

MAINTAIN SUBSTITUTIONS

MSS-4 | BUSINESS PROCESS PROCEDURE

The purpose of this Business Process Procedure (BPP) is to explain how to maintain shift substitutions in the Integrated HR-Payroll System.

Trigger:

Perform this procedure to create shift substitutions for your direct report employees.

Business Process Procedure Overview:

Manager Self-Service (MSS), or 'My Staff,' is a single access point for managers to find employee information and perform managerial tasks.

MSS users must be designated as a 'Line Supervisor' (B 002) in the organizational structure to access MSS My staff functions.

The **Maintain Substitutions** service is located in the 'My Team' Workset in MSS. Managers will use this to create shift substitutions for their employees.

There are circumstances where an employee is unable to work his/her shift. Another employee can substitute on that shift. When taking over a shift, the substituting employee inherits all the attributes for the shift for which they are substituting (e.g. shift premium eligibility). For the substituting employee to inherit the shift attributes, a substitution record must be created by the manager.

Shift Substitutions - A shift substitution involves specifying a Daily Work Schedule (DWS) or a Work Schedule Rule (WSR) that the substituting employee will work during the period of the substitution record.

- DWS Should be used for a substitution of a single day
- WSR Should be used 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 dates of the substitution changes, the record must be updated to ensure proper compensation.
- If a substitution is no longer necessary, or an employee did not work the assigned substitution shift, the relevant record should be deleted to ensure additional compensation is not earned.

Reference: The 'Work Schedule Job Aid' is located on the OSC Training > Help Documents website:

https://www.osc.nc.gov/documents/work-schedules

Procedures

1. From the Integrated HR-Payroll System Home Page, click the My Staff (MSS) tab



(i) Information

The tabs on the main portal will vary by the user, depending on the roles and authorizations. Only managers will have the My Staff (MSS) tab.

CRITICAL!

When using web applications that maintain or create data, always leave the application (or log off) when completing work. This will prevent record locking.

My Data (ESS)	My Staff (MS	SS) SAP G	UI SAP GUI - TR	RAINING USERS ONLY							
My Work Overview	My Team										
	1	My Staff (MSS) >	My Work Overview								
My Work Overview	,	Approve	Time Sheet Data								
▶ My Team		Collect View: M	ive Approval Rev eekly View - Simple	2 3 view and Save Complet	ed						
		Employee	pproval	Erm	То	Meesane	Number	Tarnet Time	Approval	_	DejectionDesson
		20000111	Lorpa Sime	04/07/2019	04/12/2010	wessaye	Number	AO LI		_	RejectionReason
		80000170	Cimen Mensen	04/07/2019	04/13/2019		40 H	40 H		-	-
		00000120	Simon wonsen	04/07/2019	04/15/2019		<u>40 H</u>	40 H	Approve All	•	•
		80000111	Lorna Sims	04/14/2019	04/20/2019		<u>40 H</u>	40 H	Apprové All	•	•
		80000120	Simon Monsen	04/14/2019	04/20/2019		<u>48 H</u>	40 H	Approve All	•	•



2. Go to the 'Detailed Navigation' panel on the left section of the screen. Navigate to the Maintain Substitutions by expanding the folders down the tree structure:



My Team->Employee Working Times->Maintain Substitutions.

Note: The Maintain Substitution screen will default to display a tabular list of the manager's Direct Report employees. When an employee is selected from the list, the section to the right shows an overview of all their substitution records.

int	ain Substitutions												
Mai	ntain Substitutions												
Ē	Name	Pers.No.	WS rule		Su	bstitutions	for Employee	Jessica Hun	er				
	Earl Gutierrez17	80001079	D01N08GN		19	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PS
	Earl Gutierrez18	80001080	D01N08GN			80000124	04/15/2019	04/19/2019	1D08				00
	Earl Gutierrez19	80001081	D01N08GN										
	Earl Gutierrez20	80001082	D01N08GN										
	Greg Pastor	80000022	D01N08GN										
	Jessica Hunter	80000124	D01N08GN										
	Lorna Sims	80000111	D01N08GN										
	Shaunte Morrison	80000112	D01N08GN			Edit) (Dal	ata New						
	Simon Monsen	80000120	D01N08GN	-		De	ere New						

- 3. Select one of the following options:
 - EDIT a substitution
 - DELETE a subtitution
 - Create a NEW substitution

EDIT an Existing Substitution

- 1. Select the applicable employee form the tabular list
- 2. Select the record to be changed from the overview listing
- 3. Click Edit Edit

My Staff (MSS) > My Team > Employee Working Times > Maintain Substitutions

					_								_
6	Name	Pers.No.	WS rule	-	5	ubstitutions	for Employee	Jessica Hun	ter				
	Earl Gutierrez17	80001079	D01N08GN		- F	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	P
	Earl Gutierrez18	80001080	D01N08GN			80000124	04/15/2019	04/19/2019	1D08				0
	Earl Gutierrez19	80001081	D01N08GN										
	Earl Gutierrez20	80001082	D01N08GN										
	Greg Pastor	80000022	D01N08GN										
	Jessica Hunter	80000124	D01N08GN										
	Lorna Sims	80000111	D01N08GN										
	Chausta Marrison	90000112	D01N08GN			_		_					

4. Maintain the applicable field(s) to change the record, then click Save Substitution Save Substitution.

Personnel No.:	80000124	Name:	Jessica Hunter
WS Rule:	 [D01N08GN		
		02	
From: 04/15/2019	To: 04/19/2019	Subst. type:	
		Work Schedule Rule:	ES Grouping:
		Usiday Calcadas ID:	DC Creuniant (0)
Daily Work Schedu	ule: 1008 - 8 Day	Holiday Calendar ID:	PS Grouping: 00

- **NOTE:** You cannot change the dates on an existing record. To accommodate a date change, you must DELETE the record, and then create a NEW record.
- **NOTE:** To exit/cancel the record being edited, click Cancel Cancel to return to the upper portion of the screen. The changes will not be saved.

Delete an Existing Substitution

- 1. Select the applicable employee from the tabular list.
- 2. Select the record to be deleted from the overview listing.
- 3. Click Delete Delete

Sul	bstitutions f	for Employee	Jessica Hun	ter					
Ē	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG	-
	80000124	04/15/2019	04/19/2019	1D08				00	
									-
	Edit Dele	te New							

- 4. After clicking Delete, a Confirmation dialog box will display.
 - Click 'ok' to continue and delete the record, or
 - Click 'Cancel' to terminate the deletion process and keep the record.

Su	bstitutions f	for Employee	Jessica Hun	ter					
ħ	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG	
	80000124	04/15/2019	04/19/2019	1D08				00	
	Castratia	_			1				
	Commauo	1							
	Are you sure	e you want to o	delete the curr	ent subs	stitution?				
						_			
				ok	cancel	///			

5. For the purpose of this exercise, click 'ok'.

6. The record is deleted and no longer displays in the overview listing.

Mai	ntain Substitutions														
Ē	Name	Pers.No.	WS rule]	Sub	stitutions	for Employ	ee Jessica I	Hunter					
	Earl Gutierrez17	80001079	D01N08GN		ল	ħ	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG	
	Earl Gutierrez18	80001080	D01N08GN												1
	Earl Gutierrez19	80001081	D01N08GN												1
	Earl Gutierrez20	80001082	D01N08GN												1
	Greg Pastor	80000022	D01N08GN												1
	Jessica Hunter	80000124	D01N08GN												1
	Lorna Sims	80000111	D01N08GN												
	Shaunte Morrison	80000112	D01N08GN			6	att Da	oto New							
	Simon Monsen	80000120	D01N08GN	-		Ľ		ere New							

NOTE: Please be aware of the following when deleting records:

- If a substitution is no longer necessary, or the employee did not work the assigned substitution shift, the relevant record must be deleted to ensure additional compensation was not paid.
- If a substitution is deleted for a date in the past, and was previously processed or paid, this will cause a retroactive entry for any paid compensation.

Create a New Substitution

When creating a substitution, always maintain either the Daily Work Schedule (DWS) or the Work Schedule Rule (WSR). You will never maintain both.

1. Select an employee from the tabular list and click New New. The lower portion of the screen will display with input fields.

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tain Substitutions													
Name	Pers.No. V	WS rule	Substit	utions for Employ	ree Lorna Si	ms							
Earl Gutierrez17	80001079 D	001N08GN	Per	s.No. Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG	A.		
Earl Gutierrez18	80001080 E	001N08GN											
Earl Gutierrez19	80001081 D	001N08GN											
Earl Gutierrez20	80001082 D	001N08GN											
Greg Pastor	80000022 D	001N08GN											
Jessica Hunter	80000124 D	001N08GN									*		
orna Sims	80000111 D	001N08GN											
haunte Morrison	80000112 D	001N08GN	(mark)	Delete Dele									
Simon Monsen	80000120 D	001N08GN	Edit	Delete	<u>w</u>								
								Create Ne Personnel I WS Rule:	w Subst ło.:	itution	80000111 D01N08GN	Name:	Loma Sins
								From: 07	05/2019		To: 07/05/2019 🛅	Subst. type: 02	
												Holiday Calendar ID:	Eo orduping: PS Grouping:

2. Enter the applicable field to create the substitution record, then click Save Substitution Save Substitution

Field Name	Description
From	The start date for the substitution period.
То	The end date for the substitution period.
Daily Work Schedule (DWS)	The description of the duration and position of working time on a particular, unspecified workday.
	Note: The DWS should be used for a substitution for a single day.
Work Schedule Rule (WSR)	The work schedule rule determines which period work
	schedule is used to set up the work schedule, and the day of
	the period for which it applies.
	Note: The WSR should be used for a longer substitution
	period.
Holiday Calendar ID (Defaults)	The Holiday Calendar ID is derived by the Work Schedule Rule.
ES Grouping (Defaults)	The Employee Subgroup Grouping is derived by the Work
	Schedule Rule.
PS Grouping Defaults)	The Personnel Subarea Grouping is derived by the Work
	Schedule Rule.

NOTE: For assistance with work schedules, please refer to the Work Schedule job aid located on the OSC Training > Help Documents website.

https://www.osc.nc.gov/documents/work-schedules

3. The new record will be added to the employee's overview listing of records.

Mai	ntain Substitutions													
ħ	Name	Pers.No.	WS rule		s	ub	stitutions f	or Employee	Lorna Sims					
	Earl Gutierrez17	80001079	D01N08GN		-	5	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PS
	Earl Gutierrez18	80001080	D01N08GN			1	80000111	07/05/2019	07/05/2019	1D08				00
	Earl Gutierrez19	80001081	D01N08GN											
	Earl Gutierrez20	80001082	D01N08GN											
	Greg Pastor	80000022	D01N08GN											
	Jessica Hunter	80000124	D01N08GN											
	Lorna Sims	80000111	D01N08GN											
	Shaunte Morrison	80000112	D01N08GN				dit Dala	to Now						
	Simon Monsen	80000120	D01N08GN	-		Ē		ite inew						