

An employee’s appointment should be amended to reflect the start and return dates for maternity, adoption, paternity and shared parental leave.

What’s changed?

Updated guidance on tracking forms to be provided for adoption leave. Hyperlinks replaced.

May 2020

This guide covers the following process steps:

A: Maternity and adoption leave	1
B: Paternity Leave	3
C: Shared Parental Leave.....	5
D: Tracking documents.....	6
E: Return from leave: amend appointment (and pay if applicable)	8
F: Amending the pay	9
G: Managing leavers/end of contract during maternity leave	11
H: Appendix	12

Before making any changes to the employee record in Core Personnel it is essential that you read full guidance on family leave which can be found on the [HR Support webpage](#). This guidance has recently been updated following the change in eligibility for the University’s family leave schemes.



For **unpaid Parental Leave** please follow **QRG: CH22_Unpaid Leave** instead of this guide.



Note: Where the employee has multiple appointments the changes below must be made on **all** appointments.



Note: Departments are **only** responsible for making amendments to pay on return from the leave. Payroll are responsible for making pay amendments (e.g. to SMP, zero pay) while an employee is on Maternity, Adoption or Shared Parental Leave.

A: Maternity and adoption leave

For the birth mother/primary adopter the first two weeks must be taken as **Maternity** or **Adoption** Leave, as applicable, in all cases including when the employee has opted to take Shared Parental Leave.



Note: Changes should only be made in the payroll month in which they are effective.

Navigate to: Personnel > Maintenance > Personal Profile

1. Search for and open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.

Note: For Fixed Term appointments, click View Appointment and make a note of the current **Target End Date**.


3. Click the Amend Appointment button. The *Amend Appointment Details* window opens:

4. Complete/select the fields as below:

Field Name (*mandatory)	Description
Effective Date*	Enter the date that the change will take place.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
Action*	Select the action Maternity or Adoption / Maternity Leave (no SMP included) or Adoption Leave (no SAP included) as applicable

Reason Code*	Select the relevant reason e.g. Maternity Leave Start / Maternity Leave Start (no SMP included)
Comments	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.



Note: Payroll must be notified by email or phone if payslips are to be sent to an address other than the **Location** address, e.g. home address, during the leave period.

NB: If the employee has opted to take Shared Parental Leave you will also need to follow the steps in section C.

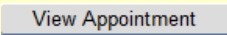
B: Paternity Leave



Note: Changes should only be made in the payroll month in which they are effective.

1. Search for and open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.



Note: For Fixed Term appointments, click  and make a note of the current **Target End Date**.

3. Click the  button. The *Amend Appointment Details* window opens:

Amend Appointment Details: Jamie Clarendon


Post Details Post Number: 228803 RESEARCH FELLOW Post Profile Type: 2 Fixed Term Effective Date: Target End Date: Planned End Date: 12-JUL-2017 Status: Commenced		Post Details Please enter the post information for the employee on this screen. Details such as department, job title and cost centre may be entered here.	
Hierarchy Details Company: 10 UNIVERSITY OF OXFORD Division: 20 FUTURE TECHNOLOGIES Sub Division: SD00 FUTURE TECHNOLOGIES Level 4: 9ZW001 FUTURE TECHNOLOGIES Management Unit: 9ZW0 FUTURE TECHNOLOGIES Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES Pay Administered by: ZWDEP FUTURE TECHNOLOGIES Cost Centre: ZW0000000000 INSTITUTE OF FUTURE TECHNOLOGIES Location: 991 ZW - FUTURE TECHNOLOGIES Work Group: 100003 ZW AI Research Team College Association: 1 DEFAULT/NOT APPLICABLE		Appointment Details Post Type: 2 FIXED TERM Project: Job Category: Job Title: SRF Job Text SENIOR RESEARCH FELLOW Employee Status: 2 FIXED TERM Sub Status: 1 FULL TIME Category: 2 RESEARCH ONLY Sub Category: AR RESEARCH FELLOW Hours: 37.50 Weeks: FTE: 1.0000 FTE Hours: 37.50 FTE Weeks: 52.0000 FTE%: 100 Future Override FTE: Pensionable: <input type="checkbox"/> Acting Up Ind: <input type="checkbox"/> Secondment: <input type="checkbox"/> Action: PL PATERNITY Reason Code: PLOS PATERNITY LEAVE ORD START Replaces Employee: Comments:	


OK Cancel

4. Complete/select the details below:

Field Name (*mandatory)	Description
Effective Date*	Start date of leave.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
Action*	Select the action Paternity or Paternity Leave (no SPP included)
Reason Code*	Select the relevant reason e.g. Paternity Leave ORD Start or Paternity Leave Start (no SPP included)
Comments	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.

 **Note:** For 'Ordinary Paternity Leave' there is no requirement to amend the pay.

If the employee has opted to take Shared Parental Leave you will also need to follow the steps in section C.

C: Shared Parental Leave

For **continuous Shared Parental** Leave you will only need to follow the steps below once.

For **discontinuous Shared Parental** Leave you will need to follow the steps below **and** the steps in section E for each occurrence of Shared Parental Leave (up to a maximum of three).



Note: Changes should only be made in the payroll month in which they are effective. Please **DO NOT** record all of the dates in advance as you will not be able to record any other appointment changes should they occur.

1. Search for an open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.




Note: For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

4. Complete/select the details below:

Field Name (*mandatory)	Description
Effective Date*	Start date of leave.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
Action*	Select the action Shared Parental Leave or Shared Parental Leave (no SHPP)
Reason Code*	Select the relevant reason e.g. Shared Parental Leave Start or Shared Parental Leave Return (no SHPP)
Comments	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.



Note: Payroll must be notified by email or phone if payslips are to be sent to an address other than the **Location** address, e.g. home address, during the leave period.

7. To record an employee's return from shared parental leave follow the steps in Section E.

D: Tracking documents

The following forms need to be sent to payroll and should also be recorded in Core Personnel:

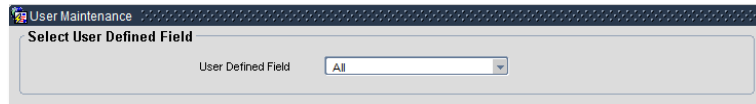
- For maternity: MATB1 and [Maternity payroll leave form](#)
- For paternity: Paternity plan and [Paternity payroll leave form](#)
- For adoption: [Maternity payroll leave form](#) or [Paternity payroll leave form](#) depending on the type of adoption leave being taken.
- For Shared Parental Leave: as above PLUS Maternity curtailment notice (*if applicable*), Notice of entitlement, Notice to book leave and ShPP form for Payroll. Follow the relevant link below:

[SPL Notifications - Birth](#) OR [SPL Notifications - Adoption](#)

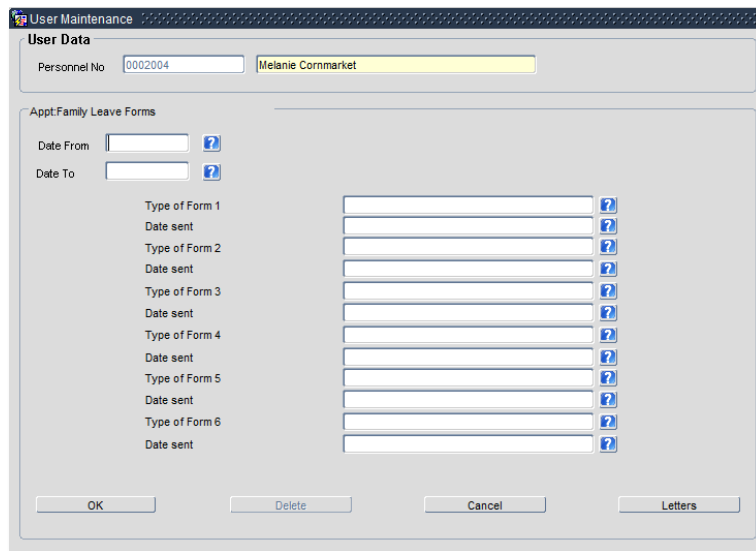


Note: Where the employee has multiple appointments, documentation is only required once. It is recommended that the department with the Primary appointment manages and logs the documents as below.

1. Click the **Appointment Details** button.
2. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



3. Click to display **User Defined Field** List of Values.
4. Select **Appt:Family Leave forms**.
5. Click **New**.



6. Complete/select the details below:

Field Name (*mandatory)	Description
Date From*	Date the first form is being logged.
Date To	Leave blank
Type of Form 1 – 6	Select the relevant form from the drop down list, working from 1 thru 6 as applicable.
Date sent*	Enter the date the form was sent to Payroll.

7. Click **OK**, then click . Exit all windows back to the Personnel main screen.

E: Return from leave: amend appointment

You must update an employee's appointment to record their return from family leave.



Note: Changes should only be made in the payroll month in which they are effective.



Note: Where the employee has multiple appointments the changes below must be made on all appointments.

1. Search for an open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.



Note: For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:




Note: Don't forget you will also need to amend the hours/FTE on the relevant appointment/s if the employee is returning on different hours.

4. Complete/select the details below:

Field Name (*mandatory)	Description
Effective Date*	Enter the actual date that the employee is returning.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
Sub status	If required, amend as appropriate, e.g. part-time.
Hours	If required, update the Hours to be worked per week
FTE Hours	Ensure FTE Hours are set to represent normal full time hours for a full time equivalent.
Action*	(1) If returning with no changes to hours enter the relevant action e.g. Maternity (2) If returning AND changing hours enter relevant action, e.g. Hours Decreased .
Reason Code*	Select the relevant reason e.g. Maternity Leave Return or Maternity leave Return (no SMP included)
Comments	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return back to the *Appointment Details* window.



Note: Changing date/s (if required)

If, after you have entered an appointment change, the effective date needs to be amended please contact the HRIS Support Centre to amend the date.

F: Return from leave: Amending the pay

1. When recording a return from leave you will also need to amend their pay details as below.




Note: This step is **not** required when returning from 'Ordinary Paternity Leave'.



Even if the hours/FTE have not changed it is essential that this section is completed and the appropriate reason is selected and saved. The returning employee may not get paid if this step is not completed.

- Click the **Appointment Details** button. The *Post Appointment Maintenance* window opens.
- Go to **Selection > Amend Pay Rate**.

- Complete the fields as below:

Field Name (* mandatory)	Description
Effective Date *	Return date.
Multiplier *	If necessary, change back to previous e.g. 1 for a full time post.
Actual Pay	Will reflect salary to be paid, check it is as expected.
Reason *	Select Mat/Pat/Adoption/Shared Parental Leave Return as appropriate
Comments * 	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll. Note: If hours were also changed note ' <i>also changed hours on return from maternity</i> ' here.

- Click **OK**. The *Add Salary Amendment* window closes.
- Click **OK**. The system will ask if you are sure you want to add this salary amendment. Click **Yes**.

7. The *Maintain HR Salary Amendments* window opens.

NEXT STEPS: If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away.

G: Managing leavers/end of contract during maternity leave

If an employee resigns or their fixed term contract ends whilst they are on maternity leave follow the steps in **QRG: EA1 Ending Appointment(s)**.

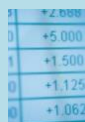


Note: We are still obliged to pay SMP, subject to eligibility, to anyone who is employed by us at their qualifying week, even if their leaving date falls before the start of the Maternity Pay Period.

When processing the employee as a leaver please ensure that you update the leaver UDF with the following details as applicable:

- If SMP will be payable
- Address P45 is to be sent to
- Details of outstanding holiday pay
- Details of redundancy payments
- Details of course fees due to be re paid

Full details are contained within the relevant QRG.



	+2.000
D	+5.000
S	+1.500
D	+1.125
D	+1.062

Useful Reports

To help track leave and monitor appointment changes don't forget to regularly run:

[PERDEP20 Monthly Personnel Changes](#)
[PERDEP45 Employee Absence](#)

H: Appendix

Recording Family Leave against an appointment in CorePersonnel

		Step 1			Step 2			Step 3			Step 4			Additional Information
		Leave start			Leave return			Leave start			Leave return			
Scenario	Effective Date	Action	Reason	Effective Date	Action	Reason	Effective Date	Action	Reason	Effective Date	Action	Reason		
1	Maternity leave only	Date leave begins	Maternity or Maternity Leave (no SMP included)	Maternity Leave Start or Maternity Leave Start (no SMP included)	Date of return	Maternity or Maternity Leave (no SMP included)	Maternity Leave return or Maternity leave Return (no SMP included)	Not applicable						
2	Maternity leave and Shared Parental leave	Date leave begins	Maternity or Maternity Leave (no SMP included)	Maternity Leave Start or Maternity Leave Start (no SMP included)	Date of return	Maternity or Maternity Leave (no SMP included)	Maternity Leave return or Maternity leave Return (no SMP included)	Date leave begins	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave Start or Shared Parental Leave Start (no SHPP)	Date of return	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave return or Shared Parental Leave Return (no SHPP)	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time
3	Paternity leave only	Date leave begins	Paternity or Paternity Leave (no SPP included)	Paternity Leave Start or Paternity Leave Start (no SPP included)	Date of return	Paternity or Paternity Leave (no SPP included)	Paternity Leave return or Paternity Leave Return (no SPP included)	Not applicable						
4	Paternity leave and Shared Parental leave	Date leave begins	Paternity	Paternity Leave Start	Date of return	Paternity	Paternity Leave return	Date leave begins	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave Start or Shared Parental Leave Start (no SHPP)	Date of return	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave return or Shared Parental Leave Return (no SHPP)	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time

Please refer to the [HR Support webpages](#) for full guidance on family leave.

CH10 – Family leave

5	Adoption leave only	Date leave begins	Adoption or Adoption Leave (no SAP included)	Adoption Leave Start or Adoption Leave Start (no SAP included)	Date of return	Adoption or Adoption Leave (no SAP included)	Adoption Leave Return or Adoption Leave Return (no SAP included)	Not applicable						
6	Adoption leave and Shared Parental leave	Date leave begins	Adoption	Adoption Leave Start	Date of return	Adoption	Adoption Leave Return	Date leave begins	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave Start or Shared Parental Leave Start (no SHPP)	Date of return	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave return or Shared Parental Leave Return (no SHPP)	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time
7	Shared Parental leave only	Date leave begins	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave Start or Shared Parental Leave Start (no SHPP)	Date of return	Shared Parental Leave or Shared Parental Leave (no SHPP)	Shared Parental Leave return or Shared Parental Leave Return (no SHPP)	If Shared Parental leave is being taken discontinuously steps 1 and 2 will need to be repeated up to twice more at the appropriate time						

Please refer to the [HR Support webpages](#) for full guidance on family leave.