



Department  
for Business  
Innovation & Skills

**SHARED PARENTAL LEAVE AND  
PAY**

**Employers' Technical Guide to  
Shared Parental Leave and Pay**

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# Contents

|  |          |
|--|----------|
| <b>SHARED PARENTAL LEAVE AND PAY</b> .....   | <b>1</b> |
| <b>Contents</b> .....  | <b>2</b> |
| <b>Employers' Technical Guide to Shared Parental Leave and Pay</b> .....   | <b>4</b> |
| Introduction .....   | 4        |
| What this guide includes .....   | 4        |
| Summary: shared parental leave and statutory shared parental pay .....   | 5        |
| Maternity leave and pay .....  | 6        |
| Adoption and surrogacy .....   | 6        |
| Shared parental leave and pay: how it works .....  | 7        |
| Eligibility criteria .....   | 7        |
| Shared parental LEAVE qualifying conditions .....  | 7        |
| Shared parental PAY qualifying conditions.....   | 8        |
| Ending maternity or adoption leave and pay to create shared parental leave and pay .....                                     | 9        |
| How a mother or adopter curtails their maternity or adoption leave .....   | 9        |
| Ending maternity or adoption leave by returning to work .....  | 10       |
| Curtailling maternity or adoption leave by giving notice to end the leave on a specified date before returning to work ..... | 10       |
| Revoking notice to curtail maternity or adoption leave.....  | 10       |
| Curtailling maternity or adoption pay or maternity allowance before returning to work.....                                   | 11       |
| Curtailling maternity or adoption pay or maternity allowance after having returned to work....                               | 12       |
| Knowing whether your employee qualifies for shared parental leave and pay .....  | 12       |
| Further information you can ask for .....  | 13       |
| How much shared parental leave and pay can be taken? .....   | 13       |

|   |           |
|---|-----------|
| How much shared parental leave and pay is MY employee entitled to? .....                                | 14        |
| Calculating the number of weeks of shared parental leave and pay created .....                          | 14        |
| Arrangements for 'booking' shared parental leave and pay .....  | 15        |
| Employees who change their shared parental leave plans .....  | 16        |
| When shared parental leave and pay can be taken.....  | 17        |
| Further information on shared parental leave and pay .....  | 17        |
| <b>Frequently Asked Questions.....</b>  | <b>18</b> |
| Qualifying conditions for shared parental leave and pay.....  | 18        |
| Opting into shared parental leave and pay .....   | 21        |
| Ending maternity or adoption leave and pay early .....  | 24        |
| Calculating the number of weeks of entitlement to shared parental leave and pay .....                   | 28        |
| Notification Requirements – entitlement to shared parental leave and pay and booking leave and pay..... | 31        |
| Patterns of shared parental leave.....  | 40        |
| Employers' responsibility and liability .....   | 45        |
| Employment rights of employees on shared parental leave.....  | 48        |
| Employees who have more than one job.....   | 49        |
| Occupational schemes.....   | 51        |
| Cases of maternal, paternal or infant death.....  | 52        |
| Shared Parental Leave in Touch ("SPLiT") Days.....  | 54        |
| Miscellaneous .....   | 55        |

# Employers' Technical Guide to Shared Parental Leave and Pay

Eligible employees will have a new statutory entitlement to shared parental leave and pay from next year. This is technical guidance for employers who think their employee(s) may be eligible for shared parental leave and/or pay. A summary of the key points is available on [www.gov.uk/shared-parental-leave-and-pay-employer-guide](http://www.gov.uk/shared-parental-leave-and-pay-employer-guide).

## Introduction

Where their baby is due on or after 5 April 2015, eligible mothers will be able to volunteer to end their maternity leave and/or pay early to create leave and pay which they can share with the child's father or their partner as shared parental leave and pay.

The intention is to allow families more choice over how they look after their children in the first year. Existing rules on maternity and ordinary paternity leave and pay remain the same. Additional paternity leave and pay will be abolished. The arrangements for recovering statutory payments via HMRC for statutory maternity pay and ordinary statutory paternity pay will apply in the same way in respect of statutory shared parental pay.

Shared parental leave means that eligible fathers and partners will be able to request more leave from work in the first year following their child's birth. Because it is shareable, there will also be cases where eligible mothers will return to work early because the child's father or their partner is taking leave in their place. Shared parental leave can be taken in discontinuous blocks. This means that eligible parents will also be able to request to mix work with leave in the first year of their child's life and return to work between periods of leave if they wish.

An eligible employee must inform you at least 8 weeks before they plan to take shared parental leave and/or pay. They are also entitled to ask you a further two times to take more leave or to change the pattern of shared parental leave they wish to take, again with 8 weeks' notice.

You should read this guide if you are an employer and you anticipate any of your workforce being interested in taking shared parental leave, and if you advise employers.

## What this guide includes

This guidance covers the following areas:

- Summary: Shared parental leave and shared parental pay

- Shared parental leave and pay: how it works
- Eligibility criteria
- Ending maternity or adoption leave and pay to create shared parental leave and pay
- Knowing whether your employee qualifies for shared parental leave and pay
- How much shared parental leave and pay can be taken?
- Arrangements for “booking” shared parental leave and pay
- Employees who change their shared parental leave plans
- When shared parental leave and pay can be taken
- Frequently Asked Questions on shared parental leave and pay

## **Summary: shared parental leave and statutory shared parental pay**

Shared parental leave and statutory shared parental pay will be available for eligible employees whose baby is due on or after 5 April 2015 or who have a child placed with them for adoption on or after that date.

There will be changes to adoption leave and pay from April 2015, when adoption leave will be available to employees from the first day of their employment, bringing adoption leave into line with maternity leave. Statutory adoption pay will be enhanced to 90% for the first 6 weeks bringing it into line with statutory maternity pay.

All employed women will continue to be eligible to take up to 52 weeks of maternity leave (or in the case of adopters, 52 weeks of adoption leave). The same qualifying arrangements for statutory maternity pay or maternity allowance will continue to apply. As now, statutory maternity pay and maternity allowance will be paid to eligible mothers for up to 39 weeks.

Shared parental leave will be created where an eligible mother or adopter brings their maternity or adoption leave to an end early. This is called “curtailing” maternity or adoption leave. The untaken weeks of maternity or adoption leave can be taken as shared parental leave if the mother/adopter or their partner is eligible for this – up to a maximum of 50 weeks.

Statutory shared parental pay will be created where an eligible mother or adopter chooses to bring their maternity or adoption pay or maternity allowance to an end early – this is called reducing the maternity or adoption pay period or the maternity allowance period. The untaken maternity or adoption pay or maternity allowance will become available as statutory shared parental pay – up to a maximum of 37 weeks.

Shared parental leave and pay will be available to a birth mother and the child's father or a mother's or adopter's partner. "Partner" means a person who the mother or adopter is married to or in a civil partnership with; or a partner who the mother or adopter is living with. Shared parental leave and pay will also be available to the intended parents in surrogacy arrangements who they qualify for adoption leave and/or pay.

Shared parental leave will enable working parents to share leave in the year after their child's birth or placement for adoption and to take leave in a more flexible way. In contrast to maternity and paternity leave, eligible employees will be able to stop and start their shared parental leave and return to work between periods of leave.

In some families, both parents will be employed and meet the qualifying requirements for shared parental leave and pay. In these circumstances, the parents will need to decide how to divide the leave and pay entitlement between them. Leave or pay taken by one parent will reduce the pool of leave and pay that is available to the other parent.

Agency workers who are entitled to statutory maternity pay or statutory paternity pay are not eligible for shared parental leave but their employed partner may be. Agency workers and/or their partners may also be entitled to statutory shared parental pay.

This guide gives you an overview of how shared parental leave and pay will work. More detail on specific issues can be found in the section of the guidance on [Frequently Asked Questions](#) (starting on page 18).

## Maternity leave and pay

Maternity leave, statutory maternity pay and maternity allowance are not changing.

However, eligible mothers and expectant mothers who share or intend to share the care of their child with their partner or the child's father will be able to choose to bring their maternity leave and/or pay or allowance to an end early to enable the parents to opt in to the shared parental leave and pay system. Where the eligibility criteria are met, any untaken maternity leave and/or pay or allowance potentially becomes available to take as shared parental leave and/or pay.

If both the mother and her partner/the child's father are employees and both meet the eligibility criteria, they will both be entitled to take shared parental leave and/or pay and will have to decide between them how they will share this leave and pay.

## Adoption and surrogacy

An adopter or parental order parent in a surrogacy arrangement who takes adoption leave and/or pay may choose to end their adoption leave and pay early and opt into the shared parental leave and pay system in the same way as birth parents.

The majority of the examples given in this guidance and in Appendix 1: Frequently Asked Questions refer to birth parents as they make up the vast majority of employees who will

be eligible and who will apply for shared parental leave and/or pay. However, the same principles apply to employees who are adopting and the intended parents in a surrogacy arrangement where they are applying for a parental order and eligible for adoption leave and pay.

## Shared parental leave and pay: how it works

Shared parental leave is designed to enable working parents to share leave and to take time off in a more flexible way. This will allow both parents to be at home together if this is what they choose.

Only an employee can take shared parental leave and employees and others classed as employed earners for Class1 national insurance liability such as agency workers can take statutory shared parental pay. For an employee to be eligible for shared parental leave or an employer or agency worker to be eligible for shared parental pay, both parents need to meet certain qualifying criteria.

Shared parental leave may be taken in a single continuous block, or may be taken in smaller blocks of leave (a minimum of a week at a time), interspersed with time at work (in contrast to maternity leave which has to be taken in a single continuous block).

In some circumstances, only one of the parents will qualify for shared parental leave. However, if both parents meet the eligibility requirements, shared parental leave can be shared between the parents who can alternate periods of work and leave or be at home together.

Your employee needs to give you proper notice of any periods of shared parental leave and/or pay that they want to take. An employee can only give 3 notices to take leave, unless you agree to more. There are no restrictions on the number of notices for statutory shared parental pay, but pay will usually be notified at the same time as leave.

As an employer, you do not have to agree to lots of periods of leave – the maximum number of separate blocks of leave that your employee can take will be 3, unless you agree to more.

## Eligibility criteria

### Shared parental LEAVE qualifying conditions

To qualify for shared parental leave, an employee must have been continuously employed by you for 26 weeks up to and including the 15th week before the week in which their baby is due to be born, and still be employed by you in the week before any shared parental leave is due to start. This is called the “continuity of employment test”.

An employee who is adopting, or who is the partner of an adopter, meets the continuity of employment test if he or she has been continuously employed by you for 26 weeks in the week in which the adopter is notified of having been matched with a child for adoption, and is still employed by you in the week before any shared parental leave is due to start. For a parental order parent in a surrogacy arrangement, the continuity of employment test is the same as that which applies to birth parents (i.e. they must have been continuously employed by you for 26 weeks up to and including the 15th week before the week in which the baby is due to be born), even though they get adoption leave and pay.

Your employee must share the main responsibility for the care of the child that the shared parental leave and pay relates to with the other parent (i.e. their partner or the child's father) at the date of the child's birth or placement for adoption.

The other parent must meet an "employment and earnings test" for your employee to qualify for shared parental leave. To meet this test, the other parent must have been an employed or self-employed earner in Great Britain for a total 26 weeks (not necessarily continuously) in the period of 66 weeks leading up to the week in which the child is due (or matched for adoption) and to have earned an average of £30 a week in 13 of those weeks (not necessarily continuously).

It is your employee's responsibility to check they are eligible for shared parental leave and/or pay and they must give you a written declaration confirming that they are eligible. They will also provide a declaration from their partner that he or she meets the 'employment and earnings test' and consents to your employee taking shared parental leave and/or pay. You are not required to check or confirm the information given by the partner to determine whether your employee is eligible for shared parental leave and/or pay

## Shared parental PAY qualifying conditions

In order to qualify for statutory shared parental pay, your employee must:

- meet the qualifying requirements for shared parental leave and have a partner who meets the employment and earnings test;
- have earned not less than the lower earnings limit (currently £111 per week) in the relevant period. This is usually the 8 weeks leading up to the qualifying week (as with shared parental leave, the qualifying week is the end of the 15th week before the week in which the baby is due to be born, or the week that the adopter is notified of being matched with a child).

These qualification requirements will be familiar to you. The continuity of employment test is broadly similar to that which applies to statutory paternity leave. The need to meet the lower earnings limit for 8 weeks leading up to the qualifying week is the same test that applies to statutory maternity pay, statutory paternity pay, and statutory adoption pay. So an employee who has been entitled to any of these AND who has a partner (with whom he or she shares the main responsibility for the care of the child) who meets the employment and earnings test will be eligible for shared parental pay.



## Ending maternity or adoption leave and pay to create shared parental leave and pay

Shared parental leave is created by the mother or adopter reducing their maternity or adoption leave by ending it early. Or, if the mother or adopter is not entitled to maternity or adoption leave but is entitled to statutory maternity or adoption pay or maternity allowance, she can end that to create shared parental leave for her partner. Statutory shared parental pay is created by a mother or adopter ending maternity or adoption pay or maternity allowance early.

This section tells you about how a mother or adopter can end their maternity or adoption leave early and how they can reduce their maternity or adoption pay period or maternity allowance period so that the untaken pay can be taken as shared parental pay.

If the parents meet the qualifying requirements, and they wish to take shared parental leave and/or pay, the mother or adopter must curtail (or cut short) their maternity leave and pay or adoption leave and pay to create the entitlement to shared parental leave and pay.

A mother must take at least 2 weeks of maternity leave after the birth of her child before maternity leave can be curtailed. An adopter, or the parental order parent in surrogacy, must take at least 2 weeks of adoption leave before it can be curtailed. Similarly, a mother or adopter must take at least 2 weeks of statutory maternity or adoption pay. The maximum amount of shared parental leave that can be created is, therefore, 50 weeks and the maximum amount of statutory shared parental pay that can be created is 37 weeks. Special rules apply in the event of the death of the mother or adopter and the other parent can be entitled to up to 52 weeks of shared parental leave and 39 weeks of shared parental pay.

Where a mother or adopter takes 51 weeks or more of the 52 weeks of maternity or adoption leave that is available to her, then no shared parental leave can be created. It is only the untaken balance of their maternity or adoption leave that can be taken as shared parental leave.

Where a mother or adopter takes 38 weeks or more of statutory maternity or adoption pay or maternity allowance, then no statutory shared parental pay can be created.

### How a mother or adopter curtails their maternity or adoption leave

An eligible mother who wants to take shared parental leave, or who wants to enable her eligible partner to take shared parental leave, will be able to end her maternity leave in one of 2 ways:

- She can return to work before the end of her maternity leave period thus bringing her maternity or leave to an end; or
- She can give notice to her employer to end her maternity leave on a date in the future that the mother specifies. This notice must be given at least 9 weeks before her 52 weeks of maternity leave is due to end.

The same applies to an adopter who wishes to end his or her adoption leave to opt into the shared parental leave. They would either return to work before the end of their adoption leave (i.e. take less than 52 weeks leave) or give notice to their employer that they wished to end their adoption leave on a date in the future that they specify in the notice. Again this notice must be given at least 9 weeks before their 52 weeks of adoption leave is due to end.

### **Ending maternity or adoption leave by returning to work**

As now, a mother or adopter will be able to end their maternity or adoption leave before the end of the 52 week entitlement by giving their employer 8 weeks' notice of their planned return to work and then going back to work.

As now, once she has returned to work, the mother's maternity will have ended and cannot be re-started. The same applies to adoption leave.

### **Curtailing maternity or adoption leave by giving notice to end the leave on a specified date before returning to work**

To enable the mother's or adopter's partner to start taking shared parental leave from the birth of the child (and whilst the mother or adopter is still on maternity or adoption leave), the mother/adopter will be able to give notice to end their maternity or adoption leave on a specific date of the mother's/adopter's choice.

When a mother gives her employer notice to end her maternity leave and it is accompanied by a notice of entitlement to shared parental leave (or a declaration that her partner has given his or her employer notice of their entitlement to shared parental leave and the mother consents to the leave her partner intends to take), then she is bound by this notice to end her maternity leave (except in very limited circumstances – see below).

The same applies to an adopter in respect of adoption leave.

### **Revoking notice to curtail maternity or adoption leave**

If a mother or adopter has given notice to curtail their maternity or adoption leave they may revoke (withdraw) the notice only if they not returned to work, the curtailment date has not passed, and one of the following circumstances apply:

- Where it is discovered in the 8 weeks following the notice that neither the mother/adopter nor their partner has any entitlement to shared parental leave or pay.
- In the event of the death of the partner.
- (for mothers only) If the notice was given before the birth, and the mother revokes her maternity leave curtailment notice in the six weeks following the birth.

If a mother or adopter revokes their notice in the first two circumstances, there is no further opportunity to opt into shared parental leave at a later date for the same child.

A mother who revokes her maternity leave curtailment notice within 6 weeks of the birth in the last of the above circumstances will be able to opt into shared parental leave at a later date with the same partner - either by returning to work and then giving notice of entitlement to shared parental leave to her employer; or by giving another notice to curtail her maternity leave.

If the mother or adopter revokes their notice to end their maternity or adoption leave they remain on maternity or adoption leave. Their entitlement to maternity or adoption leave is restored to a total of 52 weeks, even if their partner has taken shared parental leave prior to the mother/adopter revoking her leave curtailment notice.

Where a mother gives notice to curtail her maternity leave before the birth and then changes her mind within 6 weeks of the birth, her partner's entitlement to shared parental leave stops. See: [What happens if the mother revokes her leave curtailment and so exits shared parental leave in the 6 weeks following birth?](#) for the special rules that apply in the circumstances where the partner has already taken some weeks of shared parental leave.

The mother or adopter must inform their employer in writing if they wish to revoke a leave curtailment notice that they have given to their employer.

### **Curtailing maternity or adoption pay or maternity allowance before returning to work**

Where a mother is entitled to statutory maternity pay or maternity allowance she can give 8 weeks' notice to end her maternity or adoption pay or maternity allowance to give rise to entitlement statutory shared parental pay before returning to work. Either she or her partner or both can take statutory shared parental pay, if they are eligible.

Where a mother or adopter is not entitled to maternity or adoption leave, but is entitled to statutory maternity or adoption pay or maternity allowance, they may curtail their pay or allowance to create a right to shared parental leave for their employed partner if he (or she) meets the qualifying conditions for leave. The partner will also be entitled to take statutory shared parental pay, subject to meeting the qualifying requirements for this.

A mother cannot curtail her statutory maternity pay or maternity allowance without first having taken 2 weeks of maternity pay or allowance after the birth. A maximum amount of 37 weeks of statutory shared parental pay can be created. Adopters are also required to take 2 weeks of adoption pay before the adoption pay period can be curtailed, but this does not have to be after the child is placed for adoption (adoption leave and pay can start up to 14 days before the child is placed for adoption).

Where a mother or adopter takes the full 39 weeks of statutory maternity or adoption pay or maternity allowance, then there is no untaken pay or allowance and no statutory shared parental pay can be created.

A mother or adopter cannot curtail her maternity or adoption pay or maternity allowance if neither she nor her partner is entitled to shared parental leave or statutory shared parental pay.

A mother or adopter can revoke her notice to curtail their maternity or adoption pay or allowance if their partner dies and curtailment occurs a reasonable period after this.

In addition, in the 6 weeks following birth a mother can revoke a notice to end maternity pay or allowance where the notice was given before the birth.

### **Curtailing maternity or adoption pay or maternity allowance after having returned to work**

Whilst returning to work automatically ends a mother's or adopter's entitlement to maternity or adoption leave, it does not end their maternity or adoption pay period or maternity allowance period. The statutory maternity/adoption pay period (or maternity allowance period if applicable) will continue to run "in the background" for 39 weeks from when it was started.

If the mother wants to opt into statutory shared parental pay after returning to work, and she is still in the maternity pay period (the 39 weeks from when it started), then she must give her employer a notice to end her maternity pay period at least 9 weeks before the expiry of the 39 week period. If she claims maternity allowance from Jobcentre Plus, she must tell Jobcentre Plus that her maternity allowance period is to end. The maternity pay or allowance period will end on the last day of the pay week in which the notice is given.

The same arrangements apply to an adopter in respect of adoption leave and pay.

### **Knowing whether your employee qualifies for shared parental leave and pay**

Your employee is required to let you know that he or she qualifies for shared parental leave and pay if he or she intends to take it. The employee will notify you at least 8 weeks in advance of taking any shared parental leave and/or pay of their entitlement to take this. There will be guidance available for the employee to use to give you the correct information regarding leave and pay.

The process for the parent to inform you is as follows:

After the mother or adopter has returned to work, or when they give notice to curtail their maternity or adoption leave and pay, your employee (whether it is the mother/adopter or their partner) will notify you that he or she is eligible for shared parental leave and/or statutory shared parental pay. The notice of entitlement must be given at least 8 weeks before any shared parental leave or pay can be taken and will include:

- (a) the number of weeks that the mother or adopter took maternity or adoption leave (or will have taken, where notice has been given to curtail the leave on a specific future date);
- (b) how many weeks of shared parental leave and pay is available to your employee and their partner;
- (c) how much each intends to take;
- (d) a declaration from your employee's partner stating that he or she meets the employment and earnings test. This declaration will also state that he or she gives their consent to your employee taking shared parental leave and/or pay and to you to processing information provided by them; and
- (e) a non-binding indication of how the employee will take the shared parental leave that is available to him or her.

A full list of the notice requirements are set out at [Notification Requirements – entitlement to shared parental leave and pay and booking leave and pay](#) (starting on page 31).

You are not required to check whether the information provided by the other parent in their declaration is correct or whether they meet the employment and earnings test. You are not required to speak to the other parent or their employer but you may do so if you wish.

## Further information you can ask for

You are entitled to ask your employee for the name and address of the other parent's employer and your employee is required to provide it. You may also ask for a copy of the child's birth certificate (or a declaration from your employee giving the date and place of birth if no birth certificate is available).

## How much shared parental leave and pay can be taken?

How much shared parental leave and pay your employee may take depends on when the mother or adopter curtails their maternity or adoption leave and pay. Shared parental leave is whatever remains of their 52 weeks of entitlement after returning to work or the date of the notice to curtail maternity or adoption leave and pay or maternity allowance. In essence, the untaken balance of any maternity or adoption leave can be taken as shared parental leave and the untaken balance of any maternity or adoption pay (or maternity allowance) can be taken as shared parental pay.

The maximum number of weeks of shared parental leave and pay that could be available to the parents jointly is 50 weeks of leave and 37 weeks of pay (except in circumstances where the mother dies – see: [Cases of maternal, paternal or infant death](#)).

The amount of shared parental leave and pay available will depend on how much maternity or adoption leave and pay has already been taken:

Shared parental leave will be 52 weeks minus the number of weeks that the mother/adopter takes as maternity/adoption leave.

Statutory shared parental pay will be 39 weeks minus the number of weeks of statutory maternity or adoption pay or maternity allowance taken by the mother or adopter

A mother is required to take a minimum of 2 weeks maternity leave immediately following birth (4 weeks if she works in a factory or workshop). Similarly adopters can't start their shared parental leave until 2 weeks of adoption leave has been placed with them for adoption. So the maximum amount of shared parental leave that is available can never be more than 50 weeks.

### How much shared parental leave and pay is MY employee entitled to?

When your employee notifies you that he or she is eligible to take shared parental leave or pay, he or she must inform you of the total amount available to him or her and the other parent and, if they both qualify and there is a joint entitlement, how much leave and/or pay they each intends to take.

Where both parents are entitled to shared parental leave, they can transfer the leave between them should they choose to at a later date. But this can only be done with the consent of both parents. Your employee must notify you of any change in the number of weeks of shared parental leave allocated to him or her as a result of transferring leave to or from their partner.

You are not required by law to check on whether your employee's partner is eligible to take shared parental leave. They must declare their eligibility and notify their employer.

### Calculating the number of weeks of shared parental leave and pay created

Although it is only possible to take a maximum of 50 weeks of shared parental leave (this applies to both birth parents and adoptive parents) the calculation of the number of weeks of shared parental leave that is available starts with 52 weeks and from this must be deducted the number of weeks of maternity or adoption leave taken by the mother or adopter. The total amount of shared parental leave created by a mother or adopter curtailing her maternity or adoption leave is calculated as follows:

The total entitlement of 52 weeks

*less*

*either:* The number of weeks of maternity or adoption leave taken at the point of the mother's or adopter's return to work if they have not given notice to curtail their leave and opt into the shared parental system;

*or:* The number of weeks of maternity or adoption leave that will have been taken by the mother or adopter at the curtailment date specified in the leave curtailment notice

(irrespective of whether the employee returns to work in advance of their leave curtailment date).

The total amount of statutory shared parental pay created by a mother or adopter curtailing her maternity or adoption pay or maternity allowance period is calculated as follows:

The total entitlement is 39 weeks

*less*

*either:* The number of weeks of maternity or adoption pay or maternity allowance taken by the mother or adopter at the point of their return to work if they have not given notice to curtail their leave and opt into the shared parental system;

*or:* The number of weeks of the maternity/adoption pay or allowance period at the curtailment date (irrespective of whether the mother/adopter returns to work in advance of their leave curtailment date)

Where a mother returns to work without opting into the statutory shared parental pay system and opts in at a later date, the number of weeks of maternity pay or maternity allowance taken for the purpose of statutory shared parental pay is determined at the point of the mother's return to work. If she is subsequently absent from work (for sickness, annual leave, etc.) and is still in her maternity pay or allowance period, she is entitled to statutory maternity pay or maternity allowance when she is absent from work. However, any weeks of maternity pay or allowance paid to the mother following her return to work are disregarded for the purpose of calculating entitlement to statutory shared parental pay.

This applies in the same way in the case of adopters.

Where a mother gives notice to curtail her maternity pay or her maternity allowance period, then the number of weeks of the maternity pay or allowance period at the curtailment date are determined at that date. So if the mother returns to work in advance of the date given on the pay curtailment notice, she does not generate an entitlement to more weeks of statutory shared parental pay.

## **Arrangements for 'booking' shared parental leave and pay**

Once your employee has notified you of their entitlement to take shared parental leave, he or she will also have to submit a notice to "book" a period of leave. A notice to book leave must be given at least 8 weeks before leave can be taken. In many cases, a booking notice will be submitted at the same time as the notice of entitlement is submitted.

Your employee may only give you 3 notices to book leave or to vary a previously agreed pattern of leave. However, if you want to, you can choose to accept more than 3 booking notices.

Each of the 3 notifications to book leave may notify a single, continuous block of leave or may request discontinuous periods of leave.

If your employee is asking to take a single block of leave in their booking notice they are entitled to take it. You cannot refuse such a notification.

Your employee may request a pattern of discontinuous leave (e.g. 2 weeks in June, 3 weeks in September and all of November and December) in the same notification. You do not have to agree to this pattern. You will have a 2 week discussion period, starting on the date that your employee gives you the booking notice, to talk to the employee about the pattern of leave that they have requested and propose alternatives, or to refuse the pattern. You cannot stop your employee from taking the amount of leave requested in the notice, but you can change how and when it is taken. For more information on how to handle requests that are difficult to accommodate please see: [Patterns of shared parental leave](#). If you refuse the pattern proposed and do not agree any other pattern with the employee, the weeks of leave in the notice may be taken in a single continuous block starting on a date specified by the employee (not less than 8 weeks from the date the original notice was given to you). Your employee has 5 days after the end of the 2 week discussion period in which to specify the date they will start their leave. If no date is specified, the leave will begin on the start date of the first period of discontinuous leave that the employee originally applied for.

If they have given you a notice to book discontinuous weeks of leave, your employee can withdraw his or her booking notice in the 2 weeks after the booking notice is given (on or before the 15th day), unless you have agreed the pattern in the notice or you have already reached an agreement with the employee in that period. For more information on withdrawal of notices see: [What happens if I agree to my employee's proposed leave pattern, but the other parent's employer doesn't?](#) We strongly recommend that the employer and the employee discuss the employee's proposals for taking the shared parental leave at the point of notifying entitlement when a non-binding indication of how they expect to take the leave must be submitted. Such a conversation will enable the employee and employer to understand what is most likely to work for both sides.

Your employee can notify you separately about pay and the same 8 weeks' notice applies.

## Employees who change their shared parental leave plans

Leave arrangements that have been notified can be changed by means of a notice to vary the agreed leave. 8 weeks' notice must be given. An employee can give notice to end a period of leave earlier or later than previously notified, or to aggregate a number of discontinuous weeks into a single block using a variation notice.

A notice to vary agreed leave counts towards the cap of 3 notifications to book leave (although you can agree to accept more notifications if you wish).



## When shared parental leave and pay can be taken

Shared parental leave and pay cannot begin before the birth (or placement for adoption) and must be taken within 1 year of the birth or the date that the child was placed with the family (ie the day before the child's first birthday or the first anniversary of the placement of an adopted child).

## Further information on shared parental leave and pay

Frequently asked questions are cited and answered below.

Employers should also refer to the guidance published by Acas which contains advice on how employers should structure and conduct meetings with their employees about shared parental leave and pay. This guidance can be found at: [www.acas.org.uk](http://www.acas.org.uk).

Further information on a range of topics related to shared parental leave and pay can also be found on [www.Gov.UK](http://www.Gov.UK).

# Frequently Asked Questions

## Qualifying conditions for shared parental leave and pay

### **Who is eligible for shared parental leave?**

Working parents who share the main responsibility for caring for their child are able to opt into the shared parental leave system.

Only employees are entitled to shared parental leave.

Agency workers, self-employed parents, or parents who are not employed, are not entitled to shared parental leave.

### **Do both parents always qualify for shared parental leave?**

Sometimes both parents will qualify for shared parental leave. Sometimes only one parent will qualify.

Where both the mother and the child's father/mother's partner are both employed and both qualify for shared parental leave, then they must agree between them how many weeks of leave each of them will take and each must notify their employer of the number of weeks that they have decided each employee will take.

### **What are the eligibility requirements that the parents have to meet to qualify for shared parental leave?**

To qualify for shared parental leave an employee must satisfy a number of conditions:

#### ***Maternity entitlements***

The mother of the child must be entitled to maternity leave or (if she is not entitled to maternity leave) to statutory maternity pay or maternity allowance. In addition, she must have curtailed her entitlement to maternity leave before she has taken her full entitlement.

#### ***Care of the child***

The mother must be sharing the main responsibility for the care of the child with the child's father or the mother's partner.

#### ***The qualification test for the employee: Continuity of employment test***

The employee must meet a continuity of employment test.

The continuity of employment test is as follows: the employee must have been continuously employed by the same employer for 26 weeks at the end of the 15th week before the expected week of childbirth and remain employed by that employer at the start of the week in which shared parental leave is to be taken.

The continuity of employment test is similar to the test for statutory maternity pay and statutory paternity pay. So an employee who is entitled to statutory maternity pay or statutory paternity pay is likely to meet the continuity of employment test for shared parental leave.

### ***The qualification for the other parent: Employment and earnings test***

The other parent – who must be the partner of an employee (the mother's partner or the child's father - even if the father is not in a relationship with the mother) must satisfy an employment and earnings test and must make a declaration that they meet this test. The employment and earnings test requires that in the 66 weeks leading up to the week in which the child was due, they have worked in Great Britain for at least 26 weeks and in 13 weeks in that 66 week period they have earned an average of £30 a week and have paid either class 1 or class 2 national insurance contributions in those weeks (or hold an exemption certificate for those weeks).

The employment and earnings in the period could have been as an employee, a worker or agency worker, or on a self-employed basis.

### **Who is eligible for statutory shared parental pay?**

Only a mother who qualified for statutory maternity pay will be entitled to shared parental pay.

Where a mother qualified for statutory maternity pay or maternity allowance, her partner would be entitled to shared parental pay if he (or she) qualified for statutory paternity pay.

Only an adopter who qualified for statutory adoption pay, or their partner (if he or she qualified for statutory paternity pay), would usually be entitled to shared parental pay.

An employee who does not meet the qualifying conditions for statutory maternity pay or statutory adoption pay or statutory paternity pay will not meet the qualifying conditions for shared parental pay.

An agency worker who is not entitled to maternity leave or shared parental leave would be entitled to shared parental pay if she was entitled to statutory maternity pay.

The partner of an agency worker would usually qualify for shared parental pay if he or she qualified for statutory paternity pay and the mother of the child qualified for statutory maternity or adoption pay or maternity allowance.

A self-employed person, or a person who is not working, will not be eligible for shared parental pay.

### **What are the qualifying requirements for statutory shared parental pay?**

Shared parental pay is only available if the mother was entitled to statutory maternity pay (SMP) or maternity allowance (MA). If a mother does not qualify for SMP or MA, then the

parents may qualify for shared parental leave, but they cannot qualify for statutory shared parental pay.

A mother is entitled to 39 weeks of SMP or MA. She has to reduce the number of weeks she is paid SMP or MA for any statutory shared parental pay to be created.

An employee will only qualify for shared parental pay if he or she qualifies for shared parental leave. In addition to meeting the qualification requirements for shared parental leave, an employee must have earnings not less than the Lower Earnings Limit (£111 a week in 2014-15) in the relevant period. The 'relevant period' is usually the 8 weeks leading up to the end of the 15th week/beginning of the 14th week before the week in which the child is due to be born (or leading up to the matching date in the case of an adoption).

As the relevant qualifying criteria is identical to that required for SMP and statutory paternity pay, an employee will only qualify for statutory shared parental pay if he or she qualified for SMP or statutory paternity pay. A mother who qualified for MA will not qualify for shared parental pay, but her employed (or agency worker) partner might.

An agency worker will not qualify for shared parental leave (as they would not qualify for maternity or adoption or paternity leave) but he or she may be entitled to shared parental pay if he or she was entitled to SMP, statutory adoption pay or statutory paternity pay.

### **How will my employee know if he or she meets the 'continuity of employment test' and if their partner meets the 'employment and earnings test' for shared parental leave?**

Your employee will probably know if he or she meets the continuity of employment test, if they know when they were first employed by you. You will also know if your employee meets the test from their employment records.

Since the continuity of employment test for statutory maternity pay or paternity pay is similar to the test for shared parental leave, an employee who was eligible for statutory maternity pay or paternity pay will know they meet the continuity of employment test for shared parental leave.

Your employee will need to ask their partner/the child's father if he or she meets the employment and earnings test. The partner will know from their payslips (if they are employed) or their National Insurance Contributions (if they are self-employed) when they worked and what they earned.

### **What if both parents are employees?**

If both the mother and the child's father/mother's partner meet the eligibility criteria, then both are entitled to shared parental leave and they need to decide how they will share the available leave between them.

If the mother brings forward the date on which her maternity leave period ends, the untaken maternity leave would be available for both the mother and the child's father/her partner to share as shared parental leave. They may take the leave concurrently and both take time off work together if they wish.

### **Will an employee who receives maternity allowance be eligible for shared parental leave and/or pay?**

An employee who is entitled to maternity leave and maternity allowance may qualify for shared parental leave, but she will not be entitled to shared parental pay. A mother who did not meet the qualifying requirements for statutory maternity pay cannot meet the qualifying requirements for shared parental pay. However, her employed partner/the child's father may be entitled to shared parental leave and shared parental pay if the mother curtails her maternity leave and maternity allowance (and her partner satisfied the qualifying conditions for shared parental leave and shared parental pay). The partner/father would be able to take the balance of her maternity leave as shared parental leave and the balance of her maternity allowance as shared parental pay.

### **Can self-employed people get shared parental leave and pay?**

A self-employed parent will not be eligible for shared parental leave or pay but if they satisfy the employment and earnings test this may enable their employed partner to access shared parental leave and pay.

### **What if both parents are self-employed?**

Neither parent will be entitled to shared parental leave or pay. The mother may be entitled to maternity allowance. If the mother has recently lost her job and she qualified for statutory maternity pay before losing her job, she will also be entitled to statutory maternity pay.

### **Can adopters and parents whose child is born through a surrogacy arrangement access the shared parental system?**

Shared parental leave and shared parental pay may also be available for adoptive parents or parents whose child is born through a surrogacy arrangement if they are entitled to adoption leave and/or statutory adoption pay.

## **Opting into shared parental leave and pay**

### **How does a mother opt in to the shared parental leave and pay?**

The maternity system will continue to operate in the same way that it does currently for all women. This means that all employed women will continue to be eligible for 52 weeks'

maternity leave and will be eligible for 39 weeks' statutory maternity pay if they meet the earnings requirements. Women who do not qualify for statutory maternity pay may qualify for maternity allowance.

An employed mother who is eligible for maternity leave, and who has a partner with whom she is sharing the care of her child, may be able to reduce the weeks of maternity leave below 52, in order to create some weeks of shared parental leave.

She can do this by returning to work or, alternatively, she can give notice to her employer that she will end her maternity leave at a future date. The mother chooses the date she will end her maternity leave and specifies this in the notice she gives her employer.

In either case, the number of weeks that have been taken, or will have been taken, as maternity leave can be calculated. That number of weeks of maternity leave are deducted from the total of 52 weeks to calculate the number of weeks of shared parental leave created. These weeks of shared parental leave will be available to the mother and her partner if they both satisfy the eligibility criteria.

### **Can there be any entitlement to shared parental leave if a mother is not entitled to maternity leave?**

In some cases a woman may not be entitled to maternity leave, but she may be entitled to statutory maternity pay or maternity allowance. For example, an agency worker or a woman who has recently lost her job may be entitled to statutory maternity pay and a self-employed woman may be entitled to maternity allowance.

If such a mother chooses to reduce her statutory maternity pay or maternity allowance period and take fewer than 39 weeks of pay or allowance, then her employed partner could take the untaken weeks as shared parental leave if he (or she) is eligible for leave. In this case, the number of weeks of pay or allowance must be deducted from 52 weeks to calculate the number of weeks of shared parental leave that will be available for the partner to take.

### **When can the father or mother's partner access the shared parental leave and pay system?**

The father or mother's partner can only access the shared parental leave and pay system when the mother ends, or commits to end at a future date, her maternity leave and pay/allowance.

Where a mother is not entitled to maternity leave (because, for example, she is self-employed or an agency worker or has recently become unemployed), and she is entitled to statutory maternity pay or maternity allowance, a mother can create shared parental leave for her employed partner by ending, or committing to end on a given date, her statutory maternity pay or maternity allowance.

## How does shared parental leave and pay arise?

Shared parental leave arises when an eligible mother or adopter brings forward the date on which their maternity or adoption leave period ends and certain eligibility criteria are met.

There are 2 ways for a mother/adopter to bring forward the date on which their maternity/adoption leave period ends:

- They can return to work; or
- They can give notice to their employer to end their maternity or adoption leave on a date they specify in the notice. This is new and it will enable the number of weeks of shared parental leave to be calculated before the mother/adopter has returned to work.

Shared parental leave is created from the number of weeks of untaken maternity or adoption leave.

If the mother or adopter is not entitled to maternity or adoption leave but is entitled to statutory maternity pay (SMP), statutory adoption pay (SAP) or maternity allowance (MA), they may take fewer than the 39 weeks of the pay or allowance to which they are entitled. If they do this, the father of the child or the mother's/the adopter's partner, if he (or she) is employed and meets the eligibility criteria, will be entitled to up to 50 weeks of shared parental leave. This is calculated by deducted from 52 weeks the number of weeks for which the mother has claimed SMP or MA or an adopter has claimed SAP.

Shared parental pay (ShPP) is created where a mother is entitled to SMP or MA and curtails her entitlement (ie takes less than 39 weeks of pay or allowance). The untaken weeks of SMP or MA can be taken by the parent who is on shared parental leave, if they meet the qualifying conditions for this. The same principles apply to an adopter who curtails their SAP.

In some circumstances (such as the case of an agency worker) a parent who is eligible for SMP or statutory paternity pay but who is not entitled to maternity or paternity leave may be entitled to shared parental pay but they will not be entitled for shared parental leave.

## How much statutory shared parental pay is available?

In order for entitlement to shared parental pay to arise, the mother must have reduced (curtailed) her statutory maternity pay (SMP) period or her maternity allowance (MA) period (i.e. she must have taken or intend to take less than 39 weeks of pay or allowance).

If the woman has given notice to end her maternity pay or allowance in advance, the number of weeks of shared parental pay that is potentially available is 39 weeks less the number of weeks that the mother will have claimed SMP or MA on the date she gave in the notice for when she intends to end her SMP or MA. The maximum amount of shared parental pay that is payable (except in the case of death of the mother) is 37 weeks. The same principles apply in the case of adoption where the adopter reduces their statutory adoption pay period.

If a woman has returned to work before notifying her employer of her own or her partner's/the child's father's entitlement to shared parental pay, she will be required to end her maternity pay period or her maternity allowance period before the end of the 39th week. In this case, the number of weeks of shared parental pay that is available is 39 weeks less the number of weeks of SMP or MA taken by the mother as of the date she returned to work. If she received any further SMP or MA for absence from work subsequent to her return to work, for example, if she is off sick, these weeks are not deducted from her and/or her partner's entitlement to shared parental pay.

Any shared parental pay already taken must be deducted from the total entitlement.

## Ending maternity or adoption leave and pay early

### **What does “curtailment of maternity or adoption leave” and “curtailment of maternity or adoption pay” or “curtailment of maternity allowance” mean?**

“Curtailment of maternity leave” means bringing forward the date on which the mother's maternity leave period ends before the whole entitlement of 52 weeks of maternity leave is taken.

“Curtailment of maternity pay” means cutting short the mother's entitlement to maternity pay before 39 weeks of that pay has been taken.

“Curtailment of maternity allowance” means cutting short the mother's entitlement to maternity allowance before 39 weeks of that allowance has been taken.

“Curtailment of adoption leave” means bringing forward the date on which the adopter's adoption leave period ends before the whole entitlement of 52 weeks of adoption leave is taken.

“Curtailment of adoption pay” means cutting short the adopter's entitlement to adoption pay before 39 weeks of that pay has been taken.

### **How is entitlement to the shared parental system created?**

The mother can only opt into shared parental leave if she brings forward the date on which her maternity leave period ends or, where she is not entitled to maternity leave, where she ends her statutory maternity pay (SMP) or maternity allowance (MA) early.

A woman can bring forward the date on which her maternity leave period ends either by:

- giving her employer written notice of curtailment; or
- returning to work.

She can end her SMP or MA entitlement by curtailment (i.e. giving her employer notice that she wishes to take less than 39 weeks of pay or allowance).

If the mother has ended her maternity leave by giving a curtailment notice it is only effective if she gives her employer at the same time a notice or declaration that she or her



partner/the child's father will take shared parental leave or pay. If she has done so, the curtailment notice is binding and her maternity leave period will end on the date specified in the notice, whether or not she returns to work on that date. She may delay her return to work by taking shared parental leave (if she is eligible) or another type of leave immediately after her maternity leave. She cannot remain on maternity leave after her leave curtailment date as her entitlement to that leave ends on this date.

The mother must give 8 weeks' notice to her employer before she can take a period of shared parental leave. Her partner/the child's father will also need to give his or her employer 8 weeks' notice of any shared parental leave that he or she wants to take.

The same principles apply in the case of adoption where the adopter has given notice to their employer that they wish to curtail their adoption leave. The adopter's adoption leave will end on the date that they specified in the notice that they gave their employer.

### **What if a woman changes her mind?**

Once a mother has returned to work, she cannot restart her maternity leave.

Other than in very limited circumstances a mother cannot change her decision to end her maternity leave after a curtailment notice has been given to her employer.

Once a mother has given a curtailment notice, the balance of her maternity leave that is untaken on the date her maternity leave period ends will be the number of weeks of shared parental leave available.

### **What happens if the mother revokes her leave curtailment and so exits shared parental leave in the 6 weeks following birth?**

Her maternity leave reverts to 52 weeks of leave.

The mother and her partner's/the child's father's entitlement to shared parental leave cease immediately and both parents must inform their respective employers of the change in circumstances if they have notified entitlement to shared parental leave.

If the partner has already started taking shared parental leave or agreed a period of shared parental leave which is due to start within the 8 weeks following the revocation, his/her employer may require the partner to be absent from work on unpaid leave for some or all of this period. This protects an employer who has put cover in place for when the employee is on shared parental leave. That employer will not have to accept the employee back into the workplace with no notice.

### **If a mother revokes her notice to curtail her maternity leave, can she still opt into shared parental leave at a later date?**

A mother who gives notice to end her maternity leave prior to the birth of her child can revoke this notice provided she does this before the leave curtailment date (i.e. the date she said that would end her maternity leave on) and provided she revokes the notice within 6 weeks of the birth of her child. In this case, she and her partner can subsequently opt into shared parental leave at a later date.

If revocation occurs due to the absence of entitlement or following the death of the mother's partner/the child's father, there is no further opportunity to opt into the shared parental leave system.

### **What happens if the parents discover they are not entitled to share parental leave after all?**

If the parents discover neither of them is entitled to either shared parental leave or pay in the 8 weeks following the mother giving a curtailment notice to her employer, then she may revoke the curtailment notice and remain on maternity leave.

### **What happens if the parents discover 8 weeks after the mother has curtailed her maternity leave that neither of them is entitled to share parental leave or pay?**

We don't expect this to happen, but it is a theoretical possibility. Should this occur, a mother's maternity leave has to end on the date she specified in the curtailment notice. Her maternity pay or allowance period does not, however, end.

### **What happens with pay when a mother returns to work without opting into shared parental leave or pay?**

The 39 weeks that a mother is entitled to statutory maternity pay or maternity allowance is called the maternity pay period or the maternity allowance period. When a mother returns to work before the end of the maternity pay period her maternity pay period does not end but continues to 'run in the background'. So if a woman is absent from work for whatever reason in the 39 week period in which her maternity pay period continues running, her employer must pay her statutory maternity pay (where the mother receives a contractual payment from her employer that is higher than statutory maternity pay, the employer can reclaim the statutory maternity pay from HMRC).

Similarly, if the mother is entitled to maternity allowance, this will be payable through Job Centre Plus if she is absent from work for whatever reason whilst the 39 week period continues to run.

So in order to create an entitlement to statutory shared parental pay (for herself and/or her partner), the mother must end her maternity pay or allowance period in order to opt into statutory shared parental pay.

### **What happens to the mother's partner/the child's father when a mother revokes her notice to end her maternity leave within 6 weeks of the birth?**

When the mother exits shared parental leave by revoking her maternity leave curtailment notice before the date of curtailment and within 6 weeks of the birth, her partner's/the child's father's entitlement to shared parental leave ceases with immediate effect. If the partner has notified his (or her) employer that he or she is entitled to shared parental leave, then he (or she) must tell the employer that he or she is no longer entitled to leave (if the mother revokes her notice to curtail maternity leave, then no shared parental leave exists).

As with additional paternity leave, the partner's employer may require him to be absent on the shared parental leave he (or she) has booked for up to 8 weeks from the date on which the employer is informed of the revocation if that revocation happens either:

- while the partner is on shared parental leave, or
- within 8 weeks of a booked period of shared parental leave being due to start.

This is to enable the employer to have 8 weeks to stand down the cover arrangements that it might have put in place in anticipation of the employee's absence on shared parental leave. This period of absence is subject to negotiation so the employer may agree a shorter period of notice before the employee's return to work.

If the employer requires the employee to be absent, the absence is treated as shared parental leave (even though there is no entitlement).

Entitlement to shared parental pay ceases immediately on revocation of the notice to end maternity pay/maternity allowance as the pay or allowance period is reinstated. Consequently, if the other parent is required to be absent in the period of up to 8 weeks following revocation of the curtailment notice is not entitled to shared parental pay.

If a mother revokes a leave curtailment notice before the curtailment date and before the end of the sixth week following birth, her partner/the child's father may have taken up to 6 weeks of shared parental leave and pay (although more likely it will be 4 weeks as the first 2 weeks of any leave or pay taken are likely to be paternity leave and pay, as a partner qualifying for shared parental leave will also qualify for paternity leave and pay).

Since the partner was entitled to the shared parental leave and pay at the point it was taken, the employer must not recover the payment to which the employee was entitled before the mother revoked her notice to curtail her maternity leave and pay as that is not an overpayment. The employer will be able to recover the statutory payment from HMRC in the usual way.

### **If a mother revokes her maternity leave curtailment notice within 6 weeks of the birth, and then opts in to shared parental leave at a later date, does this affect the number of weeks of shared parental leave available?**

A mother who gives notice to bring forward the date on which her maternity leave period ends before the birth and then revokes it in the 6 weeks following the birth and before her

leave curtailment date may decide at a later date to opt into shared parental leave and shared parental pay with the same partner.

Any shared parental leave and pay taken by a partner in the period between birth and when a mother revokes her notice to end her maternity leave must be deducted from any entitlement to shared parental leave and pay, should the couple subsequently opt into shared parental leave and pay at a later stage.

Similarly, any shared parental leave that an employer requires an employee to take after revocation (where the partner had booked leave) must also be deducted.

## Calculating the number of weeks of entitlement to shared parental leave and pay

### Examples of calculating the number of weeks of shared parental leave and pay

#### ***Example 1: Jean and Pete***

7 weeks before having her baby, and 3 weeks before her maternity leave and pay starts, Jean gives her employer notice to curtail her maternity leave and pay after 10 weeks of maternity leave. At the same time, the baby's father, Pete, gave his employer notice to start 26 weeks of shared parental leave following on from his paternity leave, 5 weeks after the birth, Jean realises she is not ready to return to work so soon and she revokes her notice to curtail her maternity leave and pay. At that point, Pete ceases to be entitled to shared parental leave as Jean has revoked her notice to end her maternity leave. He has already taken 3 weeks of shared parental leave. Pete's employer has recruited a new person to do Pete's job while he was away, expecting him to be away for 6 months. Pete's employer requires Pete to take compulsory shared parental leave for 8 weeks until week 11 after the birth.

Jean then decides at a later date to curtail her maternity leave after 26 weeks. This creates the following entitlement:

#### Shared parental leave:

52 weeks of maternity leave, minus

30 weeks of maternity taken (4 weeks before birth and 26 weeks after)

3 weeks of shared parental leave taken by Pete before Jean revoked her previous curtailment notice, less

8 weeks of absence on shared parental leave that Pete's employer required him to take following Jean's revocation

Total weeks of shared parental leave =  $52 - (30 + 3 + 8) = 11$  weeks

#### Shared parental pay:

39 weeks of maternity pay, less

30 weeks taken by Jean, less

3 weeks of statutory shared parental pay taken by Pete prior to Jean's revocation of her pay curtailment notice.

Total weeks of shared parental pay =  $39 - (30 + 3) = 6$  weeks

**Example 2: Salma and Abdullah**

Salma started her maternity leave 4 weeks before the birth of her child. At that time she wanted to return to work at 12 weeks after the birth and she expected to have taken 16 weeks of maternity leave and pay at that point. As she knows what she wants to do, she gives her employer a curtailment notice 2 weeks after the birth specifying a leave curtailment date 12 weeks after the date of the birth (and 16 weeks after her maternity leave began). At the curtailment date she will have taken 16 weeks' maternity leave and 16 weeks maternity pay. The effect of the curtailment notice is to end the maternity leave and pay on the curtailment date and to create 36 weeks of shared parental leave and 23 weeks of shared parental pay. However, in the event, Salma decides to go back to work before her leave curtailment date and she gives her employer 8 weeks' notice of the date of her return to work. Her early return to work does not change the number of weeks of shared parental leave and pay to which she and her husband, Abdullah are entitled; this was determined by the leave and pay curtailment date and is unaffected by her early return to work.

**Example 3: Shakia and Leroy**

Shakia goes into early labour with her child and starts her maternity leave the day following the birth. She returns to work after 12 weeks, not planning to take any shared parental leave and pay as her mother will look after the child whilst Shakia works. However, 3 weeks after her return to work Shakia contracts shingles and is off work sick for 2 weeks, during which time she is paid statutory maternity pay. After she returns to work, Shakia's mum falls and breaks her leg and can no longer look after her granddaughter. Shakia and her husband, Leroy, decide that the easiest thing will be for Leroy to take some shared parental leave and stay at home until the baby is about 10 months old. Shakia notifies her employer that she is ending her maternity pay period and that Leroy is opting into shared parental leave and pay. The maternity pay period ends on the last day of the pay week in which the notice is given. Leroy notifies his employer that he is eligible for shared parental leave and pay and intends to take the shared parental leave and pay in 8 weeks' time.

Shakia and Leroy are entitled to 40 weeks' shared parental leave. This is because Shakia returned to work after 12 weeks of maternity leave and these 12 weeks are deducted from the total available (52).

Shakia and Leroy are entitled to 27 weeks of statutory shared parental pay calculated as the total of 39 weeks available minus the 12 weeks in which she received maternity pay following the birth of the child. The 2 weeks of statutory maternity pay paid to Shakia whilst she was absent from work with shingles is disregarded for the purpose of calculating entitlement to the weeks of statutory shared parental pay.

### **How does shared parental leave and pay interact with additional paternity leave and pay?**

Shared parental leave and shared parental pay will replace the existing entitlements of additional paternity leave (“APL”) and additional statutory paternity pay (“ASPP”) for babies due on or after 5 April 2015.

The parent of a baby due on or before 4 April 2015 (even if the baby is not born until after that date) will remain entitled to APL and ASPP. So in some workplaces, there will be people on APL and ASPP up until April 2016, whilst others are on shared parental leave and shared parental pay. For 2015-16, both systems will be in place, but there is very clear eligibility as to which system applies in the case of each employee.

### **How does a mother curtail her maternity leave?**

A mother entitled to maternity leave has to bring forward the date on which her maternity leave period ends in order to create shared parental leave. The amount of shared parental leave available is the number of untaken weeks of maternity leave.

A mother can bring forward the date on which her maternity leave period ends (reduce it to fewer than 52 weeks) either:

- By returning to work; or
- Giving written notice to her employer to end her maternity leave period on a future date which the mother must specify. This has to be accompanied by either the mother or the partner submitting to her or his employer a notice of entitlement to shared parental leave.

Once the mother has brought forward the date on which her maternity leave period ends, the untaken weeks of maternity leave are available to be taken as shared parental leave. If she gives notice to curtail her leave on a future date, then, provided the eligibility criteria are satisfied, her partner can start taking shared parental leave whilst she is still on maternity leave.

### **With whom can the mother/adopter share leave and pay?**

Working parents can share the care of their child and combine work and childcare.

The mother may share any shared parental leave with the “other parent” with whom she shares the main responsibility for the care of the child and who must be one of the following:

- the child’s father;
- a person to whom the mother is married or in a civil partnership; or

- a partner (including a same sex partner) who lives with the mother and the child in an enduring family relationship but is not the mother's child, parent, grandchild, grandparent, sibling, aunt, uncle, niece or nephew.

An adopter may share any shared parental leave with his or her spouse, civil partner, or partner (as above).

Shared parental leave and shared parental pay are only available to a mother or adopter who is sharing the care of the child with the child's father or her partner or spouse.

### **How much shared parental leave is available?**

The maximum amount of leave available to a mother and her partner/the child's father is 50 weeks. An employed mother is required to be off work on maternity leave for at least the first 2 weeks after giving birth.

To calculate the actual amount of shared parental leave available, any weeks of maternity leave taken must be deducted from the full entitlement of 52 weeks' maternity leave. So the number of weeks of shared parental leave is calculated by deducting from 52 either:

- The number of weeks of maternity leave taken by the mother; or
- If the mother is not entitled to maternity leave, the number of weeks of statutory maternity pay or maternity allowance claimed by the mother.

In addition, where a mother has given a curtailment notice before birth and the partner/child's father has taken shared parental leave following the birth and the mother then revokes her curtailment notice within 6 weeks of the birth, any shared parental leave taken by the other parent must be deducted from any entitlement to shared parental leave. Similarly, any shared parental leave that the other parent had booked prior to mother's revocation if her curtailment notice and the other parent's employer requires him to take, be also be deducted.

## **Notification Requirements – entitlement to shared parental leave and pay and booking leave and pay**

### **How will I know if my employee wants to take shared parental leave?**

There are 2 types of notices that an employee is required to give their employer before taking shared parental leave:

- Firstly an eligible employee is required to notify their employer of their entitlement to, and intention to take, shared parental leave. This is a 'one off' notification. However, an employee can vary the amount of shared parental leave they intend to take by notifying their employer of the variation (this will be

- necessary when the parents want to transfer weeks of shared parental leave between them);
- In addition, an employee will need to give a notice to his or her employer of any period that the employee wishes to take as shared parental leave, effectively a “booking” notification.

In some cases, both types of notice will be submitted at the same time. However, a “booking” notice may be submitted after to an entitlement notice.

### **What information will the notice of entitlement to shared parental leave contain in birth scenarios?**

When a woman curtails her maternity leave and pay/allowance, this will create an entitlement to shared parental leave and statutory shared parental pay if the mother and her partner/the child’s father meet the qualifying requirements.

The mother and her partner/the child’s father need to give their respective employers written notice of their entitlement to shared parental leave at least 8 weeks before she or he intends to take the leave.

That notice must contain a declaration from the “other parent” (in the case of the mother, the other parent is the child’s father, her spouse, civil partner or a partner with whom she shares the main responsibility for the care of her child; in the case of the child’s father or the mother’s partner, civil partner or spouse, the other parent is the mother).

The mother’s written notice to her employer must include the following:

- Her name;
- The name of her partner;
- The start and end dates of her maternity leave;
- The total amount of shared parental leave available (52 weeks – minus any maternity leave taken/to be taken);
- The expected week of birth of the baby (or the actual date of birth if the child has already been born);
- How the parents think they will split and take their shared parental leave.

The mother also needs to give her employer:

- a) A declaration signed by herself confirming that:
  - She has been working with the same employer for 26 weeks by the end of the 15th week before the baby’s due date;
  - She will have the main caring responsibility for the baby (along with her partner/the child’s father), and will inform her employer immediately if this changes;
  - She is entitled to statutory maternity leave;
  - She has returned to work before her maternity leave has ended or is committing to ending her maternity leave early;
  - The information she has given is accurate.



b) A declaration signed by the other parent.

The declaration signed by the mother's partner/the child's father must:

- Give his/her name and address, and national insurance number (or they must declare that they do not have a national insurance number);
- Confirm s/he has worked for 26 weeks out of 66 weeks up to the expected week of child birth and has earned at least £30 in 13 of those weeks;
- Confirm s/he is the father of the child, or the mother's partner, civil partner or spouse;
- Confirm that s/he will have the main caring responsibility for the baby (along with the mother);
- Confirm s/he consents to the mother taking the amount of leave she has set out in the notice that the mother gave her employer;
- Confirm that s/he consents to the mother's employer processing the information about him/her included in the declaration.

In the two weeks following the mother giving notice to her employer that she is entitled to, and intends to take, shared parental leave, the mother's employer may request:

- A copy of the birth certificate;
- The name and address of the partner's employer.

The mother has 14 days to respond. If the child has already been born at the time the employer makes the request, the mother must provide either a copy of the birth certificate or, if the birth certificate has not yet been issued, a signed declaration stating the date and location of the birth and stating that a birth certificate has not yet been issued.

If the child has not yet been born at the time of the employer's request, the mother must provide a copy of the birth certificate within 14 days of the birth, or if the birth certificate has not been issued at that point, the mother must provide a signed declaration stating the date and location of the birth and stating that a birth certificate has not yet been issued.

If there is no employer for her partner/the child's father (i.e. if s/he is self-employed) she must provide a declaration that there is no employer.

The child's father's/the mother's partner's written notice to his/her own employer must include the following:

- His/her name;
- The name of his/her partner – the mother of the baby;
- The start and end date of the mother's maternity leave or, if the mother is not entitled to maternity leave, the amount of statutory maternity pay or maternity allowance received or to be received;
- The total amount of shared parental leave available (52 weeks – minus any maternity leave taken/to be taken or, where the mother is not entitled to maternity leave, 39 weeks - minus any statutory maternity pay or maternity allowance received or to be received);
- The expected date of birth of the baby (or the actual date of birth if the child has already been born);

- How the parents think they will split and take their shared parental leave.

The father/the mother's partner also needs to give:

- a) A declaration signed by him/herself confirming that:
  - S/he has been working with the same employer for 26 weeks by the end of the 15th week before the baby's due date;
  - S/he will have the main caring responsibility for the baby (along with the mother), and will inform his/her own employer immediately if this changes;
  - S/he is the father of the child or spouse, civil partner or partner of the mother;
  - S/he will inform his/her employer if the mother revokes her leave curtailment notice;
  - The information given is accurate.
  
- b) A declaration signed by the mother which:
  - Gives her name and address, and national insurance number (or declaration that they do not had a national insurance number);
  - Confirms she has worked for 26 weeks out of 66 weeks up to the expected due date and has earned at least £30 in 13 of those weeks;
  - Confirms she is entitled to statutory maternity leave, statutory maternity pay or maternity allowance;
  - Confirms that she will have the main caring responsibility for the baby (along with her partner),
  - Confirms she has ended her maternity leave by returning to work or curtailing that leave or curtailed her statutory maternity pay or maternity allowance;
  - Confirms she will inform her partner/the baby's father immediately if she revokes her curtailment of leave/pay/allowance;
  - Confirms she consents to her partner/the baby's father taking the amount of leave set out in the notice;
  - Confirms that she consents to her partner/the baby's father's employer processing the information about her included in the declaration.

In the two weeks following the child's father/the mother's partner giving notice of their entitlement to, and intention to take, shared parental leave, the father's/partner's employer may request:

- A copy of the birth certificate;
- The name and address of the mother's employer.

The partner has 14 days to respond. If the child has already been born at the time their employer makes the request, the father/mother's partner must give their employer either a copy of the birth certificate or if the birth certificate has not yet been issued, a signed declaration stating the date and location of the birth and stating that a birth certificate has not yet been issued.

If the child has not yet been born at the time of their employer's request, the father/mother's partner must provide a copy of the birth certificate within 14 days of the birth, or if the birth certificate has not been issued at that point, the partner must provide a

declaration signed by him/herself stating the date and location of the birth and stating that a birth certificate has not yet been issued.

If there is no employer for the mother (i.e. if she is self-employed) the father/mother's partner must provide a declaration to their employer that there is no employer.

### **What information will the notice of entitlement to shared parental leave contain in adoptions?**

When an adopter who is taking adoption leave and pay, curtails this leave and pay an entitlement to shared parental leave and statutory shared parental pay will be created if this adopter and his or her partner meet the qualifying requirements.

An adopter and his/her partner need to give their respective employers written notice of their entitlement to shared parental leave at least 8 weeks before she or he intends to take the leave.

That notice must contain a declaration from the "other parent". The "other parent" is the adopter's spouse, civil partner or partner.

The adopter's written notice to his/her employer must include the following:

- His/her name;
- The name of their partner;
- The date s/he was notified by the adoption agency of being matched with child;
- The expected date of placement of the child (or the actual date of placement if the child has already joined the family);
- The start and end dates of his/her adoption leave;
- The total amount of shared parental leave available (52 weeks – minus any adoption leave taken/to be taken);
- How the parents think they will split and take their shared parental leave.

The adopter also needs to give their employer:

- a) A declaration signed by him/herself confirming that:
  - S/he has been working with the same employer for 26 weeks by the pointing of matching with the child;
  - S/he will have the main caring responsibility for the child (along with his/her partner), and will inform the employer immediately if this changes;
  - S/he is entitled to statutory adoption leave;
  - S/he has returned to work before his/her adoption leave has ended or is committing to ending his/her adoption leave early;
  - The information s/he has given is accurate.
- b) A declaration signed by his/her partner which:
  - Gives his/her name and address, and national insurance number (or declaration that they do not have a national insurance number);

- Confirms s/he has worked for 26 weeks out of 66 weeks up to the placement date and has earned at least £30 in 13 of those weeks;
- Confirms s/he will have the main caring responsibility for the child (along with the adopter),
- Confirms s/he is the adopter's partner, civil partner or spouse;
- Confirms s/he consents to the adopter taking the amount of leave set out in the adopter's notice to their employer of their entitled to, and intention to take, shared parental leave;
- Confirms that s/he consents to the adopter's employer using the information about him/her included in the declaration.

In the two weeks following this notice, the adopter's employer may request to see documents issued by the adoption agency which include:

- The agency's name and address;
- The date that the adopter was notified of being matched with the child;
- The date on which the child is expected to be placed with the family
- The name and address of the partner's employer.

The adopter has 14 days to provide the information. If there is no employer for her partner (i.e. s/he is self-employed) the adopter must provide a declaration that there is no employer.

The adopter's partner's written notice to his/her own employer must include the following:

- His/her name;
- The name of his/her partner – the adopter of the child;
- The date that the adopter was matched with the child;
- The start date and end date of the adopter's adoption leave or, if the adopter is not entitled to adoption leave, the amount of statutory adoption pay received or to be received;
- The total amount of shared parental leave available (52 weeks – minus any adoption leave taken/to be taken or 39 weeks – minus any statutory adoption pay received/to be received);
- The expected placement date of the child (or the actual placement of birth if the child has already been born);
- How the parents think they will split and take their shared parental leave.

The adopter's partner also needs to give:

- a) A declaration signed by him/herself confirming that:
  - S/he is the partner, civil partner or spouse of the adopter;
  - S/he has been working with the same employer for 26 weeks by the point of the child being matched with the family;
  - S/he will have the main caring responsibility for the child (along with the adopter), and will inform his/her own employer immediately if this changes;
  - S/he will inform the employer immediately if the adopter revokes their curtailment of adoption leave or pay;

- The information given is accurate.
- b) A declaration signed by the adopter which:
- Gives his/her name and address, and national insurance number (or a declaration that they do not have a national insurance number);
  - Confirms s/he has worked for 26 weeks out of 66 weeks by the point of the child being matched with the family and has earned at least £30 in 13 of those weeks;
  - Confirms s/he has the main caring responsibility for the child (along with the partner);
  - Confirms s/he is entitled to statutory adoption leave or statutory adoption pay;
  - Confirms s/he has ended her adoption leave/pay by returning to work or curtailing that leave or statutory adoption pay;
  - Confirms s/he will inform her partner immediately if she revokes her curtailment of leave/pay;
  - Confirms she consents to the partner taking the amount of leave set out in the notice;
  - Confirms that she consents to the partner's employer using the information about the adopter included in the declaration.

In the two weeks following this notice, the adopter's partner's employer may request documents issued by the adoption agency which include:

- The agency's name and address;
- The date that the adopter was notified of being matched with the child;
- The date on which the child is expected to be placed with the family
- The name and address of the adopter's employer.
- The partner has 14 days to respond. If there is no employer for the adopter (i.e. s/he is self-employed) the partner must provide a declaration that there is no employer.

### **What is a non-binding indication of when the employee expects to take the leave?**

The notice of entitlement to shared parental leave must include a non-binding indication of when the employee expects to take leave. It is non-binding so it creates no actual certainty for an employer and it does not give the employee an entitlement to take that leave. An employee still needs to give the employer a booking notice to take any particular periods of shared parental leave.

But a non-binding indication forces the parents to look ahead over the whole year and consider how they might want to take their leave. This encourages planning over the longer term. In addition, it shows the employer what the employee is thinking and creates an opportunity for an early discussion between the employer and employee which in turn is likely to create more trust and certainty.

### **Can the employer ask for additional information after receiving a notice of entitlement?**

Following submission of a notice of entitlement, an employer has a right to request certain additional evidence and the employee is required to provide it, in order to be entitled to the shared parental leave.

Specifically, where an employee notifies his or her employer of entitlement to shared parental leave, the employer may request within 14 days:

- A copy of the child's birth certificate;
- The name and address of the other parent's employer.

In this situation, the employee has 14 days to provide:

- A copy of the child's birth certificate, where one has been issued or, if the birth certificate has yet to be issued, a declaration signed by the employee, which states the date and location of the child's birth; and
- The name and address of the other parent's employer or a declaration that the other parent has no employer (if, for example, the other parent is not working at the time or is self-employed).

Where the employer's request for a copy of the child's birth certificate is made before the child is born, the employee must, within 14 days of the child's birth, provide:

- A copy of the child's birth certificate, where one has been issued; or
- If the birth certificate has yet to be issued, a declaration signed by the employee which states the date and location of the child's birth.

### **What if my employee and their partner change their minds on how the shared parental leave should be divided?**

If the parents decide that a different division of the total shared parental leave available would suit them better, they can alter the division of the leave between them if they both agree. They are each required to give a variation notice to their employer, setting out the new amounts of leave accruing to each parent, and signed by both parents.

### **How does my employee tell me when they want to be absent from work on shared parental leave?**

Employees are required to give you 8 weeks' notice of any period of shared parental leave. In many cases, the first period of leave will be notified at the same time as they notify you that they are entitled to take shared parental leave. However, a notice to book shared parental leave may be given at another time.

### **What information should the notice to 'book' leave contain?**

An employee who has notified their employer of their entitlement to shared parental leave must also give notice to "book" leave at least 8 weeks before the first week of leave is due

to start. In many cases, an employee is likely to give the employer a booking notice at the same time that he or she gives the notice of entitlement.

A booking notice must specify the weeks of shared parental leave that an employee proposes to take. It must state a minimum of 1 week and may specify more weeks in a single continuous block, or discontinuous blocks of leave.

### **Does my employee have a right to take the leave that they have 'booked'?**

Where a booking notice notifies a single continuous block of leave, the employee has a right to take that leave on the dates notified.

If a notice requests leave in discontinuous weeks, an employer is entitled to require all the weeks of leave to be taken in a single block.

So, if an employee give their employer a booking notice to take 12 weeks of shared parental leave not in a single block, but, for example, in a discontinuous pattern taking every other week off for the next 24 weeks, the employee has the right to 12 weeks leave, but he or she does not have the right to the pattern of leave proposed in the booking notice.

An employee can only take a pattern of discontinuous leave if their employer agrees.

### **What if my employee wants to book discontinuous shared parental leave?**

An employee can only take a pattern of discontinuous leave if you agree to that pattern of leave.

An employer may, for example, think that it is better to have the employee at work one week in a fortnight than to lose them for a solid 3 month block. On the other hand, the employer may prefer, and can suggest, a different pattern of discontinuous leave, for example, 2 weeks absence on shared parental leave and then 2 weeks back at work over an agreed period. Or the employer may simply refuse the discontinuous pattern of leave proposed by the employee and require them to take the leave in a single continuous block.

### **Can my employee withdraw their notice to take leave?**

An employee is not entitled to withdraw a notice for a single continuous block of leave, but may do so if you agree to the withdrawal.

An employee may withdraw their notice to 'book' discontinuous leave within 15 days of giving it, providing that they have not already reached an agreement with the employer about when they will be absent from work.

If a notice is withdrawn it does not count towards the cap of 3 booking notifications.

Once the 15th day has passed, any change to the period of leave booked must be done by a variation notice. This is subject to 8 weeks' notice and counts towards the cap of 3 booking notifications.

## Patterns of shared parental leave

### **I want to refuse the pattern of leave that my employee is proposing in their booking form. What happens now?**

If the employee is proposing a discontinuous period of leave in a single booking notification, you can refuse the pattern proposed.

If you refuse a pattern of discontinuous leave, the employee can take that leave as a single continuous block at a time starting on a date of their choosing (no less than 8 weeks from the date the notice was given).

The employee has 5 days in which to tell you the date they will start their leave. If no date is specified, the leave will begin on the date of the first day of the first period of discontinuous leave that the employee originally applied for.

The employee may choose to withdraw their notice if you have refused their preferred pattern of leave or if you have not responded during the 2 week discussion period.

### **So an employer will always get 8 weeks' notice before an employee takes shared parental leave?**

In the majority of cases, yes. However, the 8 weeks' notice to book leave is not observed in the following circumstances:

- In the case of the father/partner, where the mother dies;
- In the case of the mother, where the father/partner dies; or
- Where the baby is born more than 8 weeks early.

### **What happens if the employer refuses a pattern of leave proposed by the employee?**

If an eligible employee has submitted a proper booking notice for a single block of leave, the employer cannot refuse. The employer does not have to respond to the notice, but it would be good practice to acknowledge receipt of the notice and the dates of leave booked.

An employee has 2 weeks to withdraw the notice and they don't have to give a reason if they do withdraw. If the employee wants to vary the dates given in the notice, then he or she will have to submit a notice to vary the leave, giving at least 8 weeks' notice of any change.



If the employee has submitted a notice containing a pattern of discontinuous leave, the employer can do one of the following:

- Agree the pattern of leave proposed by the employee;
- Propose an alternative pattern of leave that must be agreed by the employee;
- Refuse a pattern of leave and require the leave to be taken in a single block;
- Not respond to the employee's notice.

There is a 2 week period for discussion following the date of submission of the booking notice. The employee may withdraw the notice at any time up to and including the 15th day after submission of the notice.

If no agreement can be reached between the employer and employee on the pattern of leave the employee will take within the 2 week discussion period, or if the employer does not respond to a notice proposing a pattern of leave and the employee does not withdraw the notice, the employee is required to take the leave in a single continuous block.

The employee has 5 days following the end of the discussion period to specify the date on which he or she will start the continuous period of leave of the number of weeks set out in the booking notice. The leave cannot start within 8 weeks of the date that the booking notice was submitted.

If the employee does not specify the start date within 5 days of the end of the two-week discussion period, then the continuous block of leave must start on the first date of the first week of leave specified in the booking notice. If the employee wants to change this, he or she must submit a notice of variation, subject to 8 weeks' notice.

### **Can an employee force a pattern of leave on an employer by submitting separate booking notices for each period of leave?**

There is a statutory cap of 3 notices to book shared parental leave, but the employer can allow the employee to submit more notices.

The following booking notices count towards the cap of 3:

- A notice to book continuous or discontinuous periods of leave that is not withdrawn on or before the 15th day following submission;
- A notice to vary a previously notified (or varied) period of leave.

A request by an employer to an employee to vary a period of agreed leave does not count towards the employee's maximum number of notices.

### **What happens if I agree to my employee's proposed leave pattern, but the other parent's employer doesn't?**

We recognise that, for some parents, patterns of leave will only work if both parents' employers agree to the patterns of leave that their respective employees have proposed. If

one employer says that the leave must be taken in a single block, this may not work for the family.

We encourage a 2 weeks discussion period. An employee can withdraw a booking notice at the end of the 2 weeks period (on the 15th day) without penalty. A booking notice withdrawn by the 15th day following submission does not count towards the cap of 3 notifications.

The purpose of allowing the booking notice to be withdrawn is precisely to take into account the fact that both parents are trying to agree patterns of leave with their employer.

An early discussion(s) between the employer and the employee, held shortly after an employee gives the employer a notice of entitlement to shared parental leave with a non-binding indication of when the leave will be taken, is likely to reduce the likelihood of withdrawn notices as the employee and their employer will have a clearer understanding of the other's needs.

### **Can an employee change an agreed pattern of leave?**

Yes, provided that they don't exceed the cap of 3 notifications. Employees are able to make 3 notifications or changes to agreed periods or patterns of shared parental leave. An employer may allow additional changes.

The process for giving a variation notice changing leave patterns or agreeing new patterns will be the same as the initial process for booking leave.

#### ***Example: Hazel***

Hazel gave her employer a booking notice on 1 May with 8 weeks' notice to take shared parental leave from 1 July for 6 months. On 1 June, her plans changed as her mother-in-law came to live with her and offered to provide free child care. As Hazel and her husband needed her income, they decided Hazel would return to work at the earliest opportunity. She submitted on 1 June a notice to end her shared parental leave in 8 weeks' time (1 August). In total, Hazel took 4 weeks of leave rather than 6 months. Her employer had 2 months to stand down the cover arrangements that he had put in place for 6 months starting on 1 July. The booking and variation to the leave used 2 of Hazel's 3 opportunities to book shared parental leave.

### **What if the employee and the other parent decide to transfer weeks of shared parental leave between them?**

The employee and their partner can decide to change the way they have allocated the total number of weeks of shared parental leave between them. This would require each employee to give their employer notice that they wish to change their original entitlement notice. The variation notice must set out the total number of weeks of shared parental leave and pay already taken by the parents and the new division of the leave and pay. Both parents need to sign the notice to confirm their agreement to the new division. The

variation notice must give an indication of when the leave might be taken, but it is not a booking notice and does not count towards the cap of 3 notifications to book leave.

If the employee acquires more weeks of shared parental leave as a result of a transfer of leave between the parents, any additional weeks are still subject to the cap of 3 notifications to book leave. If an employee has already given 3 booking notices, then they will not be able to take the additional weeks of leave unless the employer chooses to disregard the cap of 3 and to accept one or more additional booking notices.

### **How can an employer require leave to be taken in a single block?**

If the employee gives their employer a booking notice proposing separate, discontinuous, periods of leave, the employer does not have to agree to the pattern of leave proposed. There is a 2 week discussion period where the parties can discuss the notice. We recommend that the employer tells the employee at the earliest opportunity that the proposed leave pattern is not acceptable.

If the employer and employee cannot agree a leave pattern or the employer does not respond to the employee's notice, then the leave may only be taken in a single continuous block.

The employee has until the 15th day after giving the notice to withdraw a notice. If the employee decides to take the leave as a continuous block, he or she should tell the employer the date on which the leave will start (it cannot be before a period of 8 weeks from the date the notice was given). If within 5 days of the end of the 2 week period the employee does not specify the date on which the leave will start, then the leave will start on the first date of the first week of leave proposed in the employee's booking notice.

### **Does a limit of 3 booking notifications mean leave can only be taken in 3 blocks?**

No. An employee may give notice to their employer of all the leave they want to take – be it in a single block or discontinuous leave – in one notification. They then have 2 further opportunities to make changes.

### **What happens if an employer doesn't respond to a notice to book leave?**

If an employer does not respond within two weeks of being given the notice requesting discontinuous leave, the notice may be withdrawn by the employee on the 15th day or, if it is not withdrawn, the leave may be taken in a single continuous block.

The employee has 5 days from the end of the two week discussion period to specify the date on which the single block of leave will start (no earlier than 8 weeks from the date the booking notice was given). If the employee does not do so, the single block of leave starts on the first date of the first week of leave proposed in the original booking notice.

**How long has an employer got to consider a request for a discontinuous pattern of leave?**

There is a 2 week discussion period where the employer and employee may discuss a leave notification and also consider alternative arrangements.

At the end of the 2 week discussion period an employee may withdraw the notification without penalty by the 15th day after the notice was given, provided that they haven't reached an agreement with the employer. We consider that such an arrangement is essential when 2 parents might be applying for complementary periods of leave at the same time and one may be refused.

A withdrawn notification will NOT count towards the cap of 3 notifications.

**If my employee and their partner decide to transfer all of the leave to one parent does the right to 3 notifications transfer with the extra leave?**

No. The cap of 3 notifications applies to each employee (and is per employer, if the employee has 2 or more employers) and cannot be transferred between the parents as the leave can.

**Are there any changes to the notification arrangements in the event of an early birth?**

Where a child is born before the beginning of the week in which the child was due, different notification requirements apply in respect of shared parental leave/pay in the eight weeks following the expected week of the birth.

Where an employee has notified his or her employer of entitlement to shared parental leave or pay and has also given notice to "book" a period of shared parental leave or pay to start within 8 weeks of the child's expected week of birth and the child is born early, the parent may take the leave and pay that they have 'booked' after the actual birth if they wish. They need to give their employer a notice to vary the shared parental leave and pay that they originally applied for as soon as practicable following the birth. For example, if the mother's partner was planning to take 2 weeks of paternity leave after the birth and had booked 3 weeks of shared parental leave and/or pay to be taken after the paternity leave (thus being at home for a continuous period of 5 weeks), he or she could still take the same amount of shared parental leave and pay 2 weeks after the actual date of the birth, if he or she notified their employer of the change as soon as reasonably practicable after their child's birth.

This arrangement does NOT apply to shared parental leave or pay that was booked for a period starting after 8 weeks after the birth; or to any change in the number of weeks of leave or pay booked. Any changes to such leave or pay would be subject to the notice variation requirement and would be subject to 8 weeks' notice, irrespective of the child having been born early.

There is also a modification where a parent has notified entitlement to shared parental leave that he or she has not yet “booked”, and the child is born 8 or more weeks before the week in which the child was due to be born. In these cases the parent can book a period of leave to start within 8 weeks of the actual birth if he or she gives the notice as soon as reasonably practicable after the child’s actual birth.

Where the parent has not given a notice of entitlement to shared parental leave, and the child is born eight or more weeks before the first day of the expected week of birth, then the requirement for 8 weeks’ notice before the start date of a period of leave is to be treated as satisfied if the notice is given as soon as reasonably practicable after the actual date of birth. Similarly the requirement to give 8 weeks’ notice to “book” a period of leave is to be treated as satisfied if the period of leave is to start within eight weeks.

### **When is a notice served?**

Notification of entitlement to shared parental leave and pay and notification to ‘book’ shared parental leave must be in writing and may be given by:

- Electronic communication, where the employer has agreed;
- Post; or
- Personal delivery.

## **Employers’ responsibility and liability**

### **Are there any checks required by the employer?**

Whilst there is no obligation on the employer to do so, it is expected that the employer will check that their employee does in fact meet the continuity of employment test (26 weeks’ employment) and the average weekly earnings test for 8 weeks requirement (for ShPP). However, if the employee is the mother and she qualified for statutory maternity pay, or if the employee is the mother’s partner and he or she qualified for paternity leave/pay, then the employer would have already done the necessary checks as continuity of service test is required is the same for all of them.

The employer does not make any checks in relation to the other parent. The information on their declaration is taken on trust, although the employer may ask the employee for the name and address of the other parent’s employer (if he or she has an employer).

### **How can I check if my employee is telling the truth about their partner or if the partner is telling the truth?**

An employer is not required to verify that the partner meets the employment and earnings test. An employer may require the employee to provide the name and address of the partner’s employer and may contact them. However, the partner may not be employed at the time the employee notifies entitlement to shared parental leave.

**How will employers know how much leave the family has taken?**

Your employee will tell you how much shared parental leave is available to him or her and the other parent. They will also tell you how much leave each of them intends to take and they will give you the written consent of the other parent to the division of the leave. Once it is established how much shared parental leave your employee will take, you will wish to record the cumulative weeks taken as shared parental leave to ensure the entitlement is not exceeded.

Once they have agreed how the shared parental leave will be divided, each parent will need to give their employer notice of when they intend to take leave.

**Will employers be liable if their employee commits a fraud, e.g. by claiming too much leave or pay?**

Employers will not be liable in the event of their employee claiming more leave than they are entitled to and we do not expect them to perform detailed checks, e.g. contacting their employee's partner's employer to satisfy themselves that their employee is entitled to the leave or pay that they are claiming.

Employers are entitled to rely on the information about the other parent provided to them by their employee but employers who want to check can ask their employee for the name of the other parent's employer and contact them if they wish.

Employees who deliberately defraud the system could face a significant financial penalty and be required to pay back any amounts that they have over claimed.

HMRC will use a risk based regime to identify parents who have over claimed their entitlement to shared parental pay. Individual claimants can be linked via their national insurance numbers.

In the event of a fraud being detected, employers will use their own policies to determine how the employee is dealt with by them in the same way that they would rely on their own policy in the event of other misconduct coming to light.

**How will an employer claim back any overpayments of statutory shared parental pay?**

Employers will not have to carry out checks to establish if the information provided by their employee about the other parent's employment and earnings is correct. But they can contact the other parent's employer if they wish.

An employer who has made an overpayment to an employee will be able to recover the overpayment(s) of shared parental pay from their employees in the same way that they currently recover overpayments of additional statutory paternity pay and other statutory payments.

**How does the employer know if their employee qualifies for shared parental leave or pay?**

An employer cannot know until their employee tells them as the qualifying conditions require BOTH parents to satisfy qualifying conditions. An employer might know that their employee would meet the continuity of employment and average earnings test, but will not know until their employee tells them that:

- The employee is sharing the care of the child with their partner; and
- The partner satisfies the employment and earnings test.

**What about if my employee separates from his or her partner? What happens to the shared parental leave and/or pay?**

Shared parental leave and pay can be shared between parents who have the main responsibility for the care of the child at the time of the birth (or placement for adoption). Even if the parents separate, each continues to be entitled to shared parental leave and pay if they are caring for the child in the week they take the leave and pay.

An employee's entitlement to shared parental leave and pay ends if a curtailment notice is revoked and they are not allowed to be on the shared parental leave or claiming shared parental pay if they are not caring for the child.

The amount of shared parental leave or pay that an employee is entitled to may change if the employee varies the notice of entitlement with another notice signed by both parents.

An employer does not need to concern him or herself with the domestic arrangements of his or her employee.

**How much money is statutory shared parental pay and who pays it?**

An eligible couple can claim up to 37 weeks of shared parental pay (this can rise to 39 weeks for a mother's partner where the mother dies in childbirth).

Shared parental pay is paid to an employee by their employer at the lower of 90% of salary or the flat rate of £138.18 a week (2014-15 tax year). It is paid by the employer in the same way that other statutory payments (such as statutory maternity pay or ordinary and additional statutory paternity pay) are paid. Employers can reclaim from the Exchequer (by means of underpayments of national insurance contributions to HMRC) either 92% or 103% of the payment (depending on the size of the employer's national insurance contributions pay bill).

**Will employers need to contact each other to find out what their employees' leave and pay entitlements are?**

No. An employer can ask for the name and address of the other parent's employer, and may contact them if they so wish. This is the current arrangement for additional paternity leave and pay.

### **How much will statutory shared parental pay cost employers?**

Employers will pay shared parental pay in the same way they make other statutory payments, such as statutory maternity pay, paternity pay, additional statutory paternity pay and statutory adoption pay. They are able to claim back at least 92% of all statutory maternity, paternity, adoption and shared parental pay payments they make from HMRC. Small employers (those whose tax/NICs contributions are less than £45,000 per annum) are able to claim back 100% of the statutory payments they make plus 3% towards the employer's national insurance contribution. This will be the same for shared parental pay.

## **Employment rights of employees on shared parental leave**

### **What terms and conditions apply during shared parental leave?**

During any period of shared parental leave an employee benefits from all of the terms and conditions of employment which would have applied if the employee had not been absent from work (except for remuneration), and is bound by any obligations in those terms and conditions (except they don't need to go to work).

### **What employment protections will apply in relation to shared parental leave?**

An employee is protected from detriment and from unfair dismissal connected with the taking of shared parental leave.

If an employee is made redundant whilst on shared parental leave, he or she is entitled to be offered a suitable alternative vacancy if one arises. This is the same as the level of protection available to a mother on maternity leave.

### **Contractual rights to shared parental leave and pay**

Employees who meet the qualifying requirements and have correctly notified their employer of their entitlement to, and intention to take, shared parental leave and/or pay and who have booked the shared parental leave and/or pay have a statutory right to it.

However, an employer is free to offer a contractual scheme that is more favourable to the employee, for example, by waiving the requirement for 8 weeks' notice to take leave, allowing additional leave that could be taken after the first year, accepting unlimited numbers of notices to book leave, etc. In addition, an employer is free to top up the shared parental pay by pay some or all of the shared parental pay at a higher rate determined by the employment contract, which may or may not be the same as the employer offers to mothers on maternity leave. If they do so then when the employee



takes that leave and pay, the employee may not exercise the statutory right and the corresponding contractual right separately, i.e. they cannot take occupational shared parental leave and/or pay and then have a right to statutory shared parental leave and/or pay as well.

### **Can an employee take shared parental leave whenever he or she wants?**

We encourage employers and employees to discuss parental leave arrangements at the earliest opportunity. The system will work best if there are no surprises on either side.

Employees are required to give their employer at least 8 weeks' notice of entitlement to shared parental leave and at least 8 weeks' notice of any absence on leave (these notices may be given concurrently).

### **What would happen to an employer who did not let an employee take leave?**

An employee has a statutory right to shared parental leave if he or she satisfies all of the eligibility criteria.

An employer who denied the employee their statutory right to shared parental leave is likely to face a successful challenge in an Employment Tribunal.

## **Employees who have more than one job**

### **What happens if my employee has 2 jobs?**

If your employee is the child's mother and is entitled to maternity leave from you and also from another employer she must bring forward the date on which her maternity leave and/or pay periods end with both you and her other employer(s). Shared parental leave and/or pay can only be created if the mother gives all of her employers who are liable to give her maternity leave or pay notice at the same time.

If your employee (whether the mother or the partner) meets the criteria for shared parental leave and shared parental pay in his or her employment with you, he or she can take leave and pay from the employment with you. If your employee also meets the criteria for shared parental leave and pay from another job as well, then they can take the leave and pay from the other employer as well.

### **How much shared parental leave is an employee with 2 jobs entitled to?**

Where an employee has 2 (or more) jobs and they qualify for shared parental leave in respect of each employment, they are entitled to take shared parental leave from each of their employers.

If the mother wants to take or create shared parental leave for her partner/the child's father to take and she has 2 (or more) jobs, she must have brought forward the date on which her maternity leave period ends for each of her jobs either by returning to work or by giving notice to end her maternity leave period (the notice must be given to each of her employers at the same time).

A mother cannot take shared parental leave if she has only brought forward the date on which her maternity leave period ends with one of her employers. A mother cannot still be on maternity leave in one job and on shared parental leave in another job, because she must curtail all her maternity leave entitlement (from both jobs) for any entitlement to shared parental leave to arise.

### **Calculation of the maximum amount of shared parental leave available in the event of multiple employers**

The number of weeks of shared parental leave is calculated by deducting the maximum number of weeks that the woman has taken (i.e. the total length of absence, even if it is with different employers).

#### ***Example: Mother on maternity leave from 2 different employments***

A mother is on maternity leave from employment A and employment B. She returns to work in employment A on week 20. She returns to work in employment B in week 25.

The maximum amount of shared parental leave in this case will be  $52-25=27$  weeks (not  $52-20$ ).

#### ***Example: Mother gives notice to curtail her maternity leave to 2 different employers***

A mother gives notice to curtail her maternity leave from employer A from week 32 of her maternity leave period and a notice to curtail maternity leave from employer B from week 30 of that leave period.

The maximum amount of shared parental leave in this case will be  $52-32=20$  weeks (not  $52-30$ ).

### **Does an employee have the right to return to the same job after taking shared parental leave?**

The right to return to the same job will be maintained for returning from any period of relevant statutory leave that includes maternity, or paternity, adoption or shared parental leave that totals 26 weeks or less in aggregate, even if the leave is taken in discontinuous blocks. This will mean that an employee who takes 26 weeks or less of any combination of relevant statutory leave will have the right to return to the same job. Periods of unpaid parental leave of more than four weeks are excluded from the '26 week calculation'.

Once the employee has taken more than 26 weeks of relevant statutory leave in aggregate (including any combination of maternity, paternity, adoption or shared parental leave) then the employee will have the right to return to the same job that they were doing immediately

preceding the last period of absence, or, if it is not reasonably practicable for the employer to permit the employee to return to that job, to another job which is both suitable for the employee and appropriate for the employee to do in the circumstances (sometimes referred to as a similar job).

Unpaid parental leave is not included in the 26 week aggregate total. Taken in isolation, an employee can take up to four weeks of unpaid parental leave and have the right to return to the same job. If an employee takes more than four weeks in isolation, he or she will have the right to return to the same or a similar job.

If an employee takes a period of more than 4 weeks unpaid parental leave as part of a string of family-related leave, they will have the right to return to the same or a similar job.

### ***Example A***

Helen takes 10 weeks of maternity leave and then returns to work to the same job for 4 weeks to complete a project she had started before her maternity leave. She then takes 16 weeks of SPL and then returns to work. Helen has the right to return to the same job she was doing before her period of shared parental leave.

### ***Example B***

Sarah takes 10 weeks of maternity leave and then returns to work to the same job for 4 weeks to complete a project she had started before her maternity leave. She then takes 17 weeks of shared parental leave and then returns to work. Sarah does not have the right to return to the same job, as her aggregate leave has exceeded 26 weeks. She has the right to return to the same job unless that's not reasonably practicable, in which case she has the right to return to an appropriate similar job.

### ***Example C***

Ben takes 2 weeks of paternity leave and then returns to his job as a warehouse supervisor for 16 weeks. He then takes 4 weeks of unpaid parental leave whilst his wife returns to work to complete a project she started before her maternity leave. He then returns to work for 12 weeks, during which time he changes from the warehouse to the accounts section. At a later date, he takes a further 16 weeks of shared parental leave for the same child, Ben has the right to return to the same job he was doing in the accounts department before his shared parental leave, as his paternity leave and shared parental leave do not exceed 26 weeks in aggregate.

## **Occupational schemes**

### **Will women on shared parental leave be able to continue to be part of an occupational maternity scheme?**

Occupational maternity schemes will be able to continue for women on maternity leave.

Introducing a new statutory right to shared parental leave and pay does not affect the current arrangements around maternity leave and pay. Maternity leave is a protected period, and companies are able to offer maternity benefits to women only, when they are on maternity leave.

We are clear that where employers wish to offer a maternity scheme of a fixed length to those on maternity leave, as many do currently, they will continue to be able to do so. The ability to offer such schemes to women on maternity leave will be unaffected by the ability of a woman to reduce the length of her maternity leave in order to allow access to shared parental leave.

### **Will employers be forced to provide occupational pay for men and women on shared parental leave?**

No. It will be entirely at the discretion of employers whether they wish to offer occupational parental schemes for men and women taking shared parental leave. The way in which employers respond to these changes will therefore vary across different employers based on their individual business plans.

There will be no legal requirement for companies to create occupational parental leave schemes.

However, a maternity scheme can only be offered to a woman on maternity leave. If an occupational scheme is offered to a mother on shared parental leave, it could constitute sex discrimination if such an occupational scheme were not offered to fathers/a mother's partner.

## **Cases of maternal, paternal or infant death**

### **What happens if death occurs before maternity leave and pay is curtailed?**

If the mother dies before bringing forward the date on which her maternity leave period ends and before the end of her maternity pay or allowance period, then her partner will still be able to access shared parental leave in the same way that he or she would have been able to had the mother curtailed her maternity leave and pay/allowance before her death. The amount of shared parental leave available for the partner will be 52 weeks and the amount of shared parental pay will be 39 weeks, less the number of weeks of maternity leave (or statutory maternity pay or maternity allowance) taken by the mother prior to her death.

If the mother dies without having taken any maternity leave (for example if a woman dies during childbirth without having previously started her maternity leave) or any pay/allowance, then the full 52 weeks of leave and 39 weeks of pay is available as shared parental leave and pay (usually shared parental leave is capped at 50 weeks as maternity leave cannot be ended before the 2 week compulsory absence period following the birth).

If the mother had curtailed her maternity leave period before her death by giving notice to her employer and then revoked that curtailment any shared parental leave and pay taken by her partner in relation to the child resulting from the curtailment would also need to be deducted.

Where the mother has died, the requirement for the partner to give 8 weeks' notice of entitlement to shared parental leave and pay and 8 weeks' notice to book leave does not apply. Instead, he or she is required to tell his or her employer as "soon as is reasonably practicable" that he or she is entitled and to book the first period of leave. Should the partner not take all the leave in a single continuous block, subsequent notices to take shared parental leave remain subject to 8 weeks' notice.

If the mother's partner or the child's father dies before the mother has brought forward the date on which her maternity leave period and pay/allowance period ends, the mother remains on maternity leave and pay/allowance. She cannot bring forward the date on which her maternity leave period ends and opt into shared parental leave after the death of her partner as she will not be able to meet the requirement that she shares the main responsibility for the care of her child with the person who was her partner/the child's father on the date of the child's birth.

If the child dies before the mother has brought forward the date on which her maternity leave period ends, the mother and her partner will not be allowed to opt into shared parental leave and pay as one of the qualifying conditions is having the main responsibility for the care of the child (with the other parent). If there is no child to care for, the mother remains entitled to maternity leave and pay/allowance and her partner is entitled to paternity leave/pay.

### **What happens if death occurs after maternity leave and pay is curtailed?**

If the mother's partner or child's father dies after the mother has given notice to bring forward the date on which her maternity leave period and pay/allowance end, but she has not returned to work (in the case of maternity leave) and the curtailment date has not passed, the mother may revoke the curtailment notice and revert to 52 weeks of maternity leave and 39 weeks of statutory maternity pay/maternity allowance. Any shared parental leave or pay taken by her partner before death will not affect this.

Alternatively, she will be able to remain opted in to shared parental leave and pay if she wishes and any untaken leave and pay that was available to the couple will default to her. She will need to notify her employer of the additional shared parental leave weeks added to her entitlement. Where she had used her cap of 3 notifications, she will acquire a statutory right to a 4th notification to book leave. The 8 weeks notification period does not apply for the first period of leave booked, or a variation to a period of booked leave, following the partner's death; instead, she is required to tell her employer as "soon as is reasonably practicable" and provide the date of her partner's death.

If the mother dies after bringing forward the date on which her maternity leave period ends, the available shared parental leave and pay defaults to the mother's partner/the child's father if he or she would have been entitled to this leave and pay had the mother not died.

Where the mother had already notified her employer of entitlement to shared parental leave or pay before her death, that untaken leave and pay so notified is available to her partner after her death. The partner will need to notify his or her employer of the additional weeks of shared parental leave and/or pay that are transferring to him by means of a variation notice to their original notice of entitlement. Where the partner wants to start a period of leave, or to vary a period of leave, the 8 weeks' notice does not apply for the first

period of leave booked or changed following the mother's death; instead, the partner is required to tell his or her employer as "soon as is reasonably practicable" and to provide the date of the mother's death. In addition, where the partner has already used the 3 opportunities to book or vary a period of leave, he or she acquires a statutory entitlement to make a 4th notification.

If the mother's partner/the child's father had no entitlement to shared parental leave or pay before the mother's death (e.g., if the partner/father is not an employee or is employed but does not meet the continuity of employment test, or the mother did not meet the employment and earnings test), no entitlement is created for the partner by the fact of the mother's death.

If the parents are employees and their child dies after they had opted into shared parental leave and/or pay, they each continue to be entitled to take the leave and pay that they booked before the death. Any entitlement to shared parental leave or pay that had not been booked at the time of the child's death is no longer available to the parent. Shared parental leave or pay is only available to an employee if that leave or pay had been booked prior to the death of the child. An employee may reduce a period of leave booked or cancel a period of leave, subject to 8 weeks' notice. No further notice can be given to book leave and only one variation notice may be given to reduce a period of leave or to aggregate discontinuous weeks into a single block of leave.

## Shared Parental Leave in Touch ("SPLiT") Days

### **Will there be an equivalent of Keeping in Touch ("KIT") days under shared parental leave?**

Each parent entitled to shared parental leave or shared parental pay will have an individual entitlement to 20 shared parental leave in touch ("SPLIT") days. This will enable them to work on up to 20 days (per employer if a parent has multiple employers) – either continuously or on odd days – without bringing to an end their shared parental leave or pay.

### **Can parents work part-time whilst on shared parental leave?**

Whilst shared parental leave and pay will need to be taken in minimum blocks of one week, employees eligible for shared parental leave can work part-time if both they and their employer agree.

An employee can use up to 20 shared parental leave in touch days ("SPLIT days") to return to work for part of a week without bringing their shared parental leave to an end. An employee would also be able to receive statutory shared parental pay for that week. This will enable parents to try out a new working pattern before making a formal flexible working request, or to return to work in a gradual way.

### **Payment for shared parental leave in touch ("SPLIT") days**

Because shared parental leave in touch ("SPLIT") days allows work to be done under the employee's contract of employment, the employee is entitled to be paid for that work. The

rate of pay is a matter for agreement with the employer, and may be as set out in the employment contract or as agreed on a case-by-case basis. However, the employer will need to bear in mind their statutory obligations about paying staff, such as ensuring that the employee is paid at least the National Minimum Wage. |

## Miscellaneous

### **Am I able to get in touch with staff off on shared parental leave? Are there rules around this?**

There is no prohibition on reasonable contact between an employer and an employee on shared parental leave. The legislation provides for shared parental leave in touch (“SPLIT”) days for the employee to attend the workplace, and telephones calls can certainly take place whilst the employee is on shared parental leave.

### **Do I need to arrange payroll to pay staff for days worked when they are taking discontinuous blocks of shared parental leave?**

Yes. When an employee is at work, they should be paid as per their usual contractual arrangements. Unless the employer is offering occupational shared parental pay, then an employee on shared parental leave who is entitled to statutory shared parental pay must receive this statutory payment for the weeks he or she is entitled to it.

### **Does an employee accrue contractual annual leave while on shared parental leave?**

Yes. The legislation provides that an employee on shared parental leave is entitled to all the benefits of all the terms and conditions of employment (excluding remuneration) which would have applied had the employee not been absent on leave.

### **Can an employee take sickness absence while on shared parental leave?**

If an employee is sick and unable to care for the child, then they are not entitled to take shared parental leave. An employee must be paid sick pay rather the statutory shared parental pay when they are sick.

### **Can I continue with our occupational maternity/ paternity scheme?**

Yes. An occupational maternity or paternity scheme may continue and not be extended to shared parental leave. However, a mother must be on maternity leave and not shared parental leave and a father (or mother’s partner) must be on paternity leave and not shared parental leave to benefit from such occupational schemes.

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Department for Business, Innovation and Skills  
1 Victoria Street  
London SW1H 0ET  
Tel: 020 7215 5000

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