

SHIFT SUBSTITUTIONS TM-53 | PA61



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



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 Solution.

Maintain Time Data			
🗅 🦉 🛍 🛱 🛛 🤽 🛗 List entry	🗷 Wee	k 💷 Month 📴	Year
rsonnel no.]	ז
-		-	
Working times Additional accourt	nt assignm	ents Time quot	as 🛛 Time manag 🗎 💷 🕒
Infotype text	S	Period	
Absences	-	 Period 	
Attendances	-	From	To
Time Events	_	○ Today	O Curr.week
Overtime			O Current month
Substitutions		OFrom curr.date	◯Last week
On-Call		O To Current Dat	e OLast month
Time Transfer Specifications		OCurrent Period	OCurrent Year
Employee Remuneration Info		🔁 Choo	se
	•		
Direct selection			

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 Solution.

👦 🔎 Maintain Time Data	
🗋 🖉 🛍 🗑 🔝 🛗 List entry 🛛 🔤 We	eek 🚾 Month 🚾 Year
ersonnel no. <mark>80000450</mark> ame Rita Henry01 EGroup A SPA Employees ESubgroup B1 FT S-FLSAOT Perm	PersA 4601 Cultural Resources CostC 4699999999 CULTURE RESOURC
Working times Additional account assign Infotype text s	Period
Attendances Time Events Overtime	From To To OToday Ocurr.week
Substitutions On-Call	O From curr.date O Last week O To Current Date O Last month
Employee Remuneration Info	Current Period Current Year
Direct selection Infotype	STy



These instructions provide information on how to:

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

CREATE EMPLOYEE SUBSTITUTION

👼 🖌 Maintain Time Data	
🗋 🥒 🛍 🗎 🔔 🏦 List entry 🔰 🔤 W	/eek 🔤 Month 🚇 Year
Personnel no. 80000450 Name Rita Henry01 EEGroup A SPA Employees EESubgroup B1 FT S-FLSAOT Perm	PersA 4601 Cultural Resources CostC 4699999999 CULTURE RESOURC
Working times Additional account assig	nments Time quotas Time manag)
Absences Attendances Time Events Overtime Substitutions On-Call Time Transfer Specifications Employee Remuneration Info	Period From To Today Ourr.week All Ourrent month From curr.date Last week To Current Date Last month Current Period Ourrent Year Choose
Direct selection Infotype	STy

5. Update the following fields:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From.
		Example: 04/16/2007
То	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 Sutton.
- 7. Click the **Create (F5)** button.

Create Substitutions (2003)	
🗟 🗟 🚨 🛅 🎹 Personal work schedule Activit	cy allocation Cost assignment External services 🕴 🔂
Personnel No 80000450 Name R:	ita Henry01
EE group A SPA Employees Personnel ar 46	601 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	

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

👦 🖌 Maintain Time Data		
🗋 🥖 🛍 🛱 🚨 🎹 List entry 🛛 🛙	😐 Week	k 💷 Month 💷 Year
Personnel no. 80000450 Name Rita Henry01 EEGroup A SPA Employees EESubgroup B1 FT S-FLSAOT Perm	Pe Co	ersA 4601 Cultural Resources ostC 46999999999 CULTURE RESOURC
Working times Additional account a	assignme	Period
Absences Attendances Time Events Overtime Substitutions On-Call Time Transfer Specifications Employee Remuneration Info		
Direct selection		
Infotype		517

11. Update the following fields:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From.
		Example: 04/16/2007
То	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) Image: Colspan="2">Personal work schedule Activity Personnel No 80000450 Name Ritt EE group A SPA Employees Personnel ar 460 WS rule D02N10_F MTWH-10,FSaS-O From 04/18/2011 To 04/23/2011 Subst. type 02 Shift substitution Daily work schedule Daily work schedule Daily work schedule	allocation Cost assignment External services a Henry01 1 Cultural Resources Status Active
Image: Second state of the second s	allocation Cost assignment External services a Henry01 1 Cultural Resources Status Active
Personnel No 80000450 Name Rit EE group A SPA Employees Personnel ar 460 WS rule D02N10_F MTWH-10,FSaS-O From 04/18/2011 To 04/23/2011 Subst. type 02 Shift substitution Daily work schedule Daily work schedule Daily work schedule	a Henry01 1 Cultural Resources Status Active
Subst. type 02 Shift substitution Daily work schedule Daily work schedule	
Daily work schedule	
Work schedule rule	
Work schedule rule Holiday Calendar ID	ES grouping

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

i 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

👼 Maintain Time Data	,						
🗋 🥒 🛍 🛱 🚵 🎛 List entry	💶 Wee	k 💷 Month 🔤 🛛	Year				
Personnel no. 80000450 Name Rita Henry01 EEGroup A SPA Employees EESubgroup B1 FT S-FLSAOT Perm	P(C(ersA 4601 Cultural R ostC 4699999999 C	lesources ULTURE RESOURC				
Working times Additional accou	int assignm	ents Time quotas	Time manag)				
Absences Attendances Time Events Overtime Substitutions On-Call	•	Period From Today All From curr.date To Current Date	To Curr.week Current month Last week				
Time Transfer Specifications Employee Remuneration Info Direct selection							
Infotype		STy					

17. Click the All O 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) 20. button.



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

Change Substitutions (2003)							
6 6 🕹	Personal work	schedule Activ	ity allocation C	ost assignment	External services	🐺	
Personnel No EE group	80000450 A SPA Employees	Name F Personnel ar 4	Aita Henry01 1601 Cult	ural Resources			
From	04/25/2011 To	05/01/2011 0	hg. 04/11/201	1 ZWFINOMPA04	2		
Subst. type	02 Shift substitutio	n					
Daily work sch	edule						
Daily work sch	edule						
Work schedule	e rule						
Work scheduk Holiday Calend	e rule E01N08G	MTWHF-8, SaS-O	ES grouping PS grouping	2	2		

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

👦 🖌 Mainta	ain Time Data				
0 / 0 0	🚨 🎹 List entry	🚾 Week	🚾 Month	😰 Year	
Personnel no. Name EEGroup A EESubgroup B1 Working times	80000450 Rita Henry01 SPA Employees FT S-FLSAOT Perm Additional accoun	PersA CostC	4601 Cult 46999999	ural Resources 99 CULTURE RESOURC	
Infotype text Absences Attendances Time Events Overtime Substitutions On-Call Time Transfer S Employee Remu	pecifications neration Info	S Pe	eriod Period From Today All From curr.dd To Current Current Period C	To Curr.week Current month ate Last week Date Last month iod Current Year hoose	
Direct selection Infotype	Substitutions		STy		

24. Click the All O 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.

List Substitutions (2003)													
Personnel No 80000450 Name Rita Henry01													
EE 🤉	group	A SPA Emplo	yees	P	ersonne	el a	ar 4601		Cultur	ral Reso	urces		
WS	rule	D02N10_F MT	WH-	10,FSa	aS-O			S	tatus	Acti	ive		
1	Choose	03/01/2011	7 То		5/31/2	0:	11 S	ту. [
Su	bstitutions												
	Start Date	End Date	S.,	From	То	Ρ	Hours	Brk	Start	End	Paid	Unp S	St 🛄
	04/26/2011	05/01/2011	02				0.00				0.00	0.00	*
	04/18/2011	04/23/2011	01				0.00				0.00	0.00	

- 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.

Delete Substitutions (2003)								
ه ه ک	Dersonal work	schedule A	tivity 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	Chg. 04/11/2011 ZWFINOMPA042					
Subst. type 01 Employee Substitution								
Work schedule	e rule							
Personnel nun	nber 8000041	0	Sarah Beckham01					

- 30. Click the **Delete (Shift+F2)** button.
- 31. Press ENTER.
- 32. The system task is complete.

Additional Resources

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

Change Record

Change Date: 5/15/20 – Changed by C. Ennis

Changes: Updated format, assigned reference number, and made accessible