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| **REVIEWING MATERNITY/ADOPTION LEAVE REQUESTS – PAYROLL CHECKLIST** |
| **Action** | **Progress** |
| **Reviewing a leave request** |
| 1. When you receive an email notification that a request for approval has been recorded in-system, log in to SuccessFactors.
 | [ ]  Done |
| 1. Click on the **‘Approve Requests’** tile on your home page.
 | [ ]  Done |
| 1. Select the appropriate maternity or adoption leave time off request and click on the blue hyperlinked workflow details**.**
 | [ ]  Done |
| 1. Download the maternity/adoption plan and print out.
 | [ ]  Done |
| 1. Click on **‘Back to Home Page’** to close the workflow.

**NB: do not click on any of the ‘decision’ buttons on the workflow at this stage** | [ ]  Done |
| 1. Based on the person’s continuous service, their EWC/date of matching, and their earnings, calculate their entitlement to maternity/adoption pay.
 | [ ]  Done |
| 1. Using the standard template, prepare and send the email to the employee/worker confirming their eligibility (or otherwise) for maternity/adoption pay.

**NB: for employees/workers who do not typically use PCs as part of their work, send a letter to their home address instead of an email.** | [ ]  Done |
| 1. Navigate back to the workflow, post any comments required in the ‘Comment’ box.
 | [ ]  Done |
| **Approving a leave request** |
| 1. Review the maternity/adoption leave request and if all is in order, click on **‘Approve’**.
 | [ ]  Done |
| 1. This will trigger an email notification to the employee/worker with a copy to the Department Administrator/Local HR Administrator as appropriate. The approval will have disappeared from your home page.
 | [ ]  Done |
| **Declining a leave request** |
| 1. If the maternity/adoption plan does not include the MatB1/matching certificate post a comment in the **‘Comment’** box to explain why you are sending the request back and click on **‘Decline’**.
 | [ ]  Done |
| **Delegating a leave request** |
| 1. If you need to delegate the request to someone else, post an explanation in the **‘Comment’** box and click on **‘Delegate’**.
 | [ ]  Done |
| 1. In the pop-up window that opens, enter the name of the person you wish to delegate the workflow to and click on **‘Send’**.
 | [ ]  Done |
| 1. You will be asked to confirm your wish to delegate in a new window. If you are happy to delegate the request, click on **‘Delegate’**.
 | [ ]  Done |

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| **Confirming actual return to work** |
| The employee/line manager will enter an actual return to work date when it is known or when it is agreed that they will be curtailing their maternity/adoption leave and switching to shared parental leave. This will trigger a further workflow that you will need to prioritise to ensure that either the employee is made ‘active’ for their return to work or they are able to enter their shared parental leave request. |
| **Paperwork** |
| 1. 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.
 | [ ]  Done |

***For further details, please refer to the ‘How to… Record Maternity or Adoption Leave in SuccessFactors’ guide.***

*Remember: SuccessFactors times out after 30 minutes of inactivity – do not leave form for longer than this as it will not be saved*