

Marcus Reed
IT Systems Engineer
Employer HR file

Date: 14 July 2026
Our Reference: SPLC/572ED19F
Document Type: Checklist

Shared Parental Leave Planning Checklist

1. EXECUTIVE SUMMARY

This checklist supports HRHeaven QA Sample Employer in managing the Shared Parental Leave (SPL) request submitted by Marcus Reed, IT Systems Engineer. The request was received on 3 March 2025 with a proposed start date of 5 May 2025. To ensure a smooth transition, key planning tasks have been identified, including arranging cover, scheduling on-call duties, and confirming documentation and payroll arrangements.

Due to some missing information and metadata-only evidence, this checklist highlights the critical tasks to be completed and recommends further review to confirm factual accuracy and completeness prior to finalising the SPL process. The SPL start date is upcoming and actions should be prioritised accordingly.

CHECKLIST DETAILS

Employee
Marcus Reed

Role
IT Systems Engineer

Case type
Shared Parental Leave Process

Reference
HRA-572ED19F

KEY DATES

Completed
14 July 2026

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2. TASK

Review and confirm all facts and SPL request details with Marcus Reed to ensure completeness.

Arrange temporary cover for routine maintenance duties during SPL period.

Schedule a rota for on-call duties between two senior engineers to cover Marcus's responsibilities.

Document the escalation path clearly for the team during the SPL period.

Instruct outsourced payroll on SPL dates and eligibility for statutory shared parental pay.

Confirm that Marcus has remote access permissions needed for any ongoing work or handover responsibilities.

Prepare and provide a handover checklist to Marcus and relevant colleagues to support continuity.

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the shared parental leave record and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the shared parental leave response and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
Shared Parental Leave Start is due on 05 May 2025.	HR	To be confirmed	Completion note or supporting evidence	Open
Record practical cover, contact and review arrangements for shared parental leave.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the Shared Parental 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. OWNER

HR Manager responsible for employee relations to verify details with Marcus.

Line Manager/Team Leader to arrange operational cover.

Line Manager to establish on-call rota.

Line Manager/HR to document escalation path.

Payroll Department to process employee SPL arrangements.

IT Team or appropriate authority to confirm remote access permissions.

HR and Line Manager jointly to prepare and distribute handover checklist.

4. PRIORITY

High priority to confirm SPL facts and employee communication due to imminent start date.

High priority for cover arrangements to prevent service disruption.

High priority for on-call rota to maintain critical operational support.

Medium priority to ensure a clear escalation path is in place.

High priority to instruct payroll promptly for statutory payments.

Medium priority for confirming remote access ahead of SPL.

Medium priority to finalise handover checklist before leave start.

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5. DUE DATE

Immediate - confirm SPL request details and missing information as soon as possible.

By 15 April 2025 - operational cover and rota to be fully arranged.

By 15 April 2025 - escalation path to be documented and communicated.

By 20 April 2025 - payroll instructions completed for SPL processing.

By 25 April 2025 - remote access verified and any adjustments made.

By 30 April 2025 - handover checklist completed and shared with all parties.

6. EVIDENCE REQUIRED

Confirmed SPL request and notice documents from Marcus Reed (check details and completeness).

Written plan or confirmation of temporary cover and on-call rota arrangements.

Document outlining escalation path during SPL.

Payroll notification and confirmation of payment arrangements for SPL period.

IT confirmation of remote access permissions and any changes.

Signed handover checklist or equivalent acknowledgement from Marcus and line manager.

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7. STATUS

SPL request received; further information requested from employee.

Cover arrangements and rota scheduling pending.

Escalation path documentation in progress.

Payroll instructed pending confirmation of SPL details.

Remote access permissions under review.

Handover checklist preparation underway.

8. COMPLETION NOTES

Ensure review of SPL request record aligns with agreed facts before formalising.

Confirm all cover and contact plans are practical and clearly communicated to affected staff.

Verify payroll team has received accurate SPL dates for statutory payment processing.

Double-check remote access instructions to avoid operational disruption.

Finalise handover checklist and obtain sign-off from all involved.

Given the metadata-only evidence and missing answers, verify all facts and documents prior to filing or issuing any formal communications.