The purpose of this Business Process Procedure is to explain how to enter a substitute for an employee who is unable to work their shift.

Trigger: There is a need to enter a substitute for an employee who is unable to work on their shift.

Business Process Procedure:

In the event that an employee is unable to work his or her shift, another employee can substitute on that shift if approved by the employee's supervisor. When taking over a shift, the substituting employee assumes all the characteristics for the shift he/she is substituting for, including planned working time and shift premium eligibility. If the substituting employee has the corresponding premium eligibility records, then he/she will be eligible for any premiums associated with the additional shift. The Substitution Infotype (Infotype 2003) enables the substitution functionality.

There are several substitutions available in the Integrated HR-Payroll System. There are two substitutions relevant to shift substitutions.

Employee substitution (subtype 01) - An employee substitution involves specifying a personnel number of the employee for which the substituting employee will be replacing during the period of the substitution record. The substituting employee will assume the planned working time and premium eligibility of the employee specified for period of the substitution record.

Shift substitution (subtype 02) - A shift substitution involves specifying a Daily Work Schedule (DWS) or Work Schedule Rule (WSR) that the substituting employee will work during the period of the substitution record. A DWS should be used for a substitution of a single day. A WSR substitution is more appropriate for a longer substituting period.

After a Substitution record is created, the maintenance of the record is very important due to the possible changes in compensation due to substitutions for premium eligible shifts. If the actual period or date of the Substitution changes, the relevant Infotype 2003 record also must be updated to ensure proper compensation. If a Substitution is no longer necessary or an employee did not actually work the assigned substitution shift, the relevant record should be deleted to ensure additional compensation is not earned through the original Substitution assignment.

This BPP will detail:

1. Creating an Employee substitution
2. Creating a Shift substitution
3. Maintaining a substitution record
4. Deleting a substitution record

Tips and Tricks:

There are nine other substitution types in the Integrated HR-Payroll System. The following substitution types are relevant for Leave of Absences (LOA) and will be managed via personnel actions by the Master Data Maintainer.

- 05 - LOA Generic
- 10 - LOA - FMLA
- 11 - LOA - WC Regular
- 12 - LOA - WC Salary Continuation
- 13 - LOA – Military

The following substitution types are relevant for Short-term Disability absences and will be managed via personnel actions by the Short-term Disability Specialist.

- 06 - STD (1st 6 months prior 89)
- 07 - STD (2nd 6 months prior 89)
- 08 - STD (1st 6 months after 89)
- 09 - STD (2nd 6 months after 89)

Access Transaction:

Via Menu Path: SAP menu >> Human Resources >> Time Management >> Administration >> Time Data >> PA61 – Maintain

Via Transaction Code: PA61

Procedure
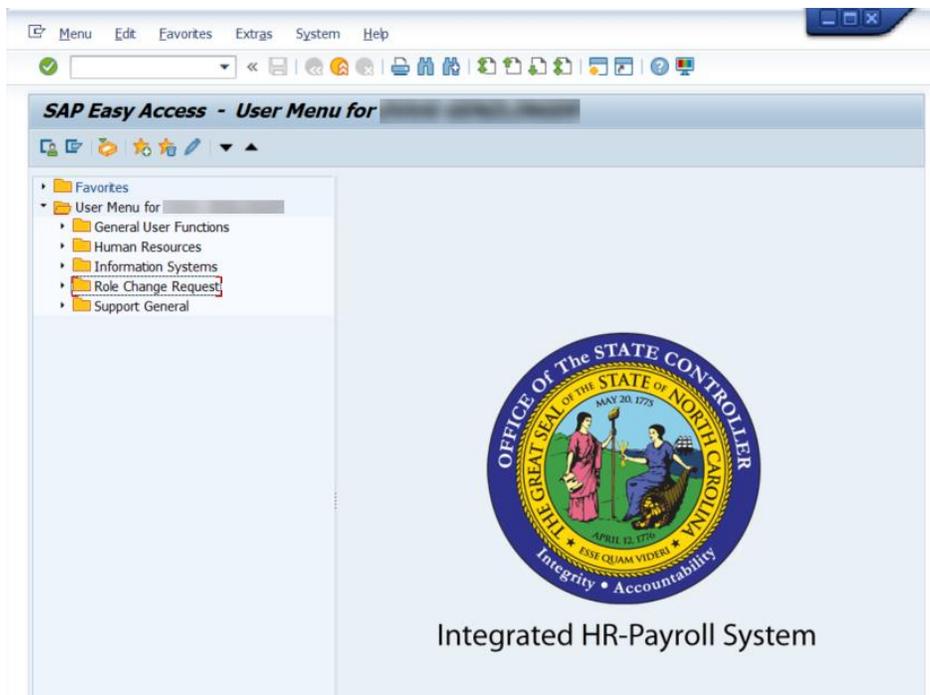
1. Update the following fields:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. **Example**: PA61

2. Click the **Enter** button.

3. Update the following fields:

Field Name	Description	Values
Personnel no.	Unique employee identifier	Enter value in Personnel no. **Example**: 80000450

4. Click the **Enter** button.

> **Information**
>
> Ensure the correct personnel number was entered after clicking Enter.

These instructions provide information on how to:

- o Create an employee substitution
- o Create a shift substitution
- o Maintain a substitution
- o Delete a substitution

CREATE EMPLOYEE SUBSTITUTION

5. Update the following fields:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 04/16/2007
To	Ending date of the specified date range	Enter value in To. **Example**: 04/20/2007
Infotype	Unique number identifying the type of data to be displayed	Enter value in Infotype. **Example**: 2003
Sty	Infotype subtype	Enter value in STy. **Example**: 01

6. Click the **Enter** button.

7. Click the **Create (F5)** button.

Create Substitutions (2003)

Personal work schedule | Activity allocation | Cost assignment | External services

Personnel No	80000450	Name	Rita Henry01	
EE group	A SPA Employees	Personnel ar	4601	Cultural Resources
WS rule	D02N10_F MTWH-10,FSaS-O		Status	Active
From	04/18/2011 To	04/23/2011		

Subst. type   01   Employee Substitution

Work schedule rule

Personnel number

8. Update the following fields:

Field Name	Description	Values
Personnel number	Unique number identifying an individual's master record data in the system.	Enter value in Personnel number. **Example**: 80000410

Enter the Personnel number of the employee who the current employee will be substituting for during the period identified on the substitution record.

If the personnel number is not known, use the match code to search for the personnel number for which the current employee will be substituting.

9. Press **ENTER**.

10. Click the **Save (Ctrl+S)** button.

CREATE SHIFT SUBSTITUTION

11. Update the following fields:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 04/16/2007
To	Ending date of the specified date range	Enter value in To. **Example**: 04/20/2007
Infotype	Unique number identifying the type of data to be displayed	Enter value in Infotype. **Example**: 2003
Sty	Infotype subtype	Enter value in STy. **Example**: 02

12. Press **ENTER**.

13. Click the **Create (F5)** button.

Create Substitutions (2003)

Personnel No	80000450	Name	Rita Henry01
EE group	A SPA Employees	Personnel ar	4601	Cultural Resources
WS rule	D02N10_F MTWH-10,FSaS-O			Status	Active
From	04/18/2011 To	04/23/2011

Subst. type 02   Shift substitution

Daily work schedule

Daily work schedule [ ]

Work schedule rule

Work schedule rule [ ]   ES grouping [ ]
Holiday Calendar ID [ ]   PS grouping [ ]

14. Update the following fields:

Field Name	Description	Values
Work schedule rule	Work schedule rule	Enter value in Work schedule rule. **Example**: E01N08GN

Information	• When changing the Work Schedule Rule (WSR), be sure to select the correct Holiday calendar as well. • The Daily Work Schedule (DWS) also can be used for shift substitution. Use the drop-down menu to select the appropriate DWS for the substitution. • Use 9 or Edit > Maintain Text to add comments. This is highly recommended when creating a WSR. • WSR substitutions supersede WSR on IT0007. For this reason, if the WSR substitution is needed for an extended period of time, it is better to change IT0007.

15. Press **ENTER**.

16. Click THE **Save (Ctrl+S)** button.

MAINTAIN SUBSTITUTION

17. Click the **All** ⚪ All radio button.

18. Update the following fields:

Field Name	Description	Values
Infotype	Unique number identifying the type of data to be displayed.	Enter value in Infotype. **Example**: 2003

19. Press **ENTER**.

20. Click the **Change (F6)** button.

> ℹ️ **Information**   If multiple substitution records exist for the employee, use the right and left scroll buttons to find the record to be maintained.

21. Update the following fields:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 04/26/2011

22. Press **ENTER**.

23. Click the **Save (Ctrl+S)** button.

DELETE SUBSTITUTION

24. Click the **All** ○ All radio button.

25. Update the following fields:

Field Name	Description	Values
Infotype	Unique number identifying the type of data to be displayed.	Enter value in Infotype. **Example**: 2003

26. Press **ENTER**.

27. Click **Overview (Shift+F8)** button.

28. Click in front of the substitution that needs to be changed.

29. Click the **Delete (Shift+F2)** button.

	Highlight the record to be deleted and click Delete. A second screen will display the record in detail. Review the detail of the record to ensure the correct record has been selected for deletion.
Information	

30. Click the **Delete (Shift+F2)** button.

31. Press ENTER.

32. The system task is complete.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 5/15/20 – Changed by C. Ennis
Changes: Updated format, assigned reference number, and made accessible