter the estimated due date as per your MATB1.

Actual Date of Childbirth – Can be completed at a later date by a Line Manager, not mandatory at time of request.

Planned Start Date/Planned End Date – Enter your current planned start and end date, these can be changed if needed. If you do not currently know the end date enter 52 weeks from the start date as this is the maximum time allowed.

Actual Start Date/Actual End Date – Should your planned start and end date change your Line Manager will override them by entering the definite dates here. It will then be these dates that payroll will use to manage your maternity pay. No need to complete at the time of requesting leave.

9. In the **Details** section choose Option 1, 2 or 3 from the dropdown. These correlate to the options around how you wish to receive your maternity pay.

Should you wish to change your mind at a later date you can do so however to complete the application you must indicate your preferred option at this stage.

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	Planned Start Date \$ Planned End Date \$ End Date \$	Actual End Date End Date Actual Duration 0 Calendar Days	î.	
	Details *Reason Øption 3 Select a value Option 1 Option 2 Option 3 Comments	Notification Date 10/05/2021	(°)	

10. The final step is to upload your MATB1 form. Either click to upload the file or drag the file into the **Attachment** space.

Add Abse	nce		Save and Close	Submit Cance	el
	Details				
	*Reason Option 3 V	Notification Date 27/10/2021	Ċò		
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	Comments				
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	Drag files here o	or click to add attachment 🐱			
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	Legislative Information				
	Qualifying Week	Override Average Weekly Earnings			

When you have completed all fields press **Submit**. A notification will be sent to your **Line Manager**.

Note: Selecting Save and Close will not submit the application, it will save it as a draft.

Following submission HR Ops will pick up the request and carry out some checks before issuing confirmation of arrangements in writing.

How to amend Maternity Leave Dates

1. From the Home page open the **Me** section, then click **Time and Absences**.



2. Choose Existing Absences.

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Rev	bsence Balance	Existing Absences View, change or withdraw existing absence requests	Cash Disbursements Sell a portion of your plan balance.					
Ca	alendar	Team Schedule						

3. Choose the maternity absence record and click the **pencil** icon to edit.

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	Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Withdrawn		
	Maternity: 365 Calendar Days 21/01/2022 - 20/01/2023	Awaiting approval	1	
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn		
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	/	
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	/	
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4. In Edit Absence, edit the maternity dates and Submit.

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	Planned End Date 20/01/2023 Planned Duration 365 Calendar Days	ĉ	Act	ual D	uratio lar Daj								
	sos Calendar Days												

5. Your Line Manager will receive a notification with the new absence dates and HR Ops will pick up the request and carry out some checks before issuing confirmation of changes in writing.

How to submit an application for Unpaid Parental Leave

1. From the Home page navigate to **Me** and select the **Time and Absence** app.

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	My Organization Chart			
	My Public Info	Current Jobs Wellness	Personal Brand Volunteering	

2. Choose Add Absence.

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C Time and Abser	nces					
(Current Time Card Open your current time card.	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval			
	Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Cash Disbursements Sell a portion of your plan balance.			
	Calendar	Team Schedule				

- 3. Choose the Unpaid **Parental Leave** from the **Type** drop-down menu.
- 4. Enter the **Start Date** and **End Date** by clicking the calendar icon and selecting the relevant dates and enter a **Comment** if required.

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	Absence Duration 0 Calendar Days Projected Balance Calculate				
	Details				
	Comments and Attachments				
	Comments				

5. Click on the **Submit** button to complete the request.

Your request will then go to your line manager for approval.

How to submit an application for Partner Leave

1. From the Home page navigate to **Me** and select the **Time and Absence** app.

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	My Organization Chart								
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2. Click on Add Absence to create the request.

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Current Time Card Open your current time card.	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval	
Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Cash Disbursements Sell a portion of your plan balance.	
Calendar	Team Schedule		

- 3. Choose the **Type** Partner Birth or Partner Adoption from the drop-down
- 4. Enter the planned start and end dates. **Note:** Partner Leave must be taken in blocks of 7 or 14 days.

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Add Abs	ence	[<u>Save and Close</u>	Sub <u>m</u> it <u>C</u> ancel
3	*Type Partner Birth When	~		
3	Expected Date of Childbirth 22/01/2022 Image: Childbirth Planned Start Date Image: Childbirth 21/01/2022 Image: Childbirth Planned End Date Image: Childbirth 03/02/2022 Image: Childbirth Planned Duration 14 Calendar Days	Actual Date of Childbirth dd/mn/yyyy Actual Start Date Start Date Actual End Date End Date Actual Duration 0 Calendar Days	60 60	

5. Add any **Comments** required and press the **Submit** button.

Add A	bsence Save and Close Submit Cancel
	Comments and Attachments
	Legislative Information Qualifying Week Partner Name Additional Information

This submission does not require approval, but your line manager will receive a notification to let them know about your request.

How to submit an application for Adoption and 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 Appendix 1 at the end of this document, as well as the End to End Process User Guide.

1. From the Home page navigate to **Me** and select the **Time and Absence** app.

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Contact Info Contact Info Family and Emergency Contacts Family and	
My Organization Chart	
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2. Choose **Existing Absences** and look for any planned absences that are scheduled during the proposed maternity leave.

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C Time and Abs	sences				
	Current Time Card	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval		
	Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Calendar View your shifts, absences, and public holidays		
	Team Schedule				

3. In this example the employee has 24 hours of **Other** leave requested for March. To view the absence in more detail, click the **pencil** icon.

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	Search by type or status Q Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Awaiting approval	Soft By Date				
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn					
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	1				
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	1				
	Sickness: 0 Calendar Days 24/10/2021 - Open ended	In progress					
			Load More Items 1-5 of 5 items				

4. Any absences (including annual leave) that are planned at the same time as proposed adoption or surrogacy leave need to be cancelled. Click **Delete** to remove the absence record.

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	When		Edit Entries	
	*Start Date and Duration 02/03/2022 0 Open ended *End Date and Duration 03/03/2022 0	Absence Duration 14 Hours		
			Projected Balance Calculate	
	Details			
	*Reason			

- 5. You will see the leave status changes to **Withdrawn**. Now the adoption or surrogacy request can be submitted.
- 6. Go back to **Time and Absences** and click on **Add Absence**.

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Current Time Card Open your current time card.	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval			
Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Cash Disbursements Sell a portion of your plan balance.			
Calendar	Team Schedule				

7. Select **Surrogacy and Adoption** from the **Type** drop-down list.

When			
Expected Date of Placement		Planned Duration	
dd/mm/yyyy	100 C	0 Calendar Days	
		Actual Date of Placement	
Won't return to work		dd/mm/yyyyy	6
Placement Match Date		Actual Start Date	
dd/mm/yyyy	í 🍅	Start Date	i o
Planned Start Date		Actual End Date	
Start Date	ίφ	End Date	rio -
Planned End Date		Actual Duration	
	Ċo	0 Calendar Days	

- 8. Enter the **Expected Date of Placement**.
- 9. Enter the **Placement Match Date**, **Planned Start Date** and **Planned End Date** for the leave request.

Add Abset	nce			Save a 8	Sub <u>m</u> it Cancel
Ø	Details *Reason Option 3	~	Notification Date 27/10/2021	ŝ	
	Comments and Attachmen	ts			
	Attachments	Trag files here or	click to add attachment 🗸		
	Legislative Information Birth Date of Child	ř.	Matching Week Override Average Weekly Earnings		

- 10. Select the **Reason** (pay option) from the drop-down list. Please refer to the policy on which option to select.
- 11. Upload the MATB1 or evidence that you have been matched with a child to the attachments section and add any appropriate comments.
- 12. When you have completed all fields press **Submit**. A notification will be sent to your **Line Manager**.

Note: Selecting Save and Close will not submit the application, it will save it as a draft.

Following submission HR Ops will pick up the request and carry out some checks before issuing confirmation of arrangements in writing.

Edit an Absence Date Before the Start Date

1. From the Home page navigate to **Me** and select the **Time and Absence** app.

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2. Choose **Existing Absence** and locate the absence request.

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Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests. Cash Disbursements Sell a portion of your plan ba	dance.
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3. Click the **Pencil** icon.

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	Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Withdrawn		
	Maternity: 365 Calendar Days 21/01/2022 - 20/01/2023	Scheduled	/	
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn		
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	/	
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	1	
			Load More Items 1-5 of 6 items	

4. Edit the **Dates** as required and then click on **Submit.** If the absence was one which required approval by your line manager when the initial request was made, the changed submission will also go to them for approval.

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Expected Date of Childbirth 22/01/2022	2 9 16	3 10 17		1	13	1		15	
Will not return to work	23 30		25 1	2	27	2		29	
Planned Start Date 21/01/2022	6	Er	nd De	Tod ate	ay			(b)	
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Planned Duration 365 Calendar Days									

Withdrawing an Absence Request Before the Start Date

1. From the Home page navigate to **Me** and select the **Time and Absence** app.

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	3 Family and Emergency Contacts	Time and Absences	Personal Information	Skills and Qualifications	Learning			
	My Organization Chart	F	3		Ŕ			
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2. Choose Existing Absences.

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C Time and Abse	nces					
	Current Time Card Open your current time card.	Existing Time Cards Access all of your time cards.	Add Absence Request an absence and submit for approval			
	Absence Balance Review current plan balances and absences taken or requested	Existing Absences View, change or withdraw existing absence requests	Cash Disbursements Sell a portion of your plan balance.			
	Calendar	Team Schedule				

3. Find the absence to delete and click the **pencil** icon.

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< Exist	ing Absences			
	Absences		+ Add	
	Last 6 months ~ Search by type or status Q		Sort By Date V	
	Other Paid Leave: 14 Hours 02/03/2022 - 03/03/2022 Leverhulme Early Career Fellow	Withdrawn		
	Maternity: 365 Calendar Days 21/01/2022 - 20/01/2023	Awaiting approval	1	
	Leave: 7 Hours 31/12/2021 - 31/12/2021	Withdrawn		
	Leave: 7 Hours 30/12/2021 - 30/12/2021	Scheduled	/	
	Leave: 7 Hours 28/12/2021 - 28/12/2021	Scheduled	/	
			Load More Items 1-5 of 6 items	

4. Click **Delete** to remove the absence record.

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Edit Abs	ence	[Delete	Sub <u>m</u> it <u>C</u> ancel
•	*Type Maternity When Expected Date of Childbirth [22/01/2022 6	Actual Date of Childbirth	(b)	
	Will not return to work Planned Start Date 21/01/2022 Planned End Date 20/01/2023 Planned Duration 365 Calendar Days	Actual Start Date Start Date Actual End Date End Date Actual Duration 0 Calendar Days	() ()	

The absence will be withdrawn.

Appendix 1 – Adoption & Surrogacy Leave Fields in P&M

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 as well as an outline for the timeframe for submission within P&M.

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

CITCUITISIAITCES	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 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
Time Frame for	This information should	This information shou	Id This information

Time	This information should	This information should	This information
Frame for	be input and	be input and submitted	should be input and
submission	submitted within seven	within 28 days of getting	submitted at least
within P&M	days of being matched	notification of the	15 weeks before
	with a child, and at least	estimated date of arrival	the baby's due
	28 days in advance of	in the UK.	date.
	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.	