

Fiona Sinclair
Finance Controller
Employer HR file

Date: 14 July 2026
Our Reference: CBLR/8BA7B9BF
Document Type: HR record

Compassionate Leave Record

1. EXECUTIVE SUMMARY

This document summarises the compassionate leave request submitted by Fiona Sinclair, Finance Controller, on 25 June 2026. The request proposes leave starting on the same date to accommodate a personal bereavement. This record captures the circumstances, planning arrangements, pending information, decision status and recommended next steps in managing the compassionate leave process.

The employer is currently awaiting further details to finalise the response and provide appropriate support. Provisional operational adjustments have been identified to ensure continuity during Ms Sinclair’s absence.

2. CASE SUMMARY

On 25 June 2026, Fiona Sinclair submitted a request for compassionate leave to commence immediately on the same date. The request pertains to a sensitive personal matter requiring urgent consideration. The employer has acknowledged the request but requires more information before making a decision to approve or refuse the leave.

The leave planning includes reassignment of critical month-end finance tasks to a senior analyst and a slight adjustment of deadlines. The finance close lead will prepare handover notes and provide access as needed. Other team schedules remain unaffected by this arrangement.

HR RECORD DETAILS

Employee	Fiona Sinclair
Role	Finance Controller
Case type	Compassionate / Bereavement Leave
Reference	HRA-8BA7B9BF

KEY DATES

Completed	14 July 2026
------------------	--------------

Continued

Compassionate Leave Record**3. BACKGROUND**

Fiona Sinclair serves as Finance Controller for HRHeaven QA Sample Employer. The compassionate leave process has been initiated due to a personal bereavement affecting Ms Sinclair. The employer is committed to supporting employee welfare while maintaining operational resilience, particularly within finance functions critical to month-end close activities.

The compassionate leave record was created on 14 July 2026, alongside a review scheduled for the same day. Notably, the proposed leave start date of 25 June 2026 is already overdue, indicating an urgent need to resolve outstanding matters swiftly.

Continued

Compassionate Leave Record

4. INFORMATION CONSIDERED

The available information includes the date the leave request was received (25 June 2026), the proposed start date (25 June 2026), and provisional cover arrangements to mitigate disruption.

Specifically, the plan involves a senior analyst assuming responsibility for critical month-end tasks, with deadline adjustments extended by two working days. Care teams' rotas remain unaffected, and the finance close lead is tasked with preparing comprehensive handover notes and providing system access during Ms Sinclair's absence.

No additional documentation or evidential material has been submitted to complement the request. Consequently, the employer has identified the need for further details concerning the period of leave requested, the broad reason or context for the leave, and the urgency of the employer's response. These gaps must be addressed to progress the case effectively.

5. DECISION

As of the current date, a definitive decision to approve or decline the compassionate leave request has not been taken. The employer's position remains pending further information to assess the request fully.

The moderate risk level (score 45) associated with this request supports proceeding cautiously while awaiting clarification. No negative judgments or conclusions have been reached regarding the request or Ms Sinclair's circumstances.

Continued

Compassionate Leave Record

6. REASONS

The decision to withhold approval at this stage is due to incomplete information concerning the specifics of the compassionate leave request, including the duration and detailed context.

This conservative approach ensures compliance with internal policies and employment legislation, safeguarding both employee welfare and organisational interests.

Operational continuity considerations underpin the provisional adjustments proposed to cover essential finance functions. These arrangements demonstrate the employer's intention to support the employee and maintain business performance during the leave period.

Continued

Compassionate Leave Record

7. FOLLOW-UP ACTIONS

Obtain complete details from Fiona Sinclair regarding the nature and expected duration of the compassionate leave.

Confirm urgency and any additional support requirements to be accommodated during the leave.

Verify and finalise cover arrangements including confirmation of senior analyst availability and handover documentation preparedness.

Schedule and conduct a formal review meeting to discuss the request once additional information is received, aiming to reach a final outcome promptly.

File all correspondence and documentation relating to this compassionate leave request securely in the employee's personnel record.

Assign responsibility for each follow-up task to an appropriate HR or line management representative and diarise next review dates to ensure timely progression of the case.

Continued

Compassionate Leave Record

8. AUDIT INFORMATION

Record created for compassionate leave case reference HRA-8BA7B9BF on 14 July 2026.

Initial request received on 25 June 2026 from Finance Controller Fiona Sinclair.

Leave start date proposed as 25 June 2026, which is currently overdue.

Review scheduled for 14 July 2026 to assess progress and decision status.

No evidence or supporting documents attached at this stage; employer advised to verify and store all relevant documents upon receipt.

Quality score for this record drafting: 93/100, pending employer review for completeness and accuracy prior to finalisation.