

Maternity Leave /Adoption Leave Managers' Checklist

(a separate checklist for colleagues using Paternity, Parental and Shared Parental leave is available for managers)	
Checklist – The HWU HR website has all relevant up to date policies - see https://www.hw.ac.uk/services/human-resources-policies.htm	
Manager:	
Employee's name	
On Notification of Pregnancy/Placement of Child	
Congratulate the employee and confirm their plans to communicate their news to other team members	
Direct employee to the University's Supporting Family Life Policy and the supporting relevant procedures under the Family Friendly Policies section here: https://www.hw.ac.uk/uk/services/human-resources/human-resources-policies.htm <ul style="list-style-type: none"> • Maternity leave • Adoption leave (for use by the primary adopter) • Shared parental leave_(for use within first year of baby's birth) and the Family Friendly HR Hub page for information	
Refer employee to HR Services if required to explain entitlement to maternity pay and maternity/ shared parental leave using policy.	
Update Risk Assessment to include Health and Safety Risk Assessment for new and expectant Mothers (where applicable). Refer to Health & Safety Services for further advice for further advice	
For staff in office-based environments: encourage employee to carry out another Workstation Assessment to ensure they are comfortable at work (where applicable)	
Upon receiving the Workstation Assessment report, order any additional equipment via the Procurement Team, or make any adjustments, required to support the employee throughout their pregnancy (where applicable)	
Ensure staff member takes lunch breaks and sufficient rest breaks (where applicable)	
Let the staff member know that there is a private rest room in the Lord Balerno Building and the Nursing Room , Hugh Nisbet Building in Edinburgh or alternative arrangements on other campuses.	
Agree date for a planning meeting to discuss leave arrangements for maternity cover and any concerns. Whilst initial plans can be discussed earlier, it will only be once the MATB1 or matching certificate has been received (15 weeks before the baby's birth) that plans can be finalised.	
During the Pregnancy/Period Directly Before Placement of Child	
Allow time off for ante-natal, or adoption appointments in line with the University's Supporting Family Life Policy	

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Advise the employee that they must complete the Maternity Statement Form or, Adoption Leave Statement and return to Human Resources (along with their MAT B1 certificate where applicable), in line with the relevant notification requirements	
Payroll will notify the pension scheme of your leave period. Please refer to the pension website USS or Lothian Pension Fund or contact Payroll with any queries.	
Provide employee with a copy of the University's Maternity and Paternity Coaching Flyer and allow sufficient time away from work for the employee to attend coaching sessions, as required.	
Inform staff member about the availability of Edinburgh on-campus nursery (Pinocchio's). There is no nursery based on the Borders campus however the nearest day nursery to the campus is Osito Nursery .	
Planning for Maternity/Adoption Leave	
Hold an informal meeting with the employee, after they have their MATB1, to discuss their maternity/adoption leave and support mechanisms available to them including: <ul style="list-style-type: none"> Proposed start/end dates of leave period 	
<ul style="list-style-type: none"> Consider and discuss annual leave arrangements for current holiday leave year and upon return to work. (Agree any plans for the employee to 'phase' their return to contractual hours e.g. using their accrued annual leave or unpaid leave) 	
<ul style="list-style-type: none"> Agree contact arrangements for the leave period (phone, email, how often, and for what purpose – work/social etc.) Confirm that contact will be made if any local and school changes, changes to their role or funding, and at beginning of promotion process. 	
<ul style="list-style-type: none"> Discuss/agree <i>Keeping in Touch Days (KIT days)</i> - up to 10 days are available on full pay without affecting maternity/ adoption leave entitlement. If using Shared Parental Leave – up to 20 days (SPLIT days) are available. These can be used for a variety of purposes, e.g. development days, to attend conferences or team/ school/ service events. If you are receiving maternity, adoption or shared parental leave payments, including statutory payments, you will receive your normal full day's pay for each KIT day. If you are on the unpaid part of your leave, you will receive payment for the number of hours you worked on the KIT day. 	
<ul style="list-style-type: none"> Communicate that any requests to work flexibly should be submitted in good time (3 months' notice normally required) so they can be carefully considered 	
Plan and organise maternity/adoption leave cover based on informal discussion. Inform relevant line management (Head of School/ Director of Service). Consider secondment opportunities, internal advertising, and external advertising. Start recruitment process if appropriate.	
Carry out the employee's Performance Development Review (PDR), four weeks before they leave, and notify them of the academic promotions round (if these will fall during the maternity/adoption leave period)	
For Academic/Research Staff Only:	
Where employee is externally funded, clarify the terms and conditions of the funding - discuss with School Finance team.	

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Inform the grant funding body of interim arrangements include the School Finance Office and Research Grants Office in any correspondence.	
Discuss with Finance Manager any funding with year-end closure to ensure carry forward to next financial year	
Discuss how day-to-day supervision of PhD students will be managed	
Discuss who will assume interim responsibility for supervising technicians or researchers on externally funded projects	
Inform the grant funding body of interim arrangements	
Discuss and inform Building Safety Officer of who will be responsible for lab safety during leave period.	
During Maternity/Adoption Leave	
Send congratulations of baby's birth (as per school/service norms)	
Staff member to notify line manager if they intend to use Shared Parental Leave. Manager should contact HR Services for advice.	
Keep in contact with the employee whilst they are on leave and follow-through on any arrangements previously agreed. In particular, be sure to notify the employee of any major workplace changes that may affect them, such as changes to organisational structure, role or funding.	
Forward the employee a copy of both the University's Vacancy List and internal Staff Newsletters to their personal email address (if agreed)	
Notify staff of any promotions round (if these fall during the maternity leave period) and invite them into Promotions workshops.	
Make arrangements for employee to come back into work for any agreed KIT / SPLIT days, including the arrangement of payment for this time via the HR Team	
Staff member to submit request for Flexible working (min 3 months in advance) if appropriate	
Staff member to notify line manager if they intend to return to work early (minimum 8 weeks' notice).	
Notify the HR Team at the nearest opportunity where employee will be changing their return-to-work date	
On Return from Maternity/Adoption Leave	
Explain arrangements that can be made to accommodate nursing mothers, where applicable, including details of any Nursing Rooms available on campus	
Check how long they have been away from work	
Ask how much contact they have had with work and work colleagues whilst off. How beneficial was the work contact?	
Ask if they used their available KIT/SPLIT days, if applicable (check all payments have been received)?	
Check if they have any family caring responsibilities still causing them concern?	

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Update the Health and safety Risk assessment and make necessary arrangements in relation to breast-feeding/ expressing. Refer to Health & Safety Services for further advice.	
Check if they need to be referred to the University Occupational Health Advisor or Counselling. Contact your HR Consultant to make the necessary referral.	
Check if they require any adjustments in the workplace for their return to work?	
Notify them that the Travel and Expenses Policy (section 4.14) outlines the University's position regarding childcare costs.	
Check if they require any adjustments to your work pattern either short term or longer term?	
Agree appropriate re-induction during the employee's first week back at work. This may include: <ul style="list-style-type: none"> • introductions to new employees • information on new/revised policies or procedures • training on new/revised systems/tools. 	
Hold an interim PDR meeting within one month of return as part of PDR process with the employee to discuss their return from maternity/adoption leave and support mechanisms available to them including: <ul style="list-style-type: none"> • Complete Forward Job Plan • Development opportunities that may minimise any disruption to the employee's career as a result of their leave • Consideration of workload allocation during 'settling in' period agree the balance of research, admin, teaching and any other priorities with the employee. Try not to allocate any new teaching to the employee immediately following their return to work, if possible. • Consider any steps that might be taken to help minimise the impact of the career break/childcare responsibilities on the returners career • Provide relevant encouragement and support in relation to the academic promotions round, as required 	
Follow-up on any agreed statutory or non-statutory Flexible working request resulting in a change in hours/work location or /inform School/HR/Payroll	
Hold review meeting with employee after month 1 and month 3 of return to work (this can be as part of the interim or full PDR) to check no further issues or concerns.	
Any Time During the Process	
Contact Human Resources for further advice and guidance. Details of whom to contact for specific types of information is available here	

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Signed by manager and date	
Signed by expectant mother/ primary adopter and date	
Review meetings:	
Signed by manager and date	
Signed by expectant mother/ primary adopter and date	
Return to work review:	
Signed by manager and date	
Signed by expectant mother/ primary adopter and date	
1- month post return review:	
Signed by manager and date	
Signed by expectant mother/ primary adopter and date	
3-month post return review:	
Signed by manager and date	
Signed by expectant mother/ primary adopter and date	