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| **RECORDING SHARED PARENTAL LEAVE IN SUCCESSFACTORS – EMPLOYEE/WORKERS’ CHECKLIST** |
| **Action** | **Progress** |
| **Curtailing your maternity/adoption leave (mother or primary adopter only)** |
| 1. Log in to SuccessFactors.
 | [ ]  Done |
| 1. Click on the **‘Time Off’** tile on your home page.
 | [ ]  Done |
| 1. Select the record for your maternity/adoption leave from the calendar and click on the **‘pencil icon’ (Edit)** on the pop-up window that opens on the relevant record.
 | [ ]  Done |
| 1. Enter the actual return to work date in line with the date on which you wish to switch to shared parental leave.
 | [ ]  Done |
| 1. Add a note in the **‘Comment’** box advising that you wish to curtail your maternity/adoption leave and switch to shared parental leave.
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| 1. Click on ‘**Send Request**’ to trigger the approval workflow.
 | [ ]  Done |
| 1. You will receive an email notification when your request has been approved by your line manager and when Payroll have approved it.

**NB: you will not be able to submit a request for shared parental leave until Payroll have approved the curtailment of your maternity/adoption leave.** | [ ]  Done |
| **Requesting shared parental leave** |
| 1. If you are the mother’s partner or the secondary adopter, ensure that you have a copy of your partner’s MatB1 or matching certificate as appropriate before starting the request in SuccessFactors.
 | [ ]  Done |
| 1. Log in to SuccessFactors.
 | [ ]  Done |
| 1. Click on the **‘Time Off’** tile on your home page.
 | [ ]  Done |
| 1. Click on **‘New Absence’** and then select the **‘Shared Parental Leave’** option from the drop down list.
 | [ ]  Done |
| 1. Select/input the start date, end date, and add any comments you wish to record in the **‘Comment’** box.
 | [ ]  Done |
| 1. If you are the mother/primary adopter, you will need to upload both an SPL1 and SPL3 form. If you are the partner of the mother/primary adopter, you will need to upload both an SPL2 (which contains a copy of the mother’s/primary adopter’s Mat B1/matching certificate) and SPL3 form.

**NB: fields marked with a red asterisk are mandatory and you will not be able to submit your request unless you have completed all mandatory fields.** | [ ]  Done |
| 1. Click on **‘Send Request’** to trigger the approval workflow (which will go to your line manager and then Payroll).
 | [ ]  Done |
| 1. You will receive email notifications when your request has been approved by your line manager and Payroll.
 | [ ]  Done |
| 1. If you wish to take the discontinuous leave option, you will need to repeat the process of requesting shared parental leave for each period separately.
 | [ ]  Done |

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

***and ‘How to… Record Shared Parental Leave in SuccessFactors’ guides.***

*Remember: SuccessFactors times out after 30 minutes of inactivity and your changes will not be saved automatically.*