

**This work instruction was last updated: 16<sup>th</sup> March 2010**

## **New Parental Leave Process**

This Work Instruction describes the new process for recording:

Maternity Leave

Paternity Leave

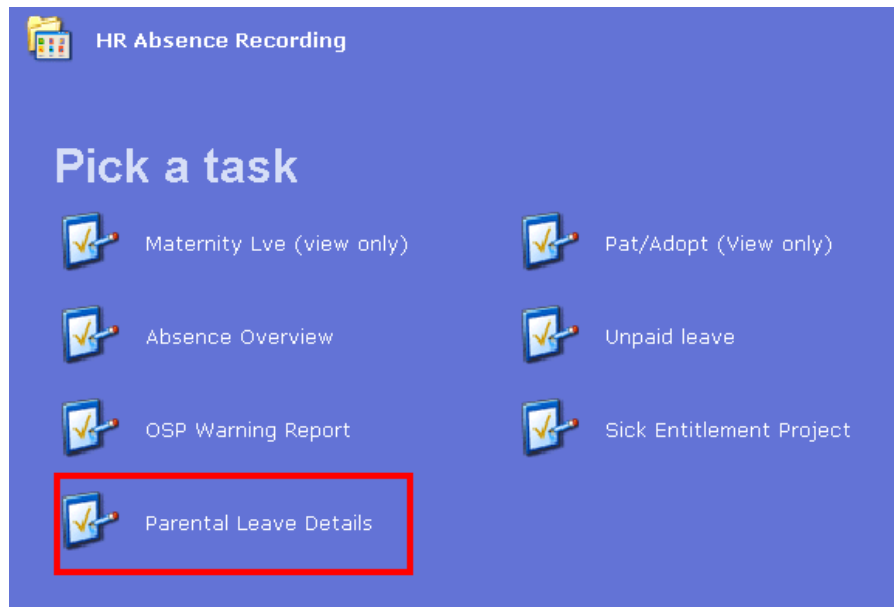
Adoption Leave

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

- |   |   |
|---|---|
| 1 | Starting the Parental Leave Process   |
| 2 | Parental Leave data entry screen  |
| 3 | Entering Maternity Details  |
| 4 | Entering Paternity Details  |
| 5 | Entering Adoption Details   |
| 6 | Amending Parental Leave Details – This applies to Maternity, Paternity and Adoption |

## 1 Starting the Parental Leave Process

### 1.1 Location of Screen



## 2 Parental Leave data entry screen

The set up on Resourcelink has been changed so that maternity, adoption and paternity leave are held under one screen called **Parental Leave Details**. The screen is as set out below:

The screenshot shows a software window titled 'Task - Parental Leave Details - Parental Leave Details'. The window has a menu bar (Session, Edit, View, Other, Process, Tools, Display, Help) and a toolbar. The main content area is for Employee 2073552: LADY H BADROCK. It includes a 'Due/Matching Date' field with a calendar icon and a 'Type' dropdown. Below this is a 'Details' section with a table for 'Payments Start Date' and 'Start Yr/Prd'. The table has columns for 'Statutory' and 'Occupational'. The 'Pay End Date' is set to 'N'. The 'Average/Normal Pay' and 'Total Paid' are both 0.00. The 'Completed' checkbox is checked. There are also fields for 'Calculate Payment', 'Mortality Ind', and 'KIT Days'. At the bottom, there are several icons for 'Pay Period View', 'Weekly Detail', 'Average Pay', 'Normal Pay', 'Processing Dates', 'Other Details', 'NI Grosses', and 'Notes'. A status bar at the bottom says 'Enter The Expected Due Date'.

### 3 Entering Maternity Details

#### 3.1 Employee search screen

Task - Parental Leave Details - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname  Initials

Sex  Nat. Ins. No.

Current Employee ☒ Y As at Date 16/03/2010

Previous Surname

Known As

Add Search

Surname	Initials	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number

#### 3.2 Parental Leave Screen

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 2073552 : LADY H BADROCK

Due/Matching Date  + - Type

Details

Payments Start Date  Start Yr/Prd

Pay End Date  Statutory  Occupational

Average/Normal Pay 0.00 0.00

Total Paid 0.00 0.00

Completed

Calculate Payment ☒ N


Mortality Ind

KIT Days

Pay Period View Weekly Detail Average Pay Normal Pay

Processing Dates Other Details NI Grosses Notes

Enter The Expected Due Date

- 3.1 Click on  to move into 'Add' mode
- 3.2 In the Due/Matching Date field enter the date that the child is due to be born and press enter
- 3.3 The Type field will automatically default to M for maternity, press enter

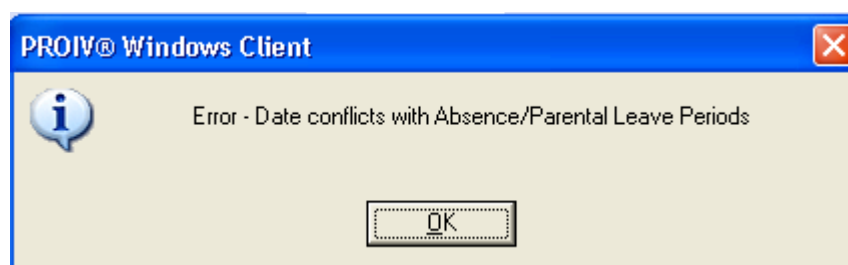
3.4 The **Contract Hours** will pull through automatically and relate to the employees main post. These can be overridden. Otherwise leave as is and enter through.

3.5 The **Service Start Date** will pull through the employees current start date automatically. This can be overridden but cannot be before the employees original start date. Press Enter.

☛ Please check the **Service Start Date** is correct i.e. check if they have moved from a temp bank post etc. The **Service Start Date** will automatically pull through the **Current start date** and not the 'to staff' field and therefore this should be checked in all instances.

3.6 Enter the start date for payments in the **Payments Start Date** field. This cannot be before the **Earliest Date** or after the **Latest Date**. Press Enter.


☛ If the following screen appears:

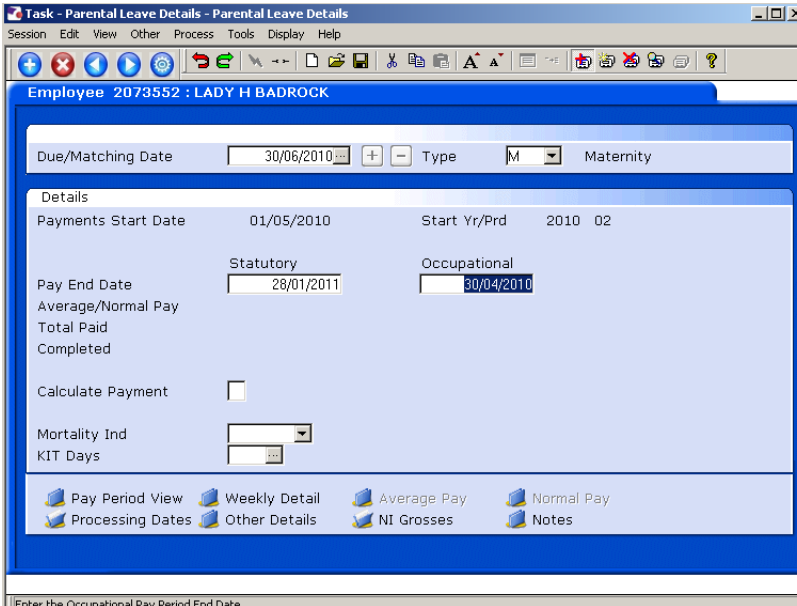


It means there are already absence records for the period of parental leave you are trying to enter. You will need to delete these records first before you can continue

3.7 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter.

3.8 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter

- 3.9 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter **N**. Press Enter
- 3.10 In the **Expected** field enter the date the employee is expected to return to work. Press Enter
- ☛ The Expected field is a mandatory field. If you are unsure of the date please enter a date 1 year from start of the maternity leave period.
- 3.11 The **Actual** date can be completed at a later date. Press Enter
- 3.12 Enter the date the MATB1 was received in the **Cert'n Received** field. This is not a mandatory field on RL but maternity leave and pay is subject to receipt of this document.
- 3.13 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 3.14 Click on **Exit** 



- 3.15 The payment end dates for the statutory maternity pay period and occupational maternity pay period are displayed.
- 3.16 Press Enter

- 3.17 The Average/Normal pay amounts are then calculated
- 3.18 HR users do not need to go past this point. **Contact Payroll** as they will need to complete the rest of the record.
- 3.19 Press Enter 3 times to return to the **Due/Matching date** field
- 3.20 Click on **Save**

## 4 Entering Paternity Details

### 4.1 Employee search screen

### 4.2 Parental Leave Screen

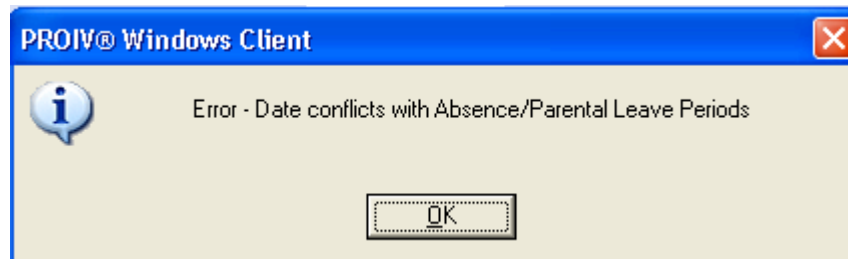
- | MD340G20 Parental Leave Processing Dates |                                   |                    |          |
|--|-----------------------------------|--------------------|----------|
| General                                  |                                   |                    |          |
| Due Date                                 | 01/04/2010                        | Type               | PatBirth |
| Birth/Placement Date                     |                                   | Contract Hours     | 30.00    |
| Earliest Date                            |                                   | Latest Date        |          |
| QW Start Date                            |                                   | Service Start Date |          |
| Payments Start Date                      |                                   | Start Yr/Prd       |          |
| Return To Work                           | <input type="checkbox"/> Expected |                    | Actual   |
| Expected End Date                        |                                   |                    |          |
| Cert'n Received                          |                                   |                    |          |
| Payment Method                           | WEEKLY                            |                    |          |

- Page 7 of 15

automatically pull through the **Current start date** and not the 'to staff' field and therefore this should be checked in all instances.

- 4.8 Enter the start date for payments in the **Payments Start Date** field. This cannot be before the **Earliest Date** or after the **Latest Date**. Press Enter

☛ If the following screen appears:



It means there are already absence records for the period of parental leave you are trying to enter. You will need to delete these records first before you can continue

- 4.9 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter
- 4.10 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter
- 4.11 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter N. Press Enter
- 4.12 The **Expected** field will automatically complete based on the Payments Start Date + 2 weeks. Press Enter.
- ☛ Please note that if someone is not requesting to take their full two weeks entitlement at this stage this date can be overridden
- ☛ The **Expected** field is a mandatory field
- 4.13 The **Actual** date can be completed at a later date. Press Enter
- 4.14 Enter the date the certification was received in the **Cert'n Received** field. This is not a mandatory field although it must be completed in order for paternity leave to be paid.
- 4.15 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 4.16 Click on **Exit**



Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 1840355 : MR BM THOMPSON

Due/Matching Date  + - Type  PatBirth

Details

	Statutory	Occupational
Payments Start Date	01/04/2010	01/04/2010
Start Yr/Prd	2010 01	2010 01
Pay End Date	<input type="text" value="14/04/2010"/>	<input type="text" value="14/04/2010"/>
Average/Normal Pay	313.84	353.81
Total Paid	0.00	0.00
Completed	N	N
Calculate Payment	<input type="text" value="N"/>	
Mortality Ind	<input type="text" value=""/>	
KIT Days	<input type="text" value=""/>	

- 4.17 Tab through for The Payment end dates for Statutory & Occupational paternity pay are displayed.
- 4.18 Stop at **Calculate Payment** and leave field as 'N'
- 4.19 Press Enter
- 4.20 HR users do not need to go past this point. **Contact Payroll** as they will need to complete the rest.
- 4.21 Press Enter 3 times to return to the **Due/Matching date** field
- 4.22 Click on **Save**

## 5 Entering Adoption Details

### 5.1 Employee search screen

Task - Parental Leave Details - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname  Initials

Sex  Nat. Ins. No.

Current Employee ☒ Y As at Date

Previous Surname

Known As

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number

### 5.2 Parental Leave Screen

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 1813862 : MR TJ WATERTON

Due/Matching Date  + - Type

Details

Payments Start Date  Start Yr/Prd

Pay End Date  Statutory  Occupational

Average/Normal Pay 0.00 0.00

Total Paid 0.00 0.00

Completed


Calculate Payment ☒ N

Mortality Ind

KIT Days

Pay Period View Weekly Detail Average Pay Normal Pay

Processing Dates Other Details NI Grosses Notes

5.3 Click on  to move into 'Add' mode

5.4 In the **Due/Matching Date** field enter the date that the child is due to be matched and press enter

- 5.5 The **Type** field will automatically default to **M** for Maternity if the employee is female. Click on the drop down and select **D Adoption** if the employee is female or **C Paternity Adoption** if the employee is male:

- 5.6 Press Enter

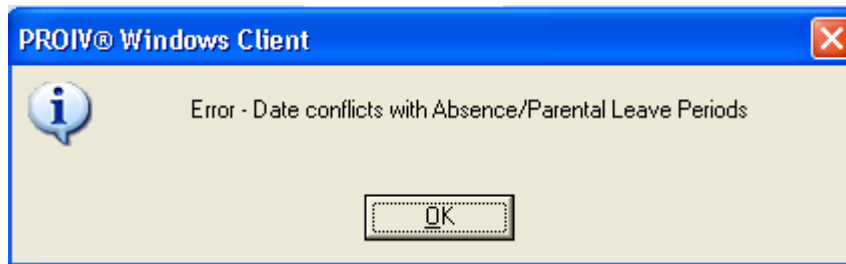
- 5.7 Enter the **Birth/Placement Date**. Placement Date is mandatory for adoption leave. Press Enter

- 5.8 The **Service Start Date** will pull through the employees current start date automatically. This can be overridden but cannot be before the employees original start date. Press Enter.

☛ Please check the **Service Start Date** is correct i.e. check if they have moved from a temp bank post etc. The **Service Start Date** will automatically pull through the **Current start date** and not the 'to staff' field and therefore this should be checked in all instances.

- 5.9 Enter the start date for payments in the **Payments Start Date** field. This cannot be before the **Earliest Date** or after the **Latest Date**. Press Enter

☛ If the following screen appears:



It means there are already absence records for the period of parental leave you are trying to enter. You will need to delete these records first before you can continue

- 5.10 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter
- 5.11 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter
- 5.12 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter **N**. Press Enter
- 5.13 In the **Expected** field enter the date the employee is expected to return to work. Press Enter
  - ☛ The Expected field is a mandatory field
- 5.14 The **Actual** date can be completed at a later date. Press Enter
- 5.15 Enter the date the certification was received in the **Cert'n Received** field. This is not a mandatory field on RL although it is mandatory for the adoption leave and pay to be granted.
- 5.16 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 5.17 Click on **Exit**

**Task - Parental Leave Details - Parental Leave Details**

Session Edit View Other Process Tools Display Help

Employee 1813862 : MR TJ WATERTON

Due/Matching Date 01/04/2010 + - Type B PatBirth

**Details**

Payments Start Date 01/04/2010 Start Yr/Prd 2010 01

Pay End Date Statutory 14/04/2010 Occupational 14/04/2010

Average/Normal Pay 534.95 574.10

Total Paid 0.00 0.00

Completed N N

Calculate Payment N

Mortality Ind

KIT Days

Pay Period View Weekly Detail Average Pay Normal Pay  
Processing Dates Other Details NI Grosses Notes

- 5.18 The **Statutory Payment End date** will display. Press Enter and the **Occupational Payment End date** will display.
- 5.19 Stop at **Calculate Payment** and leave field as 'N'
- 5.20 HR users do not need to go past this point. Contact Payroll as they will need to complete the rest.
- 5.21 Press Enter 3 times to return to the **Due/Matching date** field
- 5.22 Click on **Save**

## 6 Amending Parental Leave Details – This applies to Maternity, Paternity and Adoption

**Task - Parental Leave Details - Parental Leave Details**

Session Edit View Other Process Tools Display Help

Employee 1840355 : MR BM THOMPSON

Due/Matching Date 01/04/2010 + - Type B PatBirth

**Details**

Payments Start Date 01/04/2010 Start Yr/Prd 2010 01

Pay End Date Statutory 14/04/2010 Occupational 14/04/2010

Average/Normal Pay 313.84 353.81

Total Paid 0.00 0.00

Completed N N

Calculate Payment N

Mortality Ind

KIT Days

Pay Period View Weekly Detail Average Pay Normal Pay  
Processing Dates Other Details NI Grosses Notes

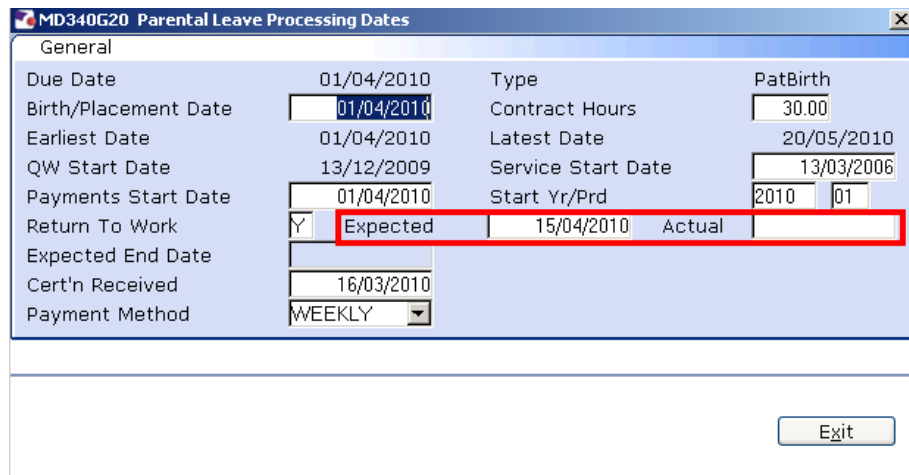
- 6.1 Once a period of parental leave has been created it can viewed and amended.
- 6.2 Enter Past the **Due/Matching Date** field first.
- 6.3 HR can amend the following areas:

#### ☛ Kit days

- ⓘ Please note these fields are applicable for both maternity and adoption leave. These are days which may, or may not be paid in addition to the normal maternity or adoption pay. If they are paid in addition then please notify Payroll accordingly who will make the necessary payments. Up to 10 days are allowable for both maternity and adoption leave.

#### ☛ Expected & Actual Return to Work dates

Click on Processing Dates



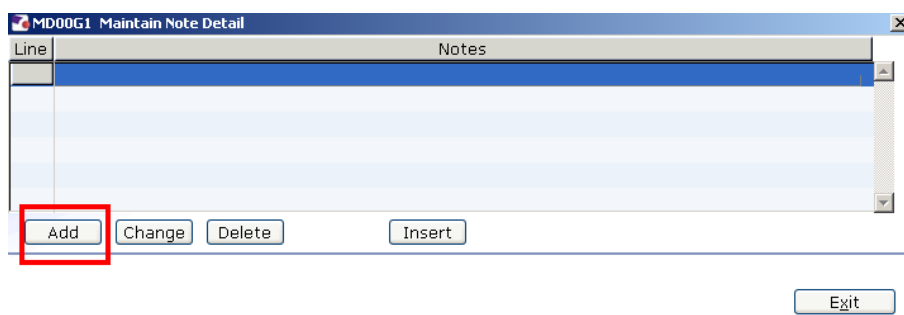
MD340G20 Parental Leave Processing Dates			
General			
Due Date	01/04/2010	Type	PatBirth
Birth/Placement Date	01/04/2010	Contract Hours	30.00
Earliest Date	01/04/2010	Latest Date	20/05/2010
QW Start Date	13/12/2009	Service Start Date	13/03/2006
Payments Start Date	01/04/2010	Start Yr/Prd	2010 01
Return To Work	Y	Expected	15/04/2010 Actual
Expected End Date			
Cert'n Received	16/03/2010		
Payment Method	WEEKLY		

Exit

Click on **Exit** when complete

- Notes

Click on  and then 



MD00G1 Maintain Note Detail	
Line	Notes

Add Change Delete Insert

Exit

6.4 Click on **Exit** when complete

6.5 Click on **Save**

☛ **Contact Payroll where the changes effect payments.**