

How to...

Record Maternity or Adoption Leave in  
SuccessFactors

## This guide applies to employees who wish to request a period of Maternity Leave or Adoption Leave in SuccessFactors.

This guide details how University employees may request a period of Maternity/Adoption Leave in SuccessFactors and how line managers will review and record the outcome of such requests.

It should be used in conjunction with the Maternity/Adoption Leave process map, as well as the University Policies found at:

<https://warwick.ac.uk/services/humanresources/internal/policies/maternity>

<https://warwick.ac.uk/services/humanresources/internal/policies/adoption>

Please note that this guide does not apply to the following people, who will not be able to request/record Maternity or Adoption Leave within SuccessFactors:

- Individuals engaged as a temporary/variable worker or as a sessional teacher
- Employees who are based permanently overseas
- Employees who have transferred to the University under the Transfer of Undertakings (Protection of Employment) Regulations and retain their former employer's terms and conditions, including Warwick Ventures

Requests for Maternity/Adoption Leave for anyone in the categories above should be discussed with their HR Adviser or the STP team as appropriate by the individual's line manager.

## Version History

Version	Date Published	Authored By	Summary of Key Changes
1.0	25/09/19	Brigitte Hatfield	N/A – first publication

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## Section A – Employee Guidance

### Introduction

This guide explains how you can record a period of maternity/adoption leave in SuccessFactors. However, before you do so, you must:

- Familiarise yourself with the University's maternity benefits set out in the maternity leave policy at: <https://warwick.ac.uk/services/humanresources/internal/policies/maternity> or in the adoption leave policy at: <https://warwick.ac.uk/services/humanresources/internal/policies/adoption>
- Complete as applicable the Maternity/Adoption Plan on the HR webpages (found via the links provided above) including a copy of your MatB1 form (which is given to an expectant mother by her midwife or GP and confirms the expected week of childbirth) or your Matching Certificate (which confirms the details of an adoption). The maternity/adoption plan will need to be uploaded to SuccessFactors and therefore this will need to be available before you commence recording your leave in the system.

The process for recording maternity and adoption leave is identical with the exception of the selected reason for absence. The screenshots used throughout this guide will follow a Maternity Leave example.

In order to record the absence in SuccessFactors and ensure that all of the necessary parties are aware of your impending absence (i.e. HR and Payroll), a workflow will be triggered within the system that requires 'approval'. This is purely to pass information to the relevant parties and does not in any way imply that a request for maternity or adoption leave is in itself subject to approval.

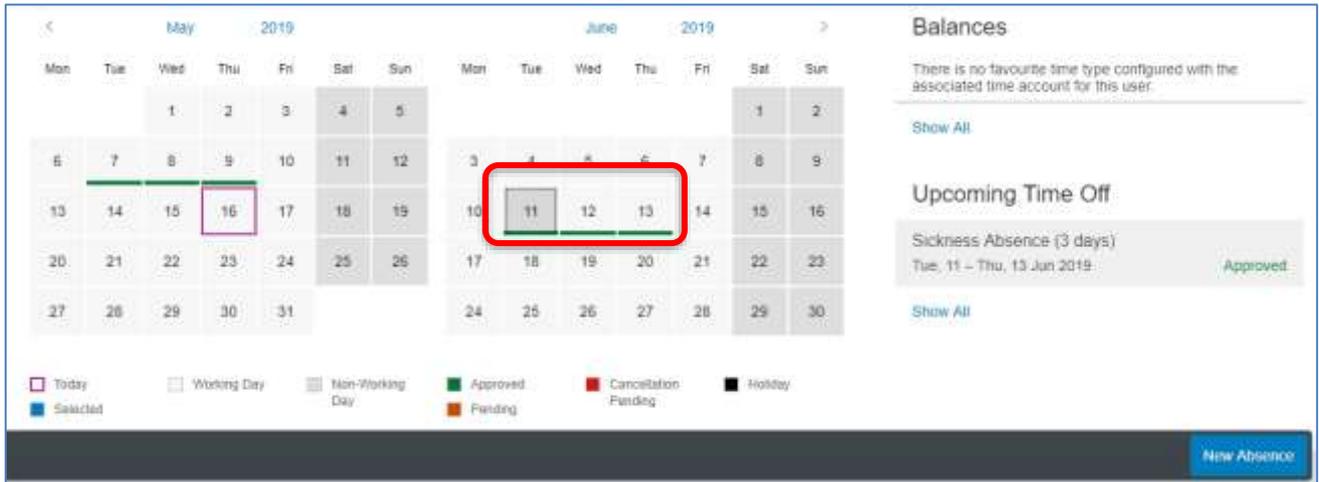


**Note:** If you hold more than one salaried contract with the University, you will need to record your maternity/adoption leave in all contracts and you must ensure that the dates that you enter for your period of leave are the same in all cases. Failure to do this may result in a delay in processing Maternity/Adoption pay.

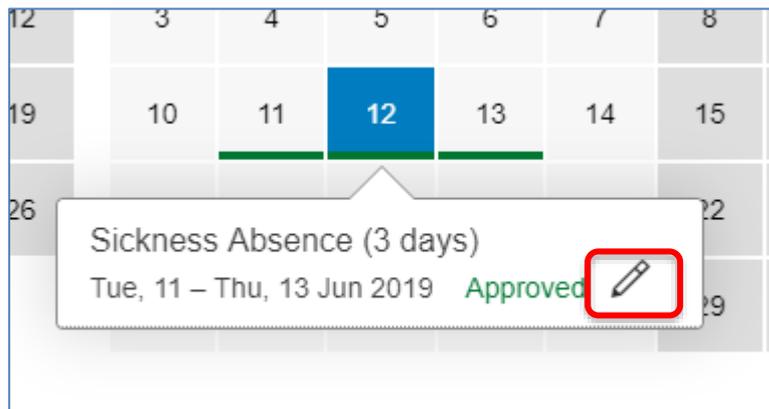
If you also hold any variable assignments including any Sessional Teaching assignments, you should ensure that your line manager is aware and the relevant teams are informed of your absence accordingly.

### Step-by-step instructions – preparing for recording maternity/adoption leave

1. Log in to SuccessFactors.
2. From your home screen click on the **'Time Off'** tile and you will be taken to the following screen:



- SuccessFactors will only allow one type of absence to be recorded against one day and therefore before you start to request your maternity/adoption leave, you will need to cancel all other types of approved absence that are currently recorded for days that fall within your planned maternity/adoption leave period (including any time off requested for Statutory or Customary days booked if you are either a part time employee or work non-standard working arrangements). To do this, identify any absences that have been approved and may be blocking your required maternity/adoption leave dates, click on the date and then on the 'Edit' or pencil icon as shown in the screenshot below:



- When you have clicked on the pencil icon, the details of that absence will open on the right hand side of the screen as shown below:

**\*Time Type** ?

Sickness Absence v

---

**\*Start Date** **\*End Date**

11 Jun 2019 13 Jun 2019

---

Requesting

3 days

---

Team Absences

4 out of 25 team members

---

Comment

Operation

Cancel Cancel Request Send Request

- Click on **'Cancel Request'** and it will either be cleared from your calendar (if it does not require approval) or you will need to wait until you have received confirmation that any cancellations have been approved by your line manager before you can proceed with the following steps to record your maternity/adoption leave.



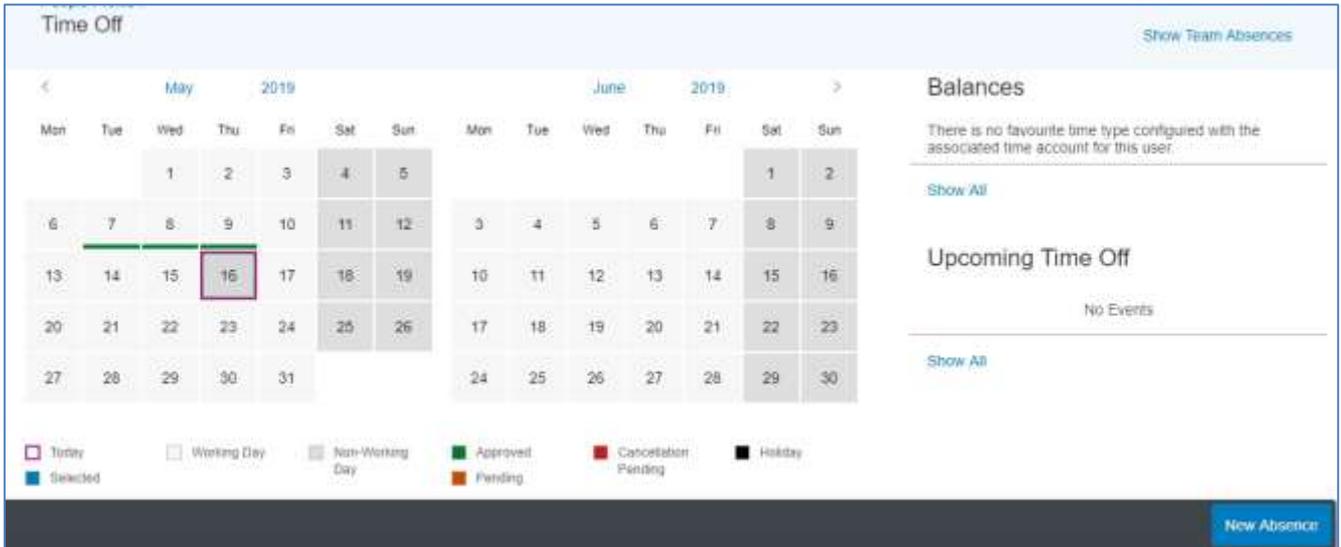
Note: Any absences that 'clash' with your desired maternity/adoption leave that are still pending approval (underlined in amber), do not need to be cancelled as they will be 'over-written' by your request for maternity/adoption leave and you will receive the warning shown below to alert you to that fact:

**⚠** If you create this absence, the existing absence of time type Unpaid Leave from 22/05/2019 to 24/05/2019 will be cancelled.

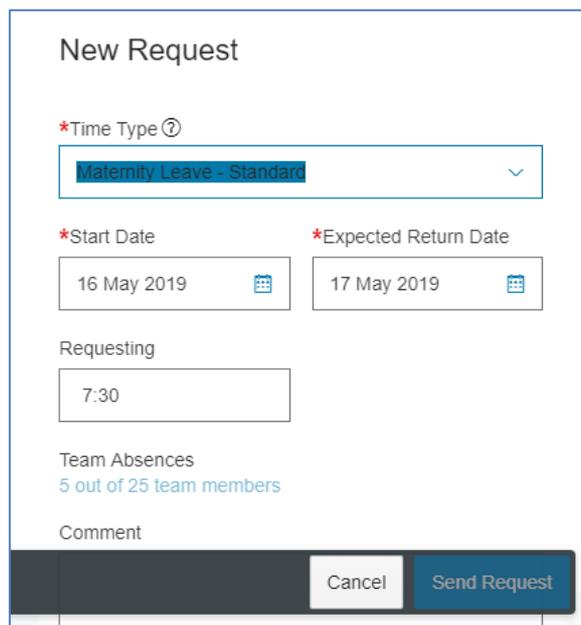
If you are happy to proceed with your request you can ignore the message and continue. Alternatively, you can remove the pending absences in the way described above.

## Step-by-step instructions – recording maternity/adoption leave

- From your home screen click on the **'Time Off'** tile and you will be taken to the following screen:



- Click on 'New Absence' in the bottom right hand corner of the screen and select as appropriate either the 'Maternity Leave' or 'Adoption Leave' option from the drop down list:




Note: **'Maternity Leave – Standard'/'Adoption Leave – Standard'** relate to the following pattern of desired maternity/adoption pay:

- Eight weeks of normal full pay followed by;
- Sixteen weeks of normal half pay plus statutory maternity/adoption pay (where this does not exceed normal full pay) followed by;

- Fifteen weeks of statutory maternity/adoption pay (weekly amount reviewed annually by the government) followed by;
- Up to thirteen weeks of unpaid maternity/adoption leave.

**'Maternity Leave – Alternative'/'Adoption Leave – Alternative'** relate to the following pattern of desired maternity/adoption pay:

- Sixteen weeks of normal full pay followed by;
- Twenty three weeks of statutory maternity/adoption pay (weekly amount reviewed annually by the government) followed by;
- Up to thirteen weeks of unpaid maternity/adoption leave.

In both cases, your eligibility for statutory and/or University maternity/adoption pay will be checked and confirmed by Payroll.

3. Complete all fields required (you will need to scroll down the page by using the scroll bar on the right hand side of the screen):
  - a. Select/input the start date, end date, your expected week of confinement (EWC) if you are requesting maternity leave and any comments you wish to record. An asterisk (\*) to the left of a field denotes that it is mandatory and you will receive an error message if you attempt to submit your maternity/adoption leave record without completing any of these fields/uploading your maternity/adoption plan (you should already have agreed your plans with your line manager and completed your maternity/adoption plan before inputting to SuccessFactors so that you can upload this including a copy of your Mat B1/matching certificate.)



**Tip:** If you click on the calendar in any field requiring a date, a pop-up calendar will appear on screen for you to find the appropriate date using the drop-down menus for month and year. When you click on the appropriate date, the field will be populated for you. Alternatively, you can enter the date manually in the format shown within the field (DD/MM/YYYY).

Alternatively, you can select date(s) by hovering over the start date on the calendar showing on screen, then click and hold, and drag the paint brush icon to the end date. The start and end date fields will then auto populate.



**Note:** If you work anything other than standard working arrangements e.g. shift, rota, annualised hours, you may need to adjust the dates against which you enter your absence to ensure that your absence and any salary adjustments are accurately recorded. Please see the 'How to... Update a Work Schedule in SuccessFactors' guide for further information.

- b. Once you have finished inputting the required information, click on **'Send Request'** in the bottom right hand corner. The dates you have requested will be showing as pending on your calendar and the following information will then appear on the right hand side of your screen:

### Balances

There is no favourite time type configured with the associated time account for this user.

---

[Show All](#)

### Upcoming Time Off

Maternity Leave - Standard (365 days)  
 Mon, 6 May 2019 – Mon, 4 May 2020 Pending

[Show All](#)

4. If you click on the word **'Pending'**, you will be able to see who the request has gone to (it will normally be your line manager or their nominated deputy) and they will receive a workflow notification for them to review the request. You will receive an email to inform you of the decision made by your line manager and the status of your request will update in the system (e.g. once final approval has been received from Payroll, the status will change from **'Pending'** to **'Approved'**).



**Note:** Recording maternity/adoption leave follows the same 'approval' process as other requests for time off work. The only circumstances where your 'request' would be declined would be where:

- the dates that you are recording conflict with those in your maternity/adoption leave plan or
- the dates do not tally with the arrangements you have previously made with your line manager or
- you have uploaded incomplete information (e.g. a plan without a Mat B1 or matching certificate).

5. When your request has been approved by your line manager, the details of your maternity/adoption leave dates will be forwarded to the University's Payroll department for final review, to check your eligibility for payments.
6. You can track where your request is at any time by clicking on your **'Time Off'** tile and viewing the requests on the right hand side of the page. Select the request you are looking for from the list beneath 'Upcoming Time Off' and click on the word **'Pending'** to see who the workflow is with. In the screenshot below, the employee's request has been approved by their line manager and is now awaiting verification by the Payroll department:

### Request Details

Time Type **Maternity Leave - Standard** ⓘ

Date **Mon, 6 May 2019 – Mon, 4 May 2020**

Requesting **365 days**

Approval Status **Pending**

To Be Approved **Payroll**

By

Maternity Plan [maternity\\_adoption\\_leave\\_plan\\_-](#) ⓘ  
v2.0.docx

Activity 🗨️

7. Once a Payroll administrator has confirmed your eligibility for payments, the status of your absence record will change as shown below and you will receive an email similar to the one found in [Appendix A](#) confirming what you have requested, what you are entitled to in terms of payments along with an attachment ([Appendix B](#)) that sets out what happens to different salary deductions during your maternity/adoption leave. This confirmation will also be copied to your Department Administrator and Local HR Administrator (where applicable).

People Profile / Time Off Show Team Absences

< May 2019 June 2019 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5						1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30

■ Today   
  Working Day   
  Non-Working Day   
  Approved   
  Cancellation Pending   
  Holiday   
  Pending   
  Selected

#### Balances

Bookable Leave

[Show All](#)

#### Upcoming Time Off

Maternity Leave - Standard (365 days)  
Mon, 6 May 2019 – Mon, 4 May 2020 Approved

[Show All](#)

Status has changed to approved

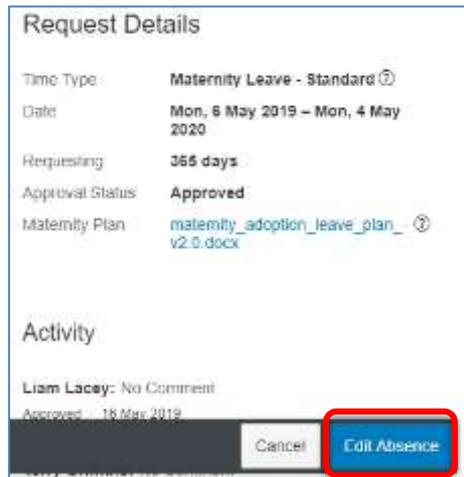
Click here to open the absence record and see any comments posted on the workflow

New Absence

## Changing your leave dates

If you need to change your maternity/adoption leave dates or you wish to change to Shared Parental Leave, you can do this at any time by clicking on the **'Time Off'** tile on your SuccessFactors home page.

1. This will open up your Time Off calendar which includes a listing of all future absences on the right hand side of the page under the heading 'Upcoming Time Off'. You can edit your maternity/adoption leave request by clicking into the relevant time off record and then clicking on **'Edit Absence'**:



**Request Details**

Time Type: **Maternity Leave - Standard** ⓘ

Date: **Mon, 6 May 2019 – Mon, 4 May 2020**

Requesting: **365 days**

Approval Status: **Approved**

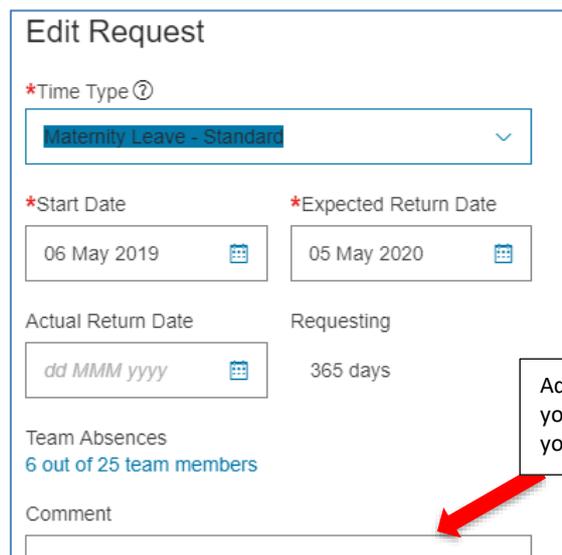
Maternity Plan: [maternity\\_adoption\\_leave\\_plan\\_v2.0.docx](#) ⓘ

**Activity**

**Liam Lacey:** No Comment  
Approved: 18 Mar 2019

Cancel **Edit Absence**

2. When you click on **'Edit Absence'** the date and attachment fields will open and be editable. Make the necessary changes to the absence record, amend your maternity/adoption plan and re-upload using the 'Update' button. Finally add some text in the **'Comments'** field to clearly indicate what you have changed on the record:



**Edit Request**

\*Time Type ⓘ  
Maternity Leave - Standard

\*Start Date: 06 May 2019 ⓘ

\*Expected Return Date: 05 May 2020 ⓘ

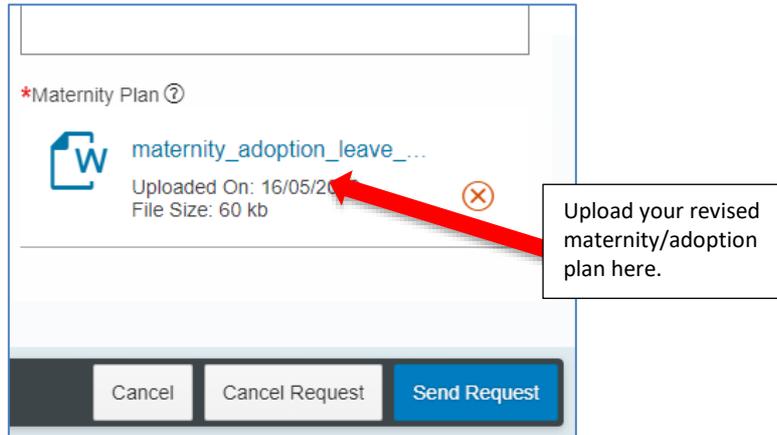
Actual Return Date: dd MMM yyyy ⓘ

Requesting: 365 days

Team Absences: 6 out of 25 team members

Comment

Add notes on how you have changed your plan here.




Note: You can make changes to your planned maternity/adoption leave start and end dates at any time subject to any timing constraints set out in the relevant policy (e.g. at least 28 days' notice has been given of a change to the start of maternity/adoption leave and at least 8 weeks' notice has been given of a change to the return to work date).



Note: If you are ending your maternity leave early in order to switch to Shared Parental Leave, you must enter the date that you wish to start your Shared Parental Leave in the field entitled **'Actual Return Date'** and state this in the **'Comments'** field so that Payroll are aware and can prioritise the approval of this workflow. Your changes to maternity have to be fully approved by Payroll before you are able to enter a period of Shared Parental Leave.

3. When you have completed all the changes you need to make, click on **'Send Request'**. A new workflow will be triggered to your line manager (or nominated deputy) and Payroll as before.
4. In certain circumstances a period of maternity leave may be triggered earlier than planned due to either:
  - the employee being absent from work due to a pregnancy related illness within 4 weeks of the Expected Week of Confinement, or
  - the baby being born early

In these situations, your line manager (or nominated deputy) will amend your absence dates on your behalf.

## [Changing to Shared Parental Leave](#)

You may also decide that you wish to switch some of your maternity/adoption leave to shared parental leave so that you can share the responsibility of caring for your new baby with your partner. If you wish to do this, you must end the initial period of maternity/adoption leave and wait for this to be fully approved by the Payroll department before submitting a fresh request for shared parental leave. The full details of how to submit a request for shared parental leave can be found in the 'How to...record Shared Parental Leave in SuccessFactors' guide. However, you must first follow the instructions contained in the section of this guide that deals with [changing your leave dates](#), complete

your actual return date and in the comments field, ensure that you reference the fact that as well as closing a period of maternity/adoption leave, you wish to open a period of shared parental leave.

## Recording Keeping in Touch Days

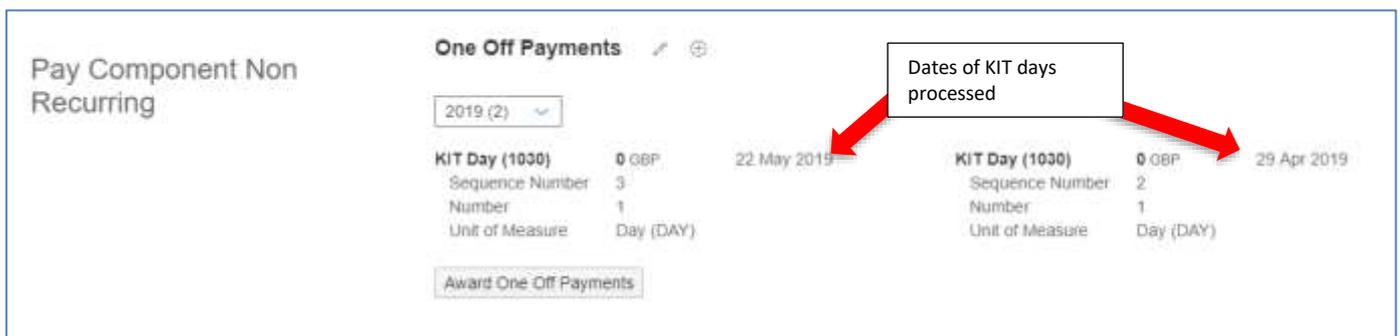
A maximum of ten Keeping in Touch (KIT) days may be worked during maternity/adoption leave, in agreement with a manager/Head of Department. These days provide a means for employees to be kept updated on relevant work/job related matters. The following steps outline what you need to do to ensure that you receive the relevant payments for any KIT days that you work.

1. First, agree with your line manager which day(s) you are intending to work as keeping in touch days. You may choose to agree these before you go off on maternity/adoption leave. Alternatively you may agree on these dates once you have commenced your leave. There is, however, no requirement for individuals to carry out KIT days, nor for departments to agree to them.
2. If you do agree with line manager that you will attend work for a KIT day, once you have completed it your line manager will make a one-off payment to you within SuccessFactors to be paid in the following payroll month.



**Note:** Payment for KIT days will amount to a normal day's full pay inclusive of any current maternity payments. For example, during the period of maternity leave if you are receiving full pay, no further payment would be due. If you work your KIT day(s) during a period of SMP, your statutory pay will be enhanced to full pay, and if work takes place during a period of unpaid maternity leave, you should be paid the equivalent of your normal daily rate. Any number of hours worked in a day constitutes one KIT day.

3. You will not see the KIT day recorded on your calendar in SuccessFactors. However, once your line manager has processed the payments for your KIT days, you will be able to see these recorded on your profile page under the compensation section as shown below:



The screenshot displays the 'One Off Payments' section in SuccessFactors. On the left, it shows 'Pay Component Non Recurring'. The main area lists two 'KIT Day (1030)' payments, both valued at '0 GBP'. The first payment is dated '22 May 2015' and the second is dated '29 Apr 2019'. A box labeled 'Dates of KIT days processed' has red arrows pointing to these two dates. Below the list is an 'Award One Off Payments' button.

Payment Details	Date
KIT Day (1030) Sequence Number: 3 Number: 1 Unit of Measure: Day (DAY)	22 May 2015
KIT Day (1030) Sequence Number: 2 Number: 1 Unit of Measure: Day (DAY)	29 Apr 2019

## Planning Your Return to work

There may be occasions where you decide to return to work earlier than originally anticipated or wish to request changes to your working arrangements on your return (e.g. working part time or changing your working pattern.)

If you wish to return to work earlier than originally planned, you should agree this with your line manager and then follow the instructions in the section of this guide entitled [‘Changing your leave dates’](#).

If you wish to request a change to your working arrangements on your return to work, you should discuss this as soon as possible with your line manager and then refer to the guidance contained on the following pages on the HR intranet: <https://warwick.ac.uk/services/humanresources/internal/wellbeing/flexibleworking>

## [Confirming Your Return to Work/Switching to Shared Parental Leave](#)

A month before you are due to return to work, your line manager will update your absence record to confirm your actual return to work date (if you are aware that your original anticipated return date is going to differ to your actual return date, you must inform your line manager at least 8 weeks in advance).

Alternatively, if you have agreed with your line manager that you will curtail your maternity/adoption leave to switch to a period of shared parental leave, you must ensure that your maternity/adoption leave record has been ‘closed’ by entering an actual return to work date and that this has been fully approved by the Payroll department before you are able to enter your shared parental leave record. You can follow the steps below to ensure that this is actioned. (You may also wish to refer to the ‘How to... Record Shared Parental Leave in SuccessFactors’ guide for further details.)

On your first day back at work (or when you know the date on which you wish your first period of shared parental leave to commence), you must check that your profile is now showing you as **‘Active’** and that your Maternity/Adoption Leave record has been updated with an **‘Actual Return to work Date’**.

1. Log in to SuccessFactors, navigate to the **Time** section of your profile and click on **‘Administer Time’**. The Time Information screen will appear:

Time Information for Jacklyn Hyde							
TIME RECORDS		TIME ACCOUNTS		WORK SCHEDULE			
Time Records (3)							+ New Absence ▾
Start Date	End Date	Taken	Time Type	Related Records	Requester	Requested On	Status
3 Feb 2020	31 Aug 2020	211 days	Career Break		Jacklyn Hyde		Approved 
15 Jan 2019	13 Jan 2020	364 days	Maternity Leave - S...		Jacklyn Hyde		Cancelled
15 Jan 2019	12 Jan 2020	363 days	Maternity Leave - S...		Jacklyn Hyde		Approved 

2. Identify the relevant entry, click on the ‘pencil’ (edit) icon on the corresponding line and the following window will open:

Edit Absence

\*Time Type <sup>(?)</sup>  
 Maternity Leave - Standard

\*Start Date      \*Expected Return Date      Actual Return Date      Requesting  
 01 Feb 2019      30 Jul 2019      dd MMM yyyy      179 days

Comment  
 My circumstances have now changed and therefore I have brought forward my expected return date from 31/1/2020 to the end of July.

\*EWC <sup>(?)</sup>  
 11 Feb 2019

\*Maternity Plan <sup>(?)</sup>  
 maternity\_adoption\_leave\_plan\_-\_v2.0.docx  
 Uploaded On: 09/04/2019 - File Size: 60 kb

Cancel    Cancel Request    Submit

- Check that your line manager has completed the **'Actual Return Date'** field along with entering a supporting comment in the **'Comment'** box. If there is no actual return date specified, please enter this date and add in a note confirming whether your actual return date differed from your anticipated return date. This information is important to ensure that the Payroll department is aware of your return.

Edit Absence

\*Time Type <sup>(?)</sup>  
 Maternity Leave - Standard

\*Start Date      \*Expected Return Date      Actual Return Date      Requesting  
 01 Feb 2019      30 Jul 2019      30 Jul 2019      179 days

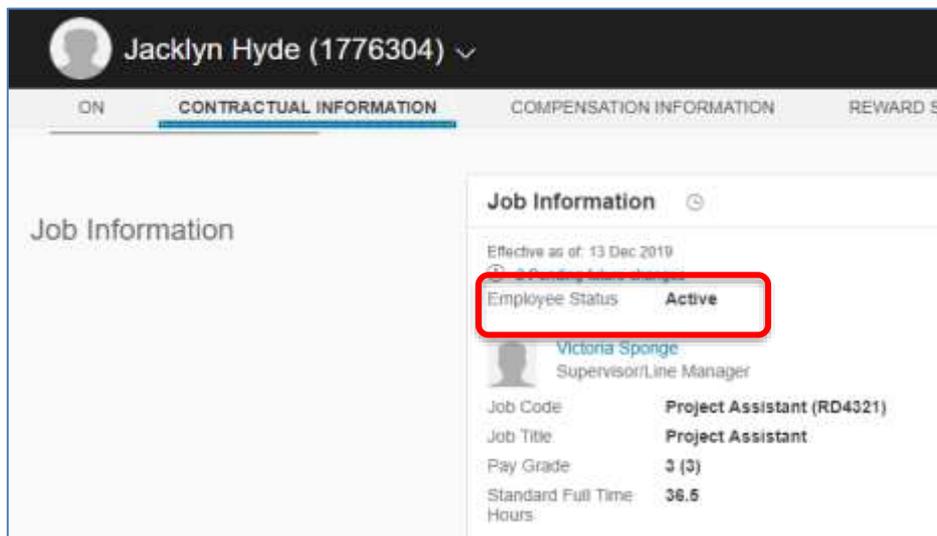
Comment  
 As agreed bringing my return date forward to the end of July.

\*EWC <sup>(?)</sup>  
 11 Feb 2019

\*Maternity Plan <sup>(?)</sup>  
 maternity\_adoption\_leave\_plan\_-\_v2.0.docx  
 Uploaded On: 09/04/2019 - File Size: 60 kb

Cancel    Cancel Request    Submit

4. Click on **'Submit'** and you will be returned to your Time Information screen where your Maternity/Adoption Leave absence record will again show as **'Pending'**.
5. A workflow will be triggered that requires both Head of Department and Payroll approval before the record shows as approved.
6. Once this has been approved you will be able to see that your profile shows you as being **'Active'** rather than being on **'Paid Leave'**:



The screenshot shows a user profile for Jacklyn Hyde (1776304) with the 'CONTRACTUAL INFORMATION' tab selected. The 'Job Information' section is highlighted, showing the following details:

Job Information	
Effective as of:	13 Dec 2019
Employee Status	<b>Active</b>
Supervisor/Line Manager	Victoria Sponge
Job Code	Project Assistant (RD4321)
Job Title	Project Assistant
Pay Grade	3 (3)
Standard Full Time Hours	36.5

## Section B – Line Manager Guidance

### Introduction

Normally, members of your team will be expected to record and update any maternity/adoption leave that they wish to take in SuccessFactors, using the instructions provided in Section A.

Before recording a period of maternity/adoption leave in SuccessFactors, your direct report should have:

- Reviewed the University guidance set out in the maternity leave policy at: <https://warwick.ac.uk/services/humanresources/internal/policies/maternity> or the adoption leave policy at: <https://warwick.ac.uk/services/humanresources/internal/policies/adoption>
- Agreed with you the dates that they wish to take maternity/adoption leave on.

Under normal circumstances, your involvement in the recording of maternity/adoption leave within SuccessFactors will be limited to reviewing the details submitted by your direct report and ‘approving’ a workflow. However, there may be times where it is not possible for one of your direct reports to record or update maternity/adoption leave for themselves in SuccessFactors. For example, if their child is born earlier than expected and they have to take their leave suddenly. In such cases, you (or in exceptional circumstances, your departmental administrator or local HR administrator) will need to record or update the absence record for the person concerned.

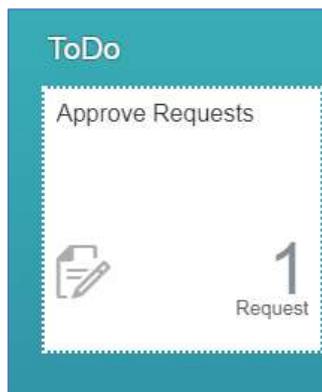
The following step-by-step instructions detail how you both approve and edit a maternity/adoption leave record.

### Step-by-step instructions - reviewing and responding to maternity/adoption leave requests

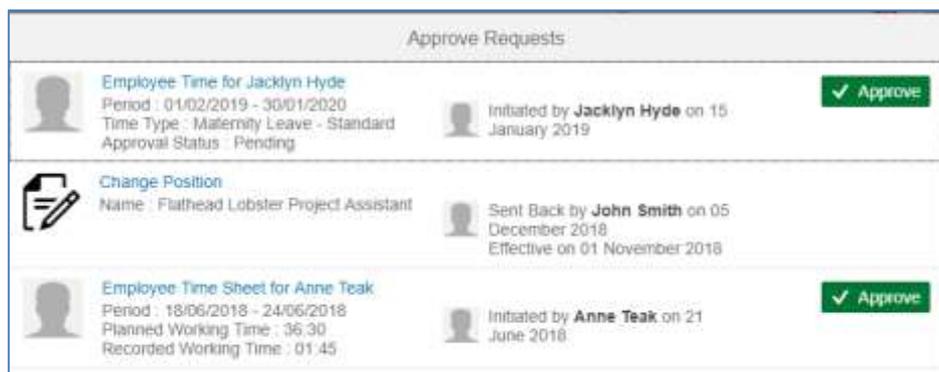
1. When one of your direct reports has recorded a period of maternity/adoption leave in SuccessFactors, you will receive an email such as the one shown below to highlight to you that a time off request is awaiting your review:



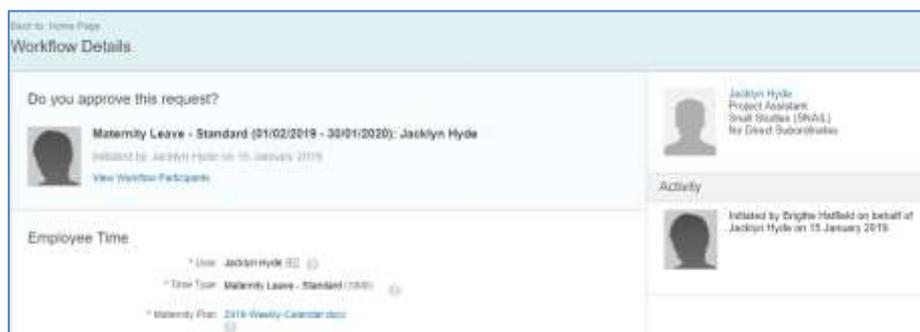
- Log in to SuccessFactors. On your home page you will see that you have a request showing in your **'To Do'** tile:



- Click on the **'Approve Requests'** tile and you will see summary details of the time off request concerned:



- Click on the hyperlinked **'Employee Time for...'** heading and the full details of the request will open up on screen:



5. On screen, you will be able to see a breakdown of the maternity/adoption leave requested and at the foot of the page you will be able to see if any other members of your team are absent in the period concerned:

Team Absence Calendar [2 others absent during this period.](#)

**Comment**

Write a comment

By clicking on the hyperlink above, you can see further details of concurrent absences in your team that may assist you in your future resource planning:

Team Absence Calendar							
Today	January – February 2019						
	Mon 28	Tue 29	Wed 30	Thu 31	Fri 1	Sat 2	Sun 3
 Jacklyn Hyde					Maternity Leave - Standard 1 Feb 2019 – 30 Jan 2020		
 Isle Awhite	Time Off 4 Jun 2018 – 19 May 2019						

6. Review the request for maternity/adoption leave and confirm that the dates tally with your verbal agreement with the employee and those contained in the maternity/adoption plan. Check that the maternity/adoption plan includes the MatB1 or matching certificate as appropriate before moving on to approve the request. Should there be any discrepancy in the details of the request or the MatB1/matching certificate is not included, you should decline the request. You do this by clicking on the relevant button at the bottom of the screen, although you should first add some comments to explain the reason for sending back the request.

**Comment**

Write a comment

- a) If you post any comments, these will appear in the right hand side of the **'Workflow Details'** screen, forming part of the audit trail of what has happened to a particular request:

**Activity**

Commented by Brigitte Hatfield on behalf of Victoria Sponge on 15 January 2019:

"Congratulations again Jacklyn !"

Your direct report who made the request will also receive an email to inform them that a comment has been posted that they may wish to review:

A comment has been posted in the following workflow, which you may wish to review:

Event reason: Create Employee Time  
 Request relates to: Jacklyn Hyde  
 Comment made by: Victoria Sponge |

Please click [here](#) to view the comments.

Please note: this is an automated email from an account that is not monitored. If you have any queries, contact [hr.services@warwick.ac.uk](mailto:hr.services@warwick.ac.uk).

- b) In the unlikely event that you need to delegate the request, you should do this by clicking on the **'Delegate'** button. This will open a new window where you will need to select the person to whom you wish to delegate the request, before clicking on the **'Send'** button.

Delegate Request

Please select a person to whom you want to delegate this request.

[Show more information...](#)



Jason Gale

Head of Department

Snail Studies (SNAIL)

180 Direct Subordinates

Cancel

Send

Both the person you have delegated to and the person recording maternity/adoption leave will receive an email to notify them about the delegation.



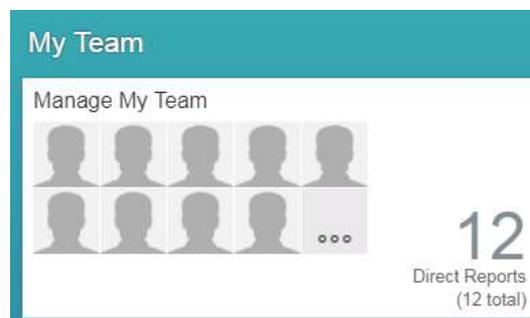
**Note:** When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (unless they do so normally). You are responsible for ensuring that you only delegate workflow requests to colleague for whom it is appropriate to see the personal data of your direct report and the type of request that they are making. This is vital for enabling compliance with [data protection legislation and the University's data protection policy](#).

- c) Once you have selected one of the three options available to you to deal with the workflow request (**'Approve'**, **'Delegate'** or **'Decline'**), a pop-up message will appear briefly on screen to confirm that you have dealt with the request. You will then be routed back to your home page and the request will have disappeared from your **'To Do'** list. Your direct report who made the request will also receive an email to inform them of the outcome of their request.
7. If your direct report subsequently edits or cancels their maternity/adoption leave request after it has been approved, or if they resubmit it after it has been declined, you will receive another email to notify you that you have a time off request awaiting your review (i.e. the process will restart from step 1 above).

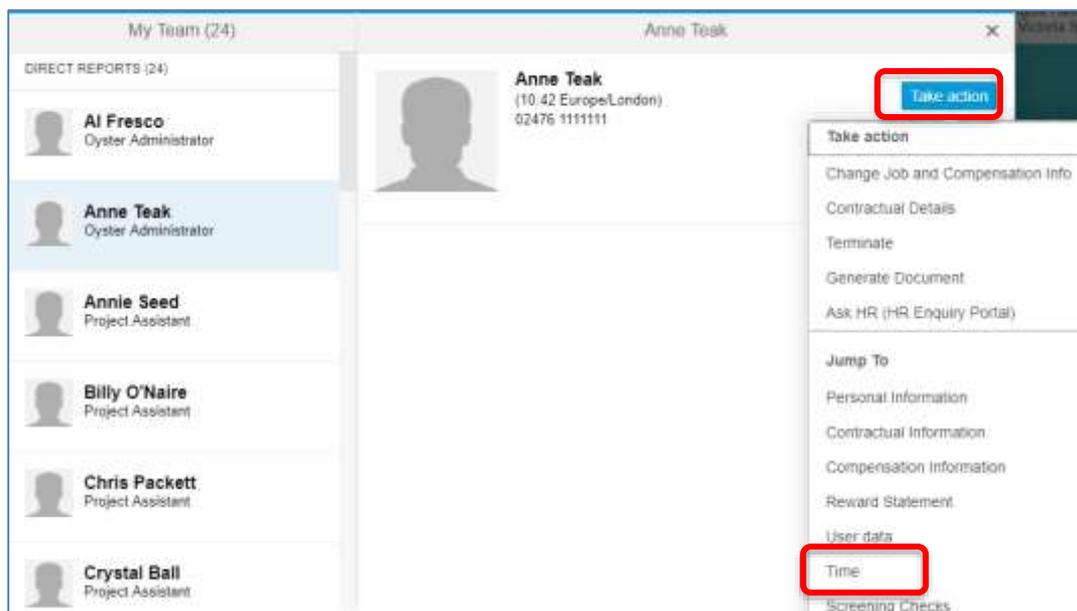
## Step-by-step instructions – recording/editing maternity/adoption leave for direct reports

Where you are required to record or edit a maternity/adoption leave request on behalf of your direct report, you should follow the following instructions:

1. Log in to SuccessFactors.
2. Click on the **'Manage My Team'** tile on your home page.



3. Click on the relevant team member from the list on the left hand side of your screen. Their details will then also appear on the right hand side of your screen, where you should click on the **'Take action'** button and select the **'Time'** option from the **'Jump To'** drop-down menu.





Tip: Anyone recording time off for an employee when they are not that person's line manager will not be able to do so by clicking on **'Manage My Team'**, as described in Step 2. In such cases, you should type the employee's name into the search bar on your SuccessFactors home page and then navigate to the **'Time'** section of their profile. Click on the **'Administer Time'** link that will be visible there if you have permission to record time off for the person concerned.

4. You will then be taken to the time information for employee concerned, where you can either:
  - a) Record a new period of maternity/adoption leave by clicking on **'New Absence'** and then following the instructions from [Section A step 3](#); or
  - b) Edit an existing period of maternity/adoption leave by clicking on **'Edit'** or **'pencil'** icon next to the record concerned and amending it as required.

TIME RECORDS	TIME ACCOUNTS	ACCOUNT PAYOUTS	WORK SCHEDULE				
Time Records (1)							
			+ New Absence				
Start Date	End Date	Taken	Time Type	Related Records	Requester	Requested On	Status
15 Jan 2019	13 Jan 2020	364 days	Maternity Leave - S...		Jacklyn Hyde	15 Jan 2019	Pending

When you are editing an existing absence record, you must include commentary detailing what has been changed and why so that Payroll can make any adjustments to payments as necessary.



Note: Any maternity/adoption leave absences that you record or update on behalf of the individual will automatically be approved by yourself (assuming that you are the employee's line manager) and will show as pending approval by Payroll. If you are not the employee's line manager, any amendments made will require both the line manager and Payroll approval.

If you are recording a period of maternity/adoption leave on behalf of your direct report and you do not have the relevant MatB1 or matching certificate, you will need to upload a maternity/adoption plan completed to the best of your knowledge and make a note of this in the **'Comments'** box, advising Payroll of how/when you can obtain the documentation.

## Recording Keeping in Touch Days

A maximum of ten Keeping in Touch (KIT) days may be worked during maternity/adoption leave, in agreement with a manager/Head of Department. These days provide a means for employees to be kept updated on relevant work/job related matters. The following steps outline what you need to do to ensure that you action the relevant payments for any KIT days that your direct report works.

1. First, agree with your team member which day(s) they are intending to work as keeping in touch days. You may choose to agree these with your team member before they go off on maternity/adoption leave.

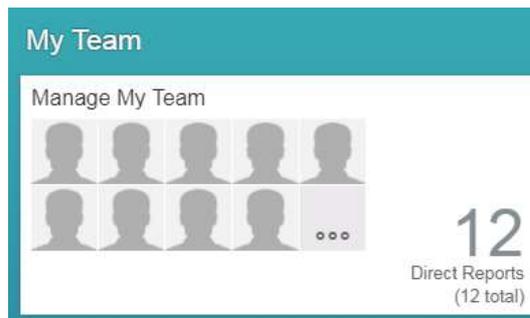
Alternatively you may agree on these dates once they have commenced their leave. There is, however, no requirement for individuals to carry out KIT days, nor for departments to agree to them.

2. Once your team member has completed a KIT day you will need to make a one-off payment to them within SuccessFactors to be paid in the following payroll month.



Note: Payment for KIT days will amount to a normal day's full pay inclusive of any current maternity payments. For example, during the period of maternity leave if the individual is receiving full pay, no further payment would be due. If an employee works their KIT day(s) during a period of SMP, their statutory pay will be enhanced to full pay, and if work takes place during a period of unpaid maternity leave, they should be paid the equivalent of their normal daily rate. Any number of hours worked in a day constitutes one KIT day.

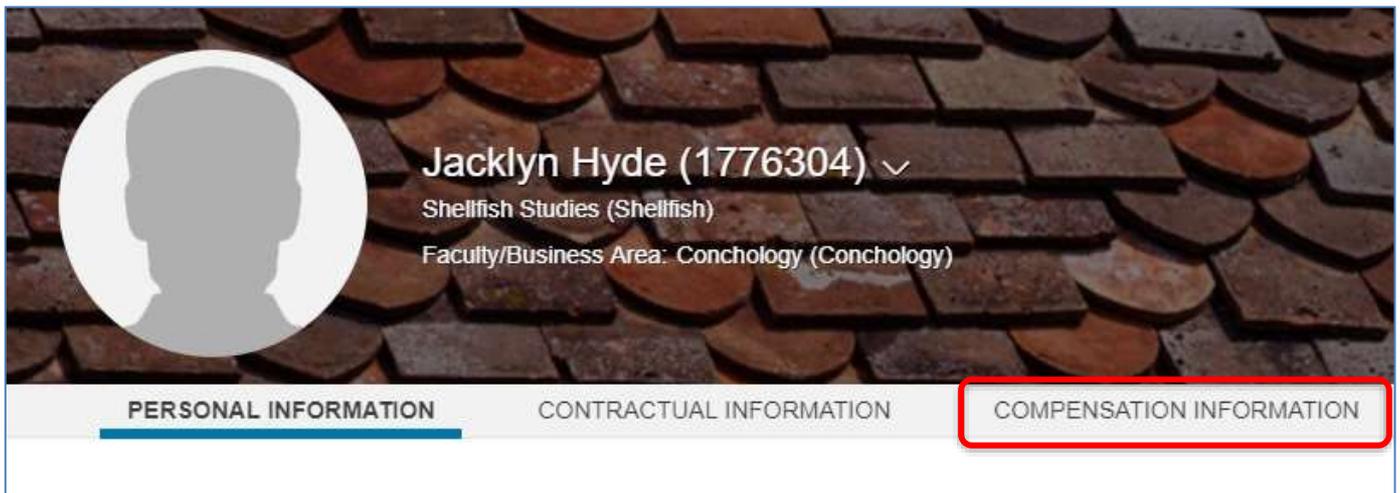
3. Log in to SuccessFactors.
4. Click on the **'Manage My Team'** tile on your home page.



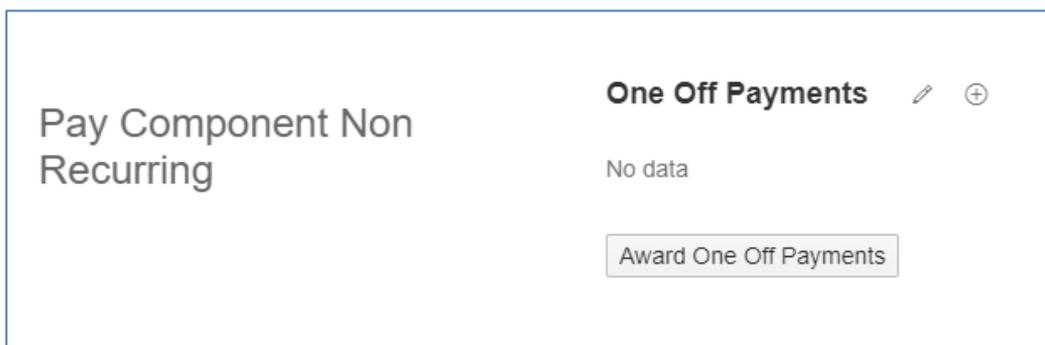
5. Click on the relevant team member from the list on the left hand side of your screen. Their details will then also appear on the right hand side of your screen, where you should click on the **'Go to Profile'** hyperlink:



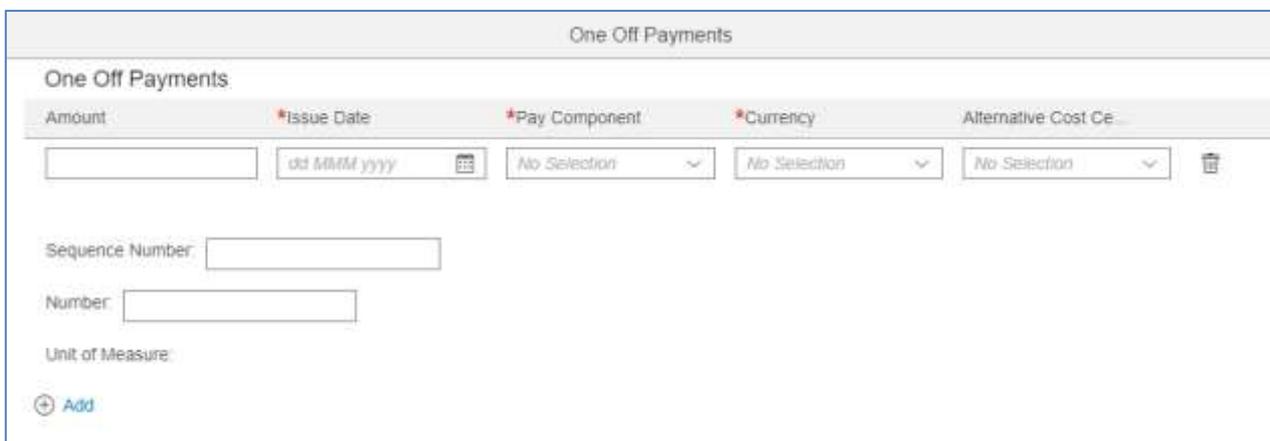
- This will open up their profile page on which you need to click on the **'Compensation Information'** tab in the top ribbon as marked on the screenshot below:



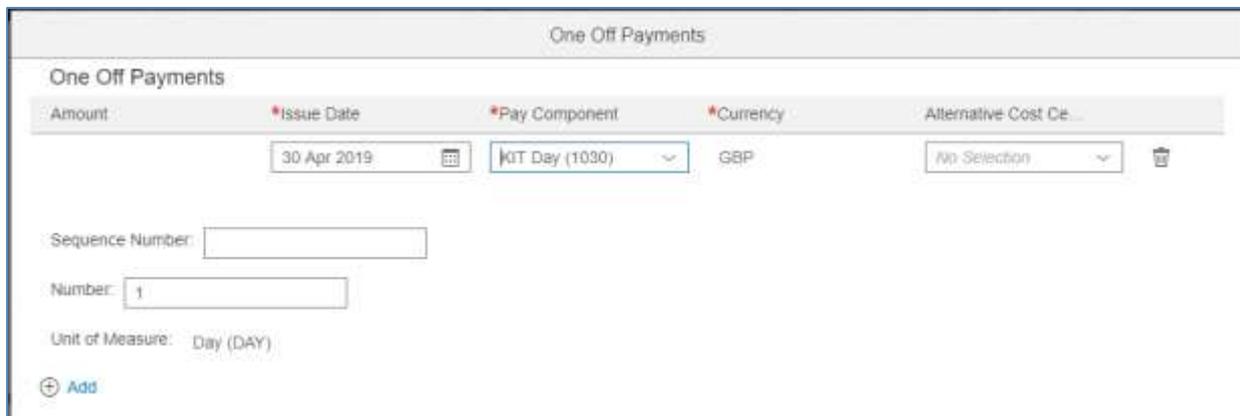
- Scroll down until you see the following section:



- Click on the **'+'** button to the right of **'One Off Payments'** and the following screen will open:



9. In the **'Issue Date'** field, complete the date of the KIT day that your team member worked.
10. Click on the dropdown arrow on the **'Pay Component'** field and then select **'KIT/SPLIT days'**. The **'Currency'** field will default to **'GBP'** (British pounds sterling).
11. If you need to allocate the costs to a cost centre other than that from which your team member's salary is paid, type this into the **'Alternative Cost Centre'** field.
12. Leave the **'Sequence Number'** field blank.
13. Leave the **'Number'** field set to 1.



One Off Payments

One Off Payments

Amount	*Issue Date	*Pay Component	*Currency	Alternative Cost Ce...
	30 Apr 2019	KIT Day (1030)	GBP	No Selection

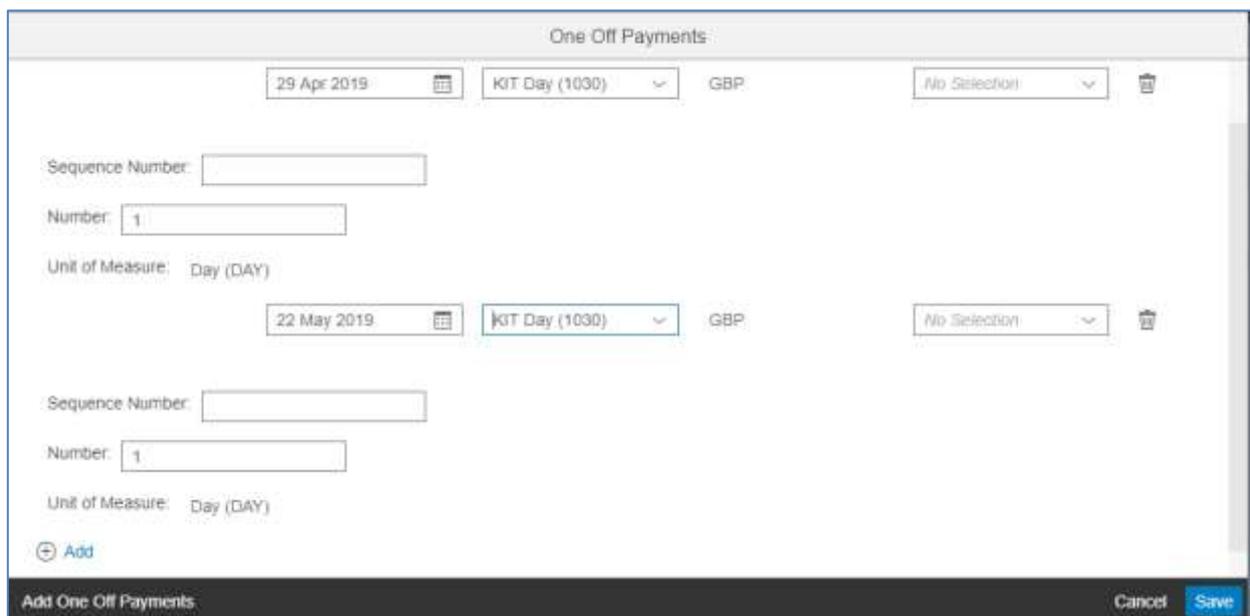
Sequence Number:

Number:

Unit of Measure: Day (DAY)

[+ Add](#)

14. If you need to add more KIT days at this stage, click on the **'+ Add'** button and you will see an additional set of fields open where you can enter the relevant details for the additional KIT day(s):



One Off Payments

	29 Apr 2019	KIT Day (1030)	GBP	No Selection
	22 May 2019	KIT Day (1030)	GBP	No Selection

Sequence Number:

Number:

Unit of Measure: Day (DAY)

Sequence Number:

Number:

Unit of Measure: Day (DAY)

[+ Add](#)

Add One Off Payments Cancel [Save](#)

- Once you have added all of the KIT days that you wish to record at this stage, click on **'Save'** and the request will be triggered in payroll automatically. You will be taken back to your team member's profile page where you will see the details of what you have recorded in the system:

Pay Component Non Recurring

**One Off Payments** ✎ ⊕

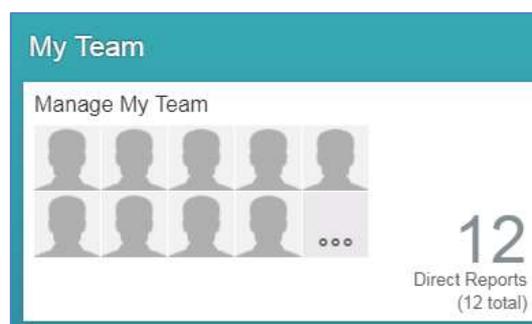
2019 (2) ▾

<b>KIT Day (1030)</b>	0 GBP	22 May 2019	<b>KIT Day (1030)</b>	0 GBP	29 Apr 2019
Sequence Number	3		Sequence Number	2	
Number	1		Number	1	
Unit of Measure	Day (DAY)		Unit of Measure	Day (DAY)	

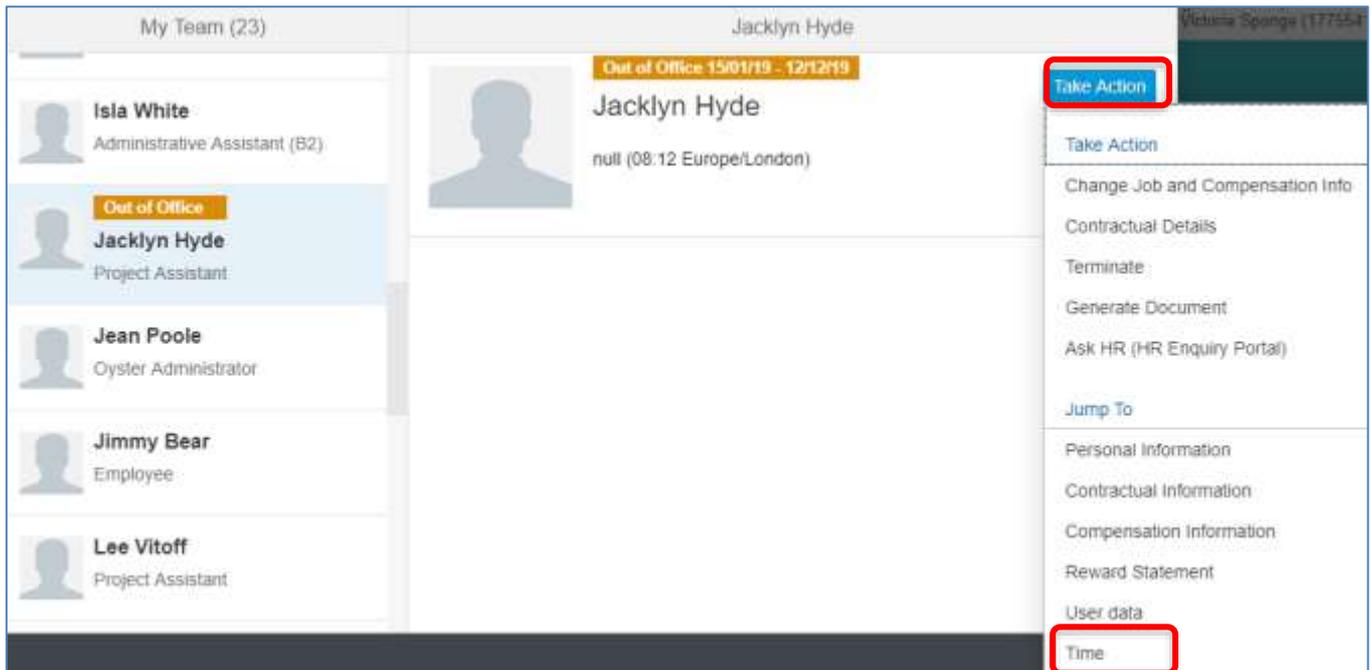
## Confirming Employee's Return to Work

A month before the employee is due to be returning to work (or earlier if you have agreed with them an earlier return to work date or they elect to curtail their maternity/adoption leave and switch to shared parental leave), you will need to complete the **'Actual Return Date'** field. This step is vital to ensure that their status is returned to **'Active'** (and in the case of a switch to shared parental leave, the employee cannot record this until their maternity/adoption leave absence has been correctly completed) and this will also ensure that Payroll are advised of the employee's return.

- Log in to SuccessFactors.
- Click on the **'Manage My Team'** tile on your home page.



- Click on the relevant team member from the list on the left hand side of your screen. Their details will then also appear on the right hand side of your screen, where you should click on the **'Take action'** button and select the **'Time'** option from the **'Jump To'** drop-down menu.



My Team (23)

Jacklyn Hyde

Out of Office 15/01/19 - 12/12/19

Jacklyn Hyde  
null (08:12 Europe/London)

Take Action

- Take Action
- Change Job and Compensation Info
- Contractual Details
- Terminate
- Generate Document
- Ask HR (HR Enquiry Portal)
- Jump To
- Personal Information
- Contractual Information
- Compensation Information
- Reward Statement
- User data
- Time



Tip: Anyone recording time off for an employee when they are not that person's line manager will not be able to do so by clicking on **'Manage My Team'**, as described in Step 3. In such cases, you should type the employee's name into the search bar on your SuccessFactors home page and then navigate to the **'Time'** section of their profile.

- Click on the **'Administer Time'** link that will be visible there if you have permission to record time off for the person concerned.

You will then be taken to the time information for employee concerned, where you can edit the existing maternity/adoption leave record by clicking on the 'pencil' (edit) icon next to the record concerned.

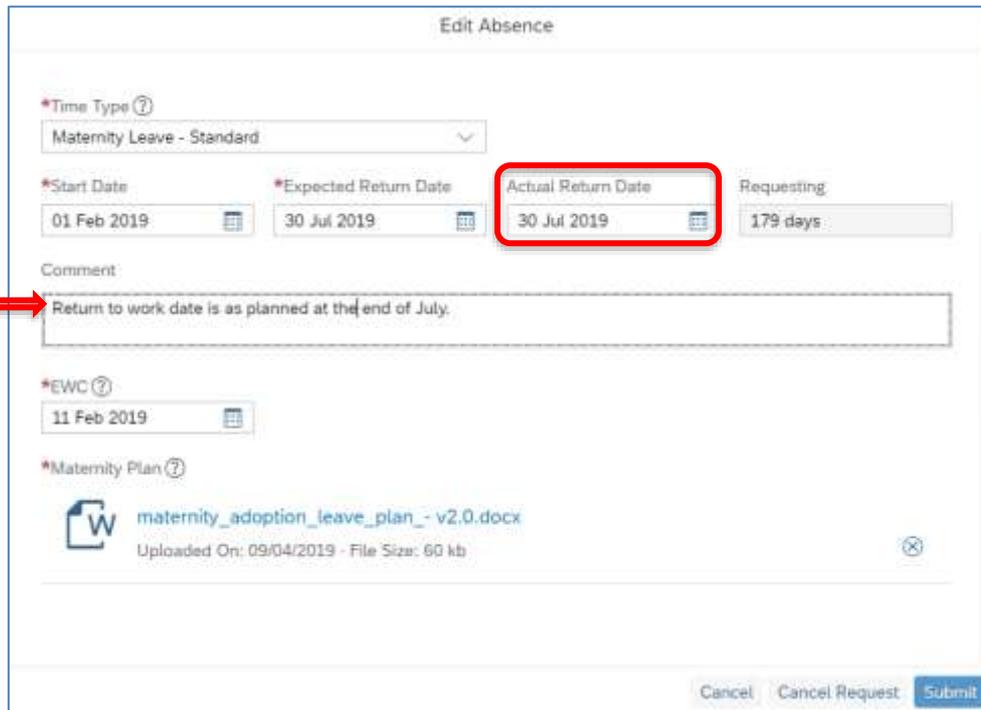
Time Information for Jacklyn Hyde

TIME RECORDS   TIME ACCOUNTS   WORK SCHEDULE

Time Records (3) + New Absence ▾

Start Date	End Date	Taken	Time Type	Related Records	Requester	Requested On	Status
3 Feb 2020	31 Aug 2020	211 days	Career Break		Jacklyn Hyde		Approved 
15 Jan 2019	13 Jan 2020	364 days	Maternity Leave - S...		Jacklyn Hyde		Cancelled
15 Jan 2019	12 Jan 2020	363 days	Maternity Leave - S...		Jacklyn Hyde		Approved 

- In the Edit Absence screen that opens, complete the **'Actual Return Date'** field and annotate the record in the **'Comment'** box to confirm whether the employee is returning on the same date as originally anticipated or a different date.



Edit Absence

\*Time Type <sup>?</sup>  
 Maternity Leave - Standard

\*Start Date: 01 Feb 2019    \*Expected Return Date: 30 Jul 2019    **Actual Return Date: 30 Jul 2019**    Requesting: 179 days

Comment:  
 Return to work date is as planned at the end of July.

\*EWC <sup>?</sup>  
 11 Feb 2019

\*Maternity Plan <sup>?</sup>  
 maternity\_adoption\_leave\_plan\_-\_v2.0.docx  
 Uploaded On: 09/04/2019 - File Size: 60 kb

Cancel    Cancel Request    **Submit**



Note: When you are editing any existing absence records, you must include commentary detailing what has been changed and why so that Payroll can make any adjustments to payments as necessary.

6. Click on **'Submit'** and you will be returned to the employee's Time Information screen where the Maternity/Adoption Leave record will again show as **'Pending'**.
7. A workflow will be triggered that requires Payroll approval before the record shows as approved and the employee's status is changed back to **'Active'**.

## Section C – Payroll Guidance

### Introduction

As a member of the payroll team, you will receive workflows relating to requests for maternity/adoption leave that will require a number of actions from you. This guide sets out the requirements within SuccessFactors but you will also need to refer to the SAP payroll guide for technical instructions.

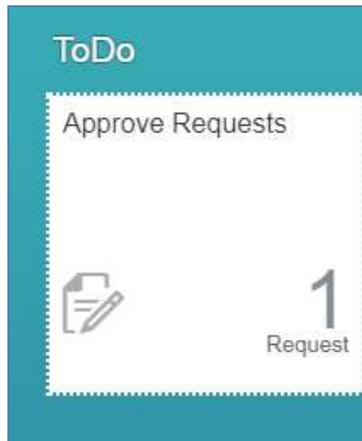
### Receiving notifications

When an employee records a period of maternity/adoption leave in SuccessFactors, their line manager will be the initial approver and this will be the first check to establish that the dates in the maternity plan tally with what they have discussed with the employee.

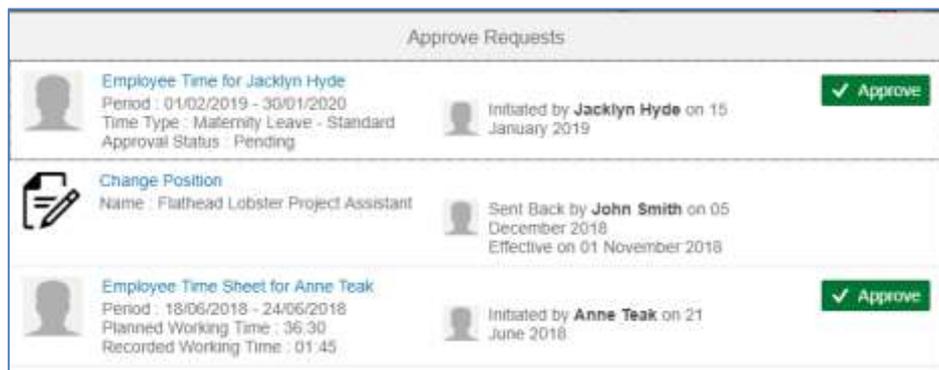
1. Once they have 'approved' the workflow, it will trigger a further 'approval' workflow that comes to Payroll and you will receive an email such as the one shown below to highlight to you that a time off request is awaiting your review:



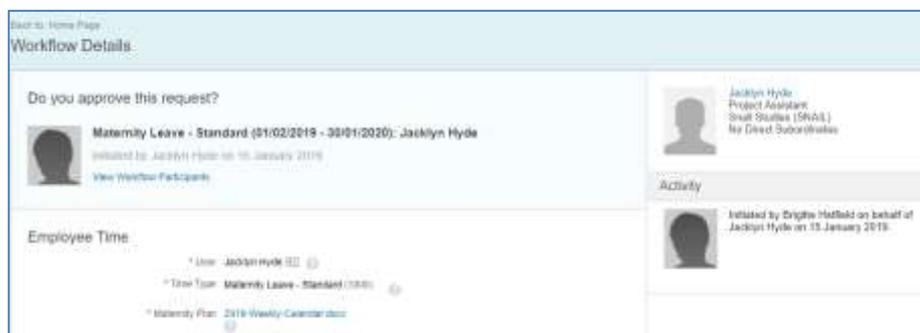
- Log in to SuccessFactors. On your home page you will see that you have a request showing in your **'To Do'** tile:



- Click on the **'Approve Requests'** tile and you will see summary details of the time off request concerned:



- Click on the hyperlinked **'Employee Time for...'** heading and the full details of the request will open up on screen:



5. Scroll down the workflow until you locate the attachment field which will contain the Maternity/Adoption Plan:

Do you approve this request?



**Maternity Leave - Standard (15/01/2019 - 12/01/2020): Jacklyn Hyde**

Initiated by Jacklyn Hyde on 24 January 2019

[View Workflow Participants](#)

---

Employee Time

\* User: Jacklyn Hyde ?

\* Time Type: Maternity Leave - Standard (3000) ?

\* Maternity Plan: [maternity\\_adoption\\_lea...](#) ?

\* Start Date: 15/01/2019 ?

Approval Status: Pending ?

Cancellation Workflow Request ?

Expected Return Date: 13/01/2020 ?

6. Click on the hyperlink and the document will open in a separate window so you can print off the plan to work from.
7. Close the window containing the maternity plan and click on **'Back to Home Page'**.

### Verifying eligibility for payments

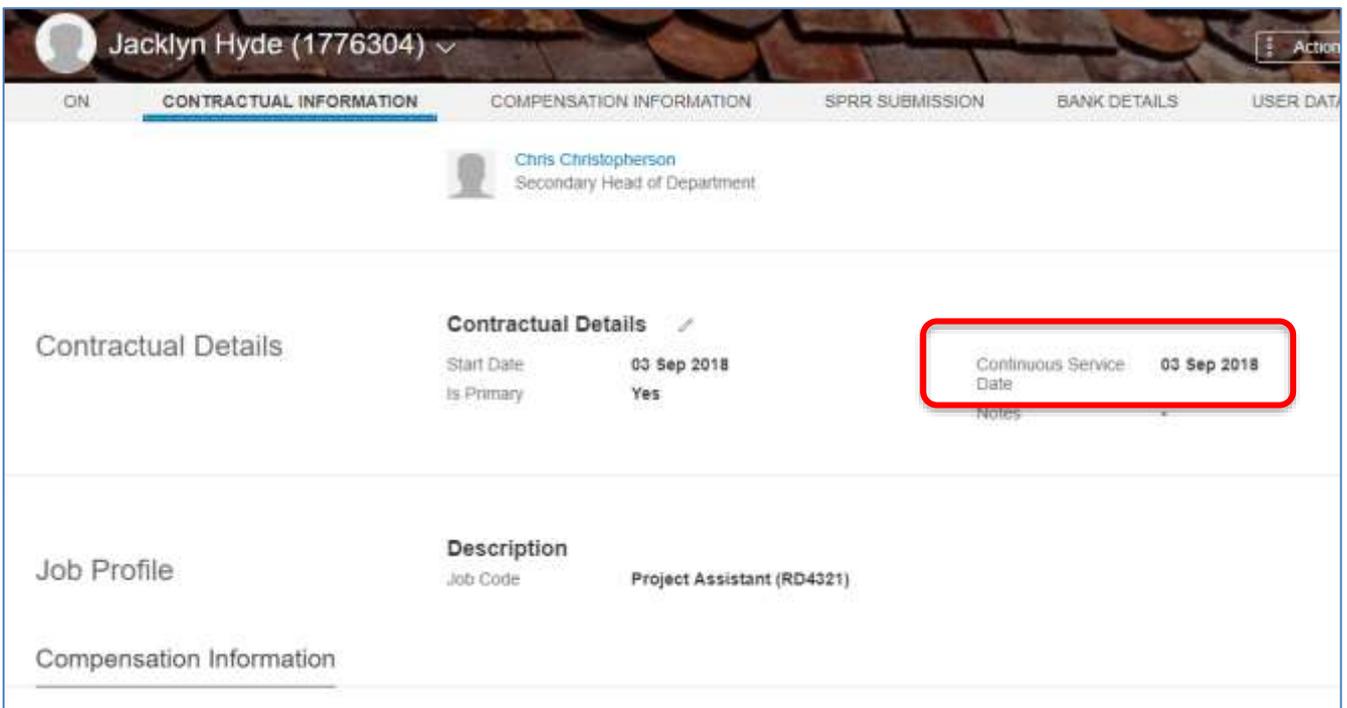
The primary requirement when reviewing a workflow request relating to maternity/adoption leave is to confirm that the individual satisfies the eligibility requirements for the payment plan that they have selected.

In order to do this you will also need to view the employee's profile and check their continuous service date. This can be done either by checking their service within SAP (see G09 How to guide – Payroll – Maternity Leave post go-live) or by following the instructions below:

1. Navigate to the employee's profile by typing in their name or University ID to the search bar in the top right hand corner of your SuccessFactors home screen:



2. Scroll down to the Contractual Details section within Contractual Information and you will see the **‘Continuous Service Date’** on the right hand side of the screen:



Jacklyn Hyde (1776304) Action

ON **CONTRACTUAL INFORMATION** COMPENSATION INFORMATION SPRR SUBMISSION BANK DETAILS USER DATA

 **Chris Christopherson**  
Secondary Head of Department

**Contractual Details** ✎

Start Date	03 Sep 2018	Continuous Service Date	03 Sep 2018
Is Primary	Yes	Notes	-

**Job Profile**

<b>Description</b>	
Job Code	Project Assistant (RD4321)

**Compensation Information**

3. Use this information alongside the detail contained within the Maternity/Adoption Plan to determine whether or not the employee is eligible for Maternity/Adoption Pay.

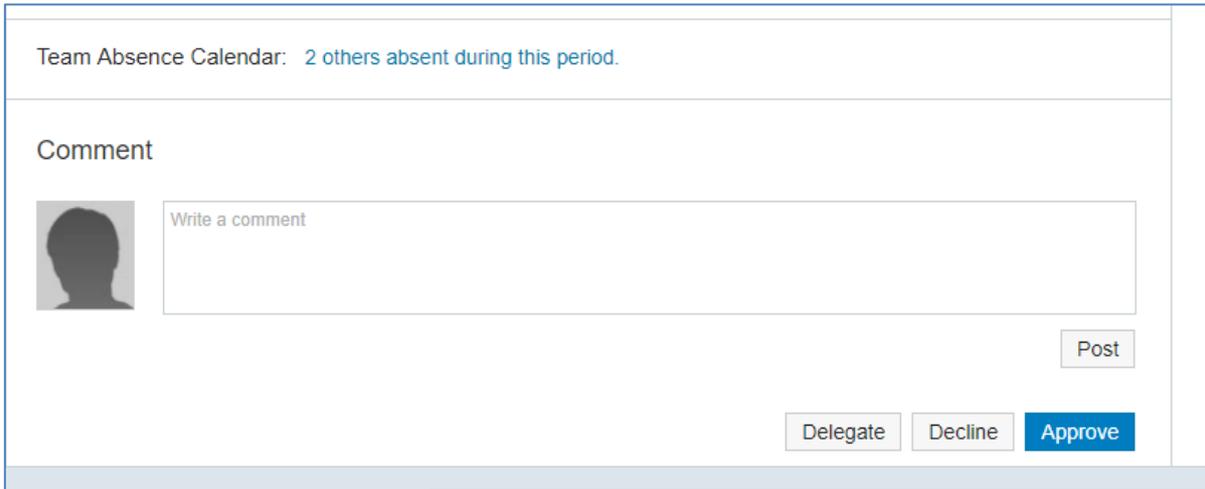
### [Confirming eligibility for payments/approving the workflow](#)

4. Once you have completed your calculations and added the relevant infotype to SAP payroll (see the ‘G09 How to guide – Payroll – Maternity Leave post go-live’ for further detail on this), you will need to use the template found at [Appendix A](#) to email the employee to confirm their eligibility for maternity/adoption pay, including the attachment found at [Appendix B](#) which details what happens with any voluntary salary deductions they have set up.

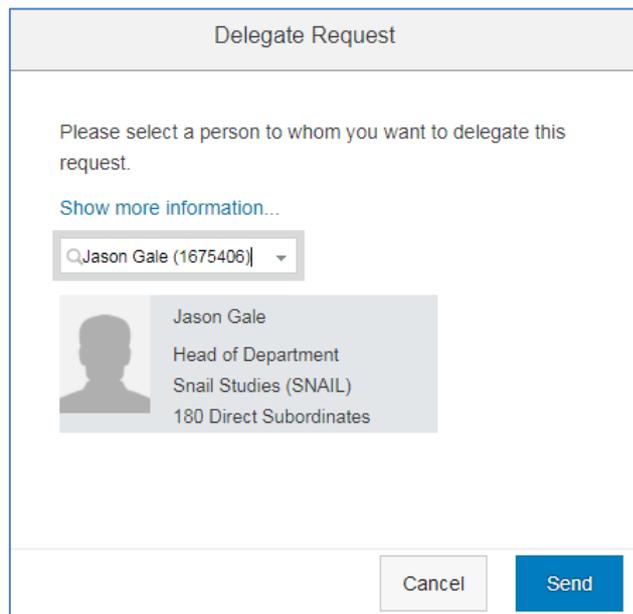


Note: Where the employee is already on leave or are not regular users of PCs as part of their work e.g. cleaners, catering assistants, gardeners, you should send a letter confirming their eligibility for payments to their home address instead of an email.

5. Return to your SuccessFactors home page and navigate to the employee's workflow request, open it in full to ensure that you are dealing with the correct workflow and choose one of the 'decision' options in the bottom right hand corner of the screen:



- a) In the unlikely event that you need to delegate the request, you should do this by clicking on the **'Delegate'** button. This will open a new window where you will need to select the person to whom you wish to delegate the request, before clicking on the **'Send'** button.



Both the person you have delegated to and the person recording maternity/adoption leave will receive an email to notify them about the delegation.



Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (unless they do so normally). You are responsible for ensuring that you only delegate workflow requests to colleague for whom it is appropriate to see the personal data of your direct report and the type of request that they are making. This is vital for enabling compliance with [data protection legislation and the University's data protection policy](#).

- b) If the employee has not included their MatB1/matching certificate, you should post a comment in the **'Comment'** box and then select **'Decline'**.
- c) If the employee does not qualify for maternity/adoption pay, you should explain this briefly in the **'Comment'** box before clicking on **'Approve'**.



Note: The right to maternity/adoption leave applies from Day 1 of someone's employment and therefore the workflow is merely a mechanism to allow Payroll to be informed of an impending maternity/adoption leave and to enable you to do the necessary payment calculations.



Comment

Write a comment

Add in any comments relating to the employee/worker's eligibility for pay, absence of MatB1 or matching certificate here.

Post

Delegate Decline Approve

- b) If you post any comments, the employee will receive a notification that a comment has been posted and your comment will be visible when the employee views the absence from their calendar.
- c) Once you have selected one of the options available to you to deal with the workflow request (**'Approve'**, **'Delegate'** or **'Decline'**), a pop-up message will appear briefly on screen to confirm that you have dealt with the request. You will then be routed back to your home page and the request will have disappeared from your **'To Do'** list. The employee who made the request will also receive an email to inform them of the outcome of their request. The Department Administrator and Local HR Administrator

(where applicable) will also receive a notification to advise them that someone from within their department has had a period of maternity/adoption leave approved.

- b) If the employee subsequently edits or cancels their maternity/adoption leave request after it has been approved, or if they resubmit it after it has been declined, you will receive another email to notify you that you have a time off request awaiting your review (i.e. the process will restart from step 1 [‘Receiving Notifications’](#) above).

### Confirming Employee’s Return to Work/Switching to Shared Parental Leave

One month prior to the employee’s anticipated return to work (or earlier if an earlier return date has been agreed), the line manager will update the absence record with an ‘Actual Return Date’ and this will trigger a further workflow for Payroll to confirm in order that the employee can be made ‘active’ in payroll again. The workflow will be the same as described in [Section C](#), steps 1-7 of this guide.

Alternatively, if the employee elects to curtail their maternity leave and switch to shared parental leave, they will be required to enter an earlier actual return to work date and have this approved by Payroll before they can record their first period of shared parental leave. In this instance, it should be made clear in the ‘Comment’ field that this is their intention and this workflow will need to be prioritised.

### File Paperwork

Calculate a ‘destroy on’ date based on the end of the tax year that contains the return to work date plus 4 years e.g. for someone returning to work in June of 2019, the end of that tax year would be March 2020; add on 4 further tax years and the ‘destroy on’ date would be March 2024. Update the paperwork with this ‘destroy on’ date and place in the Payroll cupboard with all active parental absences. Upon the employee’s return to work, move the paperwork to the separate parental leave folders in ‘destroy on’ date order.

## Appendix A – Example email confirmation of maternity leave

PERSONAL

Dear

Thank you for recording your intended Maternity Leave in our HR system, SuccessFactors, and for uploading a copy of your Maternity Leave Plan and MAT B1 form.

### Your Maternity Pay

I can confirm that you are eligible for University Maternity Pay of 8 weeks on full pay, 16 weeks on half pay and 15 weeks at the lower rate of Statutory Maternity Pay (SMP). During the period of half pay, you are eligible to receive SMP at the lower rate in addition to your half pay, where this does not exceed normal full pay. You are also entitled to up to a further 13 weeks' unpaid leave. The maternity pay that you will actually receive will depend upon the length of Maternity Leave that you take. Please see the GOV.UK web pages at <https://www.gov.uk/maternity-pay-leave/pay> for details of the current SMP rates.

### Your Period of Maternity Leave

Please ensure that you update SuccessFactors as soon as possible if there are any changes in your planned Maternity Leave dates before you go on leave. In line with our policy, you should ensure that you have provided at least 28 days' notice of any change.

You should be aware that your Maternity Leave dates may have to change automatically in certain circumstances. It will start:

- The day after the birth, if the baby is early; or
- If you're off work for a pregnancy-related illness in the four weeks before the week (Sunday to Saturday) that your baby is due, on the first day of such illness.

If you return to work before using your full entitlement of Maternity Leave you may wish to convert it into Shared Parental Leave for you and your partner to share between you, providing they meet the eligibility criteria for shared parental leave. Further information is available in the University's Shared Parental Leave Policy.

### Your voluntary deductions during Maternity Leave

Please review the attached document, which describes the different arrangements for any voluntary deductions from your salary (e.g. pension contributions, payments for car parking or employee benefits) during the course of your maternity leave and on your return to work. Please note that there may be actions that you need to take.

### KIT Days

A maximum of ten Keeping in Touch (KIT) days may be worked during maternity leave, in agreement with your manager/Head of Department. These days provide a means for you to be kept updated on relevant work/job related matters. There is, however, no requirement for you to carry out KIT days, nor for your department(s) to agree to

them. The type of work undertaken will be agreed between you and your department. Your pay for a KIT day will be made up to a normal day's full pay after taking into account any money already due to be received for that day. Any number of hours worked in a day constitutes one KIT day.

### **Returning to work**

We recommend that you have a discussion with your line manager about formal arrangements for keeping in touch with your department during your Maternity Leave. You are eligible to work for the University for up to 10 days (known as 'Keeping in Touch' or 'KIT' days) without bringing your Maternity Leave to an end. If you work a KIT day, your pay will be made up to total a normal day's pay taking into account any ordinary maternity pay or statutory maternity pay already received for the day you work. You are under no obligation to agree to attend work, and the University is under no obligation to offer you KIT days.

If you decide to change your return to work plans, you should provide your department with at least 8 weeks' notice. If you decide that you no longer wish to return to work or if you become unsure about returning to your role, please contact your line manager to discuss this as soon as possible.

Please note: SMP is paid in whole weeks only and each week starts on the day that the SMP period began, not necessarily a calendar or working week. This means that if you return part way through a week when you are in receipt of SMP only, you will not receive payment of SMP for that part week. For example, if your maternity pay started on a Thursday, all SMP weeks would run Thursday - Wednesday. Therefore, if you choose to return to work on a Monday, your SMP would cease on the previous Wednesday and you would be in receipt of no pay for the balance of your last week of maternity leave. You may wish to consider the impact of coming back to work part way through an SMP week before confirming your return date.

### **Further information**

Please do not hesitate to contact us in the Payroll team via [payroll@warwick.ac.uk](mailto:payroll@warwick.ac.uk) if you have any questions about maternity pay.

Any general questions about your Maternity Leave should be directed to your line manager in the first instance and then to the AskHR team via [askhr@warwick.ac.uk](mailto:askhr@warwick.ac.uk) if you require further information.

In the meantime, I'd like to take this opportunity to offer my congratulations on behalf of the University.

Kind regards,

## Appendix B – Attachment detailing arrangements for salary deductions during maternity/adoption leave

### **Pensions & Voluntary Deductions During Maternity, Adoption and Shared Parental Leave**

#### **Pension scheme contributions**

If you are a member of a pension scheme, your normal contributions will be topped up by the University in any period of reduced pay during your period of leave. However, if you are a member of the Universities Superannuation Scheme (USS) and are paying any additional voluntary contributions, your contributions must be based on your full salary prior to your period of leave. The University will *temporarily* top these up in any period of reduced pay, but you will need to repay the University for this top-up on your return from leave.

Please be advised if you are in the salary sacrifice pension scheme you will be moved to the corresponding non salary sacrifice scheme when you go onto statutory payments only. On your return to work you will remain in this scheme unless you advise the Pension team otherwise. Alternatively, you may choose to stop paying these contributions during your period of leave if you wish.

We strongly recommend that you contact the HR Pensions team via [hr.pensions@warwick.ac.uk](mailto:hr.pensions@warwick.ac.uk) or 024 7652 2629 prior to commencing your period of leave so that they can outline the full details of how your leave affects your pension, including the contributions you and the University will pay during this period.

#### **Car parking**

If you are making monthly payments for car parking, you may wish to cancel your permit via the University's [car parking web pages](#) once you start your period of leave, otherwise payments will continue to be deducted.

#### **Cycle to work scheme**

If you have joined the cycle to work scheme, your payments will be deferred whilst you are in receipt of statutory payments only or no pay. Payments will recommence on your return to work and the hire period will be extended in line with the length of the deferred payments.

#### **Bus Pass payments**

If and when you move onto zero pay, any payments for a bus pass will cease and any outstanding deductions will be recouped from your salary upon your return to work.

#### **Childcare vouchers and nursery salary sacrifice**

If and when you reach a point in your leave when you are in receipt of statutory payments only or no pay, you will need to make alternative arrangements to pay the University Nursery (if required). In addition, the University will temporarily cancel any childcare vouchers with Computershare for this period.

If you wish to stop your payments/salary sacrifice earlier than this, please contact Computershare (see <https://warwick.ac.uk/services/humanresources/internal/payroll/info/salaries/vouchers/>) or the Nursery (see <https://warwick.ac.uk/services/childrensservices/nursery/>) respectively.

If you want to recommence childcare vouchers or nursery salary sacrifice upon your return from leave, please contact Computershare or the Nursery the **month before** you want the deductions to re-start.

Please note: arrangements for Childcare Vouchers changed with effect from 1<sup>st</sup> October 2018 and, if you take more than a year's unpaid leave (including unpaid periods of maternity/adoption/shared parental leave), you will not be able to re-join the scheme. Please see <https://www.gov.uk/help-with-childcare-costs/childcare-vouchers> for further information on childcare vouchers.

#### **University Nursery Scheme**

If you participate in the University Nursery Scheme, you will need to pay the Nursery Fees directly once you are in receipt of statutory payments only or no pay.

If you are participating in any of the schemes above, you should also be aware that this may affect the salary used to calculate any payments due to you during your period of leave. Please let us know if you need any further information about this.

#### **Healthcare providers, trade union membership and Give As You Earn (GAYE)**

If you pay subscriptions directly from your salary to a healthcare provider or trade union, or if you donate to charity via GAYE, these deductions will stop if and when you move onto no pay and you will need to contact the provider directly to make alternative arrangements.

If you would like the deductions to come directly from your salary when you return to work, you will need to advise Payroll in advance to make these arrangements for you.