

This work instruction was last updated: 17th March 2010

Parental Leave Payroll Process

This Work Instruction describes the Parental Leave Process for existing employees at the University.

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.

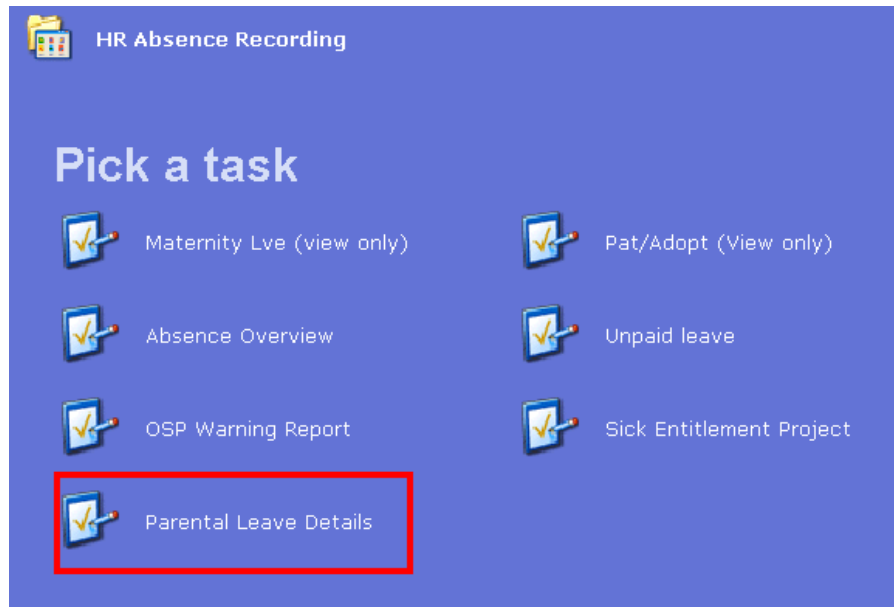
The first section for Maternity, Paternity or Adoption is completed by HR from details that are received by a letter and the Form Matb1. These details are included in this document to show the whole process

Section 4 deals with the Payroll Process.

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|---|--|
| 1 | Maternity Details Data Entry Screen – HR Process |
| 2 | Entering Paternity Details – HR Process |
| 3 | Entering Adoption Details – HR Process |
| 4 | Payroll Process |

1 Maternity Details Data Entry Screen – HR Process

1.1 Location of Screen




1.2 Employee search screen

The screenshot shows the 'Task - Parental Leave Details - Employee Selection Screen'. It has a tabbed interface with 'Employee' selected. The search criteria section includes fields for Employee Number, Surname, Sex, Current Employee (Y), Previous Surname, Known As, Initials, Nat. Ins. No., and As at Date (16/03/2010). There are 'Add' and 'Search' buttons. Below the search criteria is a table with columns: Surname, Inits, Title, Emp Number, National ID Number, Start Date, and For. The table is currently empty. At the bottom, there are 'Select', 'Exit', and 'Save List' buttons.

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

1.3 Parental Leave Screen

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

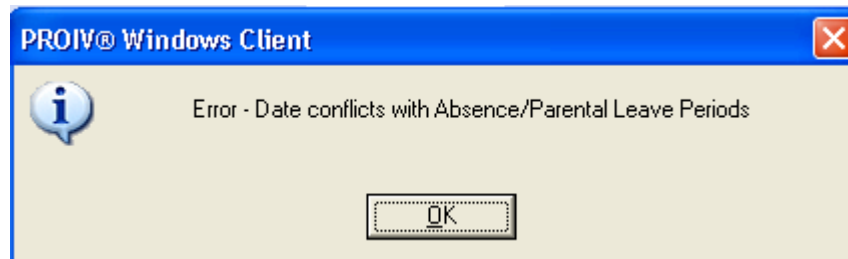
- 1.4 The **Contract Hours** will pull through automatically and relate to the employees main post. These can be overridden. Otherwise leave as is and enter through.
- 1.5 The **Service Start Date** will pull through the employees current start date automatically. This can be overridden but cannot be 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.

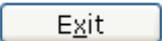
- 1.6 Enter the start date for payments in the **Payments Start Date** field. This cannot be before the **Earliest Date** or after the **Latest Date**. Press Enter.

☛ 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

- 1.7 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter.
- 1.8 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter
- 1.9 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter **N**. Press Enter
- 1.10 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.
- 1.11 The **Actual** date can be completed at a later date. Press Enter
- 1.12 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.
- 1.13 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 1.14 Click on **Exit** 

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 2073552 : LADY H BADROCK

Due/Matching Date 30/06/2010 + - Type M Maternity

Details

Payments Start Date 01/05/2010 Start Yr/Prd 2010 02

Pay End Date Statutory 28/01/2011 Occupational 30/04/2010

Average/Normal Pay

Total Paid

Completed

Calculate Payment

Mortality Ind

KIT Days

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

Enter the Occupational Pay Period End Date

1.15 The payment end dates for the statutory maternity pay period and occupational maternity pay period are displayed.

1.16 Press Enter

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 2073552 : LADY H BADROCK

Due/Matching Date 30/06/2010 + - Type M Maternity

Details

Payments Start Date 01/05/2010 Start Yr/Prd 2010 02

Pay End Date Statutory 28/01/2011 Occupational 30/04/2010

Average/Normal Pay 1357.82 665.52

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

1.17 The Average/Normal pay amounts are then calculated

1.18 HR users do not need to go past this point. **Contact Payroll** as they will need to complete the rest of the record.

1.19 Press Enter 3 times to return to the **Due/Matching date** field

1.20 Click on **Save**

2 Entering Paternity Details – HR Process

2.1 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	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number

2.2 Parental Leave Screen

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 1840355 : MR BM THOMPSON

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

2.3 Click on  to move into 'Add' mode

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

2.5 The **Type** field will automatically default to **B** for Paternity (Birth). Press Enter.

MD340G20 Parental Leave Processing Dates

General

Due Date: 01/04/2010

Birth/Placement Date:

Earliest Date:

QW Start Date:

Payments Start Date:

Return To Work: ☐ Expected

Expected End Date:

Cert'n Received:

Payment Method: WEEKLY

Type:

Contract Hours: 30.00

Latest Date:

Service Start Date:

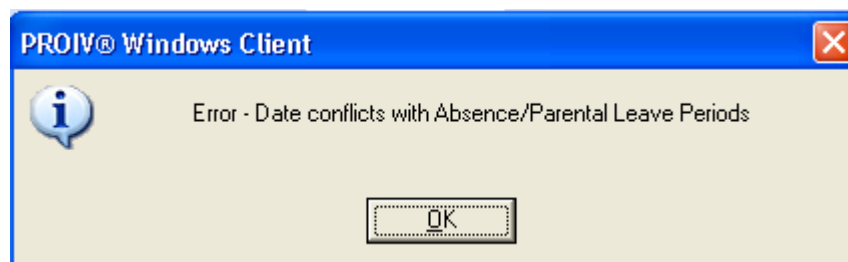
Start Yr/Prd:

Actual:

Exit

- 2.6 The **Birth/Placement Date** is mandatory only for adoption based leave. Leave blank and press Enter.
- 2.7 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.
- 2.8 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

- 2.9 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter
- 2.10 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter

- 2.11 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter N. Press Enter
- 2.12 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
- 2.13 The **Actual** date can be completed at a later date. Press Enter
- 2.14 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.
- 2.15 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 2.16 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

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	<input type="text" value="N"/>		
Mortality Ind	<input type="text"/>		
KIT Days	<input type="text"/>		

- 2.17 Tab through for The Payment end dates for Statutory & Occupational paternity pay are displayed.
- 2.18 Stop at **Calculate Payment** and leave field as '**N**'
- 2.19 Press Enter
- 2.20 HR users do not need to go past this point. **Contact Payroll** as they will need to complete the rest.
- 2.21 Press Enter 3 times to return to the **Due/Matching date** field

2.22 Click on **Save**

3 Entering Adoption Details – HR Process

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 ☐ N As at Date 16/03/2010

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

3.2 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

3.3 Click on  to move into 'Add' mode

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

- 3.5 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:

- 3.6 Press Enter

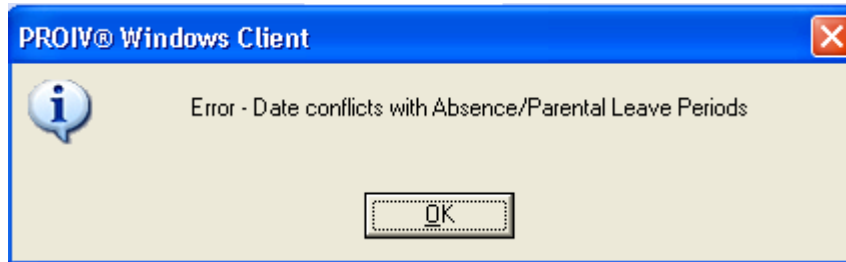
- 3.7 Enter the **Birth/Placement Date**. Placement Date is mandatory for adoption leave. Press Enter

- 3.8 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.

- 3.9 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

- 3.10 The system will automatically enter the **Start Yr** associated to the Payments Start Date entered. Press Enter
- 3.11 The system will automatically enter the **Prd** associated to the Payments Start Date entered. Press Enter
- 3.12 If the employee is expected to return to work, leave the **Y** in the **Return to Work** field. Otherwise enter **N**. Press Enter
- 3.13 In the **Expected** field enter the date the employee is expected to return to work. Press Enter
 - ☛ The Expected field is a mandatory field
- 3.14 The **Actual** date can be completed at a later date. Press Enter
- 3.15 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.
- 3.16 In the **Payment Method** field leave the default of **Weekly**. Press Enter
- 3.17 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 + - Type 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	<input type="text"/>		
KIT Days	<input type="text"/>		

Pay Period View Weekly Detail Average Pay Normal Pay

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

4 Payroll Process

- 4.1 Having checked that all of the details on this screen are correct. Calculate Payment details by entering Y and Enter.

Do not Pay Lump Sum

- 4.2 Select NO and check the OMP Pay Periods on the MMP Weeks Detail Screen and if in order Exit and Save

Task - Parental Leave Details - Parental Leave Details

Session Edit View Other Process Tools Display Help

Employee 1735683 : MRS B ACHARJEE

Due/Matching Date 12/01/2010 Type M Maternity

Details

Payments Start Date 04/01/2010 Start Yr/Prd 2009 10

Pay End Date Statutory 03/10/2010 Occupational 04/07/2010

Average/Normal Pay 186.95 193.34

Total Paid 1255.80 290.92

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

Enter the Mortality Indicator, or Window to select (PLMORT)

MD340G22 Pay Period View

General

Due Date 12/01/2010 Totals: Stat 1255.80 Occ 290.92

Seq	Period	Pay Date	Statutory	Occupational	Paid	Excl	Daily
001	2009/10	29/01/2010	673.12	100.24	Y		
002	2009/11	26/02/2010	582.68	190.68	Y		
003	2009/12	31/03/2010	615.30	351.40	N		
004	2010/01	30/04/2010	492.24	281.12	N		
005	2010/02	28/05/2010	615.30	351.40	N		
006	2010/03	30/06/2010	492.24	281.12	N		
007	2010/04	30/07/2010	492.24		N		
008	2010/05	31/08/2010	615.30		N		
009	2010/06	30/09/2010	492.24		N		

☒ Bulk Amend

4.3 Select the Bulk Amend option to change the Pay Period by changing the dates for Maternity and adoption leave

MD340G25 Bulk Amend

Selection

Start Date 04/01/2010 End Date

Pay Period Statutory Occupational

Exclusion Code

Paid Indicator

- ☛ For Paternity Leave select the Opt Out Exclusion Code in the Occupational Drop down List

Code	Desc	Long Description
NOTRET	Non Return	Employee Not Returning to Work
OPTOUT	OPT OUT	Employee has opted out of OMP
WORKED	Worked	Employee Worked

- 4.4 The Fixed Pay will have to be stopped using the Fixed Pay Element Screen and a note will have to be made to keep a record of the Pay-Point to be used

Seq	Post	Code	Desc	E	Start	Period	Amt	A	D	M	S
001	EMPLOYEE	0001	Tax Paid		01/02/2010	Calculated					
002	EMPLOYEE	0040	NI C/O		01/02/2010	Calculated					N
003	JJ00000906	1000	Basic Pay		01/03/2010		3212.58				N
004	JJ00000906	1000	Basic Pay	*	01/02/2010		3028.08				N

- 4.5 Enter the Element Detail screen by double clicking the D column and enter an End Date.

Pay Element

Pay Element ID: 1000 Basic Pay

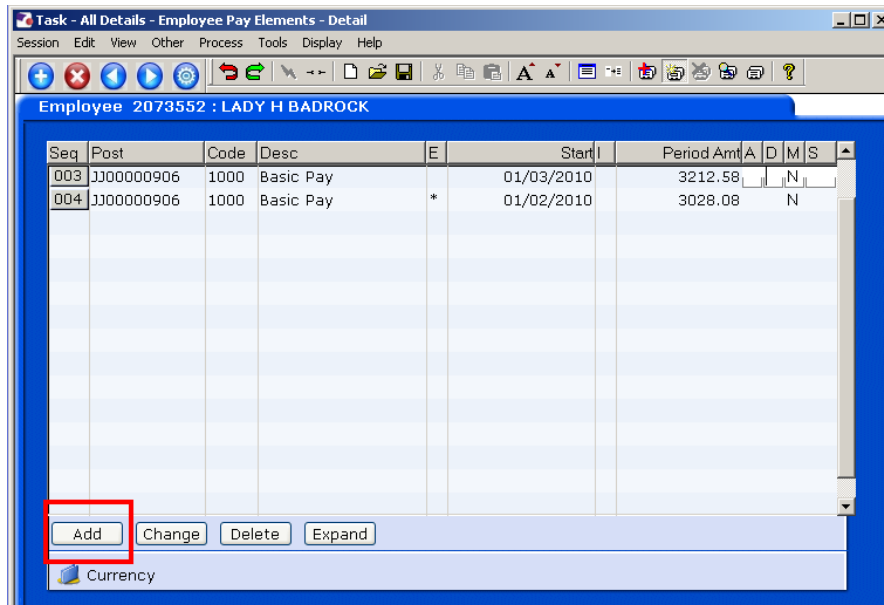
Post: JJ00000906 LECTURER

Start Date: 01/03/2010 Reason:

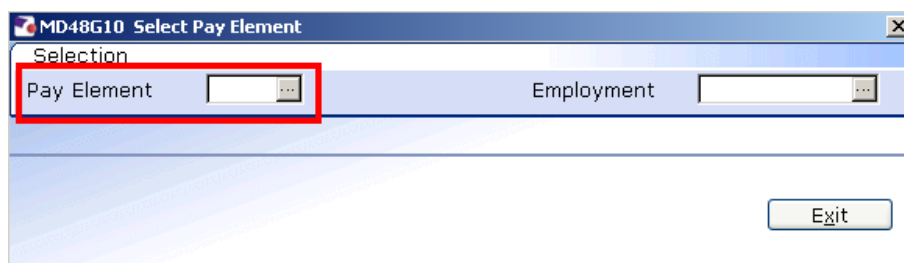
End Date:

- 4.6 If at the start of maternity leave the employee is not entitled to OMP but is entitled to SMP add to fixed Pay Element screen 1009 for notional annual salary and add either 1011, for PASNAS members, or 1010 for USS members in order for pension contribution payable by the University to be at

the full amount. These elements will also need to be entered when an employee goes from OMP to SMP only after 26 weeks full pay entitlement has been exhausted.



- 4.7 An Employee Temporary Pay Element will have to enter onto the system. Select Add. Add Pay Element 0112 for the OMP Payments and Enter



- 4.8 Save