

An employee’s appointment should be amended to reflect the start and return dates for maternity, adoption, paternity and shared parental leave.

### What’s changed?

Notes added to confirm when amendments need to be made to an employees pay. **Mar 19**

This guide covers the following process steps:

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Before making any changes to the employee record in Core Personnel it is essential that you read the Family Leave guidance on the [Personnel Services website](#).



For **unpaid Parental Leave** please follow **QRG: CH22\_Unpaid Leave** instead of this guide.



**Note:** Where the employee has multiple appointments the changes below must be made on **all** appointments.



**Note:** Departments are **only** responsible for making amendments to pay on return from the leave. Payroll are responsible for making pay amendments (e.g. to SMP, zero pay) while an employee is on Maternity, Adoption or Shared Parental Leave.

## A: Maternity and adoption leave


For the birth mother/primary adopter the first two weeks must be taken as **Maternity** or **Adoption** Leave, as applicable, in all cases including when the employee has opted to take Shared Parental Leave.



**Note:** Changes should only be made in the payroll month in which they are effective.

**Navigate to: Personnel > Maintenance > Personal Profile**

1. Search for and open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.

 **Note:** For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

**Amend Appointment Details: Louise Walton**

**Post Details**

Post Number: 229000 ADMINISTRATIVE SUPPORT  
 Post Profile Type: 1A Permanent  
 Effective Date: Target End Date: Status: Commenced  
 Planned End Date:

**Hierarchy Details**

Company: 10 UNIVERSITY OF OXFORD  
 Division: 20 FUTURE TECHNOLOGIES  
 Sub Division: SD00 FUTURE TECHNOLOGIES  
 Level 4: 9ZW001 FUTURE TECHNOLOGIES  
 Management Unit: 9ZW0 FUTURE TECHNOLOGIES  
 Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES  
 Pay Administered by: ZWDEP FUTURE TECHNOLOGIES  
 Cost Centre: ZW000000000000 INSTITUTE OF FUTURE TECHNOLOGIES  
 Location: 991 ZW - FUTURE TECHNOLOGIES  
 Work Group: 100002 ZW Admin Support  
 College Association: 1 DEFAULT/NOT APPLICABLE

**Appointment Details**

Post Type: 1A PERMANENT  
 Project:  
 Job Category:  
 Job Title: ADM Job Text ADMINISTRATIVE SUPPORT  
 Employee Status: 1A PERMANENT  
 Sub Status: 3 PART TIME  
 Category: X NOT APPLICABLE/NOT REQUIRED  
 Sub Category: DC OFFICE/ CLERICAL SUPPORT  
 Hours: 30.00 Weeks: FTE: 0.8219  
 FTE Hours: 36.50 FTE Weeks: 52.0000 FTE%: 82.19  
 Future Override FTE:  
 Absence Mgt FTE:  
 Pensionable: Acting Up Ind: Secondment:  
 Action: ML MATERNITY  
 Reason Code: MLS MATERNITY LEAVE START  
 Replaces Employee:  
 Comments:


**Post Details:**  
 Please enter the post information for the employee on this screen.  
 Details such as department, job title and cost centre may be entered here.

OK Cancel

4. Complete/select the fields as below:

Field Name (*mandatory)	Description
<b>Effective Date*</b>	Enter the date that the change will take place.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
<b>Action*</b>	Select the action <b>Maternity</b> or <b>Adoption</b> as applicable
<b>Reason Code*</b>	Select the relevant reason e.g. <b>Maternity Leave Start</b>
<b>Comments</b>	Enter any relevant comments.

5. Click **OK**. The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.



**Note:** Payroll must be notified by email or phone if payslips are to be sent to an address other than the **Location** address, e.g. home address, during the leave period.

**NB:** If the employee has opted to take Shared Parental Leave you will also need to follow the steps in section C.

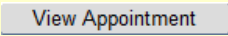
## B: Paternity Leave



**Note:** Changes should only be made in the payroll month in which they are effective.

1. Search for and open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.



**Note:** For Fixed Term appointments, click  and make a note of the current **Target End Date**.

3. Click the  button. The *Amend Appointment Details* window opens:

Amend Appointment Details: Jamie Clarendon


<b>Post Details</b> Post Number: 228803 RESEARCH FELLOW Post Profile Type: 2 Fixed Term Effective Date: Target End Date: Planned End Date: 12-JUL-2017 Status: Commenced	<b>Post Details</b> Please enter the post information for the employee on this screen. Details such as department, job title and cost centre may be entered here.
<b>Hierarchy Details</b> Company: 10 UNIVERSITY OF OXFORD Division: 20 FUTURE TECHNOLOGIES Sub Division: SD00 FUTURE TECHNOLOGIES Level 4: 9ZW001 FUTURE TECHNOLOGIES Management Unit: 9ZW0 FUTURE TECHNOLOGIES Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES Pay Administered by: ZWDEP FUTURE TECHNOLOGIES Cost Centre: ZW0000000000 INSTITUTE OF FUTURE TECHNOLOGIES Location: 991 ZW - FUTURE TECHNOLOGIES Work Group: 100003 ZW AI Research Team College Association: 1 DEFAULT/NOT APPLICABLE	<b>Appointment Details</b> Post Type: 2 FIXED TERM Project: Job Category: Job Title: SRF Job Text SENIOR RESEARCH FELLOW Employee Status: 2 FIXED TERM Sub Status: 1 FULL TIME Category: 2 RESEARCH ONLY Sub Category: AR RESEARCH FELLOW Hours: 37.50 Weeks: FTE: 1.0000 FTE Hours: 37.50 FTE Weeks: 52.0000 FTE%: 100 Future Override FTE: Pensionable: <input type="checkbox"/> Acting Up Ind: <input type="checkbox"/> Secondment: <input type="checkbox"/> Action: PL PATERNITY Reason Code: PLOS PATERNITY LEAVE ORD START Replaces Employee: Comments:


OK Cancel

4. Complete/select the details below:

Field Name (*mandatory)	Description
<b>Effective Date*</b>	Start date of leave.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
<b>Action*</b>	Select the action <b>Paternity</b>
<b>Reason Code*</b>	Select the relevant reason e.g. <b>Paternity Leave ORD Start</b>
<b>Comments</b>	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.

 **Note:** For 'Ordinary Paternity Leave' there is no requirement to amend the pay.

If the employee has opted to take Shared Parental Leave you will also need to follow the steps in section C.

## C: Shared Parental Leave

For **continuous Shared Parental** Leave you will only need to follow the steps below once.

For **discontinuous Shared Parental** Leave you will need to follow the steps below **and** the steps in section E for each occurrence of Shared Parental Leave (up to a maximum of three).



**Note:** Changes should only be made in the payroll month in which they are effective. Please **DO NOT** record all of the dates in advance as you will not be able to record any other appointment changes should they occur.

1. Search for an open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.




**Note:** For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

4. Complete/select the details below:

Field Name (*mandatory)	Description
<b>Effective Date*</b>	Start date of leave.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
<b>Action*</b>	Select the action <b>Shared Parental Leave</b>
<b>Reason Code*</b>	Select the relevant reason e.g. <b>Shared Parental Leave Start</b>
<b>Comments</b>	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return to the *Appointment Details* window.



**Note:** Payroll must be notified by email or phone if payslips are to be sent to an address other than the **Location** address, e.g. home address, during the leave period.

7. To record an employee's return from shared parental leave follow the steps in Section E.

## D: Tracking documents

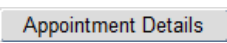
The following forms need to be sent to payroll and should also be recorded in Core Personnel:

- For maternity: MATB1 and [Maternity payroll leave form](#)
- For paternity: Paternity plan and [Paternity payroll leave form](#)
- For Shared Parental Leave: as above PLUS Maternity curtailment notice (*if applicable*), Notice of entitlement, Notice to book leave and ShPP form for Payroll. Follow the relevant link below:

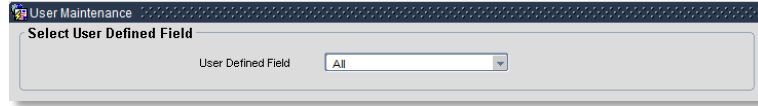
[SPL Notifications - Birth](#) OR [SPL Notifications - Adoption](#)



**Note:** Where the employee has multiple appointments, documentation is only required once. It is recommended that the department with the Primary appointment manages and logs the documents as below.

1. Click the  button.

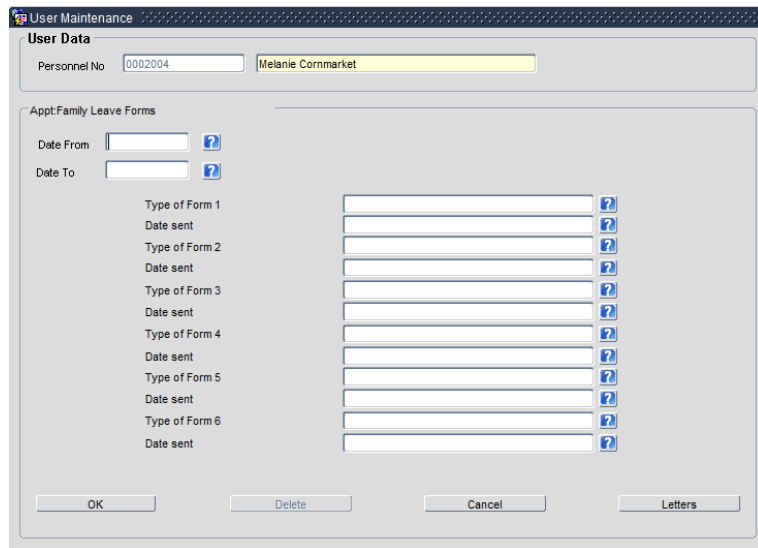
2. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



3. Click to display **User Defined Field** List of Values.

4. Select **Appt:Family Leave forms**.

5. Click **New**.



6. Complete/select the details below:

Field Name (*mandatory)	Description
<b>Date From*</b>	Date the first form is being logged.
<b>Date To</b>	Leave blank
<b>Type of Form 1 – 6</b>	Select the relevant form from the drop down list, working from 1 thru 6 as applicable.
<b>Date sent*</b>	Enter the date the form was sent to Payroll.

7. Click **OK**, then click . Exit all windows back to the Personnel main screen.

## E: Return from leave: amend appointment

You must update an employee's appointment to record their return from family leave.



**Note:** Changes should only be made in the payroll month in which they are effective.



**Note:** Where the employee has multiple appointments the changes below must be made on all appointments.

1. Search for an open the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.



**Note:** For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:



**Note:** Don't forget you will also need to amend the hours/FTE on the relevant appointment/s if the employee is returning on different hours.

**Amend Appointment Details: Dian...**

**Post Details**

Post Number: 229021 ADMINISTRATIVE SUPPORT

Post Profile Type: 1A Permanent

Effective Date: Target End Date: Planned End Date: 17-MAY-2017 Status: Commenced

**Hierarchy Details**

Company: 10 UNIVERSITY OF OXFORD

Division: 20 FUTURE TECHNOLOGIES

Sub Division: SD00 FUTURE TECHNOLOGIES

Level 4: 9ZW001 FUTURE TECHNOLOGIES

Management Unit: 9ZW0 FUTURE TECHNOLOGIES

Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES

Pay Administered by: ZWDEP FUTURE TECHNOLOGIES

Cost Centre: ZW0000000000 INSTITUTE OF FUTURE TECHNOLOGIES

Location: 991 ZW - FUTURE TECHNOLOGIES

Work Group: 100002 ZW Admin Support

College Association: 1 DEFAULT/NOT APPLICABLE

**Appointment Details**

Post Type: 2 FIXED TERM

Project: Job Category: ADM Job Text: ADMINISTRATIVE SUPPORT

Employee Status: 2 FIXED TERM

Sub Status: 3 PART TIME

Category: X NOT APPLICABLE/NOT REQUIRED

Sub Category: DC OFFICE/ CLERICAL SUPPORT

Hours: 17.00 Weeks: FTE: 0.4658

FTE Hours: 26.50 FTE Weeks: 52.0000 FTE%: 46.58

Future Override FTE: Pensionable: Acting Up Ind: Secondment:

Action: DH HOURS DECREASED

Reason Code: MLR MATERNITY LEAVE RETURN

Replaces Employee: Comments: Hours reduced


Buttons: OK, Cancel



4. Complete/select the details below:

Field Name (*mandatory)	Description
<b>Effective Date*</b>	Enter the actual date that the employee is returning.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it is still correct.
<b>Sub status</b>	If required, amend as appropriate, e.g. part-time.
<b>Hours</b>	If required, update the <b>Hours</b> to be worked per week
<b>FTE Hours</b>	Ensure <b>FTE Hours</b> are set to represent normal full time hours for a full time equivalent.
<b>Action*</b>	(1) If returning with no changes to hours enter the relevant action e.g. <b>Maternity</b> (2) If returning AND changing hours enter relevant action, e.g. <b>Hours Decreased</b> .
<b>Reason Code*</b>	Select the relevant reason e.g. <b>Maternity Leave Return</b>
<b>Comments</b>	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click  to return back to the *Appointment Details* window.



**Note: Changing date/s (if required)**

If, after you have entered an appointment change, the effective date needs to be amended please contact the HRIS Support Centre to amend the date.

## F: Return from leave: Amending the pay

1. When recording a return from leave you will also need to amend their pay details as below.



**Note:** This step is **not** required when returning from 'Ordinary Paternity Leave'.




Even if the hours/FTE have not changed it is essential that this section is completed and the appropriate reason is selected and saved. The returning employee may not get paid if this step is not completed.

2. Click the **Appointment Details** button. The *Post Appointment Maintenance* window opens.

3. Go to **Selection > Amend Pay Rate**.

4. Complete the fields as below:

Field Name (* mandatory)	Description
<b>Effective Date *</b>	Return date.
<b>Multiplier *</b>	If necessary, change back to previous e.g. <b>1</b> for a full time post.
<b>Actual Pay</b>	Will reflect salary to be paid, check it is as expected.
<b>Reason *</b>	Select <b>Mat/Pat/Adoption/Shared Parental Leave Return</b> as appropriate
<b>Comments *</b> 	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll. <b>Note:</b> If hours were also changed note ' <i>also changed hours on return from maternity</i> ' here.

5. Click **OK**. The *Add Salary Amendment* window closes.

6. Click **OK**. The system will ask if you are sure you want to add this salary amendment. Click **Yes**.

7. The *Maintain HR Salary Amendments* window opens.

**NEXT STEPS:** If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away.

## **G: Managing leavers/end of contract during maternity leave**

If an employee resigns or their fixed term contract ends whilst they are on maternity leave follow the steps in **QRG: EA1 Ending Appointment(s)**.

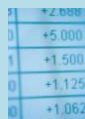


**Note:** We are still obliged to pay SMP, subject to eligibility, to anyone who is employed by us at their qualifying week, even if their leaving date falls before the start of the Maternity Pay Period.

When processing the employee as a leaver please ensure that you update the leaver UDF with the following details as applicable:

- If SMP will be payable
- Address P45 is to be sent to
- Details of outstanding holiday pay
- Details of redundancy payments
- Details of course fees due to be re paid

Full details are contained within the relevant QRG.



	+2.000
D	+5.000
	+1.500
D	+1.125
	+1.062

### **Useful Reports**

To help track leave and monitor appointment changes don't forget to regularly run:

- [PERDEP20 Monthly Personnel Changes](#)
- [PERDEP45 Employee Absence](#)

## H: Appendix

### Recording Family Leave against an appointment in CorePersonnel

		Step 1			Step 2			Step 3			Step 4			Additional Information
		Leave start			Leave return			Leave start			Leave return			
Scenario	Effective Date	Action	Reason	Effective Date	Action	Reason	Effective Date	Action	Reason	Effective Date	Action	Reason		
1	<b>Maternity leave only</b>	Date leave begins	Maternity	Maternity Leave Start	Date of return	Maternity	Maternity Leave return	Not applicable						
2	<b>Maternity leave and Shared Parental leave</b>	Date leave begins	Maternity	Maternity Leave Start	Date of return	Maternity	Maternity Leave return	Date leave begins	Shared Parental Leave	Shared Parental Leave Start	Date of return	Shared Parental Leave	Shared Parental Leave return	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time
3	<b>Paternity leave only</b>	Date leave begins	Paternity	Paternity Leave Start	Date of return	Paternity	Paternity Leave return	Not applicable						
4	<b>Paternity leave and Shared Parental leave</b>	Date leave begins	Paternity	Paternity Leave Start	Date of return	Paternity	Paternity Leave return	Date leave begins	Shared Parental Leave	Shared Parental Leave Start	Date of return	Shared Parental Leave	Shared Parental Leave return	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time
5	<b>Adoption leave only</b>	Date leave begins	Adoption	Adoption Leave Start	Date of return	Adoption	Adoption Leave Return	Not applicable						
6	<b>Adoption leave and Shared Parental leave</b>	Date leave begins	Adoption	Adoption Leave Start	Date of return	Adoption	Adoption Leave Return	Date leave begins	Shared Parental Leave	Shared Parental Leave Start	Date of return	Shared Parental Leave	Shared Parental Leave return	If Shared Parental leave is being taken discontinuously steps 3 and 4 will need to be repeated up to twice more at the appropriate time
7	<b>Shared Parental leave only</b>	Date leave begins	Shared Parental Leave	Shared Parental Leave Start	Date of return	Shared Parental Leave	Shared Parental leave return	If Shared Parental leave is being taken discontinuously steps 1 and 2 will need to be repeated up to twice more at the appropriate time						