

**FAMILY FRIENDLY LEAVE CHECKLIST**

This checklist has been designed to support both employees and managers to enable them to plan effectively for a period of family friendly leave (maternity leave/adoption leave/shared parental leave). For guidance on how to complete any of the Family Friendly leave forms on MyHR, click [here](https://lsecloud.sharepoint.com/sites/MyHRknowledgehub/SitePages/ess-family-friendly-leave-forms.aspx).

**Before Family Friendly Leave**

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| **#** | **Action** | **Employee** | **Manager** | **Completed** |
| **1** | Notify your manager of your pregnancy/adoption as soon as is reasonably practicable and/or at least by:  **Maternity Leave** - the end of the 15th week before the Expected Week of Childbirth (EWC).  **Adoption Leave** - within seven days of being notified by the adoption agency that an individual has been matched for adoption.  **Shared Parental Leave** - at least eight weeks before the leave is due to start. | ✔ |  |  |
| **2** | Discuss and agree how news of the pregnancy/adoption should be communicated to colleagues and key stakeholders. | ✔ | ✔ |  |
| **3** | Arrange a risk assessment with your line manager This should be done first on notification of pregnancy and then at regular intervals (if required, or if concerns are raised) throughout the pregnancy.  <https://www.hse.gov.uk/mothers/employer/index.htm> | ✔ | ✔ |  |
| **4** | Read the [Maternity Leave Policy](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/matPol.pdf)/[Adoption Policy (including Surrogacy)](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/adoPol.pdf)/[Shared Parental Leave Policy](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/shaParLea.pdf) which provides detailed information regarding the School’s approach, your entitlements and the procedure involved. | ✔ | ✔ |  |
| **5** | Start to think about how you would like to use your leave entitlement and (if relevant) whether [Shared Parental Leave](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/shaParLea.pdf) might be something you wish to explore. | ✔ |  |  |
| **6** | If required, arrange a meeting with your HR [Adviser](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-people) to discuss your entitlements and any further questions you may have. | ✔ |  |  |
| **7** | Discuss and agree any additional arrangements to be made i.e. antenatal appointments, workload allocation, rest breaks etc. | ✔ | ✔ |  |
| **8** | **For Research Staff**: Check the terms and conditions of the funding agreement and consider maternity leave funding/research council funding extensions, and REF implications, if appropriate. Speak to the Research Division where appropriate. | ✔ | ✔ |  |
| **9** | Discuss and agree extension to probation, if applicable. | ✔ | ✔ |  |
| **10** | Discuss and agree plans for leave arrangements i.e. cover during the period of leave and any handover arrangements. | ✔ | ✔ |  |
| **11** | **For Academic Staff:** If taking family friendly leave for at least 16 weeks, discuss when to take a period of research leave that you are entitled to; and whether you want the leave to be an automatic interruption to interim/major review timetable. | ✔ | ✔ |  |
| **12** | Formally notify HR of your intention to take your leave as follows:  **Maternity Leave** - complete the maternity leave notification form on [MyHR](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-information-systems/MyHR). This needs to be submitted on MyHR along with your MATB1 to be processed by your HR Adviser and the Payroll team no later than the end of the 15th week before the expected week of childbirth.  **Adoption Leave (including Surrogacy)** – complete the adoption leave notification form on [MyHR](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-information-systems/MyHR). This needs to be submitted along with the matching certificate to be processed your HR Adviser and the Payroll team within seven days of being notified by the adoption agency that an individual has been matched for adoption. In surrogacy agreements, a copy of the parental order should be provided.  **Shared Parental leave** - complete the notice of intention to take shared parental leave form on [MyHR](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-information-systems/MyHR) and upload a copy of your partner’s declaration on MyHR. This should be submitted for HR Adviser and the Payroll team to process at least eight weeks before the leave is due to start. | ✔ |  |  |
| **13** | Discuss and agree contact arrangements during the period of leave e.g. frequency of contact/method/type of information to be shared. Things such as organisational changes and vacancies should be communicated. | ✔ | ✔ |  |
| **14** | Put in a diary reminder to make contact during the agreed periods. |  | ✔ |  |
| **15** | Discuss and agree the use of KIT/SPLIT days (optional). | ✔ | ✔ |  |
| **16** | Discuss how to use annual leave leading up to and/or following the leave period. The expectation is that most annual leave will be taken during the leave year it is accrued; however, anything not used may be carried forward to the next holiday year. [The annual leave calculator](https://info.lse.ac.uk/staff/divisions/Human-Resources/Working-for-LSE/Annual-leave-guide?from_serp=1) may be helpful. | ✔ | ✔ |  |
| **17** | If you are planning to be based overseas outside the UK immediately before or during maternity/adoption/shared parental leave, or during any subsequent research leave, please contact your HR Partner and the LSE Tax Manager, Rudy Ghosh ([r.ghosh1@lse.ac.uk](mailto:r.ghosh1@lse.ac.uk)) for guidance as soon as possible and refer to the [LSE Policy for Staff on UK contracts requesting to work abroad for personal reasons](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/overseawor.pdf). You may be advised to take independent financial advice in such circumstances | ✔ |  |  |

**During Family Friendly Leave**

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| **#** | **Action** | **Employee** | **Manager** | **Complete** |
| **1** | Maintain the contact you agreed before the leave began. | ✔ | ✔ |  |
| **2** | If utilised, ensure that KIT days (10 maximum) or SPLIT days (20 maximum) are used as agreed and arrange payments as they occur by completing the KIT/SPLIT request form on [MyHR](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-information-systems/MyHR). | ✔ | ✔ |  |
| **3** | If the return to work date changes (either earlier or later), make sure you have provided the appropriate notice to your manager and complete the Family Friendly Amendment form on MyHR. If on shared parental leave, you will need to complete the Shared Parental Leave Amendment Form on [MyHR](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-information-systems/MyHR). | ✔ |  |  |
| **4** | Discuss and agree the plans for your return to work, e.g. breastfeeding  arrangements and risk assessments (if applicable), re-induction, and office arrangements etc. | ✔ | ✔ |  |
| **5** | If considering [flexible working](https://info.lse.ac.uk/staff/services/Policies-and-procedures/Assets/Documents/fleWorPolPro.pdf?from_serp=1) arrangements when you return to work, allow adequate time to discuss this with your line manager and submit the [formal flexible working form,](https://info.lse.ac.uk/staff/divisions/Human-Resources/Assets/Documents/Forms/Formal-flexible-working-request-form-Nov16.docx) prior to your return. | ✔ |  |  |
| **6** | Consider and identify any potential training requirements for your return. | ✔ | ✔ |  |
| **7** | Confirm your actual return date with your manager, including any annual leave which has been agreed. | ✔ |  |  |
| **8** | Arrange a return to work meeting. This can take place towards the end of the maternity leave or on the employee’s return. |  | ✔ |  |

**Returning from Family Friendly Leave**

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| **#** | **Action** | **Employee** | **Manager** | **Complete** |
| **1** | Read the [‘Return to Work From Family Friendly Leave: Guidance for Managers’.](http://info.lse.ac.uk/staff/divisions/Human-Resources/Assets/Documents/Family-Friendly-Return-to-Work-Guidance-for-Managers.docx) |  | ✔ |  |
| **2** | Have a return to work meeting to discuss return. | ✔ | ✔ |  |
| **3** | Arrange a meeting with your [HR Adviser](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-people) for a return to work meeting (optional). | ✔ |  |  |
| **4** | Contact the [Pensions team](https://info.lse.ac.uk/staff/divisions/Human-Resources/HR-people) to discuss payment of contributions during any unpaid leave period (optional). | ✔ |  |  |
| **5** | Finalise office arrangements for the employee’s return e.g. desk space, phone, computer, access etc. |  | ✔ |  |
| **6** | Discuss a re-induction programme including training, updates on new or amended systems of work, and any new members of staff or staff departures. | ✔ | ✔ |  |
| **7** | Arrange regular meetings to discuss how the return is going. | ✔ | ✔ |  |
| **8** | Discuss and agree CDR objectives. | ✔ | ✔ |  |
| **9** | Explore the [Parents and Carer’s Network](https://info.lse.ac.uk/staff/divisions/equity-diversity-and-inclusion/Staff-networks/Parents-and-Carers-Network). | ✔ |  |  |
| **10** | Review flexible working arrangements, if appropriate. | ✔ | ✔ |  |