



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.

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.

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

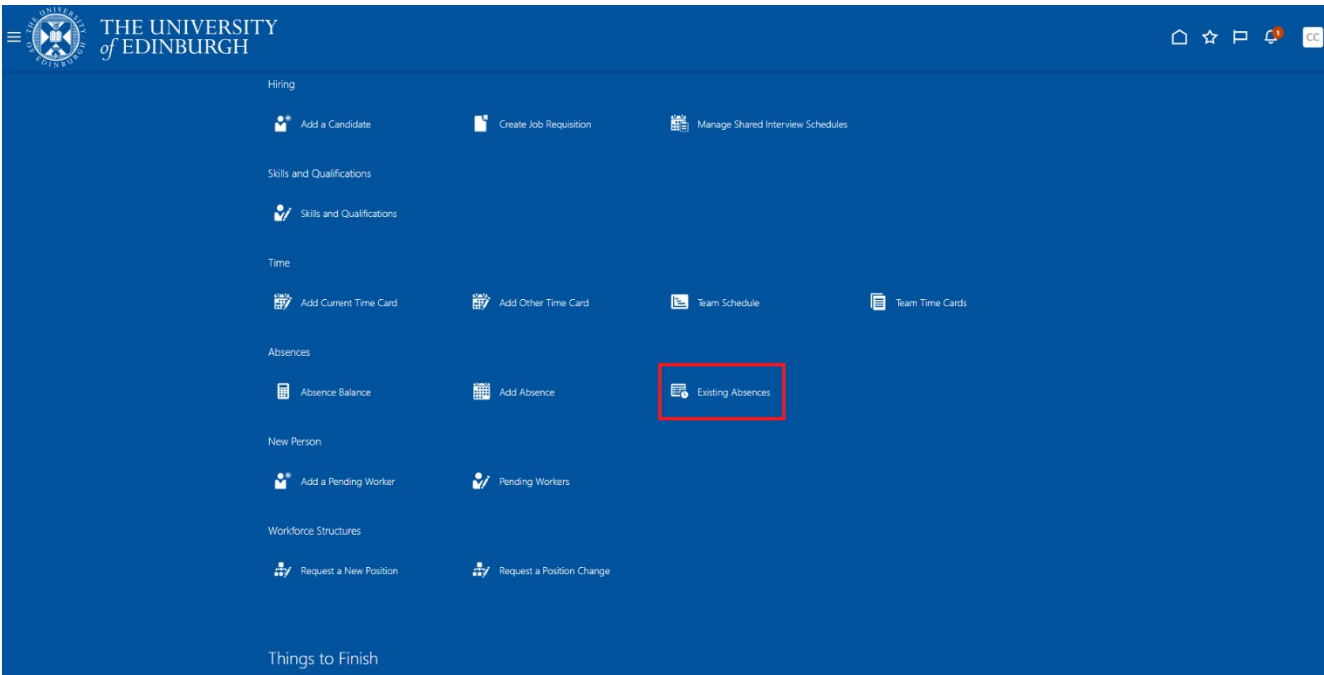
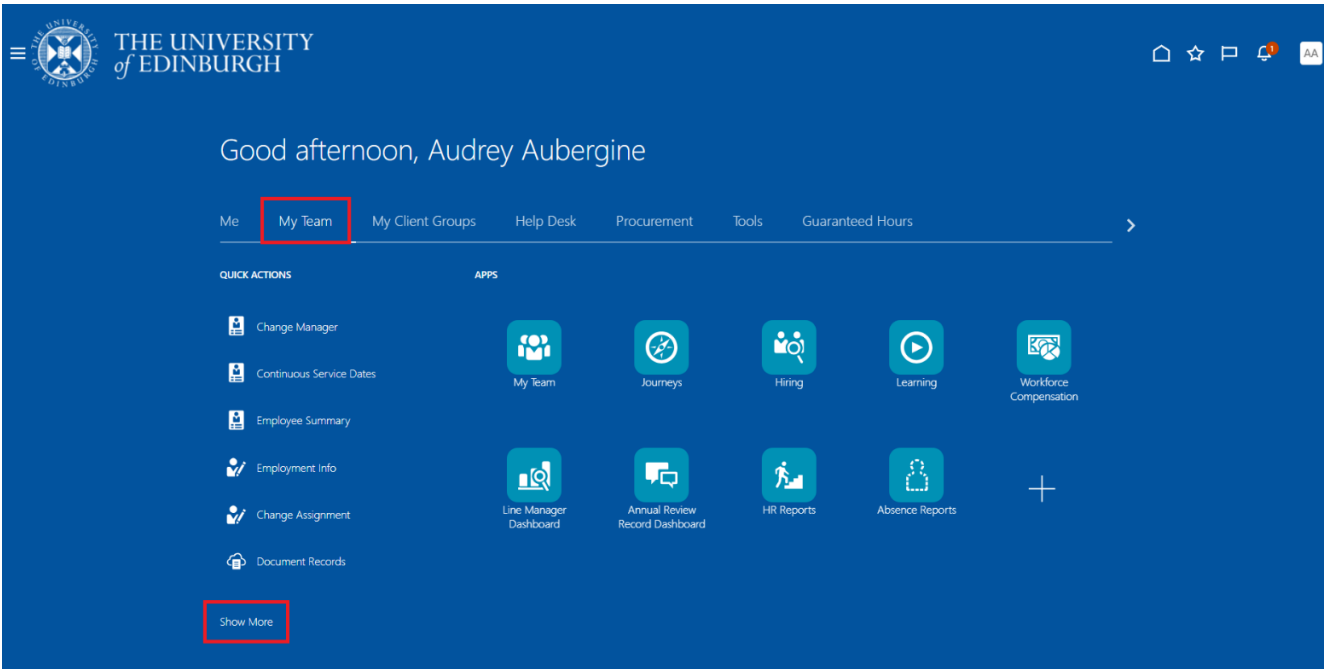
1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.
2. Search for the employee.
3. Click on the **pencil icon** against the absence.
4. Make the necessary changes to the leave dates or confirm the Actual Childbirth 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.

< HH Existing Absences
Hilary Haricot-Bean

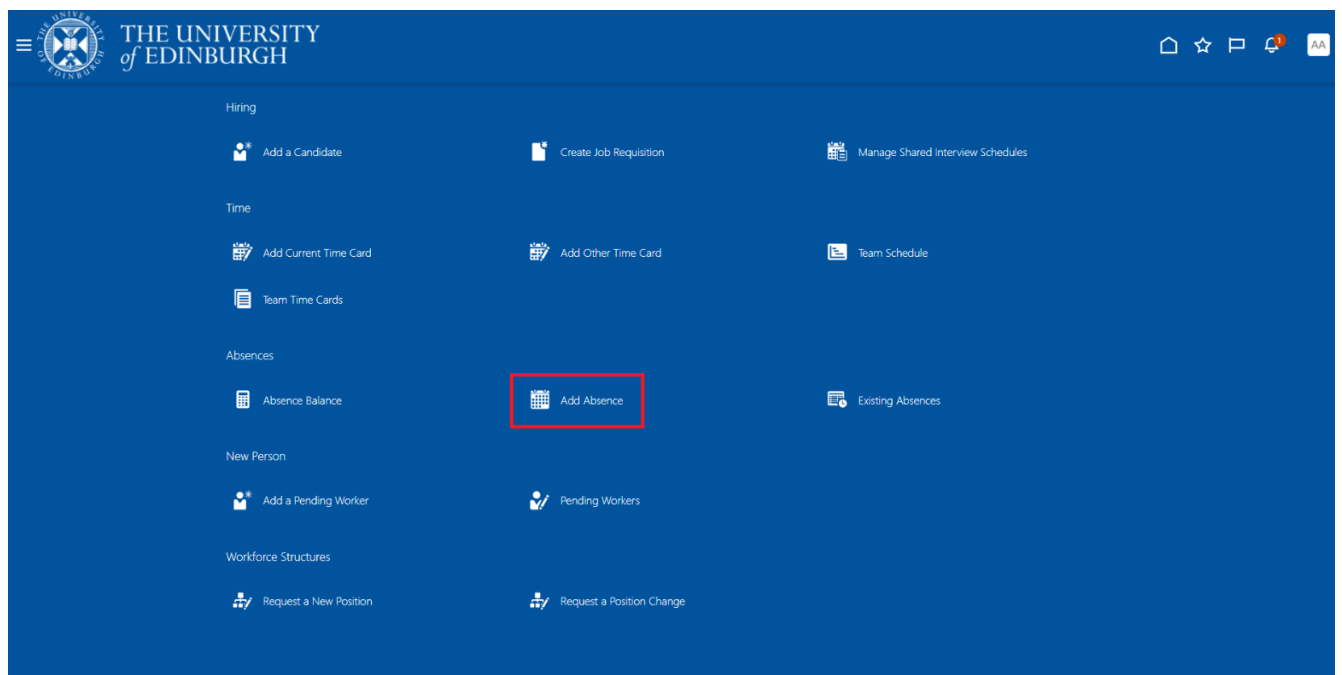
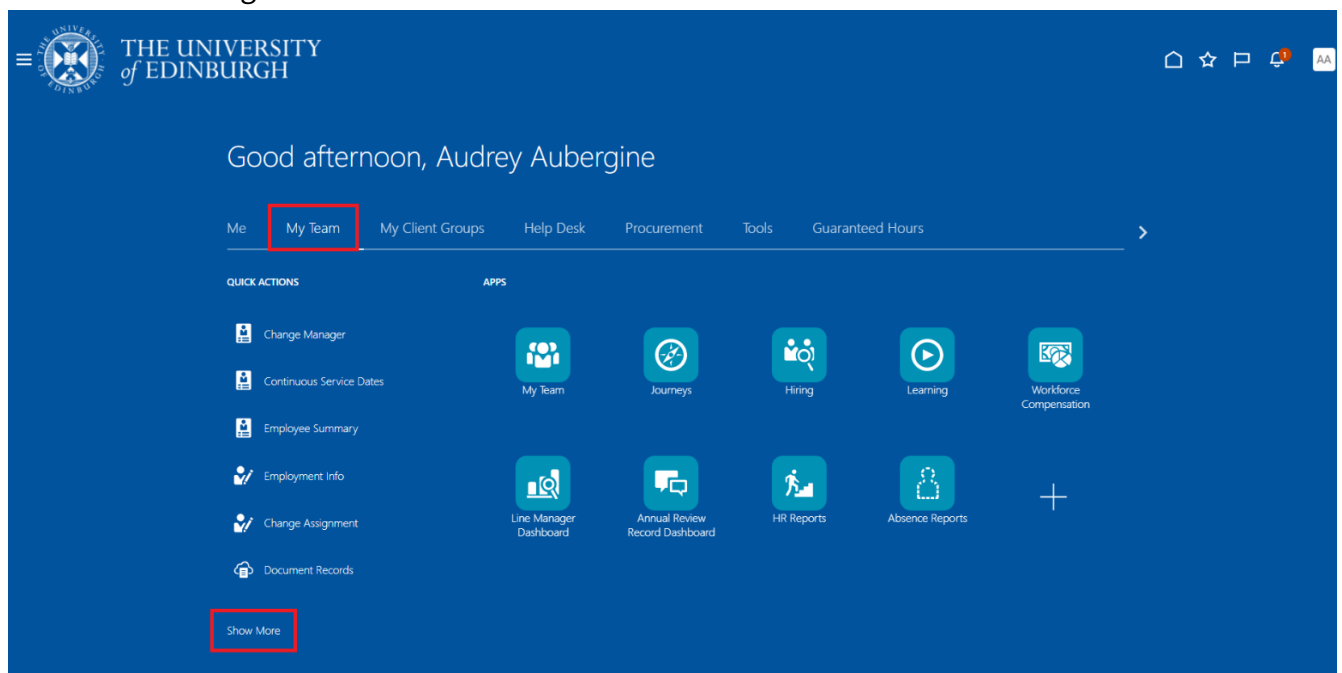
Search by type

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

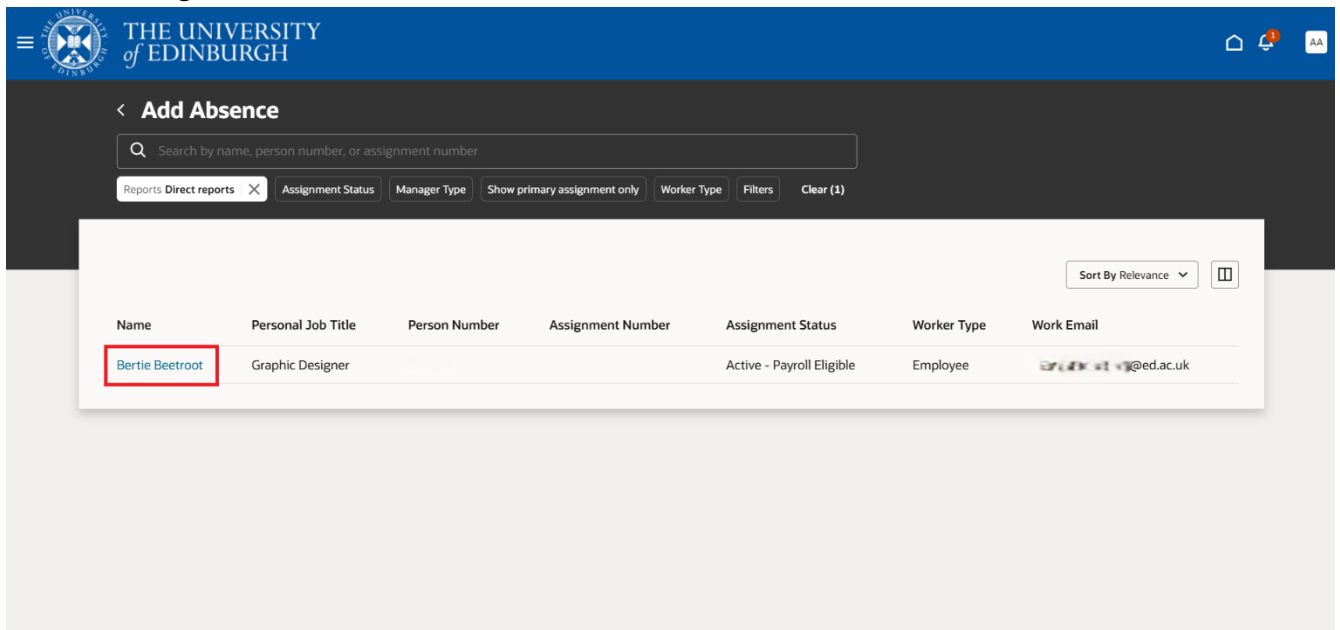
Add Absence Sort By

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**.



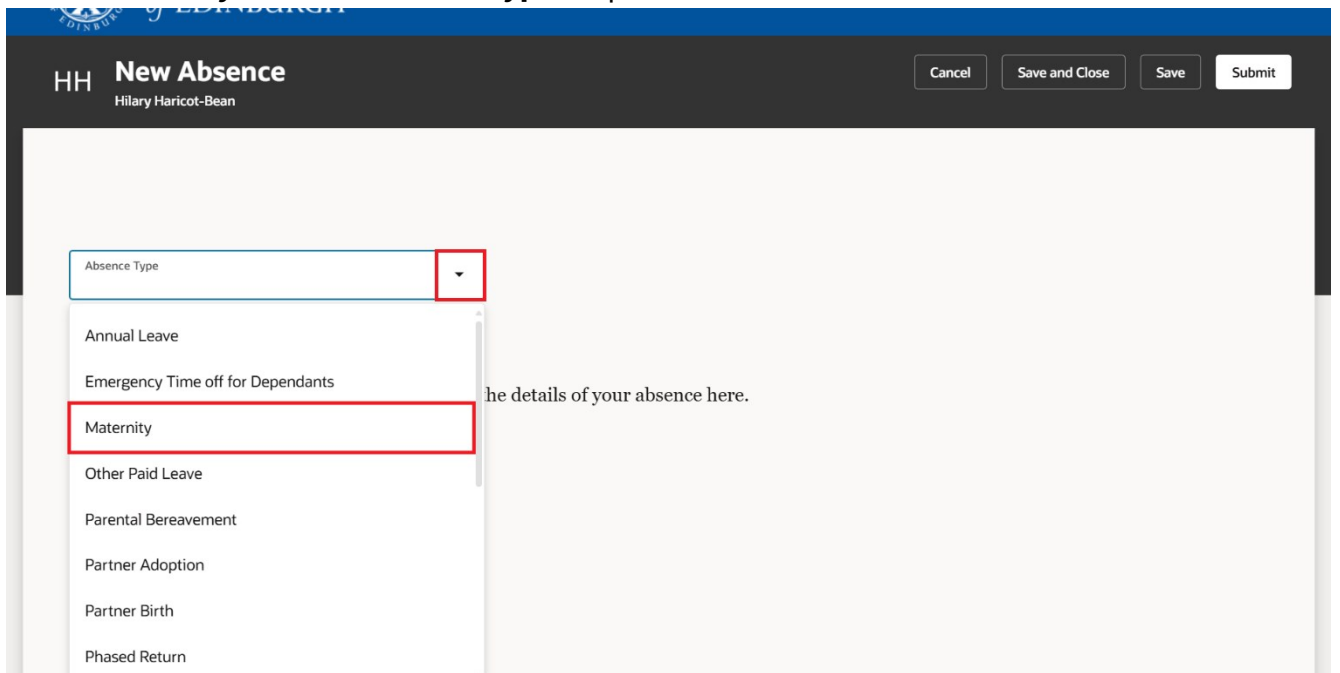
5. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



The screenshot shows the 'Add Absence' page. At the top, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar, there are several filters: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. A table of employees is displayed below the filters. 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 in the table.

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



The screenshot shows the 'New Absence' page. At the top, there is a header with 'HH New Absence' and the name 'Hilary Haricot-Bean'. Below the header, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The 'Absence Type' drop-down menu is open, showing a list of options: 'Annual Leave', 'Emergency Time off for Dependants', 'Maternity', 'Other Paid Leave', 'Parental Bereavement', 'Partner Adoption', 'Partner Birth', and 'Phased Return'. The 'Maternity' option is highlighted in the list.

7. In the **Dates** section, complete the following fields:
- Expected Childbirth Date** – Using the drop-down calendar enter the estimated due date as per the employee's MATB1.
 - 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 user 'Hilary Haricot-Bean'. At the top right are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the title, 'Absence Type' is set to 'Maternity'. A section titled 'Dates' is highlighted with a red border and contains the following fields: 'Expected Childbirth Date', 'Actual Childbirth Date', 'Planned Start Date', 'Planned End Date', 'Actual Start Date', and 'Actual End Date'. Each date field has a calendar icon. Below these fields is a toggle switch labeled 'Won't return to work', 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.

HH **New Absence**
Hilary Haricot-Bean

Actual End Date [Calendar Icon] 201 Calendar Days

Details

Reason: Option 3 [Dropdown Arrow] Notification Date: [Calendar Icon]

Comments: [Text Area]

Attachments

Drag and Drop
Select or drop files here.

URL: [Text Field] Add URL: [Button]

Legislative information

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.

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HH **New Absence**
Hilary Haricot-Bean

Absence Type: Maternity [Dropdown Arrow]

Dates

Expected Childbirth Date: 12/01/2026 [Calendar Icon] Actual Childbirth Date: [Calendar Icon]

Planned Start Date: 12/12/2025 [Calendar Icon]

Planned End Date: 30/06/2026 [Calendar Icon]

Won't return to work: [Toggle Switch]

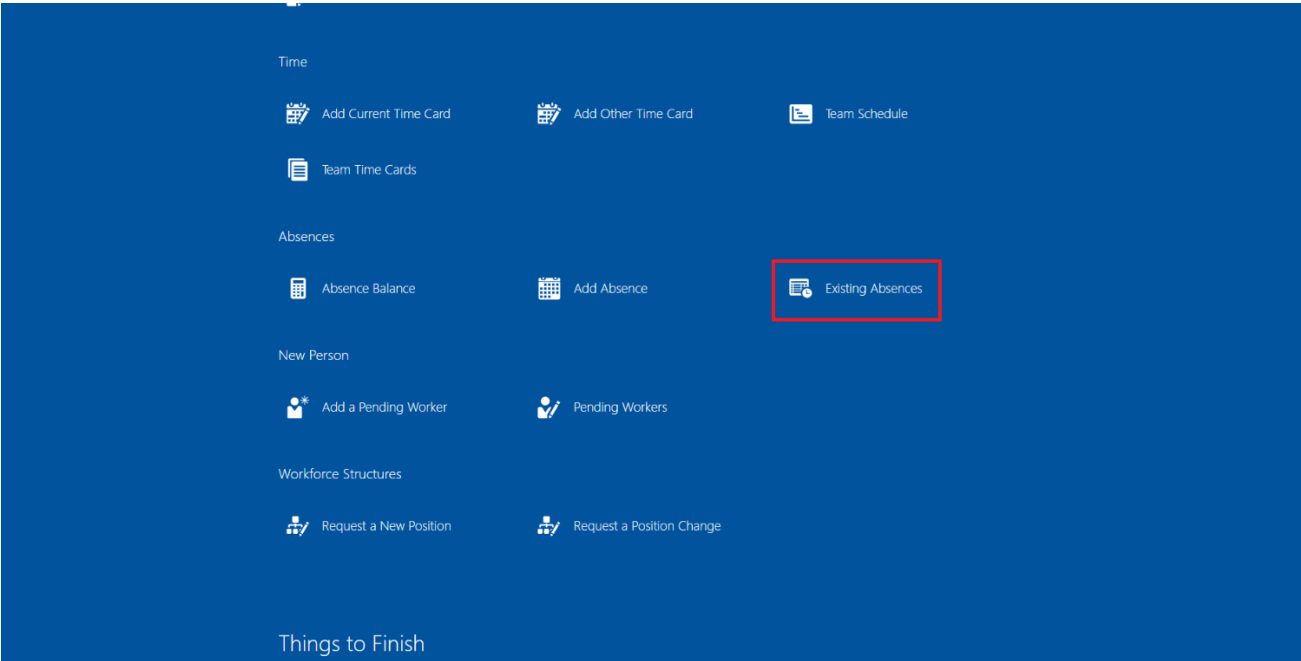
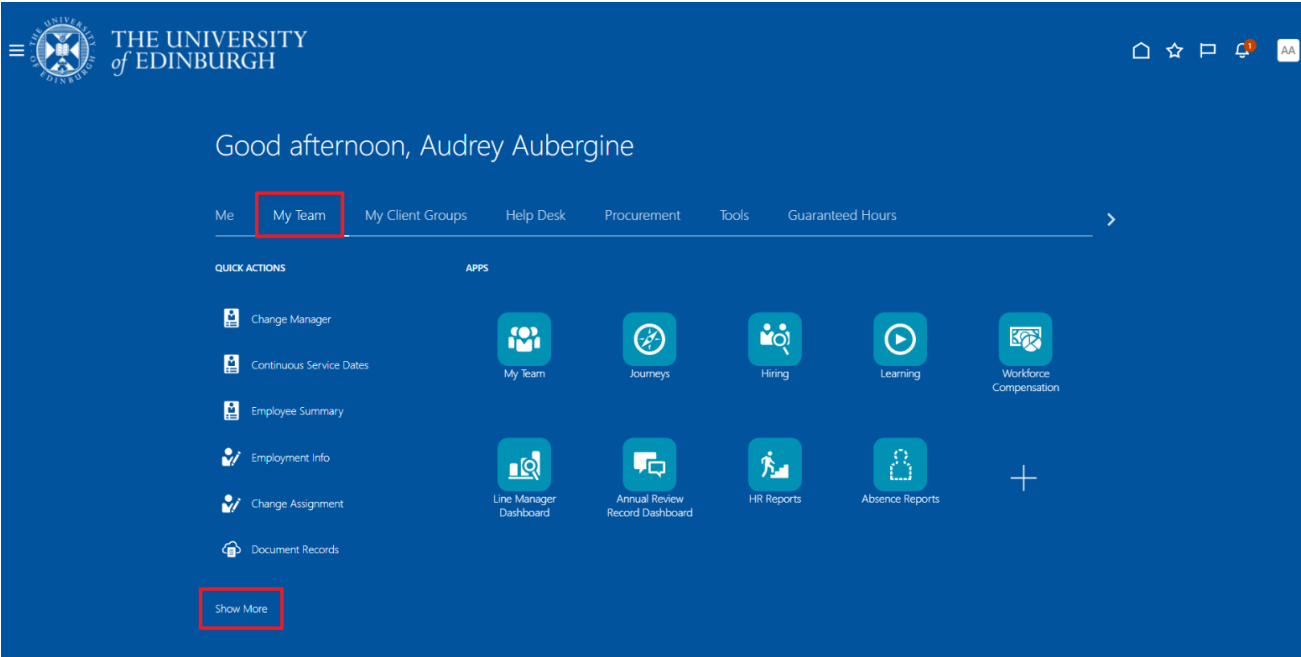
Actual Start Date: [Calendar Icon]

Cancel Save and Close Save **Submit**

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.

< 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. 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 bottom of the screen. Upload the risk assessment into the **Attachments** section.

HH Edit Absence
Hilary Haricot-Bean



Cancel Withdraw Submit

Actual Start Date  Planned End Date 30/06/2026 

Actual End Date  Planned Duration 177 Calendar Days

Actual Duration 0 Calendar Days


Details

Reason Option 1  Notification Date 28/05/2025 

Comments

Attachments

Drag and Drop
Select or drop files here.

URL 

Entitlements

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

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%
------------------------	-------------------------

Legislative information

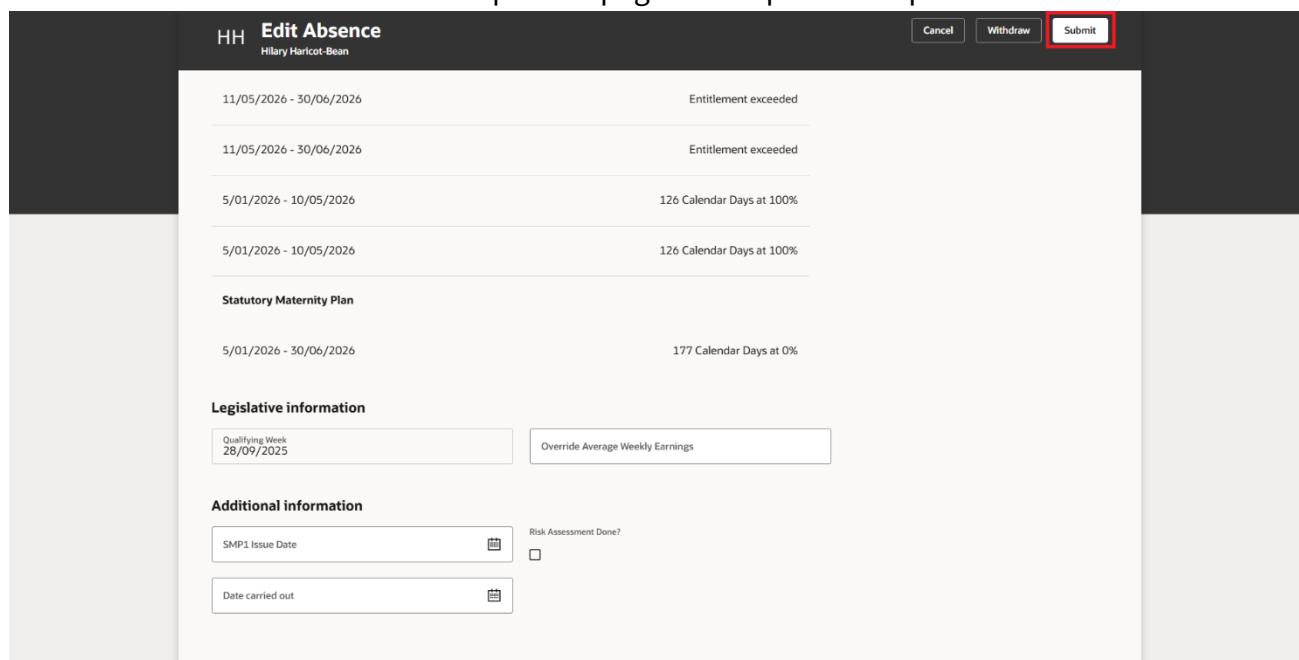
Qualifying Week 28/09/2025  Override Average Weekly Earnings

Additional information

SMP1 Issue Date  Risk Assessment Done? ☐

Date carried out 

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



Period	Entitlement
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

Period	Entitlement
5/01/2026 - 30/06/2026	177 Calendar Days at 0%

Legislative information

Qualifying Week: 28/09/2025

Override Average Weekly Earnings:

Additional information

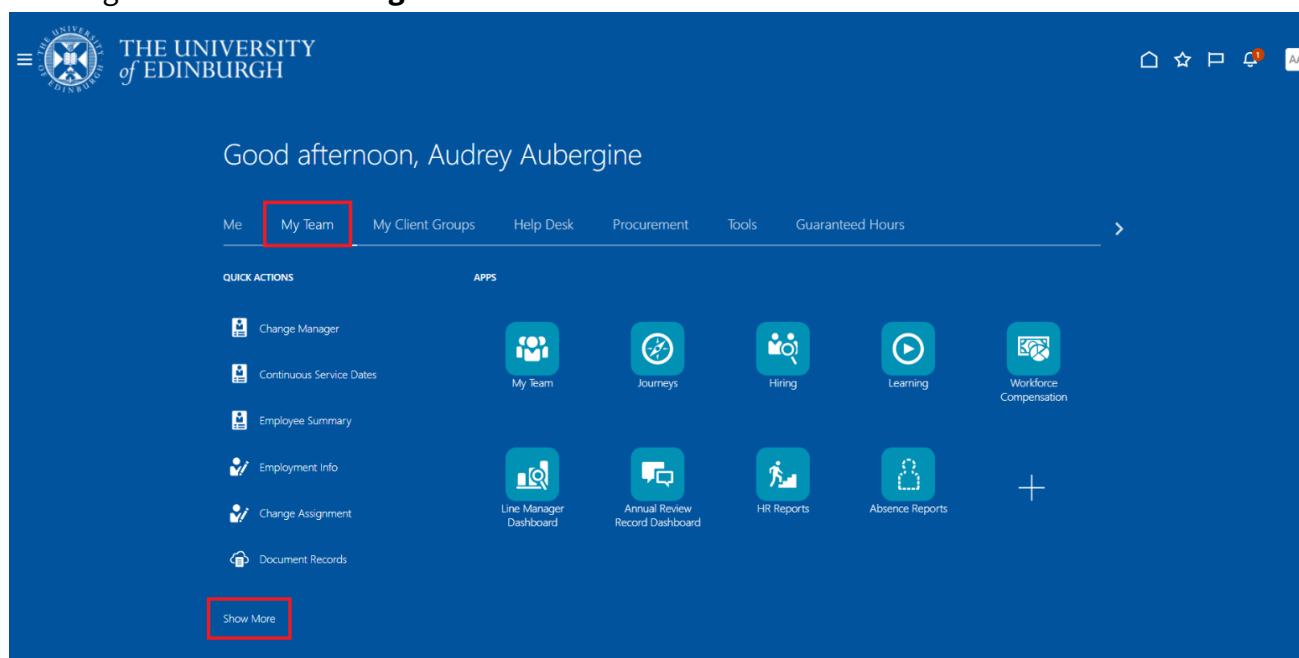
SMP1 Issue Date:

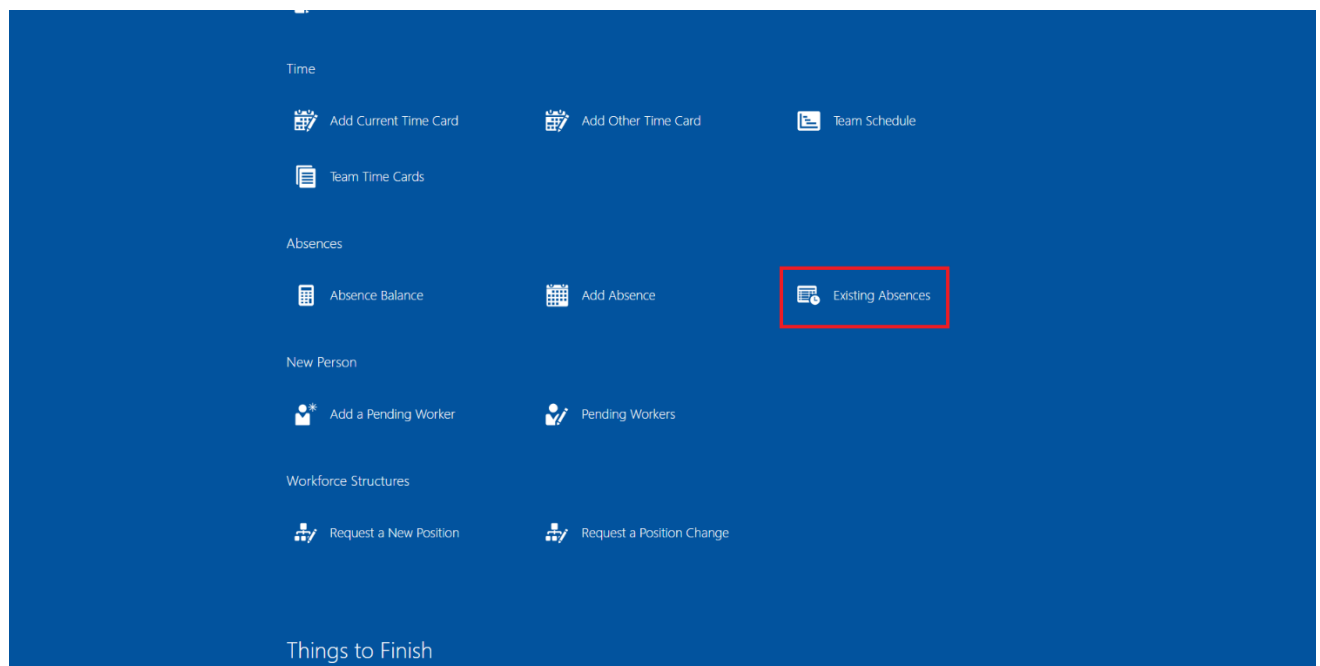
Date carried out:

Risk Assessment Done? ☐

How to Attach a MATB1 to a Maternity 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	Domestic Assistant-2	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.

The screenshot shows the 'Existing Absences' page for Hilary Haricot-Bean. The page has a search bar and filters for 'Date' (27/11/2024) and 'Status'. A table lists the following absences:

Type	Start Date	End Date	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	

- 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' page for Hilary Haricot-Bean. The page has buttons for 'Cancel', 'Withdraw', and 'Submit'. The 'Attachments' section is highlighted with a red box around the 'Drag and Drop' area. The 'Entitlements' section shows the 'Maternity Plan' with the dates 11/05/2026 - 30/06/2026 and the message 'Entitlement exceeded'.

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

HH Edit Absence
Hilary Haricot-Bean

Reason: Option 1
Notification Date: 28/05/2025

Comments

Attachments
Drag and Drop
Select or drop files here.

URL Add URL

Entitlements

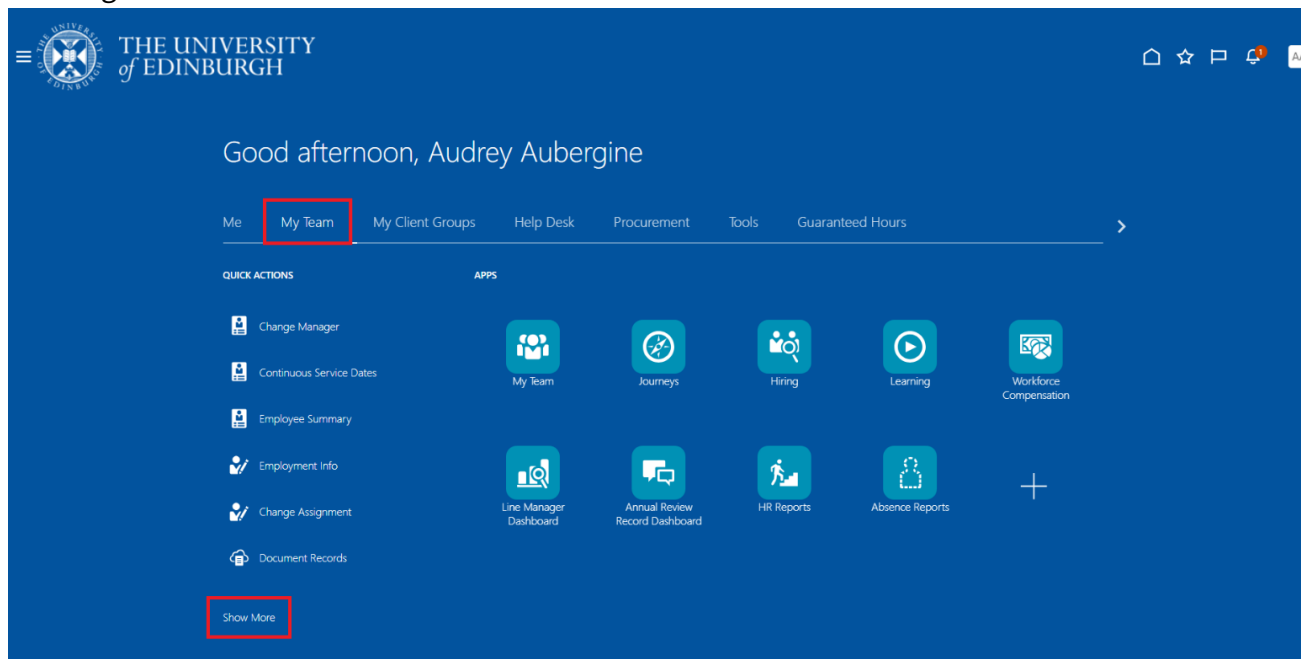
Maternity Plan

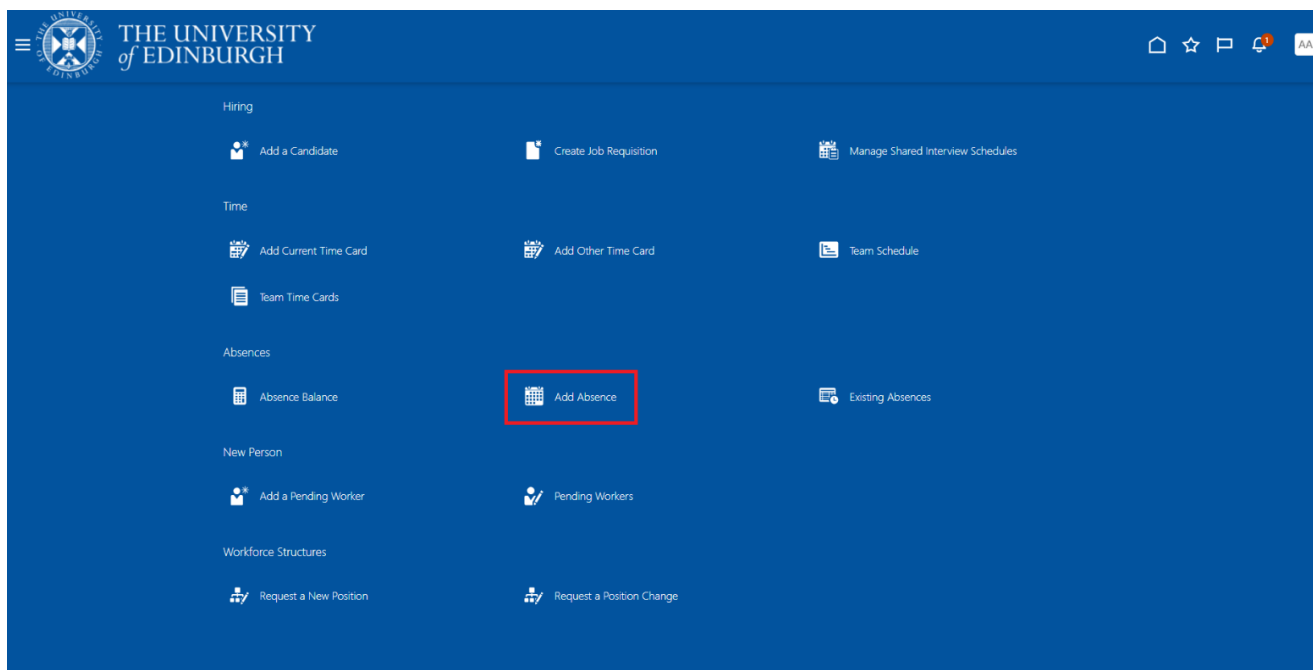
11/05/2026 - 30/06/2026 Entitlement exceeded

How to Record Adoption or Surrogacy Leave

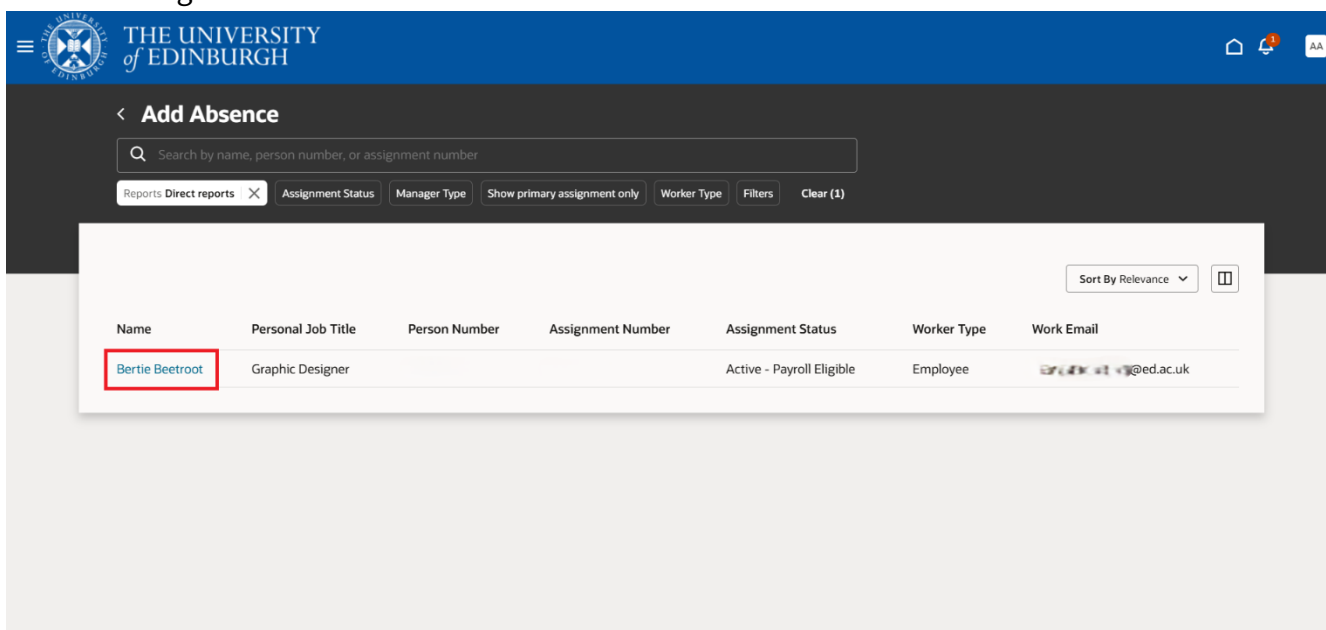
We are aware that the field names within the Adoption and Surrogacy Leave screens may not fit the employee's individual circumstances. Please refer to the [Appendix](#) as well as the [Guide to Adoption and Surrogacy Leave](#).

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.



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

The screenshot shows the 'New Absence' form header with the user 'Hilary Haricot-Bean'. The 'Absence Type' dropdown menu is open, displaying a list of options: Partner Birth, Phased Return, Sickness, Special Paid Leave, **Surrogacy and Adoption** (highlighted with a red box), Unauthorised Leave, Unpaid Leave, and Unpaid Parental Leave. The main content area contains the text 'he details of your absence here.'

4. In the **Dates** section:
- 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).
 - 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**.

The screenshot shows the 'Dates' section of the form. The 'Absence Type' dropdown is set to 'Surrogacy and Adoption'. A red box highlights the following fields: 'Expected Placement Date', 'Actual Placement Date', 'Planned Start Date', 'Planned End Date', 'Actual Start Date', 'Actual End Date', and 'Placement Match Date'. Below these fields is a 'Won't return to work' toggle switch, which is currently turned off. The 'Details' section at the bottom shows 'Reason Option 3' and a 'Notification Date' field.

5. In the **Details** section:

- 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).
- Enter the **Notification Date** that the employee made their selection on.
- Add any relevant notes in the **Comments** section.
- 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

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

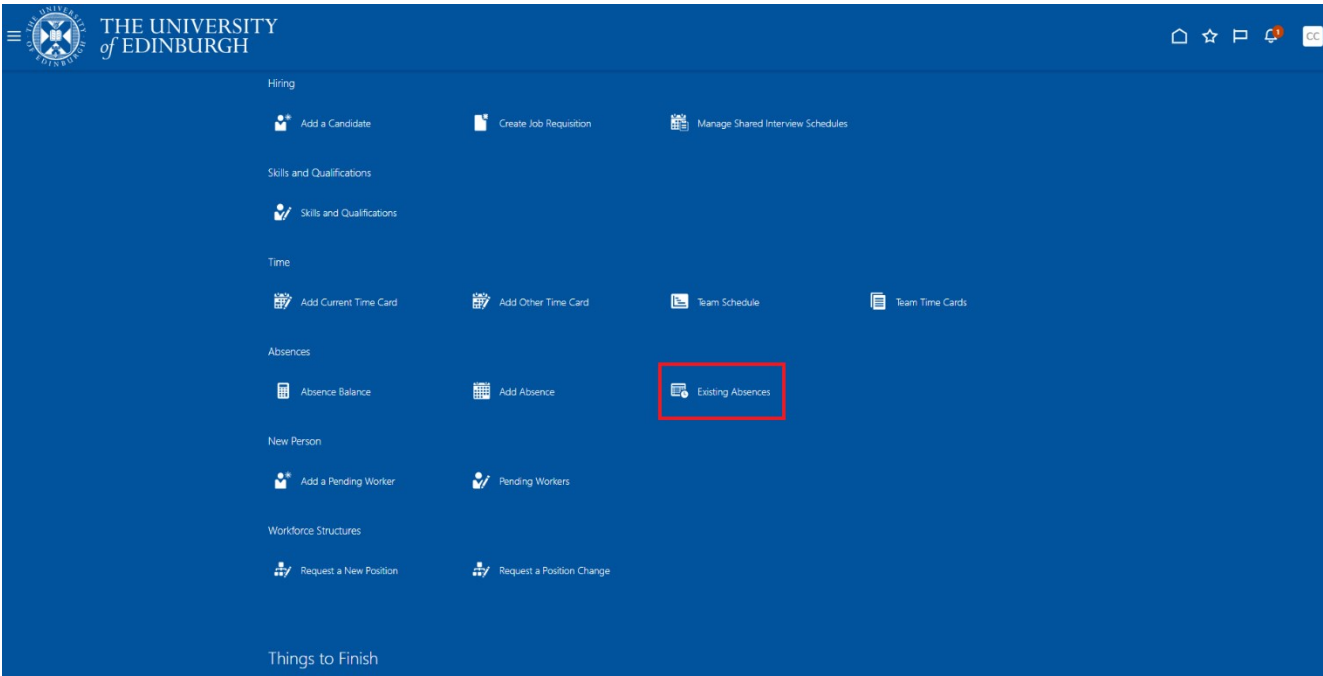
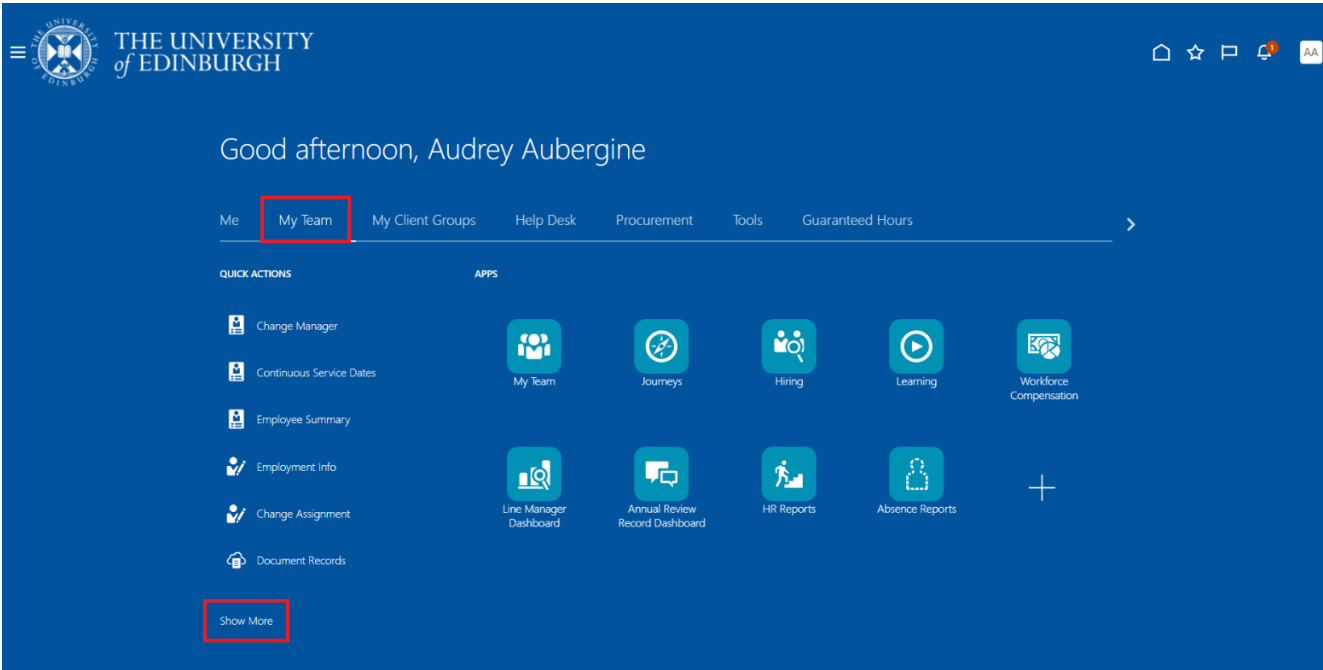
Actual End Date

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**.



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 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.

< HH Existing Absences
Hilary Haricot-Bean

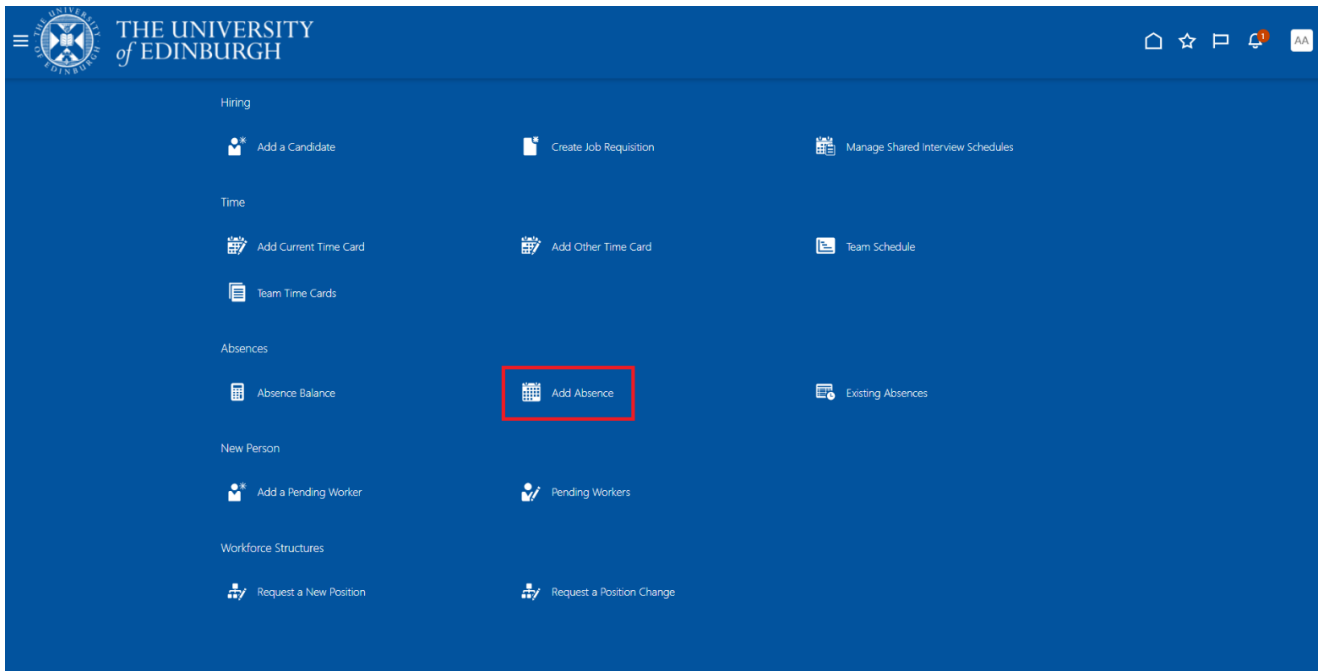
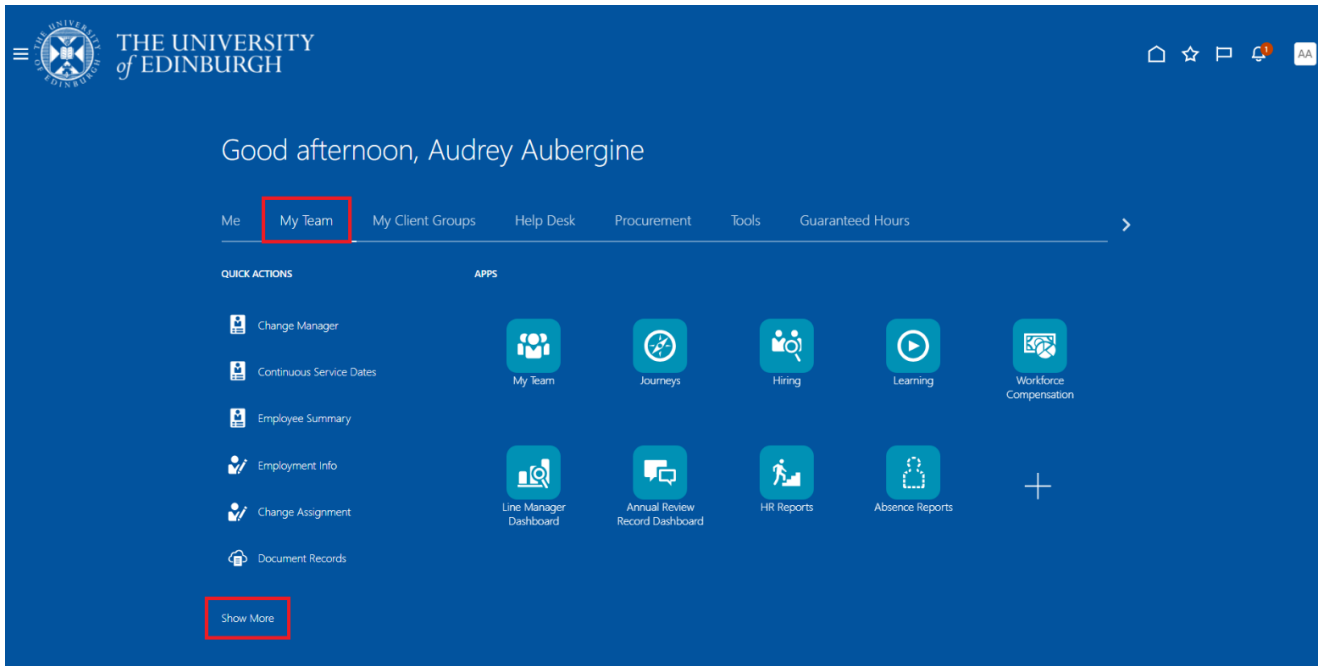
Search by type

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

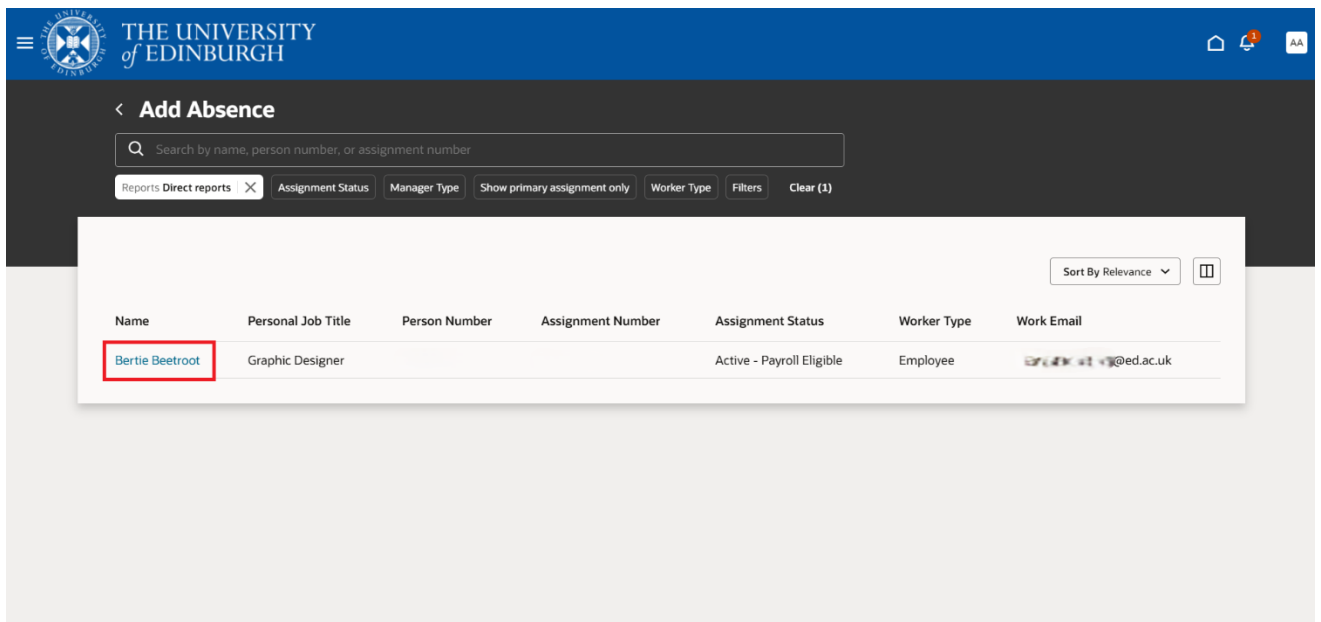
Add Absence Sort By

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**.



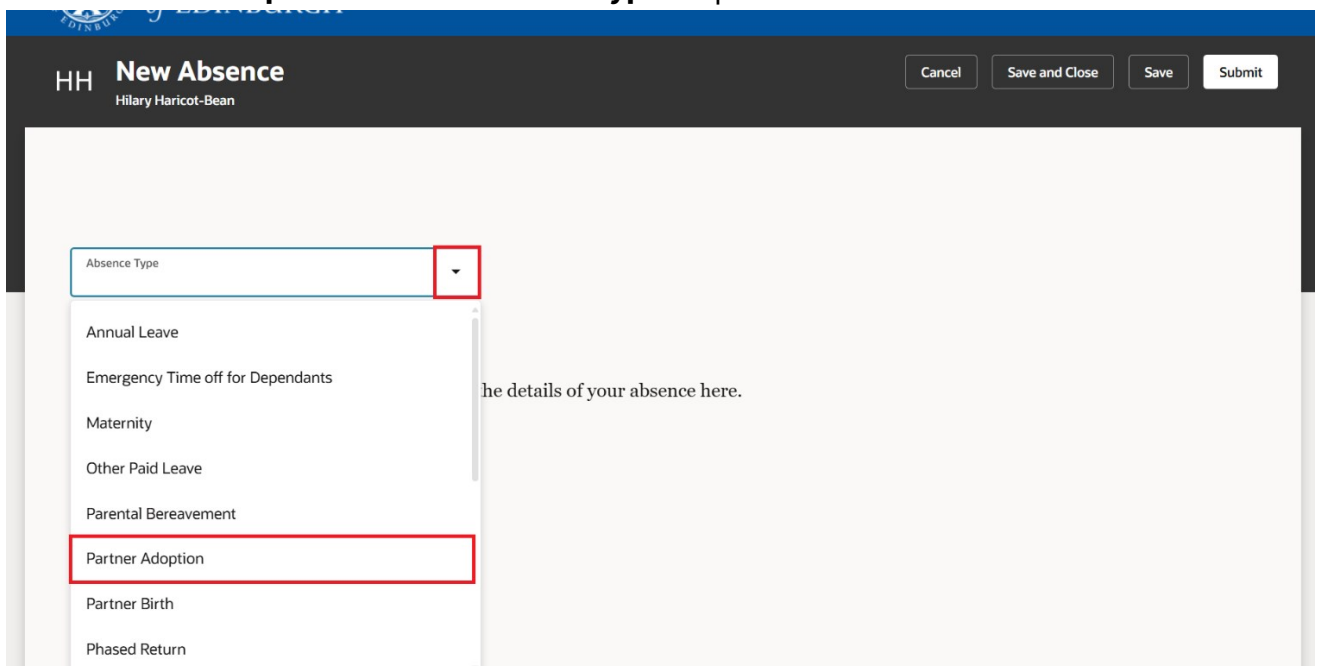
5. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



The screenshot shows the 'Add Absence' page in the University of Edinburgh system. The page has a blue header with the university logo and name. Below the header, there is a search bar and a list of employees. The employee 'Bertie Beetroot' is highlighted in a red box. The table below shows the details of the selected employee.

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 Adoption** from the **Absence Type** drop-down list.



The screenshot shows the 'New Absence' page in the University of Edinburgh system. The page has a blue header with the university logo and name. Below the header, there is a form with a 'New Absence' title and a user name 'Hilary Haricot-Bean'. The 'Absence Type' drop-down menu is open, and 'Partner Adoption' is highlighted in a red box. The list of options includes: Annual Leave, Emergency Time off for Dependents, Maternity, Other Paid Leave, Parental Bereavement, Partner Adoption, Partner Birth, and Phased Return.

7. In the **Dates** section:
- Complete the **Expected Placement Date** field **or**, if known, the **Actual Placement 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 automatically calculate the full duration of the absence.

These can be changed at a later date if needed (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's a header with 'HH' and the name. Below it, the 'Absence Type' is set to 'Partner Adoption'. The 'Dates' section is highlighted with a red box and contains the following fields:

Field	Icon
Expected Placement Date	Calendar icon
Actual Placement Date	Calendar icon
Planned Start Date	Calendar icon
Actual Start Date	Calendar icon
Planned End Date	Calendar icon
Actual End Date	Calendar icon
Placement Match Date	Calendar icon

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. The 'Details' section is highlighted with a red box and contains the following fields:

- Placement Match Date (with a calendar icon)
- Planned Duration: 14 Calendar Days
- Special Conditions (text input field)
- Comments (text input field)
- Attachments section with a 'Drag and Drop' box (text: 'Select or drop files here.')
- URL (text input field) and 'Add URL' button

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

Placement Match Date
Planned Duration
14 Calendar Days

Details

Special Conditions

Comments

Attachments

Drag and Drop
Select or drop files here.

URL
Add URL

Partner Birth

- 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**.

THE UNIVERSITY of EDINBURGH

Home
Star
Flag
Bell
AA

Good afternoon, Audrey Aubergine

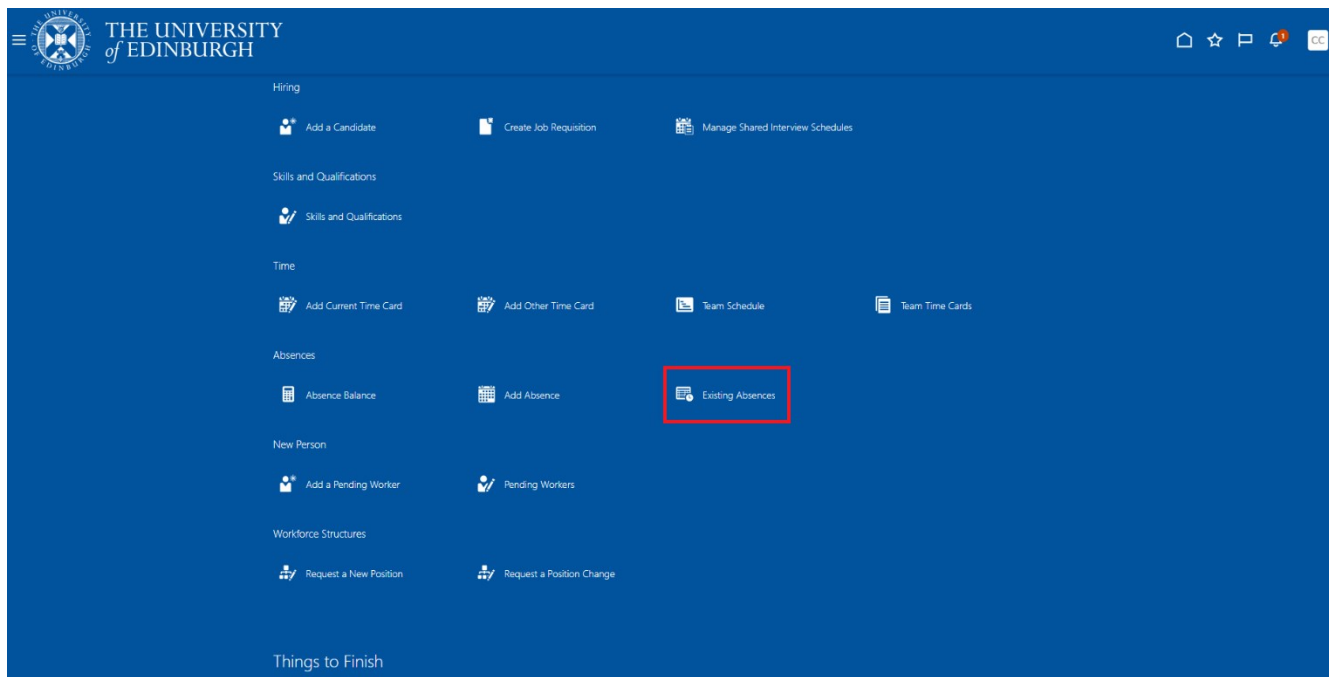
Me
My Team
My Client Groups
Help Desk
Procurement
Tools
Guaranteed Hours

QUICK ACTIONS
APPS

Change Manager
Continuous Service Dates
Employee Summary
Employment Info
Change Assignment
Document Records

My Team
Journeys
Hiring
Learning
Workforce Compensation
Line Manager Dashboard
Annual Review Record Dashboard
HR Reports
Absence Reports

Show More



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

< Existing Absences

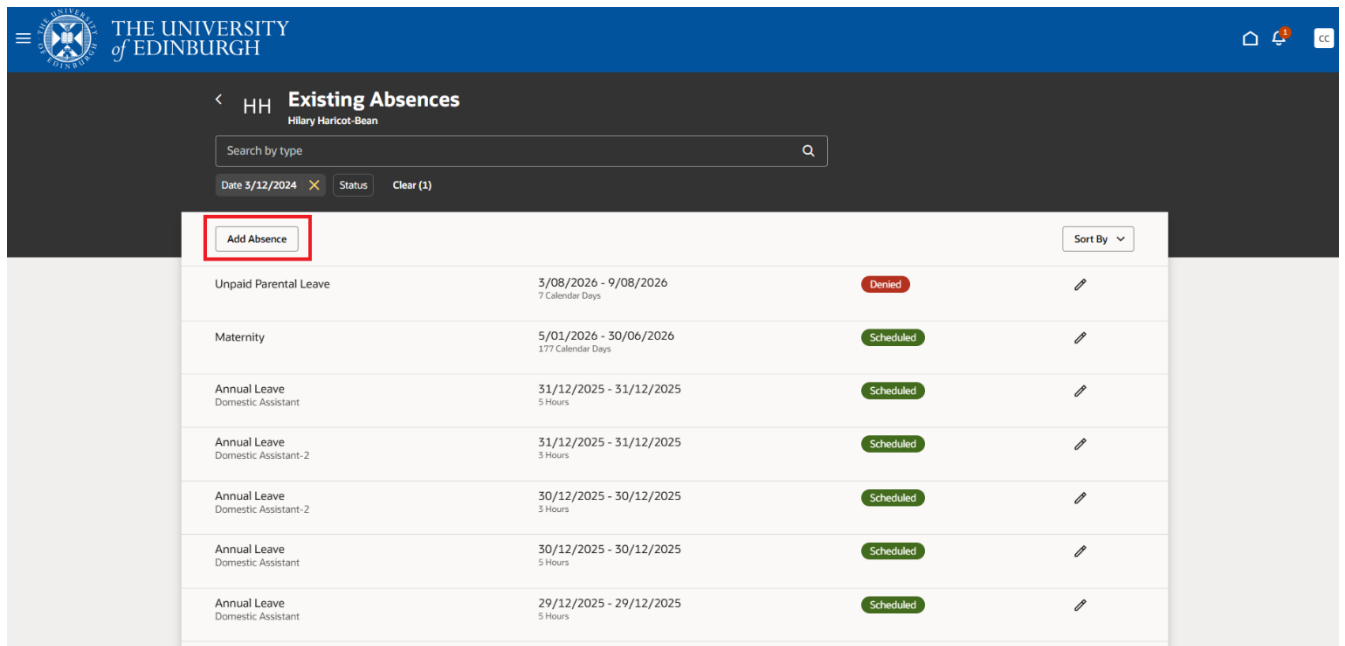
Search by name, person number, or assignment number

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

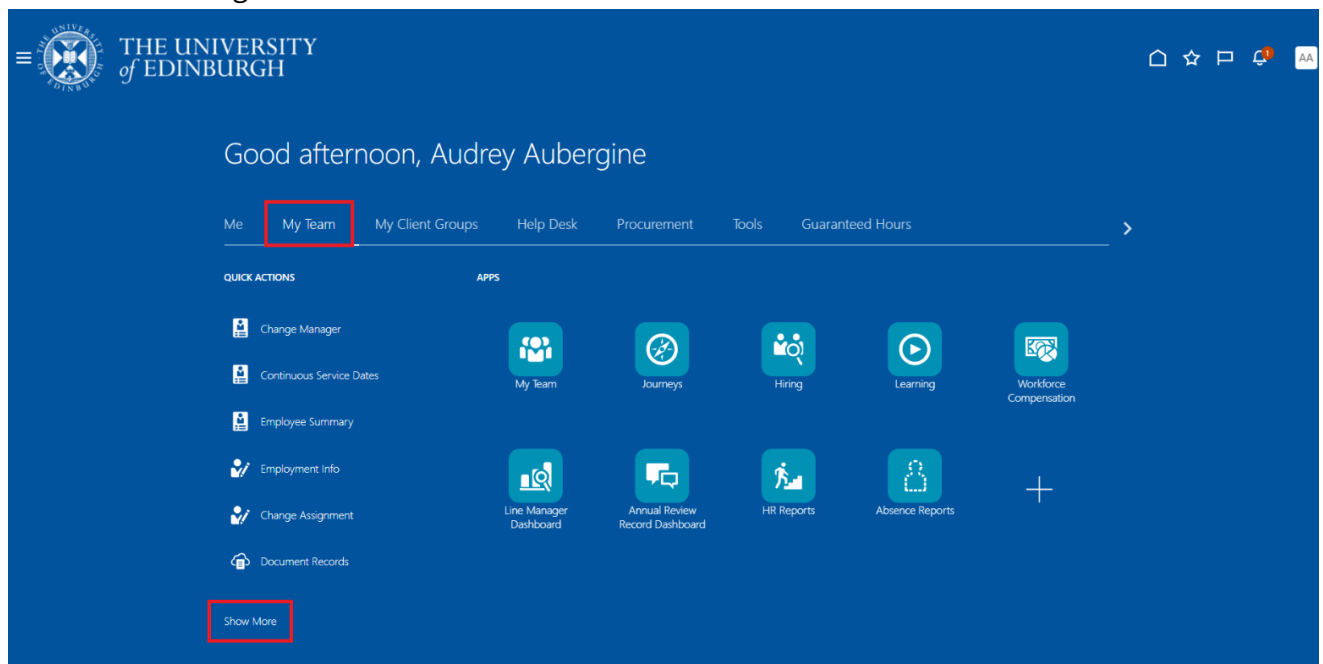
Domestic Assistant	Active - Payroll Eligible	Employee	exseed.ed.ac.uk-DNU10
Domestic Assistant	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU5
Domestic Team Supervisor	Active - Payroll Eligible	Employee	@ed.ac.uk-DNU17
Domestic Assistant	Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU6
Domestic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

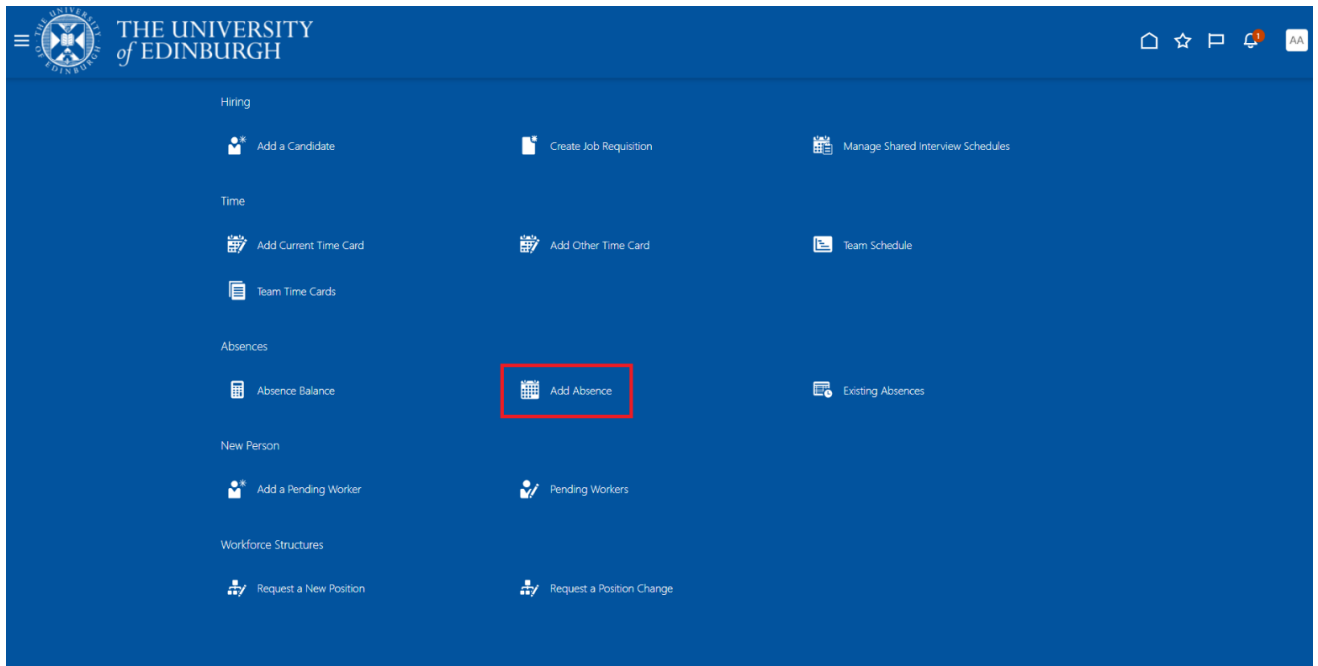
3. Look for any absences that will overlap with the proposed partner leave dates. If you need to amend or delete an absence, please see the [How to Amend Leave](#) section of this guide.

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.

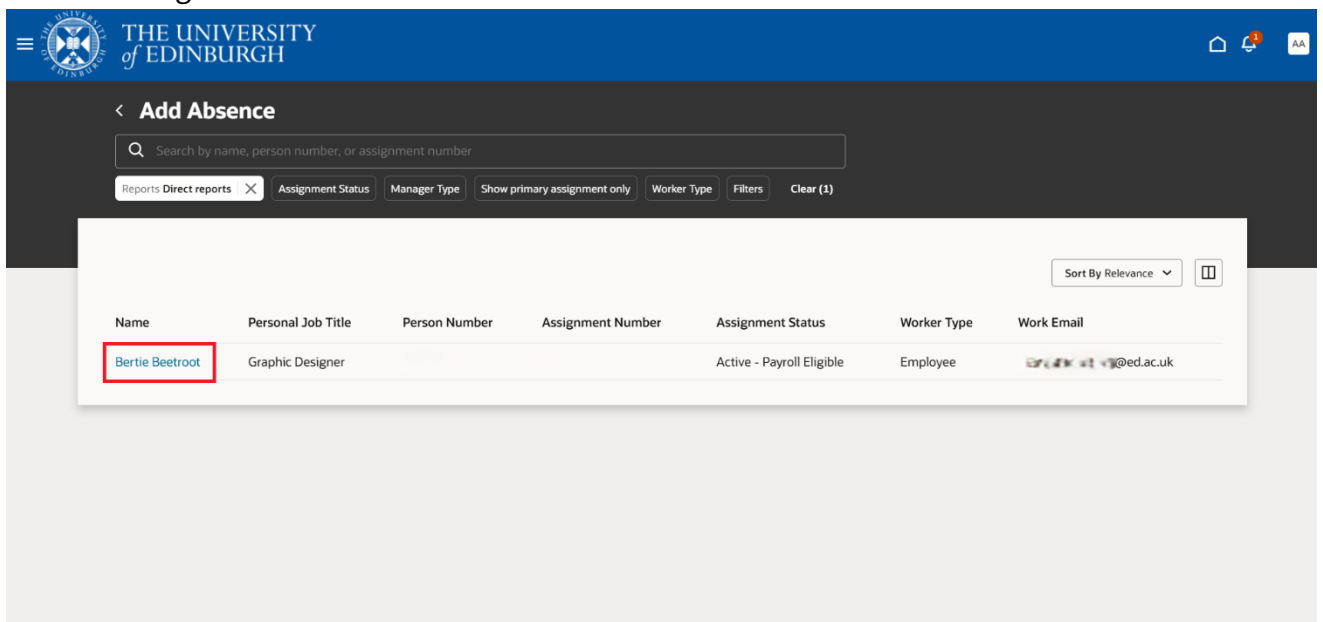


Alternatively, from the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.





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



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

The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. The 'Absence Type' dropdown menu is open, displaying a list of options: Annual Leave, Emergency Time off for Dependents, Maternity, Other Paid Leave, Parental Bereavement, Partner Adoption, Partner Birth, and Phased Return. The 'Partner Birth' option is highlighted with a red box. The dropdown menu is also outlined with a red box. The form title is 'New Absence' and the user name is 'Hilary Haricot-Bean'. There are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit' at the top right.

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 (please refer to the '[How to Amend Leave](#)' section in this guide).

The screenshot shows the 'Dates' section of the 'New Absence' form. The 'Absence Type' dropdown menu is set to 'Partner Birth'. The 'Dates' section contains six date fields arranged in a 3x2 grid: Expected Childbirth Date, Actual Childbirth Date, Planned Start Date, Actual Start Date, Planned End Date, and Actual End Date. Each field has a calendar icon. The entire 'Dates' section is outlined with a red box. 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.

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

Legislative information

Qualifying Week Northern Ireland Employee

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

3/06/2025 Actual Start Date

Planned End Date
16/06/2025 Actual End Date

Planned Duration
14 Calendar Days

Details

Comments

Attachments

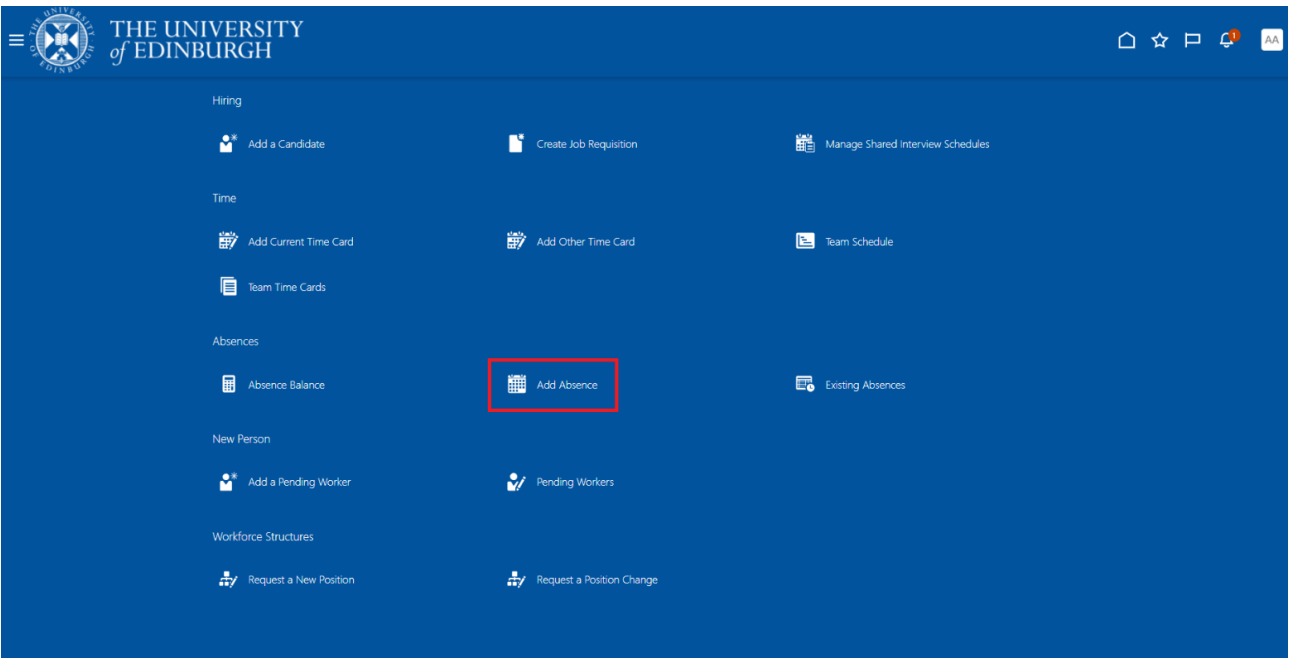
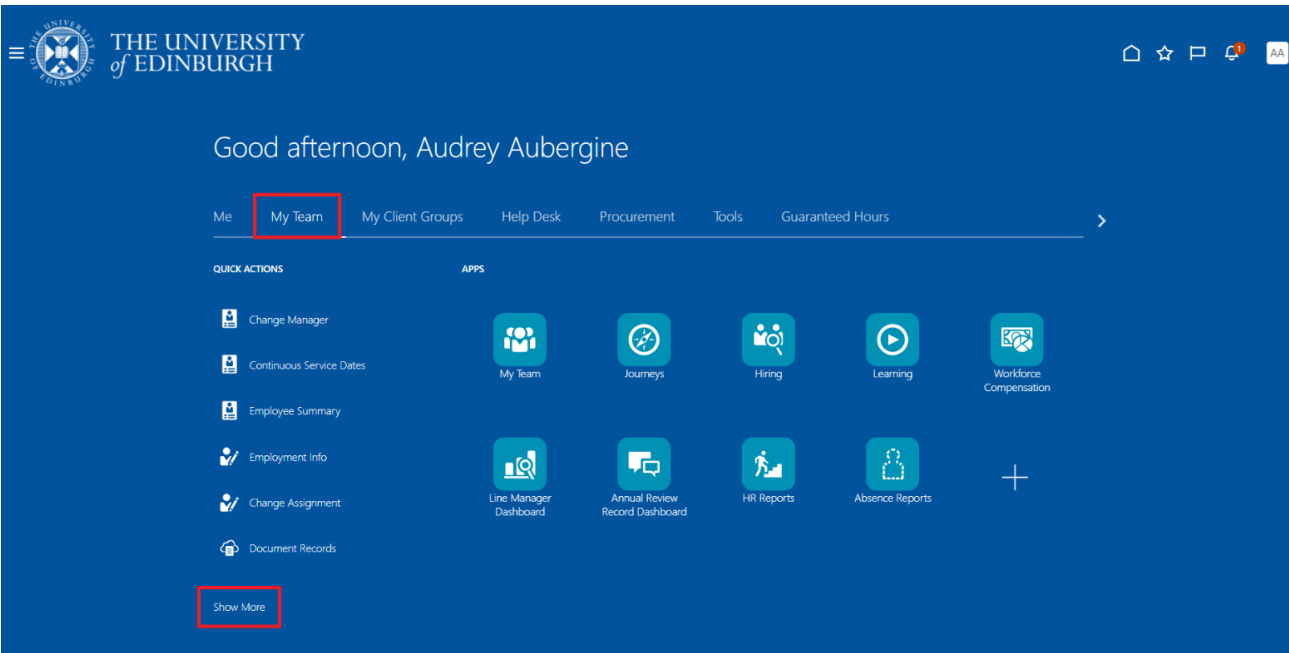
Drag and Drop
Select or drop files here.

URL Add URL

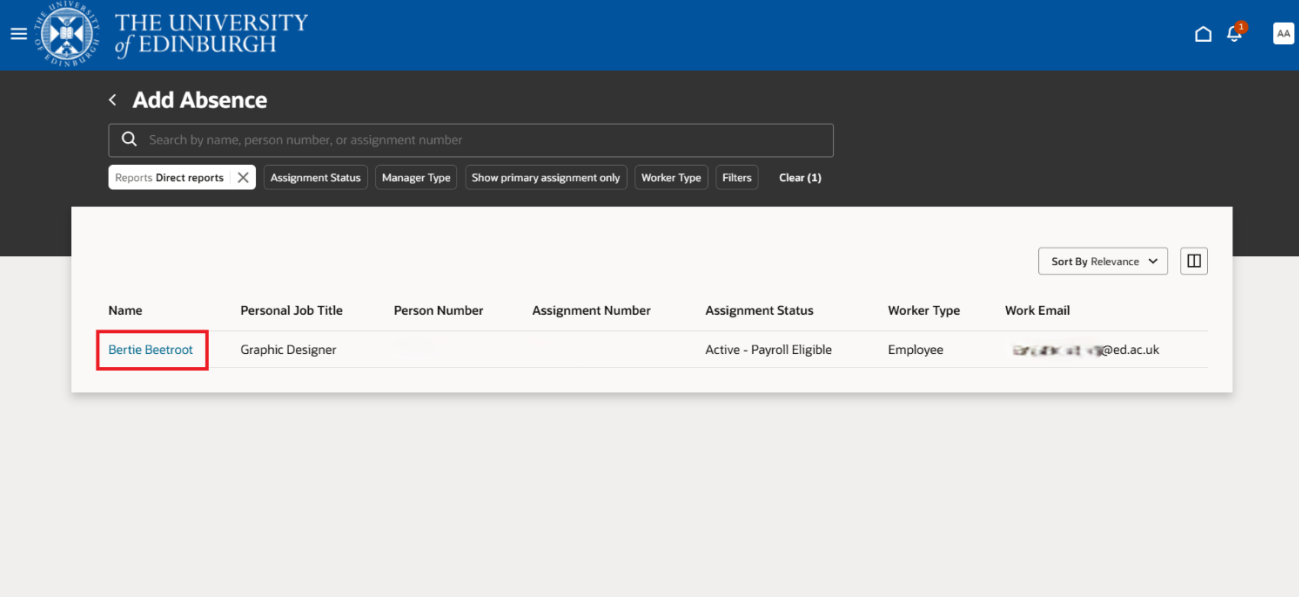
Cancel Save and Close Save **Submit**

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**.



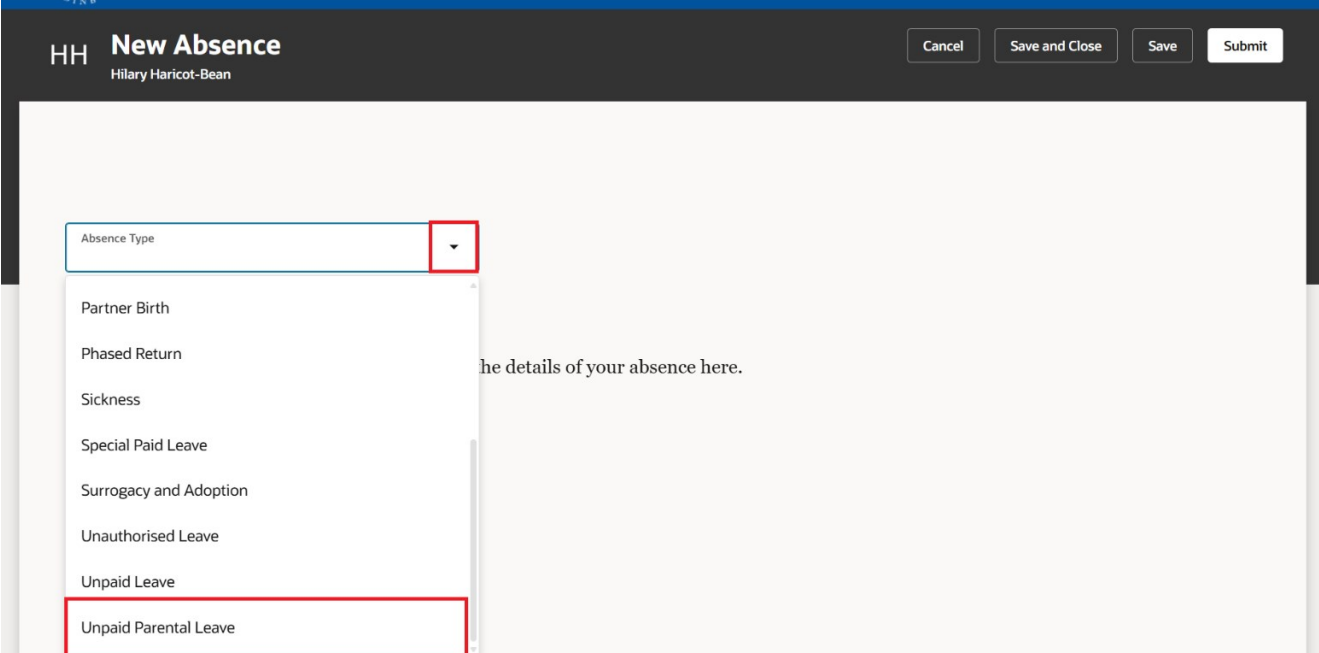
2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



The screenshot shows the 'Add Absence' page on The University of Edinburgh's HR system. At the top, there's 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)'. A table of results is displayed below the filters. The first row is highlighted with a red box, showing the employee 'Bertie Beetroot'.

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



The screenshot shows the 'New Absence' page. At the top, there's a header with 'HH' and 'Hilary Haricot-Bean'. Below the header, there's a dropdown menu labeled 'Absence Type'. The dropdown menu is open, showing a list of absence types. The option 'Unpaid Parental Leave' is highlighted with a red box.

Absence Type

- Partner Birth
- Phased Return
- Sickness
- Special Paid Leave
- Surrogacy and Adoption
- Unauthorised Leave
- Unpaid Leave
- Unpaid Parental Leave

4. 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.

The screenshot shows the 'New Absence' form for Hilary Haricot-Bean. The 'Absence Type' is set to 'Unpaid Parental Leave'. The 'Dates' section is highlighted with a red box and contains the following fields:

Field	Label	Required
Start Date	Start Date	Required
End Date	End Date	Required

Below the 'Dates' section, the 'Projected Balance' is shown as '0 Calendar Days' and the 'As-of' date is blank. The 'Start Date Duration' field is also visible.

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

The screenshot shows the 'Details' section of the 'New Absence' form. The 'Start Date' is '9/06/2025' and the 'End Date' is '13/06/2025'. The 'Start Date Duration' is 'Full day' and the 'End Date Duration' is 'Full day'. The 'Duration' is '5 Calendar Days' and the 'Projected Balance' is '0 Calendar Days'. The 'As-of' date is '13/06/2025' and there is a 'Calculate' button. The 'Comments' box is highlighted with a red box.

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.

HH

New Absence

Hilary Haricot-Bean

Cancel

Save and Close

Save

Submit

Start Date

3/06/2025

Start Date Duration

Full day

End Date

9/06/2025

End Date Duration

Full day

Duration

7 Calendar Days

Projected Balance

0 Calendar Days

As-of 9/06/2025

Calculate

Details

Comments

Legislative information

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 ...

Actions

Approve

Reject

Request Information

Delegate

Reassign

Route Task

Escalate

Suspend

Add Comments

Add Attachment

Add Assignee

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

You need to approve this part of the absence.

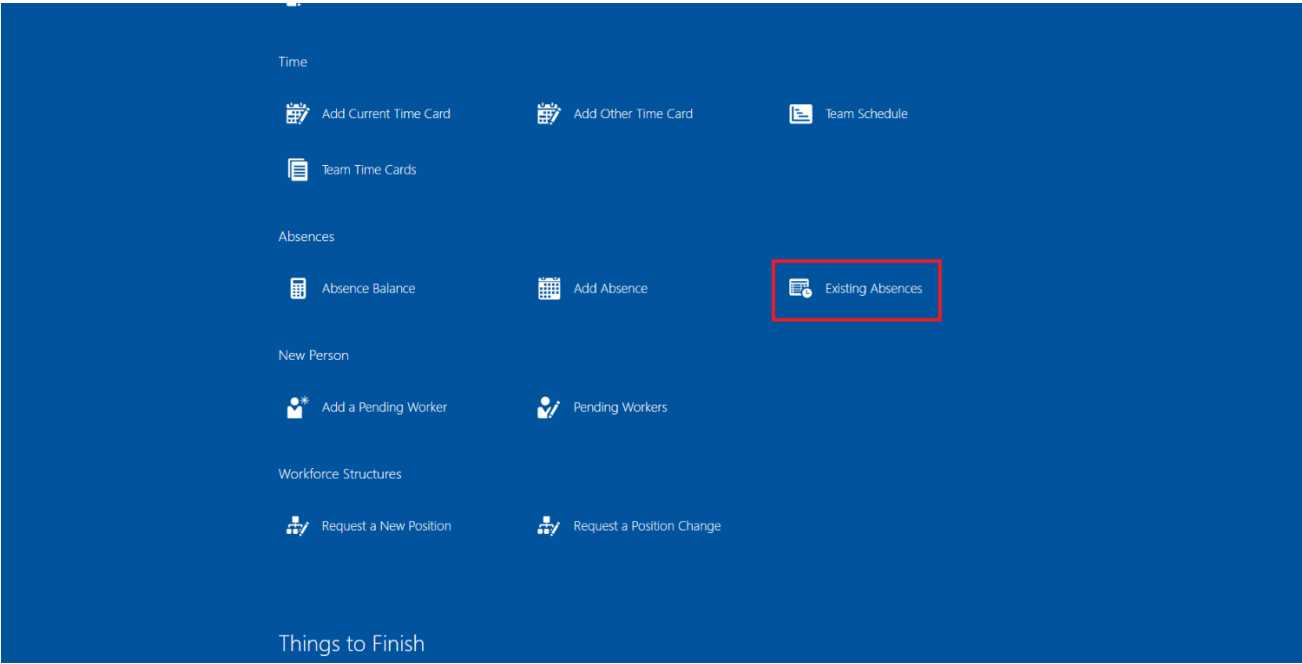
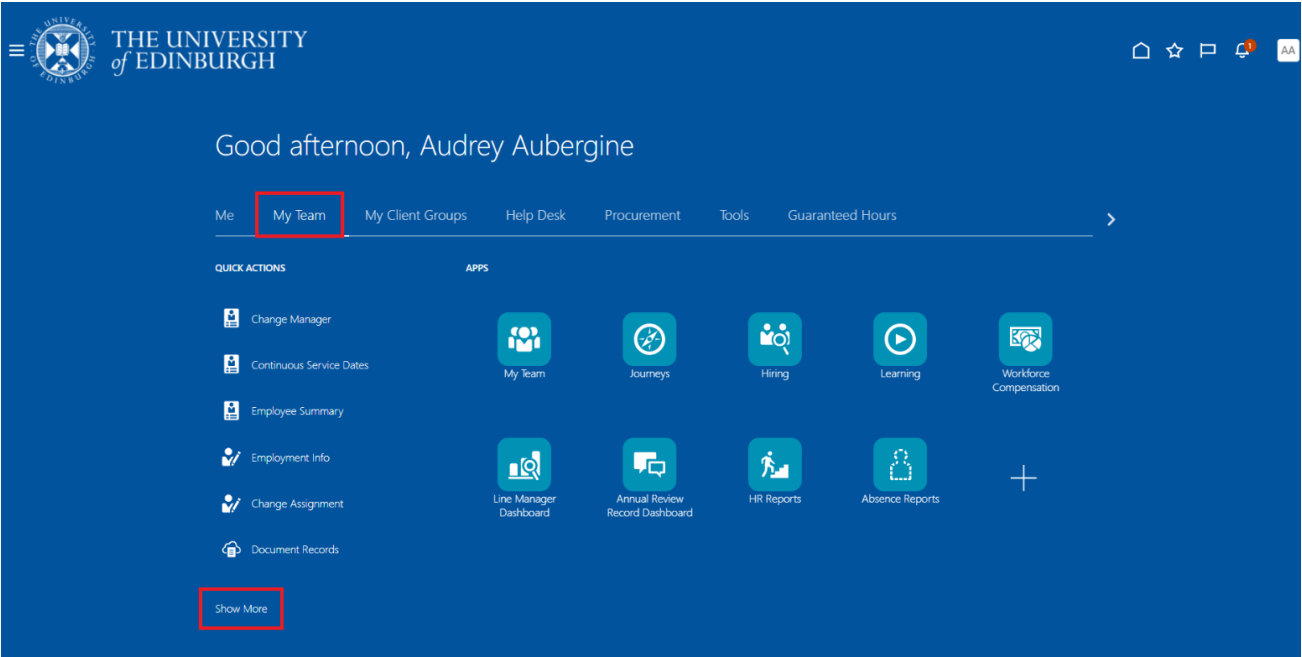
Total

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**.



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. 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.





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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. 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

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.