

Parental Leave File Checklist

A simple record-keeping tool for employers

Use this file as soon as an employee notifies the business that they intend to take parental leave. The aim is simple: confirm the dates, keep a paper trail, plan the return early, and avoid last-minute disputes.

1. Employee and leave details

Employee name	
Position / location	
Manager / contact person	
Date employee notified business	
Expected last working day	
Parental leave start date	
Expected return-to-work date	
Best contact details during leave	

2. Documents to keep on file

Done	Document / action	Date	Notes / location
<input type="checkbox"/>	Employee written parental leave request received		
<input type="checkbox"/>	Employer written approval / confirmation issued		
<input type="checkbox"/>	Leave start date confirmed in writing		
<input type="checkbox"/>	Expected return-to-work date confirmed in writing		
<input type="checkbox"/>	Any agreed leave type recorded, such as unpaid parental leave, annual leave or long service leave		

Done	Document / action	Date	Notes / location
[]	Contact plan confirmed with employee		
[]	Copy of any replacement employee arrangement kept on file		
[]	Any flexible work request received and saved		
[]	Employer response to any flexible work request saved		
[]	Return-to-work arrangements confirmed in writing		
[]	Any consultation records saved, including role changes, restructure or redundancy discussions		

3. Contact plan during leave

Do not wait until the week before the employee is due back. Diarise simple check-ins and keep notes of any discussion. These are business planning conversations, not pressure on the employee to return early.

Done	Document / action	Date	Notes / location
<input type="checkbox"/>	Contact employee one month after leave starts		
<input type="checkbox"/>	Contact employee three months before expected return date		
<input type="checkbox"/>	Contact employee six weeks before expected return date		
<input type="checkbox"/>	Contact employee two weeks before expected return date		
<input type="checkbox"/>	Ask employee to confirm any proposed change to return date, hours or days in writing		

4. Contact notes

Date	Method	Main points discussed	Action required

5. Before arranging a replacement employee

If the business needs to cover the role, be clear in writing whether the arrangement is temporary or permanent. If the person is covering parental leave, say that clearly in the employment documentation.

Done	Document / action	Date	Notes / location
<input type="checkbox"/>	Replacement role reviewed and approved internally		
<input type="checkbox"/>	Temporary or fixed-term status confirmed in writing where applicable		
<input type="checkbox"/>	Replacement employee advised the role is covering parental leave, where applicable		
<input type="checkbox"/>	Expected end date or review point recorded		
<input type="checkbox"/>	Business has avoided making promises that conflict with the returning employee's rights		

6. Return-to-work planning

Start planning the return early. If the employee wants different hours, days or duties, ask them to put that request in writing so the business can properly consider it.

Return date confirmed	
Returning position	
Location	
Ordinary hours / roster	
Reporting line	
Pre-return meeting date	
Any agreed changes	

7. Flexible work request record

Request received?	Yes / No
Date received	
What change was requested?	
Business impact considered?	Yes / No
Alternatives considered?	Yes / No
Written response issued?	Yes / No
Date response issued	

8. Return confirmation

Before the employee returns, send a short written confirmation setting out the agreed return arrangements. Keep a copy on this file.

Done	Document / action	Date	Notes / location
<input type="checkbox"/>	Return date confirmed in writing		
<input type="checkbox"/>	Role and location confirmed		
<input type="checkbox"/>	Hours / days confirmed		
<input type="checkbox"/>	Manager confirmed		
<input type="checkbox"/>	Any agreed flexible work arrangement confirmed		
<input type="checkbox"/>	Any outstanding matters resolved or diarised		

Final reminder

Talk to your ER Team at the start, not the end. We can help get you in the right spot from day one, so the process is managed properly and the employee's return does not become a last-minute problem.

This resource is general guidance only. Employers should seek advice before refusing a request, changing a role, commencing consultation or considering redundancy.