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| **REVIEWING SHARED PARENTAL LEAVE REQUESTS – LINE MANAGERS’ CHECKLIST** | |
| **Action** | **Progress** |
| **Reviewing a leave request** | |
| 1. If your direct report is not the mother/primary adopter, ensure that they have their partner’s MatB1/matching certificate available before starting their request in SuccessFactors . | Done |
| 1. Discuss your direct report’s plans and agree dates. | Done |
| 1. When you receive an email notification that your direct report has submitted their request in-system, log in to SuccessFactors. | Done |
| 1. Click on the **‘Approve Requests’** tile on your home page. | Done |
| 1. Select the appropriate shared parental leave time off request and click on the blue hyperlinked workflow details**.** | Done |
| **Approving a leave request** | |
| 1. Review the shared parental leave request and if all is as previously agreed, click on **‘Approve’**. | Done |
| 1. You will receive an email notification when the request has been approved by Payroll. | Done |
| **Declining a leave request** | |
| 1. If the shared parental leave request does not include all of the relevant documentation (SPL1 and SPL3 forms for the mother/primary adopter or SPL2 and SPL3 forms, including the MatB1/matching certificate for the partner or secondary adopter) 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 |
| **Adding in SPLIT day payments** | |
| 1. Log in to SuccessFactors and click on the **‘Manage My Team’** tile on your home page. | Done |
| 1. Click on the relevant team member from the list on the left hand side of your screen and click on the **‘Go to Profile’** hyperlink. | Done |
| 1. Click on the **‘Compensation Information’** tab and scroll down until you see the section entitled **‘Pay Component Non Recurring’**. | Done |
| 1. Click on the **‘+’** button to the right of **‘One Off Payments’** and then in the **‘Issue Date’** field, complete the date of the SPLIT day that your team member worked. **NB: payment will be made for a whole day, irrespective of the number of hours worked.** | Done |
| 1. 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). | Done |
| 1. 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. | Done |
| 1. Leave the **‘Sequence Number’** field blank and leave the **‘Number’** field set to 1. | Done |
| 1. If you need to add more SPLIT 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 SPLIT day(s). | Done |
| 1. Click on **‘Save’** and the request will be triggered in payroll automatically. | Done |
| **Confirming the actual return to work date** | |
| 1. When you are notified that the employee is returning to work (whether on their originally anticipated date or earlier), navigate to the **‘Time’** section on their profile. | Done |
| 1. Click on **‘Administer Time’** and the pencil icon next to the relevant shared parental leave record. | Done |
| 1. Enter the actual return to work date and add in a comment if the date that you have entered is different from the anticipated return to work date.   **NB. The comment is vital to ensure that Payroll are aware that they need to ‘re-activate’ the employee.** | Done |
| 1. Click on **‘Submit’** and a workflow will be triggered for Payroll approval. | 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.*