

TM-53 PA61 Shift Substitutions

Purpose

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 for 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:

- Creating an Employee substitution.
- Creating a Shift substitution.
- Maintaining a substitution record.
- 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)

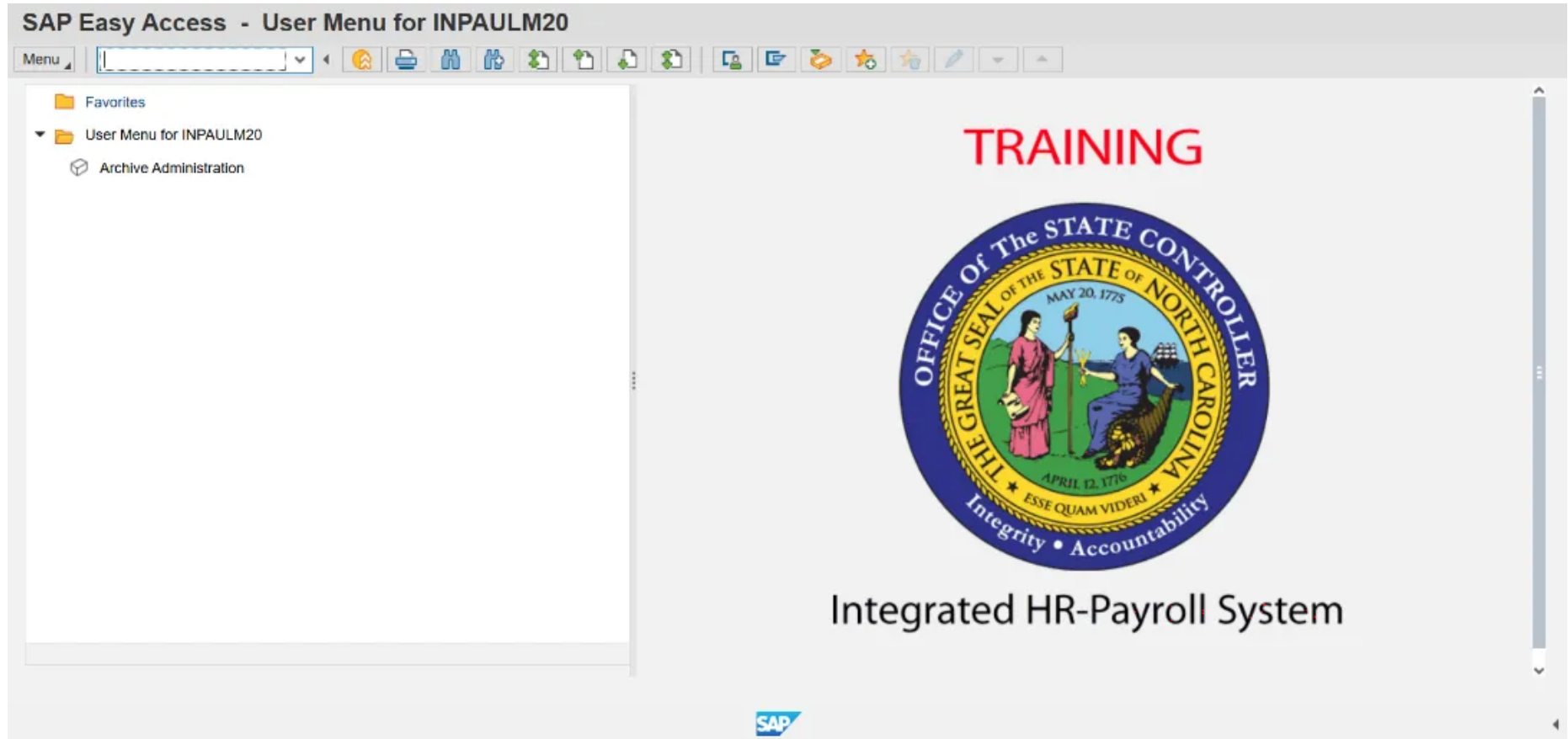
Access Transaction

Via Transaction Code: PA61

Procedure

There are 31 steps in this process.

Image



Step 1. Update the **Command** field using Transaction code **PA61**.

Step 2. Click **Enter**.

Image

Maintain Time Data

Menu



Personnel no.



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☒ Period

From

To

☐ Today

☐ Current Week

☐ All

☐ Current Month

☐ From Today

☐ Last Week

☐ Until Today

☐ Last Month

☐ Curr. Period

☐ Current Year



Choose

Direct selection

Infotype

STy

Step 3. Update the **Personnel No.** field.

Step 4. Click **Enter**.

Image

Maintain Time Data

Menu



Personnel no.

80000450

Name

Rita Henry01

EEGroup

A

SHRA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

B1

FT S-FLSAOT Perm

CostC

4699999999

CULTURE RESOURCES



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Period

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From

To

☐ Today

☐ Current Week

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☐ Current Month

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☐ Until Today

☐ Last Month

☐ Curr. Period

☐ Current Year



Choose

Direct selection

Infotype

STy

Ensure the correct personnel number was entered after clicking Enter.

These instructions provide information on how to:

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

Create Employee Substitution

Step 5. Update the following fields:

- From Date
- To Date
- Infotype (Example: 2003)
- Sty (Example: 01)

Step 6. Click **Enter**.

Image

Maintain Time Data

Menu



Personnel no.

80000450

Name

Rita Henry01

EEGroup

A

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Period

☒ Period

From 10/22/2025

To

10/23/2025

☐ Today

☐ Current Week

☐ All

☐ Current Month

☐ From Today

☐ Last Week

☐ Until Today

☐ Last Month

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Choose

Direct selection

Infotype

Substitutions

STy

01

Employee Substitution

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

Image

Create Substitutions (2003)

Menu ▾

◀

Personal work schedule

Personnel No	80000450	Name	Rita Henry01		
EE group	A SHRA Employees	Personnel ar	4601	Natural and Cultural Resources	
WS rule	D02N10_F MTWH-10,FSaS-O		Status	Active	
From	10/22/2025	to	10/23/2025		
Subst. type	01 Employee Substitution				

Work schedule rule

Personnel number

Step 8. Update the **Personnel No.** field.

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.

Step 9. Press **ENTER**.

Image

Create Substitutions (2003)

Menu | [Dropdown] | [Icons: Save, Undo, Redo, Cancel, Print, Copy, Paste, Delete, Personal work schedule]

Personnel No: 80000450 Name: Rita Henry01

EE group: A SHRA Employees Personnel ar: 4601 Natural and Cultural Resources

WS rule: D02N10_F MTWH-10,FSaS-O Status: Active

From: 10/22/2025 [Icon] To: 10/23/2025

Subst. type: 01 Employee Substitution

Work schedule rule

Personnel number: 80000410 Sarah Beckham01

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

Create Shift Substitution

Image

Maintain Time Data

Menu



Personnel no.

80000450

Name

Rita Henry01

EEGroup

A

SHRA Employees

PersA

4601

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Period

☒ Period

From 10/22/2025

To

10/23/2025

☐ Today

☐ Current Week

☐ All

☐ Current Month

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☐ Last Week

☐ Until Today

☐ Last Month

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☐ Current Year



Choose

Direct selection

Infotype

Substitutions

STy

01

Employee Substitution

Step 11. Update the following fields:

- From Date
- To Date
- Infotype (Example: 2003)
- Sty (Example: 02)

Step 12. Press **ENTER**.

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

Image

Create Substitutions (2003)

Menu

Personnel No	80000450	Name	Rita Henry01
EE group	A SHRA Employees	Personnel ar	4601 Natural and Cultural Resources
WS rule	D02N10_F MTWH-10,FSaS-O	Status	Active
From	10/22/2025 Calendar	To	10/23/2025
Subst. type	02 Shift substitution		

Daily work schedule

Daily work schedule	
---------------------	----------------------

Work schedule rule

Work schedule rule		ES grouping	
Holiday Calendar ID		PS grouping	

Step 14. Update the following fields:

- Daily Work Schedule (Example: 1N08)

Step 15. Press **ENTER**.

Image

Create Substitutions (2003)

Menu Personal work schedule

Personnel No: 80000450 Name: Rita Henry01
EE group: A SHRA Employees Personnel ar: 4601 Natural and Cultural Resources
WS rule: D02N10_F MTWH-10,FSaS-O Status: Active
From: 10/22/2025 To: 10/23/2025
Subst. type: 02 Shift substitution

Daily work schedule

Daily work schedule

Work schedule rule

Work schedule rule: ES grouping: ☐
Holiday Calendar ID: PS grouping: ☐

Notes:

- Use F9 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.

Step 16. Click the **Save (Ctrl+S)** button.

Maintain Substitution

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

Step 18. Update the following fields:

- Infotype (Example:2003)

Step 19. Press **ENTER**.

Image

Maintain Time Data

Menu



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☐ Period

From 01/01/1800

To

12/31/9999

☐ Today

☐ Current Week

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☐ From Today

☐ Last Week

☐ Until Today

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Choose

Direct selection

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Shift substitution

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

Note: If multiple substitution records exist for the employee, use the Next Record or Previous Record buttons to find the record to be maintained.

Image

Change Substitutions (2003)

Menu

Personal work schedule

Personnel No	80000450	Name	Rita Henry01		
EE group	A SHRA Employees	Personnel ar	4601	Natural and Cultural Resources	
WS rule	D02N10_F MTWH-10,FSaS-O	Status	Active		
From	10/22/2025	Chg.	10/22/2025	INPAULM20	
Subst. type	01 Employee Substitution				

Work schedule rule

Personnel number	80000410	Sarah Beckham01
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Step 21. Update the following fields:

- From Date

Step 22. Press **ENTER**.

Image

Change Substitutions (2003)

Menu          Personal work

Personnel No	80000450	Name	Rita Henry01		
EE group	A SHRA Employees	Personnel ar	4601	Natural and Cultural Resources	
WS rule	D02N10_F MTWH-10,FSaS-O		Status	Active	
From	10/24/2025	To	10/24/2025	Chg.	10/22/2025 INPAULM20
Subst. type	01	Employee Substitution			

Work schedule rule

Personnel number	80000410	Sarah Beckham01
------------------	----------	-----------------

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

Delete Substitution

Image

Maintain Time Data

Menu



Personnel no.

80000450

Name

Rita Henry01

EEGroup

A

SHRA Employees

PersA

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From 01/01/1800

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☐ Until Today

☐ Last Month

☐ Curr. Period

☐ Current Year



Choose

Direct selection

Infotype

Substitutions

STy

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

Step 25. Update the following fields:

- Infotype (Example: 2003)

Step 26. Press **ENTER**.

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

Image

List Substitutions (2003)

Menu | [Dropdown] | [Icons]

Personnel No: 80000450 Name: Rita Henry01

EE group: A SHRA Employees Personnel ar: 4601 Natural and Cultural Resources

WS rule: D02N10_F MTWH-10,FSaS-O Status: Active

Choose: [01/01/1800] [Icon] To: 12/31/9999 STy.: []

Substitutions

	Start Date	End Date	ST	From	To	P	Hours	Brk	Start	End	Paid	
	10/24/2025	10/24/2025	01				0.00				0.00	

Step 28. Highlight the row of the substitution that needs to be changed.

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

Step 30. 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.

Image

Delete Substitutions (2003)

Menu ▾

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📊 Personal work schedule

Personnel No	80000450	Name	Rita Henry01		
EE group	A SHRA Employees	Personnel ar	4601	Natural and Cultural Resources	
WS rule	D02N10_F MTWH-10,FSaS-O		Status	Active	
From	10/24/2025	to	10/24/2025	Chg.	10/22/2025 INPAULM20
Subst. type	01 Employee Substitution				

Work schedule rule

Personnel number	80000410	Sarah Beckham01
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Step 31. Click the **Delete (Shift+F2)** button.

Note: This action is permanent. You will not receive a confirmation screen before the record is deleted. Be sure this is the correct action before completing it.

The system task is complete.

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