

Jade Morgan
Customer Support Analyst
Employer HR file

Date: 14 July 2026
Our Reference: PLC/2BD745EB
Document Type: Checklist

Paternity Leave Planning Checklist

1. EXECUTIVE SUMMARY

This checklist supports HRHeaven QA Sample Employer in coordinating the paternity leave request from Jade Morgan, Customer Support Analyst, received on 23 April 2026 with a proposed leave start date of 27 April 2026.

It outlines essential tasks and controls to ensure smooth absence planning, regulatory compliance, and operational continuity during Jade's paternity leave period.

Given some required planning details remain outstanding, employers must finalise and verify all information before proceeding.

 CHECKLIST DETAILS

Employee
Jade Morgan

Role
Customer Support Analyst

Case type
Paternity Leave Process

Reference
HRA-2BD745EB

 KEY DATES

Completed
14 July 2026

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2.

 PATERNITY LEAVE PLANNING TASKS

Confirm receipt and review of Jade Morgan’s paternity leave notice dated 23 April 2026.

Owner: HR Administrator

Priority: High

Due date: Immediate

Evidence required: Leave request document (e.g. notice letter or email)

Status: Completed

Completion notes: Request logged on 23 April 2026.

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the paternity leave record and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the paternity leave response and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Paternity Leave Start is due on 27 April 2026.	HR	To be confirmed	Completion note or supporting evidence	Open
Record practical cover, contact and review arrangements for paternity leave.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the Paternity Leave Process 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

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3. SHIFT AND ROTA ARRANGEMENTS

Arrange morning shift swaps covering Jade's duties from 27 April 2026.

Owner: Line Manager

Priority: High

Due date: Before 27 April 2026

Evidence required: Swap confirmation emails or rota updates

Status: In progress

Completion notes: Coordinator notified; swaps being arranged.

4. HR MANAGEMENT SYSTEM UPDATE

Update Jade Morgan's employee record in the HRMS to reflect paternity leave from 27 April 2026.

Owner: HR Administrator

Priority: High

Due date: Before 27 April 2026

Evidence required: HRMS entry confirmation

Status: In progress

Completion notes: Pending confirmation post rota update.

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5. TEAM COMMUNICATION

Notify Jade's team of the temporary rota change and paternity leave period.

Owner: Line Manager

Priority: Medium

Due date: Before 27 April 2026

Evidence required: Team notification email or meeting minutes

Status: Planned

Completion notes: Draft message to be reviewed.

6. PAYROLL COORDINATION

Confirm pro rata salary calculations with retained payroll provider covering Jade's absence.

Owner: Payroll Officer

Priority: Medium

Due date: Before 27 April 2026

Evidence required: Payroll provider confirmation or payroll report

Status: In progress

Completion notes: Payroll provider contacted; awaiting response.

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7. ABSENCE CALENDAR MANAGEMENT

Record the planned two-week absence in the team calendar system.

Owner: Team Coordinator

Priority: Medium

Due date: Before 27 April 2026

Evidence required: Calendar entry screenshot or printout

Status: Planned

Completion notes: Awaiting final confirmation of dates.

8. ONGOING LEAVE MONITORING

Maintain weekly check-in sessions during Jade's paternity leave to support employee wellbeing and enable timely updates.

Owner: Line Manager

Priority: Low

Due date: Throughout leave period

Evidence required: Meeting notes or email summaries

Status: Planned

Completion notes: Schedule to be arranged after leave start.

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9. DOCUMENT AND EVIDENCE REVIEW

Manually review the submitted paternity leave notice document for completeness and compliance.

Owner: HR Manager

Priority: High

Due date: Immediate

Evidence required: Original submitted notice file

Status: Pending

Completion notes: Document metadata available; text content not extractable – please verify content before filing.

10. FACT AND PROCESS CONFIRMATION

Review and confirm all paternity leave facts, dates, and arrangements prior to finalising the record.

Owner: HR Manager

Priority: High

Due date: Immediate

Evidence required: Updated process notes and planning documents

Status: In progress

Completion notes: Some key details remain outstanding; advise obtaining birth/expected due dates and eligibility confirmation.