This checklist has been designed to support both employees and managers to enable them to plan effectively for a period of family leave (maternity/adoption/paternity/shared parental leave). **Note**: Some of the actions may not be applicable/appropriate for some family leave particularly if the employee absence will be relatively short (e.g. paternity leave). All of the family policies and guidance mentioned in this document can be downloaded from the Human Resources (HR) [policy page](https://www.st-andrews.ac.uk/staff/policy/hr/).

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  | **Surname** |  |
| **Job title** |  | **School/Unit** |  |
| **Type of leave** | Select Leave Type. | **Line manager** |  |
| **Proposed leave start date** | Click here to select your leave start date | **Expected week of childbirth/placement (EWC/EWP)** | Click here to select your EWC/EWP date. |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Before family leave** | **Employee** | | **Manager** | | **Completed** | |
| Read the relevant family leave policy:(Maternity/Adoption/Paternity/ Shared Parental Leave) to understand the process. Queries regarding family leave should be directed to your [HR Business Partner](https://www.st-andrews.ac.uk/hr/businesspartner/). All policies can be downloaded from the [HR policy webpage](https://www.st-andrews.ac.uk/staff/policy/hr/). |  | |  | |  | |
| Notify your line manager and HR of the pregnancy/adoption as soon as is reasonably practicable and by no later than:  **Via** [**HR Self-Service**](https://www.st-andrews.ac.uk/staff/self-service/) **(My Forms):**   * [Maternity](https://www.st-andrews.ac.uk/staff/self-service/)/[Paternity](https://www.st-andrews.ac.uk/media/human-resources/new-policy-section-documents/paternityleave/Paternity%20leave%20notification%20form.docx)/[Adoption via surrogacy](https://www.st-andrews.ac.uk/staff/self-service/): The end of the 15th week before the EWC. * UK Adoption: Within 7 days of being notified that you have been matched for adoption. * Overseas Adoption: Within 28 days of receiving official notification.   **Via** [**SPL notification form**](https://www.st-andrews.ac.uk/media/human-resources/new-policy-section-documents/sharedpaternalleave/Shared%20Parental%20Leave%20Notification%20Form.docx)**:**   * Shared Parental Leave: At least 8 weeks before the leave is due to start.   If relevant, submit a copy of the MATB1/matching certificate/official notification to HR via [HR Self-Service](https://www.st-andrews.ac.uk/staff/self-service/). |  | |  | |  | |
| If relevant, complete the [Expectant and New Mothers training course and Risk Assessment](https://www.st-andrews.ac.uk/ehss/training/#d.en.51302) (the course can be found under the heading “Pregnancy and new mothers”). Queries regarding risk assessments should be directed to [the EHSS Team](https://www.st-andrews.ac.uk/ehss/staff/). |  | |  | |  | |
| Support any outcomes/temporary adjustments from the risk assessment process. |  | |  | |  | |
| If relevant, ensure that a regular risk assessment is completed throughout the pregnancy and raise any concerns so that appropriate adjustments can be put in place. |  | |  | |  | |
| Consider what leave and pay entitlement you are eligible for and when your leave will commence. Note: ensure that you provide the correct notice to take the leave. This will be confirmed in the relevant policy. Also, if relevant, consider if Shared Parental Leave might be something you wish to explore. |  | |  | |  | |
| Arrange a meeting to discuss the leave *(*[Meeting 1](#_Meeting_1_(Discuss_1)suggests discussion points for this meeting). | |  | |  | |  |
| Agree how and when the employee would like to communicate the news with colleagues. | |  | |  | |  |
| Allow time off for medical appointments (e.g. antenatal appointments, adoption appointments). Refer to the relevant policy for entitlement information. Note: Please ensure that notice is provided to attend these appointments. | |  | |  | |  |
| Check your eligibility for [tax-free childcare](https://www.st-andrews.ac.uk/hr/payandpensions/childcarevouchers/)  and consider joining the University’s [staff parents and carers network](https://www.st-andrews.ac.uk/about/edi/staff-networks/). | |  | |  | | **☐** |
| **Plan options to cover the period of leave:**   * Requests for like for like cover should be sent to your [HR Business Partner](https://www.st-andrews.ac.uk/hr/businesspartner/). The request should confirm the name of the employee going on leave and the dates/duration of the leave. (Further Particulars should also be attached to this email request). * Any substantial changes to the cover post (e.g. working increased hours or the cover post will differ from the substantive post), should go through the Workforce Planning process via a replacement post form. Further information regarding this process can be read on the [WPG webpage](https://www.st-andrews.ac.uk/hr/workforceplanninggroup/). | |  | |  | |  |
| Consider if there is a requirement to request a contract extension:   * All external funding/research council extensions should be discussed with your [FAS](https://www.st-andrews.ac.uk/finance/financialadviceandsupportteams/) team. * All internally funded contracts extensions (FTCs) should be discussed with your [HRBP](https://www.st-andrews.ac.uk/hr/businesspartner/). | |  | |  | |  |
| If the employee is still in their probation period, arrange with [HR Probation](mailto:hr.probation@st-andrews.ac.uk) for the probation to pause during the family leave. | |  | |  | |  |
| Ensure that the annual review and development meeting is scheduled, actioned and signed off prior to going on leave. ([ARDS](https://www.st-andrews.ac.uk/policy/staff-progression-and-development-performance-management/academic-review-and-development-policy-010323-onward.pdf)/[RDS](https://www.st-andrews.ac.uk/policy/staff-progression-and-development-performance-management/review-and-development-scheme-for-support-staff.pdf)) | |  | |  | |  |
| Ensure that accrued annual leave has been requested and approved on [HR Self-Service](https://www.st-andrews.ac.uk/staff/self-service/) (or equivalent annual leave system) and taken in advance of family leave start date. | |  | |  | |  |
| Discuss and agree any KIT/SPLIT days if applicable/known (optional). | |  | |  | |  |
| Set up an informal meeting to discuss workload handover. This meeting should ideally take place around two weeks before leave commences ([Meeting 2](#_Meeting_2_(Handover) suggests discussion points for this meeting). | |  | |  | |  |
| Ensure that personal details are up to date before you go on leave. Any changes to contact details before/during/after the leave must be updated on [HR Self-Service](https://www.st-andrews.ac.uk/staff/self-service/). | |  | |  | |  |
| Agree contact arrangements during the leave period (frequency of contact/content/method e.g. phone call, email). | |  | |  | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **During leave** | **Employee** | **Manager** | **Completed** |
| Notify your line manager and [HR](mailto:hr.support@st-andrews.ac.uk) (as soon as practicable) if the baby arrives earlier or later than the planned leave dates as the family leave dates will need to be adjusted. |  |  |  |
| Refer to the [Neonatal Leave Policy](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-family-friendly-leave/neonatal-leave-policy.pdf) for information on requesting neonatal care leave if applicable/relevant. Line manager must notify [HR](mailto:hr.support@st-andrews.ac.uk) to record/process the leave arrangements. |  |  |  |
| Maintain contact as agreed throughout the leave. |  |  |  |
| KIT/SPLIT days should be used as agreed in advance. KIT/SPLIT should be recorded and processed using [HR Self-Service](https://www.st-andrews.ac.uk/staff/self-service/). |  |  |  |
| If the return-to-work date changes (earlier or later), make sure that the line manager and [HR](mailto:hr.support@st-andrews.ac.uk) are informed in writing. Note: At least 8-weeks’ notice must be provided if a change to return date is requested. |  |  |  |
| If considering [flexible working](https://www.st-andrews.ac.uk/policy/staff-employee-relations-flexible-working/flexible-working-policy.pdf) arrangements when you return to work, allow adequate time to discuss this with your line manager and submit the [formal flexible working form](https://www.st-andrews.ac.uk/media/human-resources/new-policy-section-documents/flexibleworking/Flexible%20Working%20Application%20Form.docx) prior to your return. |  |  |  |
| Offer the opportunity to meet and discuss return to work plans. |  |  |  |
| Ensure practical arrangements are sorted for the employee’s return to work (e.g. desk, equipment set up, system access). |  |  |  |
| Discuss and agree return to work requirements (e.g. training/refresher training? Buddy/mentor? Full induction? Breastfeeding facilities/arrangements? What additional support might be needed to allow a smooth transition back to the workplace after family leave?) |  |  |  |
| Agree the physical return to work date (if this has changed) considering any annual leave/neonatal leave the employee takes after family leave. Note: Annual leave should be requested and booked in the usual way as outlined in the [Annual Leave policy](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence/annual-leave.pdf). |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Returning from leave** | **Employee** | **Manager** | **Completed** |
| Set up a meeting with the employee on their first day back from leave ([Meeting 3](#_Meeting_3_(Return)suggests discussion points for this meeting). |  |  |  |
| If relevant, complete the [Expectant and New Mothers training course](https://www.st-andrews.ac.uk/ehss/training/#d.en.51302) and Risk Assessment (the course can be found under the heading “Pregnancy and new mothers”). Queries regarding risk assessments should be directed to [the EHSS Team](https://www.st-andrews.ac.uk/ehss/staff/). |  |  |  |
| Support any outcomes/temporary adjustments from the risk assessment process. |  |  |  |
| Ensure breastfeeding arrangements have been discussed and are in place (if applicable). |  |  |  |
| Where relevant, liaise with [Pensions](mailto:pensions%20%3cpensions@st-andrews.ac.uk%3e) about maintaining pension contributions (during the nil pay period of family leave). |  |  |  |
| Return to work plans, including re-induction, refresher training should be followed. |  |  |  |
| Consider any training and development opportunities via the [OSDS webpage](https://www.st-andrews.ac.uk/osds/). |  |  |  |
| If the employee’s probation was paused during the family leave, resume this and set up a meeting with the employee to agree probationary objectives. Any queries regarding the probation should be referred to [HR Probation](mailto:hr.probation@st-andrews.ac.uk). |  |  |  |
| Ensure that annual objectives are discussed and agreed once the employee has settled back in to work. |  |  |  |
| Arrange regular meetings to discuss how the return is going. |  |  |  |
| Familiarise yourself with the support offered to employees who have a family:   * [Special Leave](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-special-leave/special-leave.pdf) includes emergency time off for dependants; carers leave; fertility leave. * [Flexible Working](https://www.st-andrews.ac.uk/policy/staff-employee-relations-flexible-working/flexible-working-policy.pdf) * [Parental leave](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-family-friendly-leave/parental-leave-policy.pdf) * [Caring Fund procedure](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-family-friendly-leave/caring-fund-procedure.pdf) |  |  |  |
| Any flexible working arrangements or other changes/adjustments should be reviewed and discussed to ensure their effectiveness. |  |  |  |

# 

# Meeting 1 (Discuss leave arrangements)

**The line manager and employee should use this meeting to:**

* Review risk assessment report and follow up on any actions (where relevant).
* Consider if there are any support/adjustment required to the role (e.g., does Occupational Health need to be informed? Are there any concerns that the line manager needs to be made aware of that was not covered in the risk assessment?) **Note:** this should be an ongoing review point for expectant mothers throughout the pregnancy.
* Discuss family leave proposed start/end dates.
* Review the policy and agree what needs to be actioned, when and who needs to be informed.
* Confirm if there are any pre-arranged appointments (e.g. antenatal/adoption) scheduled during the employee’s working hours that they will be required to attend.
* Discuss whether Shared Parental Leave might be a consideration.
* Agree how the news of the pregnancy/adoption to colleagues should be communicated.
* Agree date to complete RDS/ARDS before leave commences.
* Review annual leave entitlement and plan/agree when annual leave will be taken prior to leave. (**Note:** The employee should take all of their accrued annual leave before commencing their family leave wherever possible).
* Inform the employee that they can join the University’s [staff parents and carers network](https://www.st-andrews.ac.uk/about/edi/staff-networks/) at any time.

# Meeting 2 (Handover meeting before leave)

**The line manager and employee should use this meeting to discuss the following:**

* Communication protocols – Agree contact arrangements and communication for the leave period. (e.g., what does the employee want to be kept informed of, how frequent, how should the line manager keep in touch (email/text/phone)?)
* Employee should provide work information/handover to line manager (e.g. workload pending or incomplete, key contacts, where data is stored etc).
* Remind the employee of right to request keeping in touch (KIT) days during leave.
* Remind the employee about the right to [neonatal leave](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-family-friendly-leave/neonatal-leave-policy.pdf) (if required).
* Ensure that annual leave arrangements have been agreed. Annual leave that has accrued during family leave should typically be taken in the leave year in which it is accrued however may be carried over if this is not possible.
* Remind employee that if they are considering a flexible working request, they should commence this process as early as possible as the process can be time-consuming however there is no obligation to confirm any plans prior to going on leave.
* Remind employee that if any contact details change during leave they should update these via [HR Self Service](https://www.st-andrews.ac.uk/staff/self-service/), or notify [HR support](mailto:hr.support@st-andrews.ac.uk).

# Meeting 3 (Welcome back)

**The line manager and employee should use this meeting to discuss the following:**

* Welcome the employee back to work – line manager should give the employee key updates on changes since they have been off; team update, School/Unit wide update, University/strategy update.
* Ask the employee if they require any support or assistance (e.g. refresher training, breastfeeding facilities).
* (If applicable) Ask the employee to complete the online risk assessment: “[Expectant and New Mothers training course](https://www.st-andrews.ac.uk/ehss/training/)”and share results with you.
* Appropriate support and information should be provided in relation to updates on new or amended systems of work and information should be shared in relation to any new members of staff or staff departures, with appropriate introductions being made.
* Remind the employee of the [Caring Fund procedure](https://www.st-andrews.ac.uk/policy/staff-annual-leave-and-other-absence-family-friendly-leave/caring-fund-procedure.pdf) and encourage the employee to review [PDMS](https://www.st-andrews.ac.uk/pdms/), mentoring, coaching and training opportunities.
* Ask the employee to consider their objectives for the next year which will be reviewed and discussed in the next meeting.
* Remind the employee that if they require any support, regular catch-up meetings, assistance to raise this with you.