**Paternity leave, Parental leave and Shared Parental leave**

**Managers Checklist**

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| **(a separate checklist for colleagues using** [**Maternity leave/ Adoption leave**](https://www.hw.ac.uk/services/human-resources/human-resources-forms.htm) **is available for managers)** | |
| **Checklist – The HWU HR website has all relevant up to date policies - see** https://www.hw.ac.uk/services/human-resources-policies.htm |  |
| **Manager:** |  |
| **Employee’s name** |  |
| **1.On notification of the Family leave requirement** |  |
| Where the colleague is expecting a new child congratulate the employee, and confirm their plans to communicate their news to other team members. |  |
| Provide copy of [Supporting Family Life Overarching Policy](https://www.hw.ac.uk/services/docs/SupportingFamilyLifeOverarchingPolicyUKcampuses.pdf) and relevant procedures:  [Paternity leave (for use within eight weeks of the birth or adoption of the child.)](https://www.hw.ac.uk/services/docs/PROCEDUREapplyingforPaternityLeave.pdf)  [Shared parental leave](https://www.hw.ac.uk/services/docs/PROCEDUREapplyingforSharedParentalLeave.pdf) (for use within first year of baby’s birth)  [Parental leave](https://www.hw.ac.uk/services/docs/PROCEDUREapplyingforParentalLeave.pdf) (applicable for each child under the age of 18) |  |
| Refer employee to HR Services, if required, to explain entitlement to paternity pay and/or shared parental pay. |  |
| Agree date for planning meeting to discuss leave arrangements for family leave cover. |  |
| **2. Ante-natal appointments** |  |
| Allow time off for paid ante-natal appointments or, adoption appointments in line with the [University’s Supporting Family Life – Overarching Policy](https://www.hw.ac.uk/services/docs/SupportingFamilyLifeOverarchingPolicyUKcampuses.pdf) |  |
| **3. Notifications** |  |
| The employee should notify their intention to take leave in line with the relevant procedure. They should also complete the appropriate documentation as outlined in the procedure and submit this to Human Resources as soon as reasonably practicable. <https://www.hw.ac.uk/services/human-resources/human-resources-forms.htm> |  |
| **4. Planning for Family related leave** |  |
| Arrange a meeting to discuss the employee’s intentions to take a family related period of leave |  |
| Ensure they employee is aware of the notification requirements and meets eligibility criteria for the relevant leave |  |
| Discuss how long they intend to take off on leave and likely dates. |  |
| Consider and discuss annual leave arrangements for current holiday leave year and upon return to work. |  |
| Payroll will notify the pension scheme of your leave period. Please refer to the pension website [USS](https://www.uss.co.uk/members/members-home) or [Lothian Pension Fund](http://www.lpf.org.uk/info/3/current_members) or contact payroll with any queries |  |
| Provide relevant University policies including details of the [HWU Coaching Programme](https://intranet.hw.ac.uk/ps/hrd/od/Pages/Coaching-at-Heriot-Watt-.aspx) |  |
| Inform staff member about the Childcare Voucher Schemes <https://intranet.hw.ac.uk/ps/hrd/REE/Pages/Childcare-Vouchers.aspx> |  |
| Inform staff member about the availability of Edinburgh on-campus nursery ([Pinocchio's](http://www.pinocchiosnursery.co.uk/)). There is no nursery based on the Borders campus however the nearest day nursery to the campus is [Osito Nursery](http://www.ositonurseryltd.co.uk/). |  |
| Communicate that any requests to work flexibly should be submitted in good time (3 months notice normally required) so they can be carefully considered |  |
| Plan and organise family leave cover - discuss and plan with line manager probable start of leave date and expected return date. Inform relevant line management (Head of School/ Director of Service). In cases of longer duration shared parental leave consider secondment opportunities, internal advertising, external advertising (if required) and start recruitment process (if appropriate). |  |
| Agree contact arrangements for the leave period (phone, email, how often, and for what purpose – work/social etc.) Confirm that contact will be made if any local and school changes; changes to role or funding and at beginning of promotion process. |  |
| Discuss/agree ‘SPL in-touch' (SPLIT) days for shared parental leave |  |
| Let the staff member know that there is a rest room in Lord Balerno Building and the [Nursing Room,](https://intranet.hw.ac.uk/ps/hrd/HR%20Internal/Document%20Library/Nursing%20Room%20Facilities.pdf) Hugh Nisbet Building (Edinburgh Campus). |  |
| If the PDR round is due to take place during the employee’s leave period, hold an interim PDR four weeks before they leave to discuss performance to date (agree rating) |  |
| **4a. In addition for or academic/research staff:** |  |
| Where the staff member is externally funded, check the terms and conditions of the funder - discuss with School Finance team. |  |
| Inform the grant funding body of interim arrangements (if appropriate) include the School Finance Office and Research Grants Office in any correspondence. |  |
| Discuss with Finance Manager any funding with year-end closure to ensure carry forward to next financial year |  |
| Discuss how day-to-day supervision of PhD students will be managed during absence. |  |
| Discuss who will assume interim responsibility for supervising technicians or researchers on externally funded projects |  |
| Discuss and inform Building Safety Officer of who will be responsible for lab safety during leave period. |  |
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| **4.During the period of Family leave** |  |
| Send congratulations of baby’s birth or matching date (as per school/service norms) |  |
| Staff member to notify line manager if they intend to use Shared Parental leave giving appropriate notice. Manager should contact HR Services for advice. |  |
| Finalise arrangements for any agreed ‘SPL in-touch' (SPLIT) days for shared parental leave and arrange payment for these as they occur - inform School Finance team. |  |
| Keep in contact with staff member regularly during the leave as agreed. |  |
| Keep staff member informed of local and school changes during leave period. In particular, be sure to notify the employee of any major workplace changes that may affect them, such as changes to organisational structure, role or funding. |  |
| Invite staff member in to social events and communicate events |  |
| Notify staff of any promotions round (if these fall during the family leave period) and invite them into Promotions workshops. |  |
| Staff member to submit request for Flexible working (min 3 months in advance) if appropriate |  |
| Staff member to notify line manager if intend to return to work from SPL early (minimum 8 weeks notice) or extend it further |  |
| **5.On return from Family leave** |  |
| Check how long they have been away from work |  |
| Ask how much contact have they had with work and work colleagues whilst off. How beneficial was the work contact? |  |
| Ask if they used their available SPLIT days, if applicable (check all payments have been received)? |  |
| Check if they have any family caring responsibilities still causing them concern? |  |
| Check if they need to be referred to the University Occupational Health Advisor or Counselling. Contact your HR Consultant to make the necessary referral. |  |
| Check if they require any adjustments in the workplace for their return to work? |  |
| Notify them that the [Travel & Expenses policy](https://intranet.hw.ac.uk/ps/Finance/Document%20Library/HWU%20Travel%20and%20Expenses%20Policy%20v1.0%20%203%20October%202016.docx), (section 4.14) outlines the University’s position regarding childcare costs. |  |
| Check if they require any adjustments to your work pattern either short term or longer term? |  |
| Arrange re-induction which may include:   * introductions to new members of staff, * information on new/revised policies or changes that have occurred during the leave period. * School induction paperwork can be used as a reminder. |  |
| Complete Forward Job Plan within one month of return as part of PDR process (for leave over three months in duration) |  |
| Consider workload issues during settling in period and beyond (for leave over three months in duration). Agree the balance of research, admin, teaching and any priorities with academic staff member. |  |
| Follow up on any agreed statutory or non –statutory Flexible working request resulting in a change in hours/work location or /inform School/HR/Payroll |  |
| Consider development activities and support to minimise disruption as a result of the career break /childcare responsibilities on the returners career |  |
| Consider any steps that might be taken to help minimise the impact of the career break/childcare responsibilities on the returners career |  |
| Hold review meeting with employee after month 1 and month 3 of return to work (this can be as part of the interim or full PDR) to check no further issues or concerns. |  |
| **Any Time During the Process** |  |
| Contact Human Resources for further advice and guidance. Details of whom to contact for specific types of information is available [here](https://intranet.hw.ac.uk/ps/hrd/Pages/Who's-Who-in-HRD-.aspx) |  |
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| Planning meetings: |  |
| Signed by manager and date |  |
| Signed by employee and date |  |
|  |  |
| Return to work review: |  |
| Signed by manager and date |  |
| Signed by employee and date |  |
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| 1 month post return review: |  |
| Signed by manager and date |  |
| Signed by employee and date |  |
|  |  |
| 3 month post return review: |  |
| Signed by manager and date |  |
| Signed by employee and date |  |
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