



People and Money system

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Line Manager and School/Department Administrator Guide to Family Leave

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Information to Note:

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

SDA guidance is only included within the 'In Brief' Section of this document.

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 line manager guide '[How to enter leave on behalf of your direct report](#)'. (Under absence and leave heading)

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.

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 '[How to view and approve or reject leave requests](#)' (Under 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. Click [here](#) to see these.

In Brief ...

How to Record Maternity Leave

Line Manager:

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis**  icon against the employee to add the absence against and then select **Add Absence**.
3. Select **Maternity** from the **Type** drop-down list and 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 field **will not return to work**.

4. Select which pay option the employee has chosen from the **Reason** drop-down list and the **Notification Date**.
5. Add a scanned copy of the MATB1 to the attachments.
6. Add any relevant notes in the **Comments** section.
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**.

SDA:

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 appropriate employee
3. Click **Add**
4. Continue from Step 3 in the manager steps above.

How to Record a Maternity Risk Assessment

Line Manager

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis** icon against the employee and then select **Existing Absences**.
3. Click on the **Edit/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 update the **Date carried out** field.
6. Click on the **Submit button**.

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

SDA

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 appropriate employee
3. Click on the maternity absence dates.
4. Add a copy of **the Maternity Risk Assessment** as an attachment
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. Press **Submit**.

How to Attach a MATB1 to a Maternity Record

Please Note: This should, wherever possible, be done at the same time that the initial maternity absence request is submitted. HR are unable to process the entire maternity absence without it. These steps are given in case the document needs to be added a later date.

Line Manager

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis** icon against the employee and then select **Existing Absences**.
3. Click on the **Edit/pencil** icon against the maternity absence
4. Scroll down to the **Attachments** section and upload the MATB1.
5. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.
6. Click on the **Submit** button.

SDA

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 appropriate employee
3. 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 eg: 'Jane Smith MATB1'
6. Click OK
7. Press **Submit**.

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 End-to-End Process User Guide.

Line Manager

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis** icon against the employee to add the absence against and then select **Add Absence**.
3. Select **Surrogacy or Adoption** from the **Type** drop-down list and enter the **Expected Date of Placement**, the **Placement Match Date**, the **Planned Start Date** and the **Planned End Date**.
4. Select which pay option the employee has chosen from the **Reason** drop-down list.
5. Add any documentation to the attachments section.
6. Add any relevant notes in the **Comments** section.
7. Click on the **Submit button**.

SDA

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 appropriate employee
3. Click **Add**
4. Continue from Step 3 in the manager steps above.

How to Record Partner Leave

Line Manager

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis** icon against the employee to add the absence against and then select **Add Absence**.
3. Select **Partner Birth** or **Partner Adoption** (as appropriate) from the **Type** drop-down list
4. Enter the **Expected or Actual Date of Childbirth** and **planned or actual start and end dates**, as known.
5. Add any appropriate comments or attachments
6. Click **Submit**

SDA

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 appropriate employee
3. Click **Add**
4. Continue from Step 3 in the manager steps above.

How to Record Unpaid Parental Leave

Line Manager

1. From the home page, click on the **My Team** tab and then select the **My Team** app.
2. Click on the **Ellipsis** icon against the employee to add the absence against and then select **Add Absence**.
3. Select **Unpaid Parental Leave** from the **Type** drop-down list and 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.
4. Add any relevant notes in the **Comments** section.
5. Click on the **Submit** button.

SDA

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 appropriate employee
3. Click **Add**
4. Continue from Step 3 in the manager steps above.

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 dates

Line Manager

1. From the home page, click on the **My Team** tab and select the **My Team** app.
2. Against the relevant employee click on the **Ellipsis** then select **Existing Absences** from the drop-down menu.
3. Click on the **Edit/pencil** icon against the absence.
4. Edit any Planned leave request dates as required or use the Actual leave dates to record when the child was born and the confirmed dates of the leave.
5. Click **Submit**.

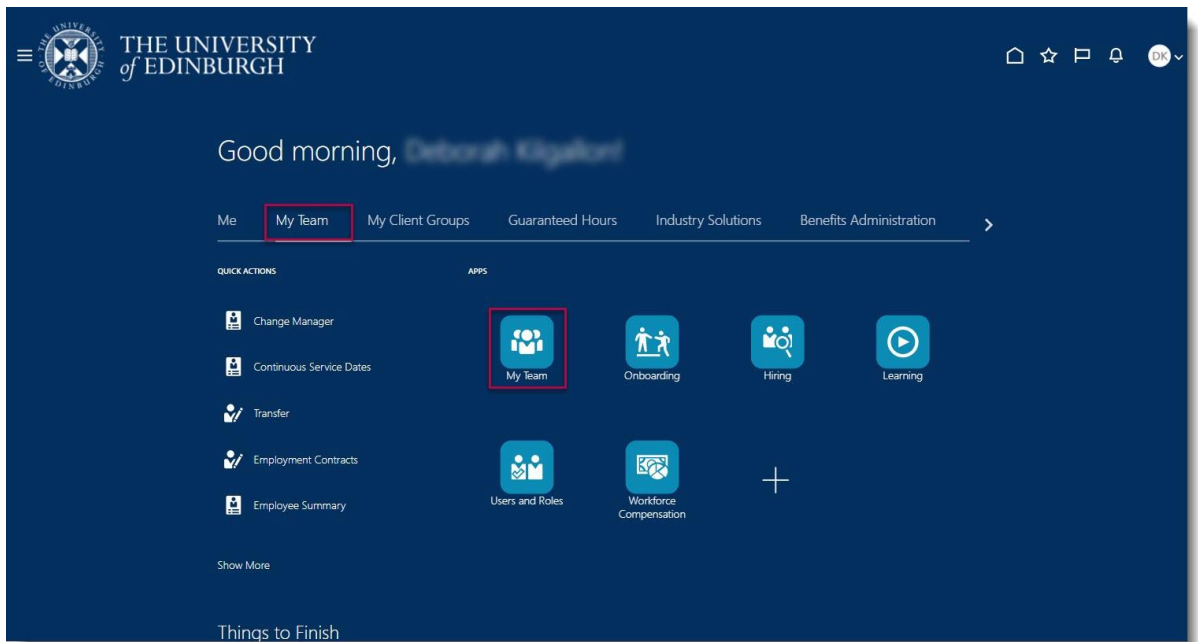
SDA

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 appropriate employee
3. Click on the maternity absence dates.
4. Edit any Planned leave request dates as required or use the Actual leave dates to record when the child was born and the confirmed dates of the leave.
5. Click **Submit**.

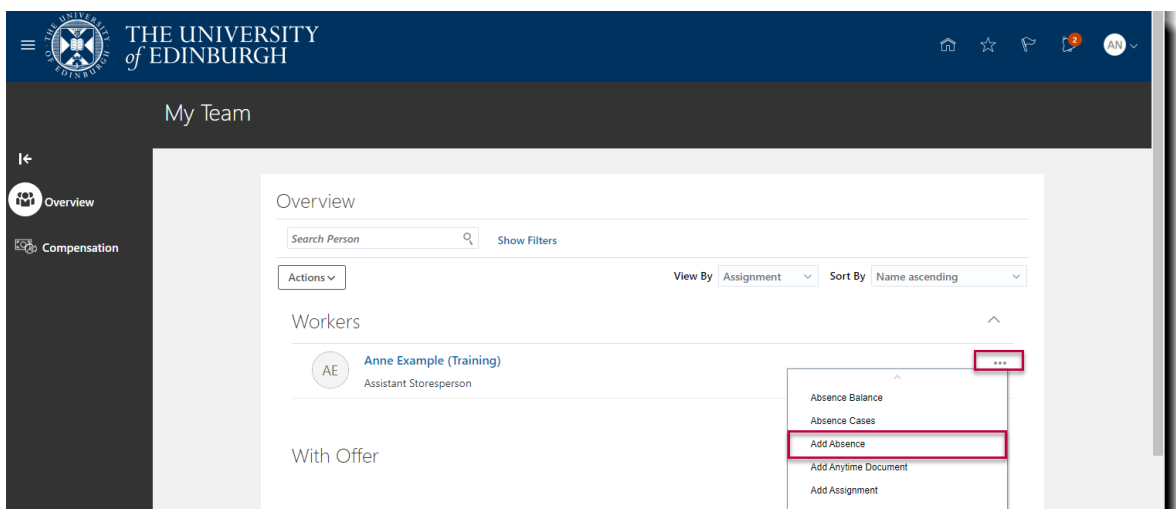
[In Detail ...](#)

How to Record Maternity Leave

1. From the home page, click on the **My Team** tab and select the **My Team** app.



2. Click on the **Ellipsis** icon against the employee to add the absence against and then select **Add Absence**.



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

The screenshot shows the 'Add Absence' form for a user named Anne Example (Training). The form is titled 'Add Absence' and has a 'Type' dropdown menu set to 'Maternity'. Below this, there is a 'When' section with two columns of date fields. The left column contains 'Expected Date of Childbirth', 'Planned Start Date', 'Planned End Date', and 'Planned Duration'. The right column contains 'Actual Date of Childbirth', 'Actual Start Date', 'Actual End Date', and 'Actual Duration'. A red box highlights the 'Expected Date of Childbirth', 'Planned Start Date', and 'Planned End Date' fields, with a red arrow pointing to the 'Planned Start Date' field. Another red box highlights the 'Will not return to work' checkbox, with a red arrow pointing to it. A third red box highlights the 'Type' dropdown menu, which is set to 'Maternity'.

4. 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 Edit an Absence for a Direct Report'.
5. 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**.
6. 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.

AE Add Absence
Anne Example (Training)

Save and Close Submit 8 Cancel

Placement Match Date: 22/02/2021
Planned Start Date: 22/02/2021
Planned End Date: 30/09/2021

Actual Start Date: Start Date
Actual End Date: End Date
Actual Duration: 0 Calendar Days

Details

Reason: Option 3 Notification Date: 29/01/2021

Comments and Attachments

Comments

7. Add any relevant **Comments** as applicable.
8. 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. More detail can be found on this in the How to Record a Maternity Risk Assessment as Complete section of this document.
9. Click on the **Submit** button to complete the absence.

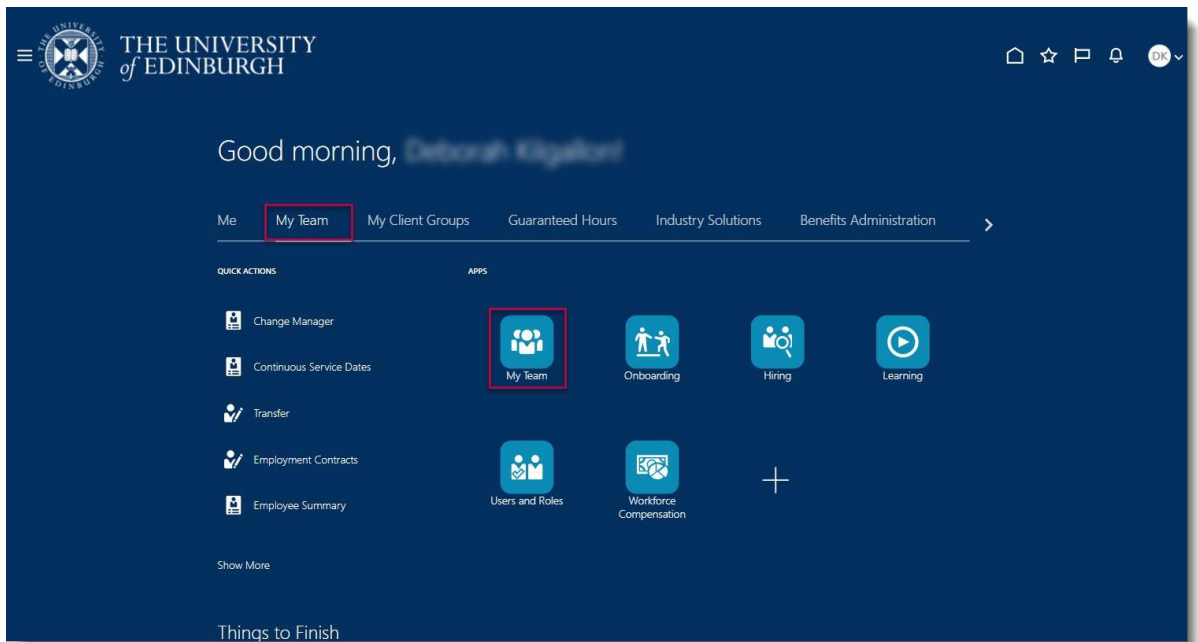
Note: The **Save and Close** button will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

How to Record a Risk Assessment

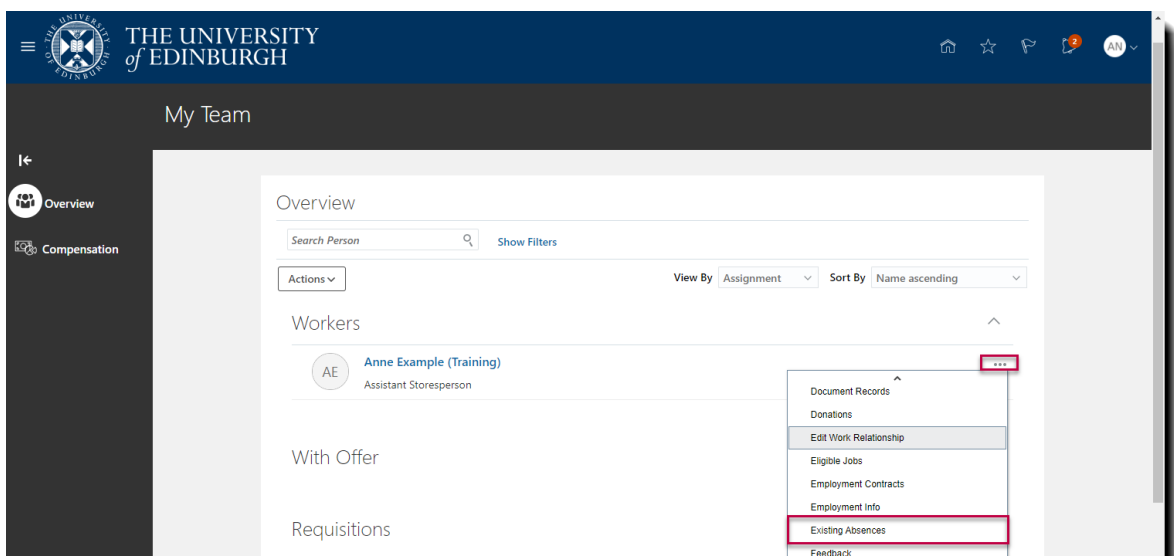
When a Line Manager has been informed that a Direct Report is pregnant, a risk assessment must be carried out. Once completed, the planned maternity absence must be updated to reflect this.

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

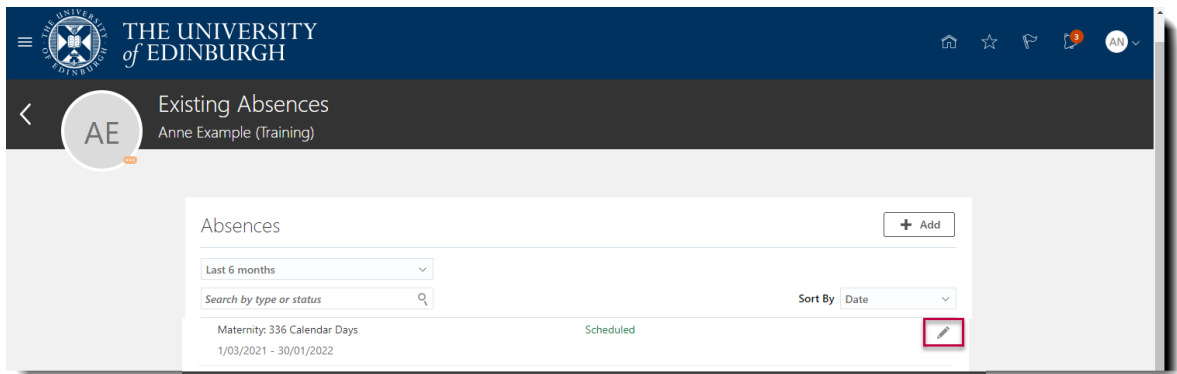
1. From the home page, click on the **My Team** tab and select the **My Team** app.



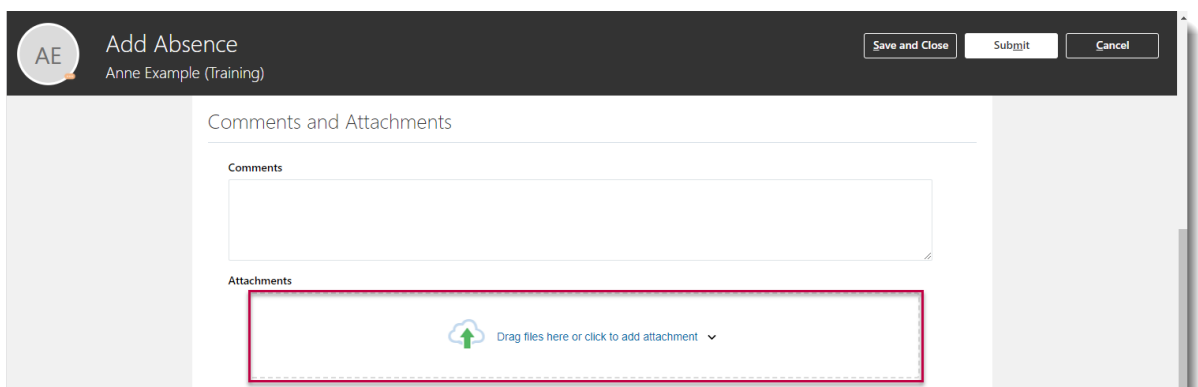
2. Click on the **Ellipsis** icon against the employee and then select **Existing Absences**.



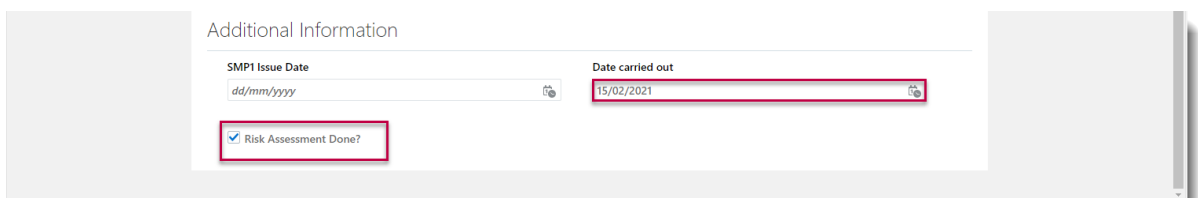
3. Click on the **Edit/pencil** icon against the maternity absence.



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



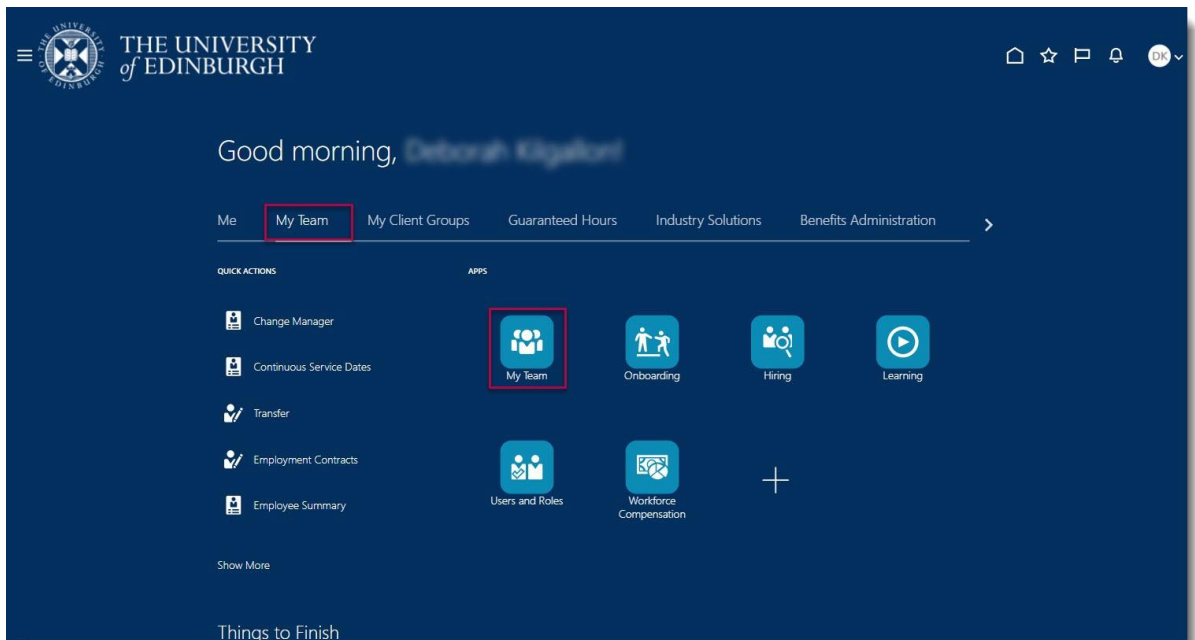
5. Within the **Additional Information** section, put a tick in the field **Risk Assessment Done** box and update the **Date carried out** field.



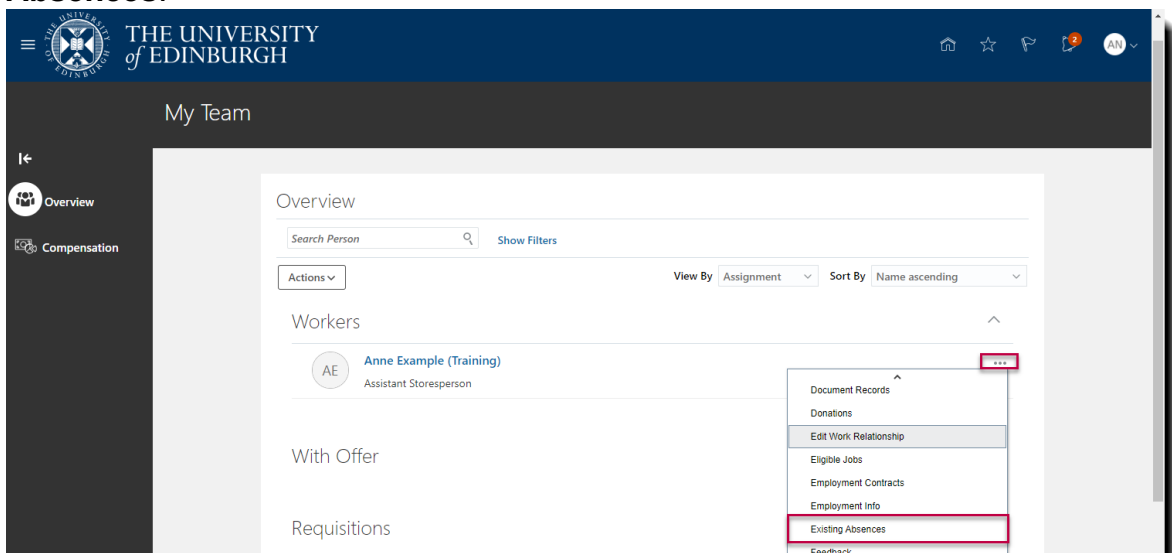
6. Click on the **Submit** button to complete the update.

How to Attach a MATB1 to a Maternity Record

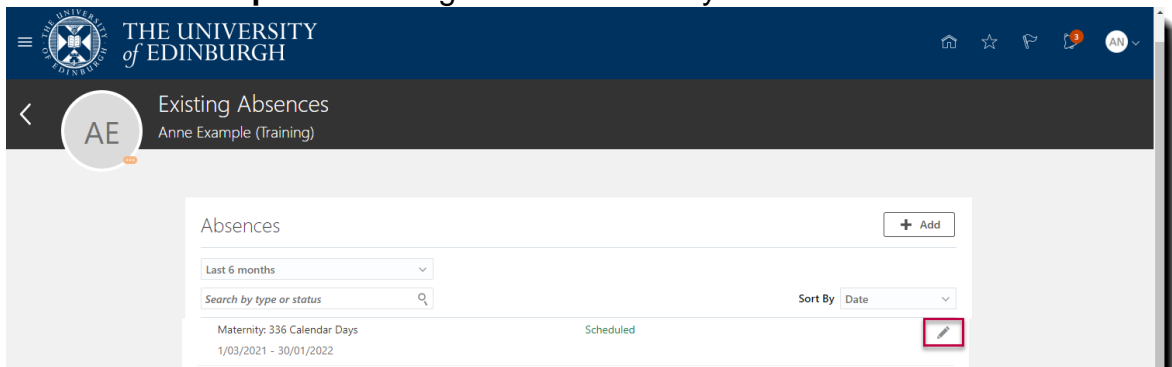
1. From the home page, click on the **My Team** tab and then select the **My Team** app.



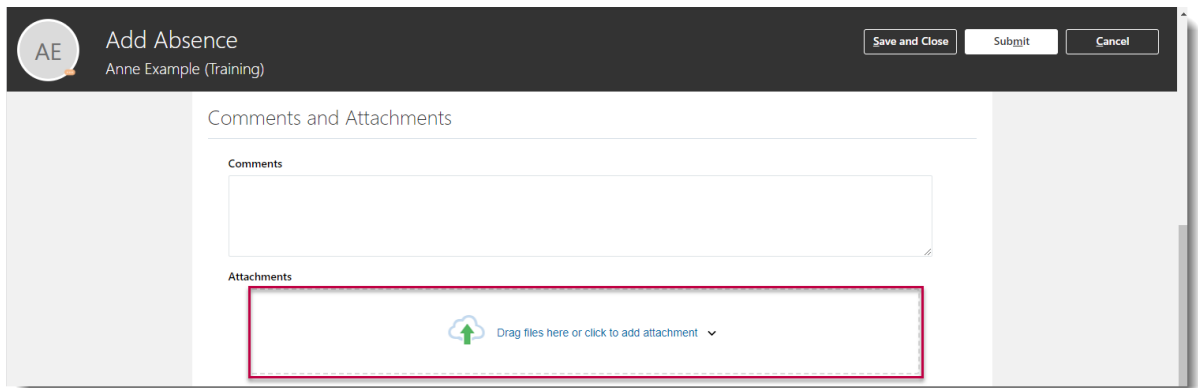
2. Click on the **Ellipsis** icon against the employee and then select **Existing Absences**.



3. Click on the **Edit/pencil** icon against the maternity absence



4. Scroll down to the **Attachments** section and upload the MATB1.

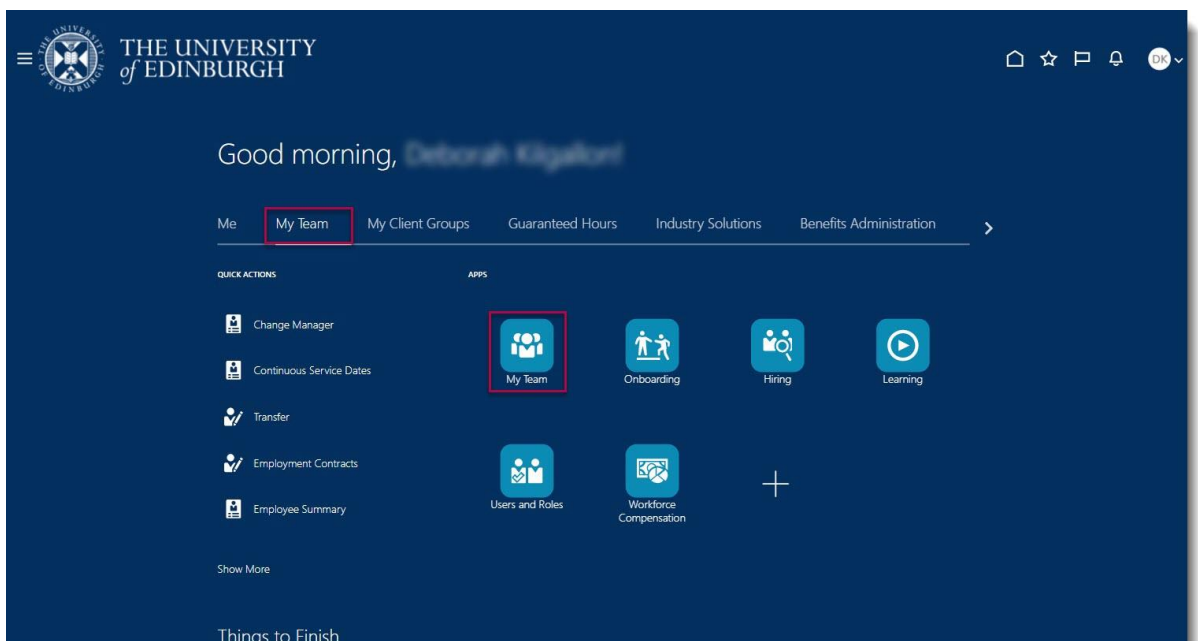


5. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.
6. Click on the **Submit** button.

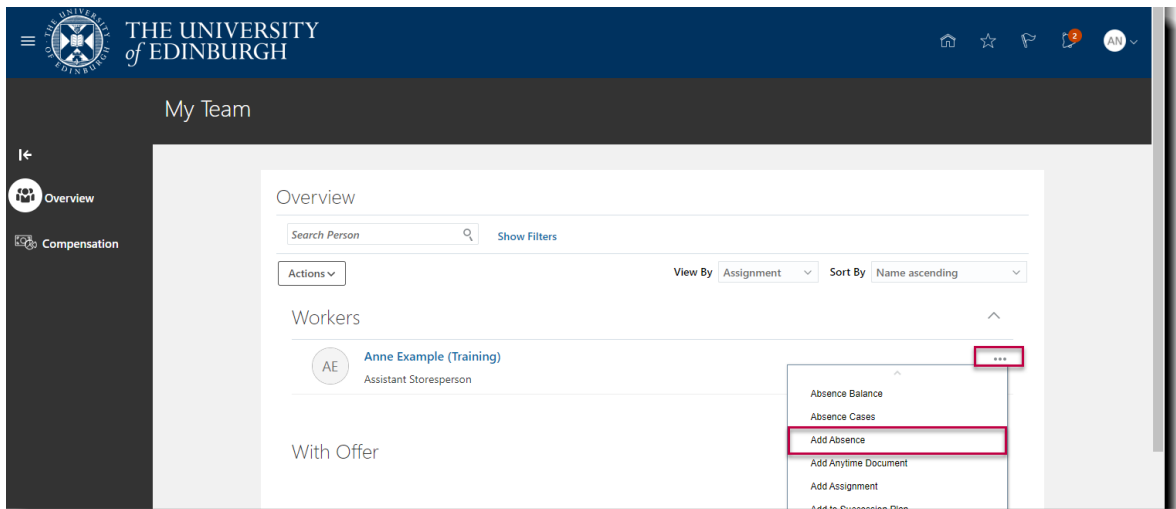
How to Record Adoption or Surrogacy Leave

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 End-to-End Process User Guide

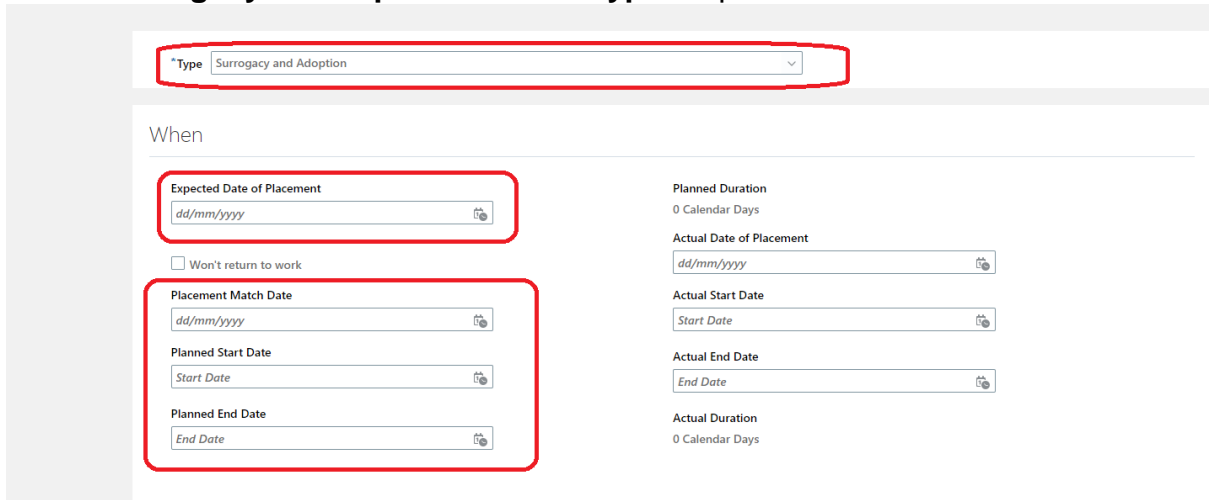
1. From the home page, click on the **My Team** tab and select the **My Team** app.



2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.



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

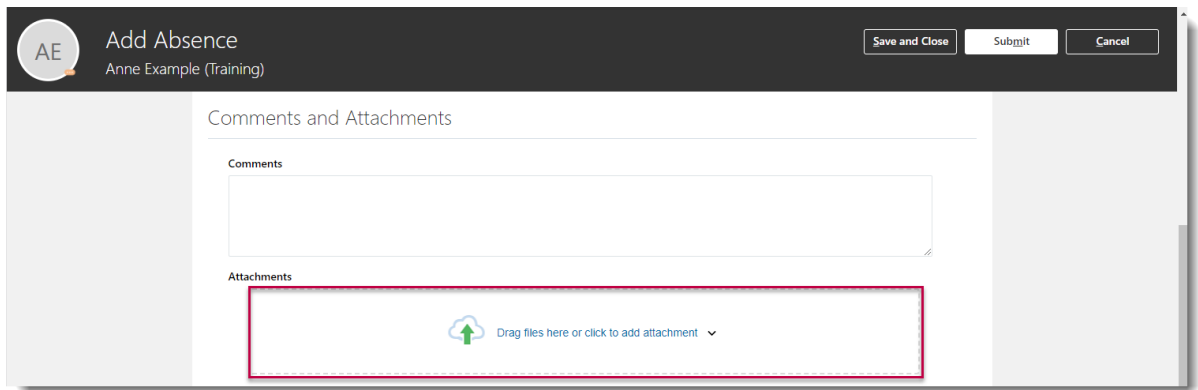


4. Enter the **Expected Date of Placement**, the **Placement Match Date**, the **Planned Start Date** and the **Planned End Date**.

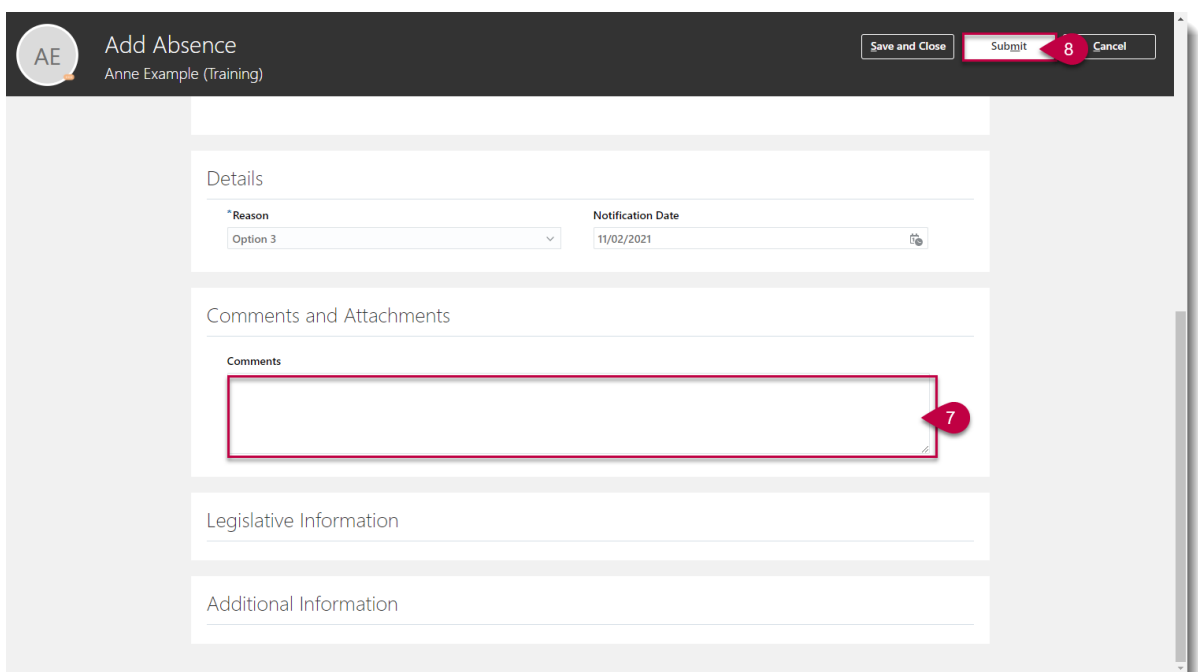
5. If the employee does not plan to return to work, put a tick against the field **Will not return to work** instead of the **Planned End Date**

6. Select which pay option the employee has selected from the **Reason** drop-down list and set the **Notification Date**.

7. Attach relevant documentation in the Attachments section.



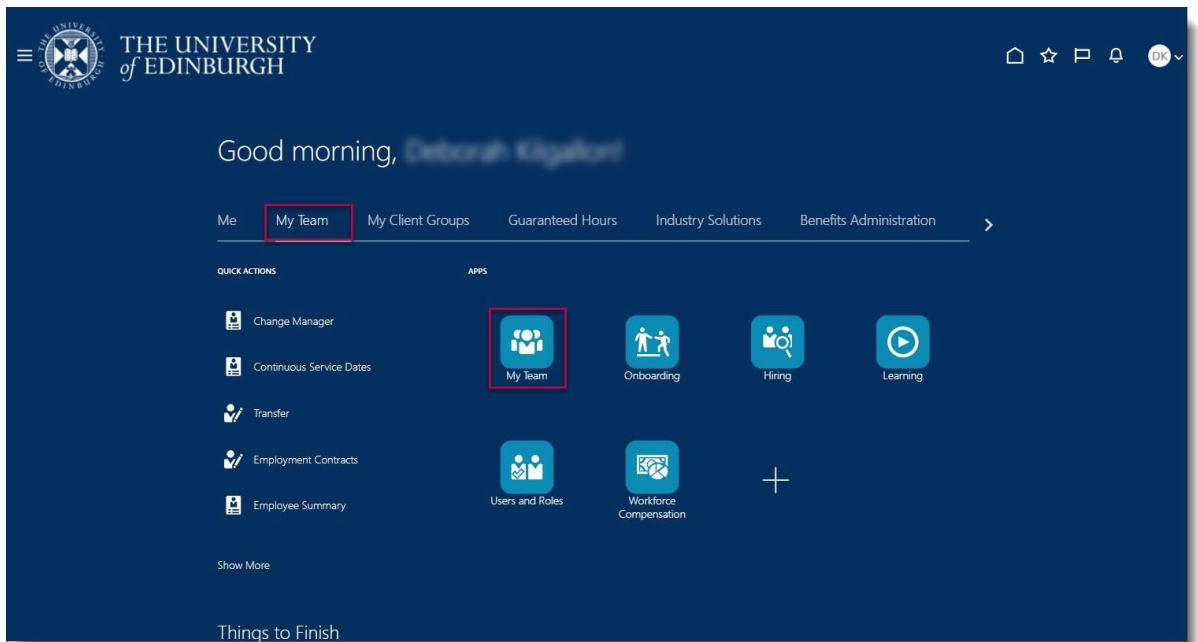
8. Add any relevant notes in the **Comments** section.



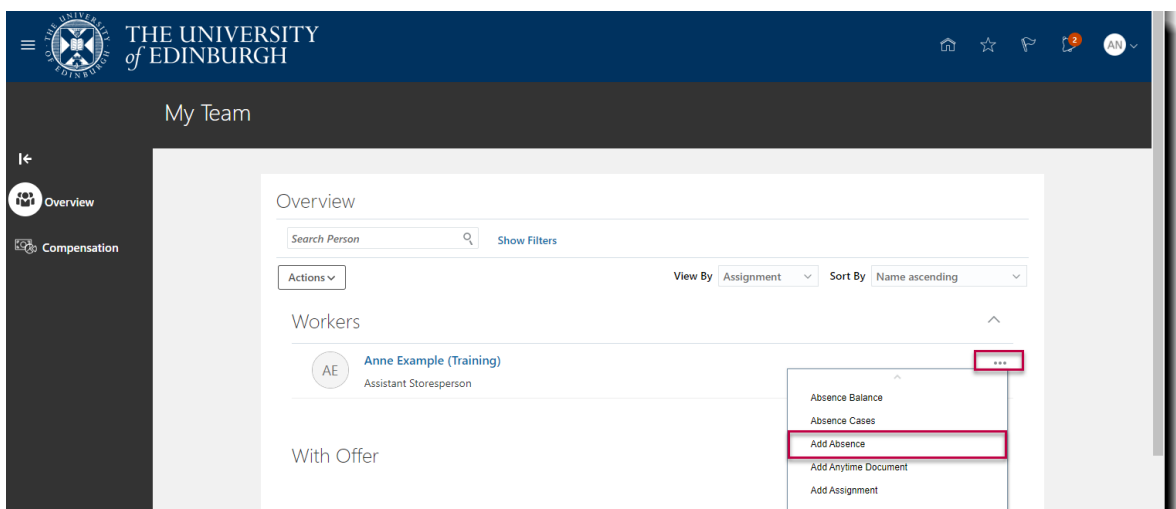
9. Click on the **Submit** button.

How to Record Partner Leave

1. From the home page, click on the **My Team** tab and select the **My Team** app.



2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.



3. Select **Partner Birth** or **Partner Adoption** (as appropriate) from the **Type** drop-down list
4. Enter the **Expected or Actual Date of Childbirth** and **planned or actual start and end dates**, as known.

*Type Partner Birth

When

Expected Date of Childbirth dd/mm/yyyy	Actual Date of Childbirth dd/mm/yyyy
Planned Start Date Start Date	Actual Start Date Start Date
Planned End Date End Date	Actual End Date End Date

Planned Duration
0 Calendar Days

Actual Duration
0 Calendar Days

5. Add any appropriate comments or attachments

AE Add Absence Anne Example (Training) Save and Close Submit Cancel

Comments and Attachments

Comments

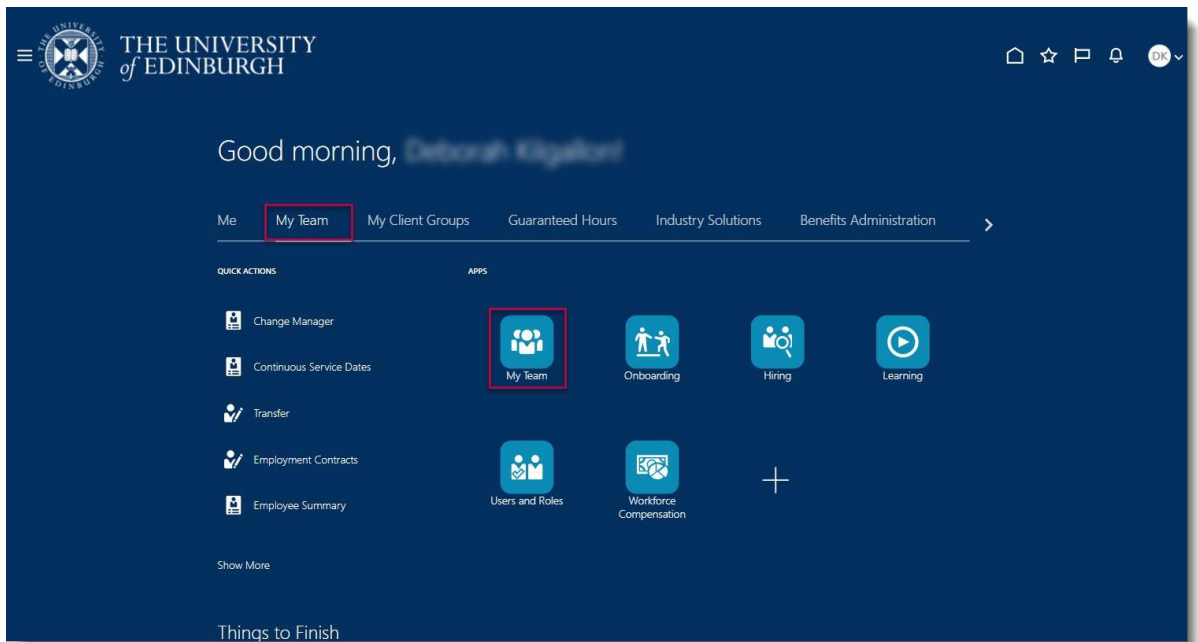
Attachments

Drag files here or click to add attachment

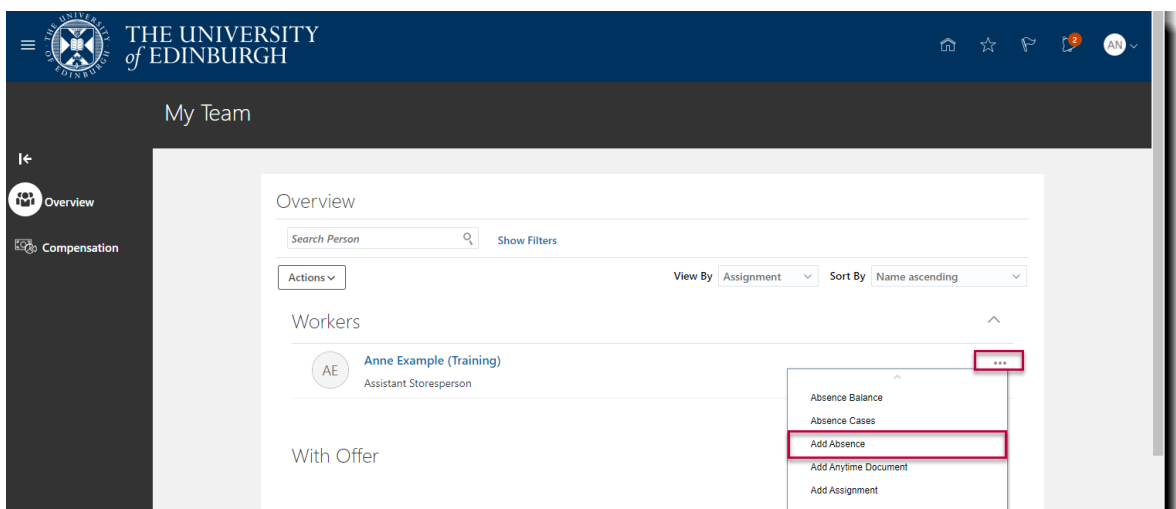
6. Click **Submit**

How to Record Unpaid Parental Leave

1. From the home page, click on the **My Team** tab and select the **My Team** app.



2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.



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

The screenshot shows the 'Add Absence' form in the My Team app. The form is titled 'Add Absence' and shows a user profile 'SK'. The 'Type' dropdown is set to 'Unpaid Parental Leave'. The 'When' section has 'Start Date' and 'End Date' fields highlighted with red boxes. The 'Comments and Attachments' section is also highlighted with a red box. Buttons for 'Save and Close', 'Submit', and 'Cancel' are visible at the top right.

4. Enter the **Start Date** and the **Planned End Date**.

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

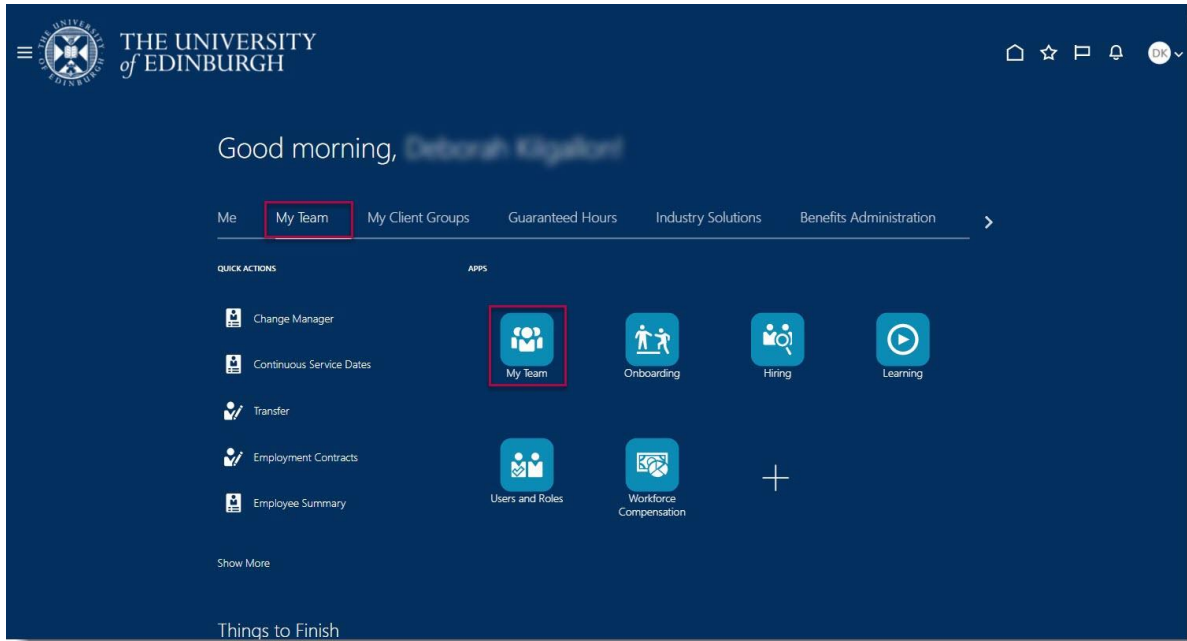
5. Add any relevant notes in the **Comments** section.

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

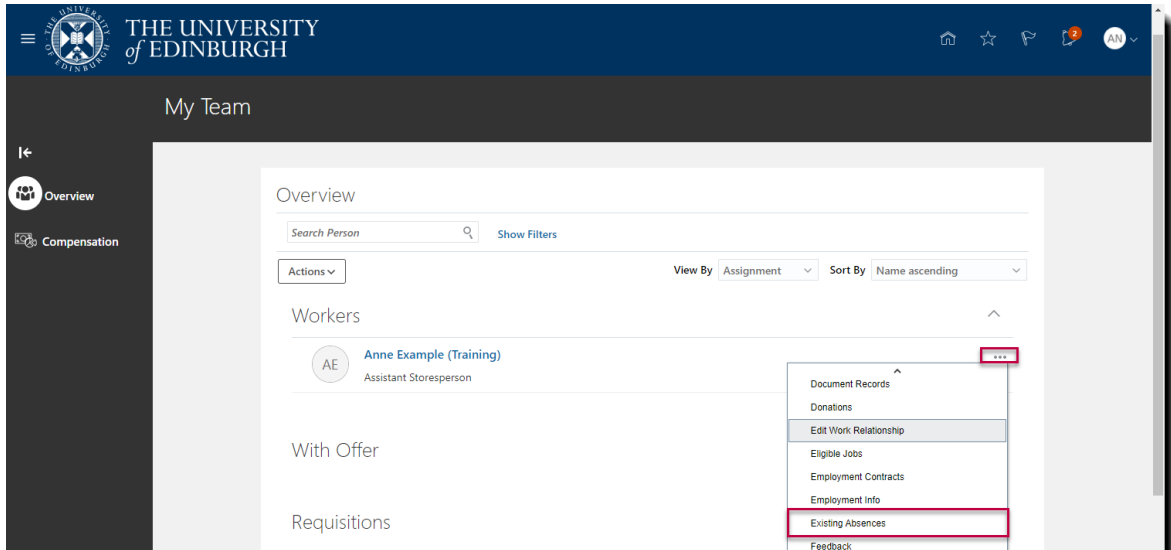
Note: When an employee submits a parental leave request, the line manager will receive a request to approve or reject this. Policy states that Parental Leave requests cannot be rejected. Alternative dates can be suggested, although the employee is not obliged to agree to these. If proposing alternative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

How to Amend Leave dates

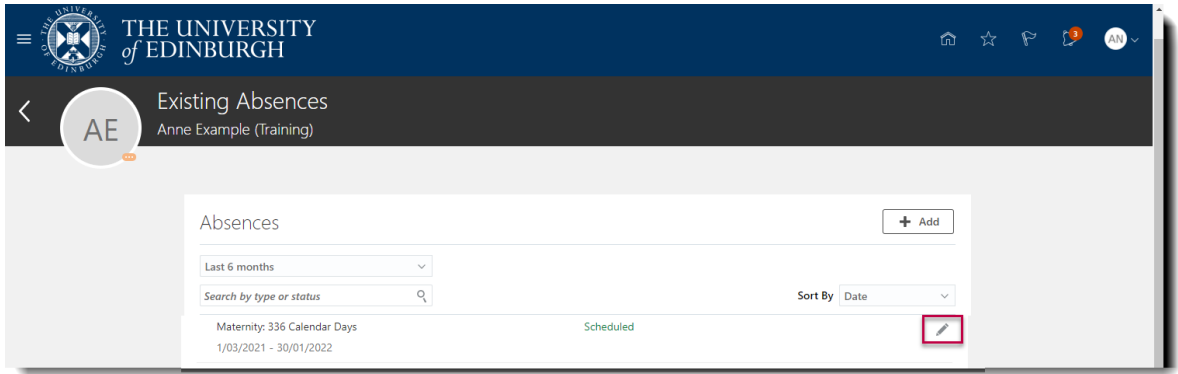
1. From the home page, click on the **My Team** tab and select the **My Team** app.



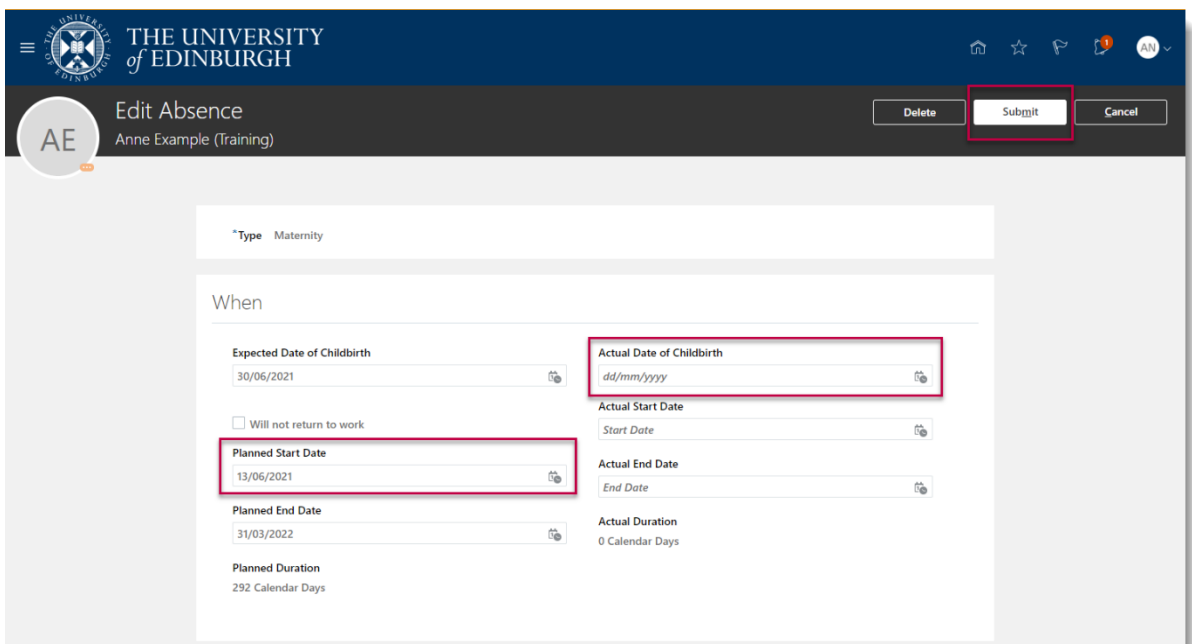
2. Search for and locate the employee whom you wish to amend the dates for and click on the **Ellipsis** then select **Existing Absences** from the drop-down menu.



3. Click on the **Edit** icon against the absence to update.



4. Make the necessary changes to the leave dates or confirm the actual date of childbirth if known. Press **Submit** when the changes are made.



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

<p>Time Frame for submission within P&M</p>	<p>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.</p>	<p>This information should be input and submitted within 28 days of getting notification of the estimated date of arrival in the UK.</p> <p>The actual date the child arrives in the UK can be input at a later date, within 28 days of the arrival date.</p>	<p>This information should be input and submitted at least 15 weeks before the baby's due date.</p>
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