

Fiona Sinclair
Finance Controller
Employer HR file

Date: 14 July 2026
Our Reference: CBLC/8BA7B9BF
Document Type: Checklist

Compassionate Leave Planning Checklist

1. EXECUTIVE SUMMARY

This checklist supports the planning and management of compassionate leave requested by Fiona Sinclair, Finance Controller, starting on 25 June 2026. Its purpose is to coordinate cover arrangements for critical finance duties during Fiona’s absence and to ensure timely follow-up actions are in place.

Current information is incomplete; additional details from the employer are needed to finalise arrangements and confirm the period and context of leave.

The key priority is to maintain operational resilience around the month-end close while providing appropriate support for the employee.

All tasks are assigned to relevant owners with defined priorities and due dates to track progress effectively.

CHECKLIST DETAILS

Employee
Fiona Sinclair

Role
Finance Controller

Case type
Compassionate / Bereavement Leave

Reference
HRA-8BA7B9BF

KEY DATES

Completed
14 July 2026

Continued

Compassionate Leave Planning Checklist

2. TASKS AND RESPONSIBILITIES

1. Confirm the exact period and context of compassionate leave with Fiona Sinclair – Owner: HR team – Priority: High – Due date: ASAP – Evidence required: Employee confirmation email or letter – Status: Pending – Completion notes: To ensure leave length and reason are clearly understood and documented.
2. Finalise cover arrangements for month-end financial tasks: Senior analyst to takeover critical month-end tasks and adjust deadlines by two working days – Owner: Finance team lead – Priority: High – Due date: Before 25 June 2026 – Evidence required: Signed handover notes and formal handover access provided – Status: In progress – Completion notes: Finance close lead to prepare and deliver detailed handover notes; ensure rota notifications to care teams remain unaffected.
3. Provide appropriate handover documentation and access: Finance close lead to prepare comprehensive handover notes and grant necessary system access to the senior analyst – Owner: Finance close lead – Priority: High – Due date: 24 June 2026 – Evidence required: Signed handover document and system access confirmation – Status: In progress – Completion notes: Check handover covers all critical tasks and reporting deadlines.
4. Review compassionate leave record and confirm it reflects agreed facts accurately – Owner: HR team – Priority: Medium – Due date: 14 July 2026 – Evidence required: Completed and signed record – Status: To do – Completion notes: Ensure all facts and dates are accurately recorded before finalising.

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the compassionate leave record and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the compassionate leave response and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Compassionate Leave Start is due on 25 June 2026.	HR	To be confirmed	Completion note or supporting evidence	Open
Record practical cover, contact and review arrangements for compassionate leave.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the Compassionate / Bereavement Leave record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	To be confirmed	Completion note or supporting evidence	Open

Continued

Compassionate Leave Planning Checklist

3. TASKS AND RESPONSIBILITIES CONTINUED

5. Review employer response and ensure it is complete, accurate, and timely – Owner: HR manager – Priority: Medium – Due date: 14 July 2026 – Evidence required: Response letter/email – Status: To do – Completion notes: Await additional employee information before issuing response.

6. Monitor leave start on 25 June 2026 and record actual start and any amendments to the planned period – Owner: HR administrator – Priority: High – Due date: 25 June 2026 – Evidence required: Leave start confirmation – Status: Overdue – Completion notes: Immediate update required due to overdue status.

7. Maintain contact and support during leave – Owner: Employee's line manager – Priority: Low – Due date: Ongoing throughout leave – Evidence required: Contact notes (if applicable) – Status: Pending – Completion notes: To provide appropriate support and manage phased return if needed.

8. Schedule review of compassionate leave arrangements and employee wellbeing – Owner: HR team and line manager – Priority: Medium – Due date: Post-leave review by 14 July 2026 – Evidence required: Meeting minutes and agreed actions – Status: To do – Completion notes: Ensure timely check-in after compassionate leave period.

Continued

Compassionate Leave Planning Checklist

4. AMENDMENT LOG

14 July 2026: Document prepared and initial checklist completed based on received information.

Pending: Await further details from employee regarding leave reason and duration.

Pending: Update overdue 'Compassionate Leave Start' task status upon receiving confirmation.