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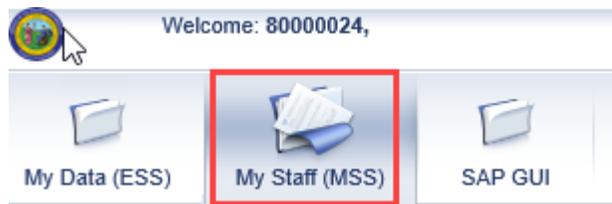
ℹ️ **Information**	The tabs on the main portal will vary by the user, depending on the roles and authorizations. Only managers will have the My Staff (MSS) tab.

❌ **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.
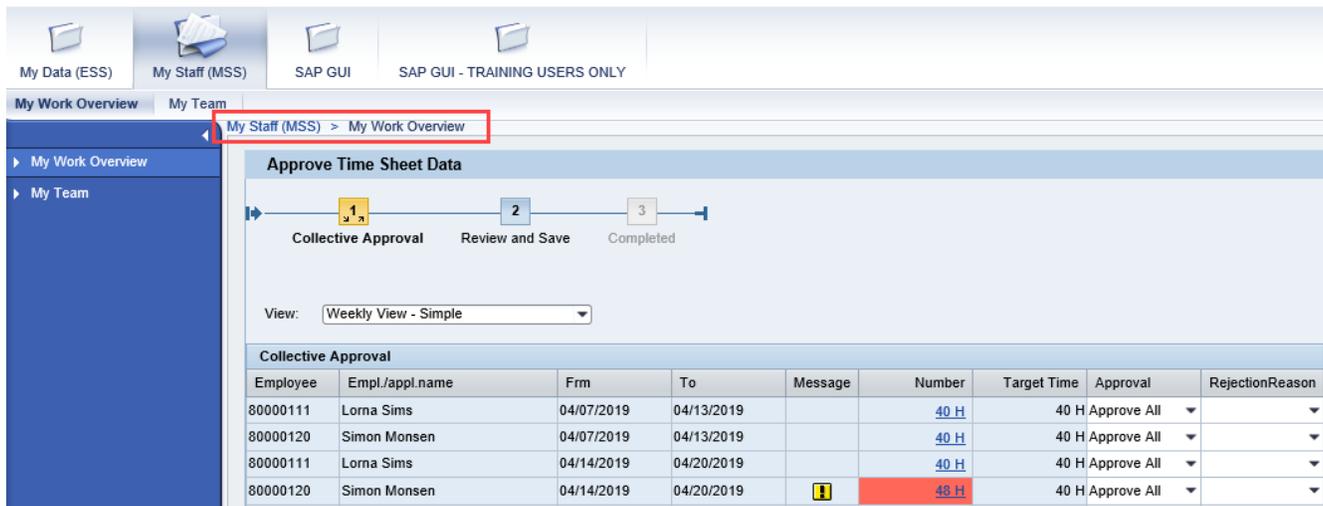
ℹ️ **Information**	MSS users are defaulted to the My Work Overview page.

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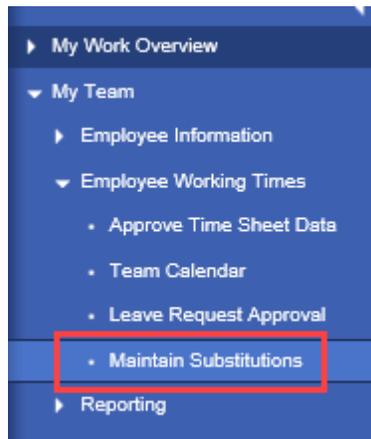
Note: The Maintain Substitution screen will default to display a tabular list of the manager's Direct Report employees. When an employee is selected from the list, the section to the right shows an overview of all their substitution records.

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
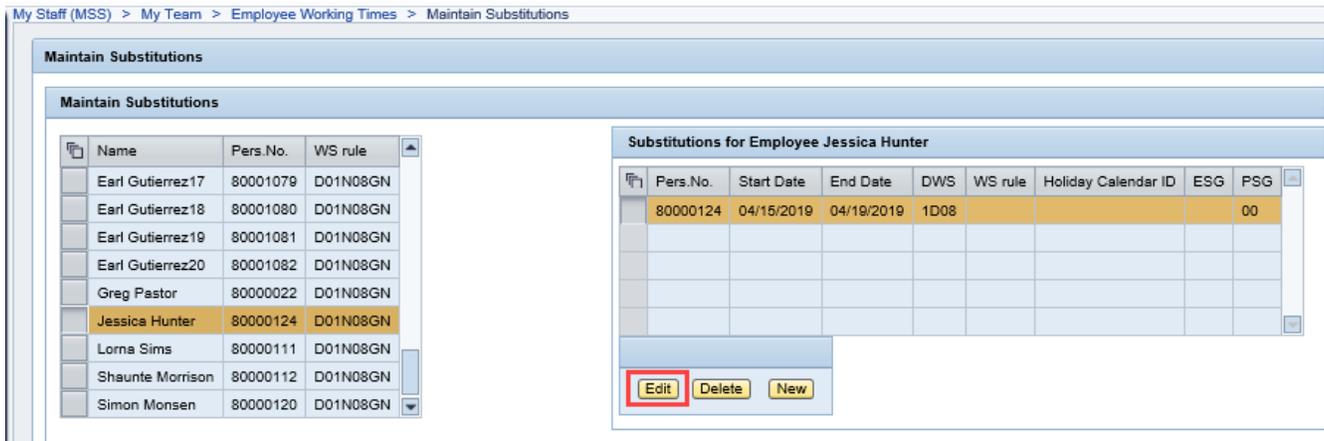
4. Maintain the applicable field(s) to change the record, then click Save Substitution Save Substitution .
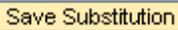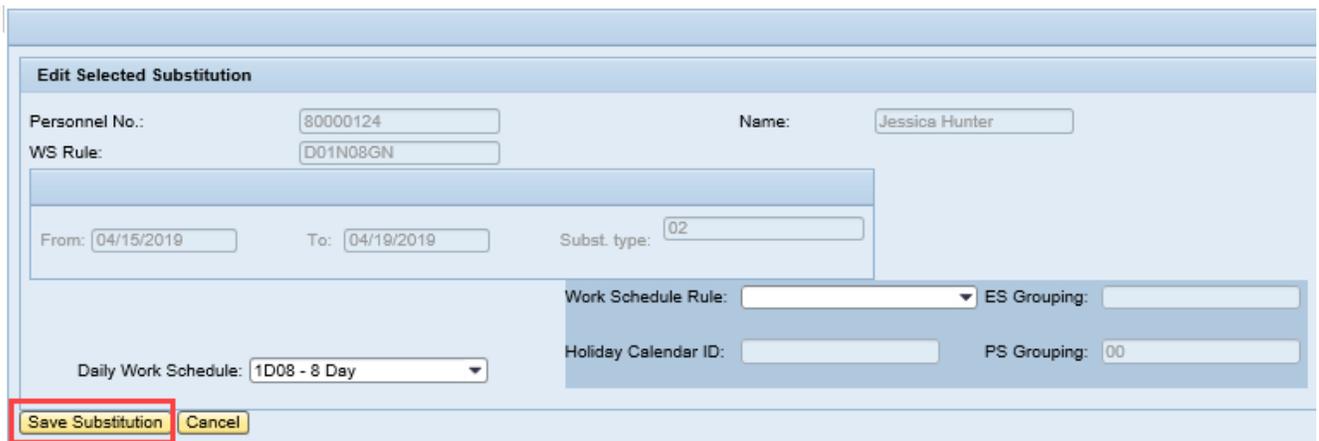
NOTE: You cannot change the dates on an existing record. To accommodate a date change, you must DELETE the record, and then create a NEW record.

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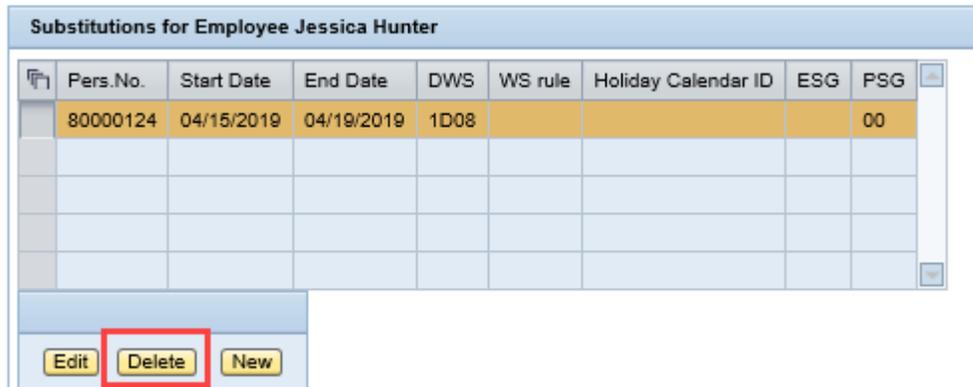
4. After clicking Delete, a Confirmation dialog box will display.
   - Click 'ok' to continue and delete the record, or
   - Click 'Cancel' to terminate the deletion process and keep the record.
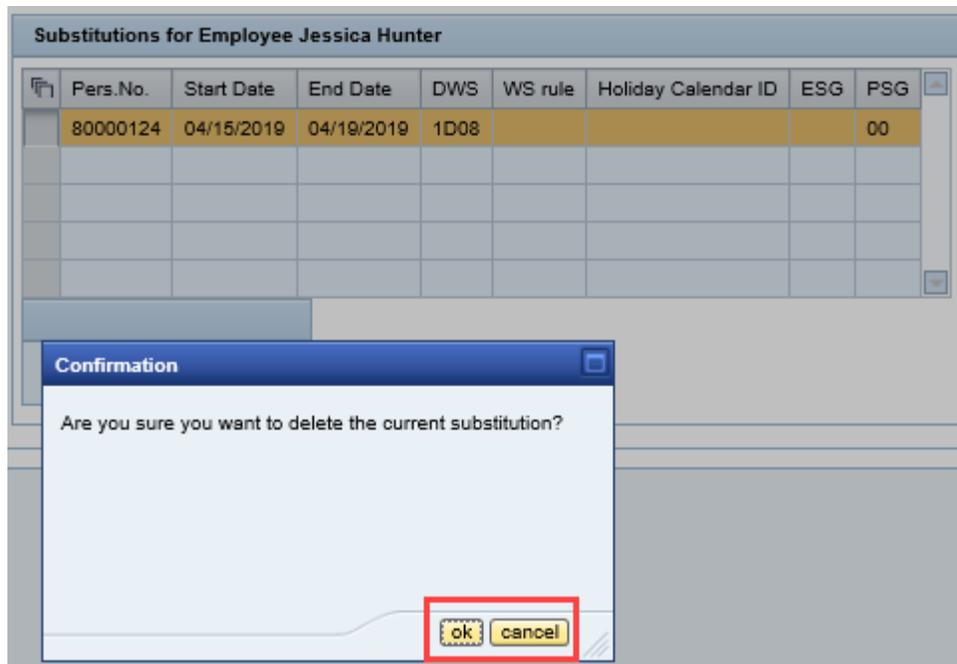
5. For the purpose of this exercise, click 'ok'.

6. The record is deleted and no longer displays in the overview listing.
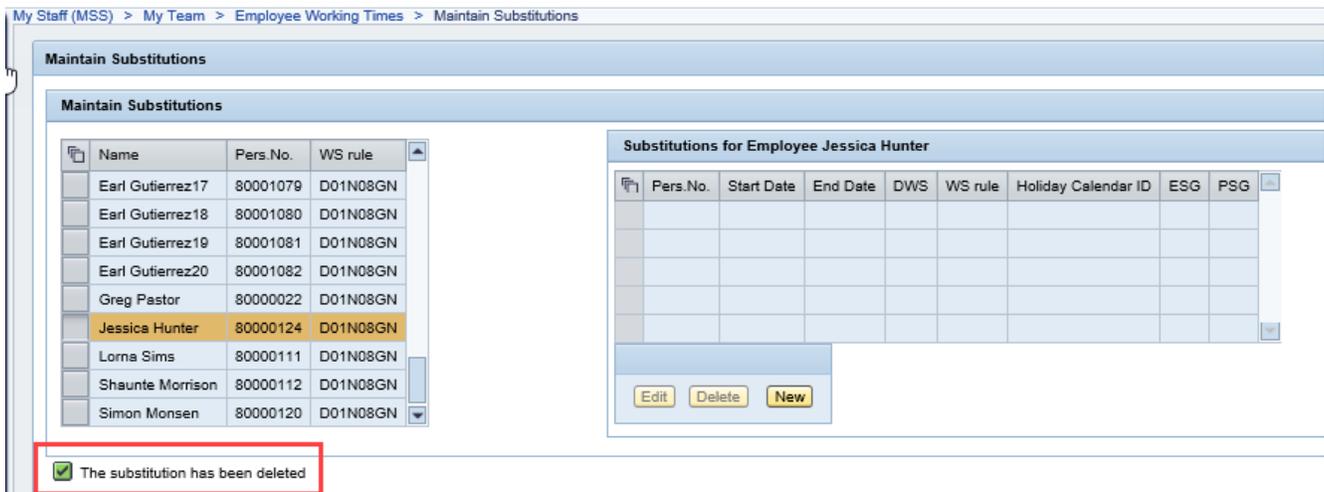
NOTE: Please be aware of the following when deleting records:

- 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.
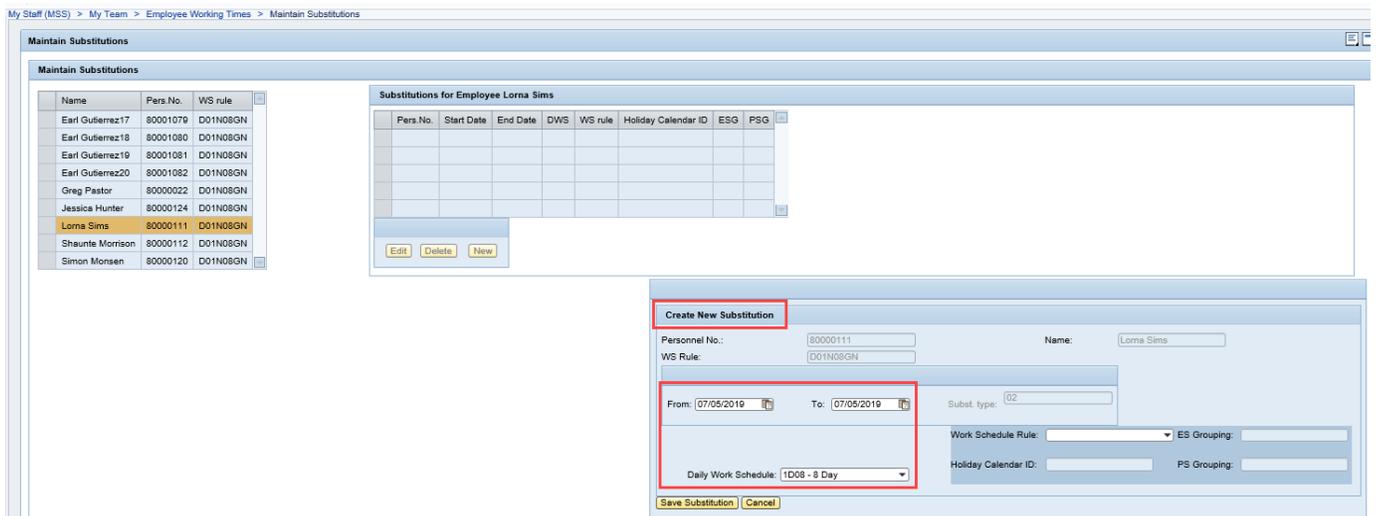
2. Enter the applicable field to create the substitution record, then click Save Substitution
   Save Substitution .
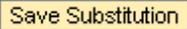
Field Name	Description
From	The start date for the substitution period.
To	The end date for the substitution period.
Daily Work Schedule (DWS)	The description of the duration and position of working time on a particular, unspecified workday. **Note:** The DWS should be used for a substitution for a single 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.