Employee Substitute - HRS3200

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Payroll > Maintenance > Leave Account Transaction > Employee Substitute

This tab is used to create:

- Employee leave transmittals and substitute pay (extra duty) transmittals.
    - If creating a substitute transmittal and the employee is split-funded, multiple budget codes are displayed from the employee's distribution record for the substitute. Distribute the substitute's pay according to the percentage shown on the employee's distribution, or manually change the codes to be expensed. The workers' compensation code associated with the employee populates the extra duty transmittal for the substitute. If no workers' compensation code is available for the employee and one is in the substitute's record, that workers' compensation code is used. If neither the employee nor the substitute has a workers' compensation code on his Job Info tab, the workers' compensation code is not populated. The **FICA Alternative** flag is selected automatically on the substitute extra duty transmittal if the substitute has a deduction code with a deduction type of D1 or D2 on the Maintenance > Staff Job/Pay Data > Deductions tab.
    - The **Leave Used** field indicates the days or hours that the employee is absent and is used to create the employee absence leave record. You cannot change the information here if it has been processed.
      Note: When entries are made to this tab for the employee and associated substitute, extra duty transmittals are created automatically for the substitute.
        - If changes are made to the extra duty transmittal amount for the substitute, and the pay date for the employee has not been processed, the amount changes the employee's leave transaction to reflect the change in the amount paid to the substitute.
        - If the substitute used for the employee on this tab needs to be changed or deleted and the employee's pay date has not been processed, change or delete the transaction, and it changes or deletes the substitute transaction on the Extra Duty tab.
        - If the employee's pay date has been processed and the substitute's extra duty transmittal needs to be changed, the system allows a change in the amount but does not allow the transaction to be deleted. A negative transaction for the substitute for the same amount and accounts must be added to offset the transaction.
        - If a transaction is added in the extra duty for the substitute instead of being created through the Employee Substitute tab, the Employee Substitute Report does not reflect the employee/substitute relationship, nor is the employee's pay reduced if docking by substitute amount is used.
- Employee leave transmittals without a substitute.

  You can create a leave transmittal for just the employee with no associated substitute transmittal by not selecting a substitute type or account distribution. Only a leave transmittal is created when saved.

- Substitute pay (extra duty) transmittals without an employee leave transmittal.

You can create a substitute pay (extra duty) transmittal for just the substitute with no associated employee leave transmittal by not selecting an employee number. Only a substitute pay (extra duty) transmittal is created when saved; however, the transmittal indicates that it was created through the Employee Substitute tab.

Maintain employee leave and substitute pay data:

Retrieve an existing record.	Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click **Retrieve**. Or, click **Directory** to perform a search in the Employees directory.

Field	Description
Pay Date	Click ⌄ to select the pay date for the employee. This pay date does not have to be the same as the substitute pay date. After the pay date is selected, if you click **Retrieve**, all leave transmittals for the employee are displayed, regardless of whether they are substitute transmittals or regular leave transmittals.

❑ Under **Default Substitute Account Code**, the **Employee** is selected by default, but you can select **Absence Reason**.

Employee	If selected, the substitute account code is populated based on the employee's distribution master record.
Absence Reason	If selected, the substitute account code is automatically generated based on the selected reason in the Absence Reason table.
Sub Frequency	Click ⌄ to select the substitute's payroll frequency (e.g., 6-Monthly CYR). This frequency is not required to be the same as the employee pay frequency.
Sub Pay Date	Click ⌄ to select the substitute's pay date. This pay date is not required to be the same as the employee pay date.
Sub Employee Nbr	Type the substitute's employee number, if known. As you type the data, a drop-down list of corresponding data is displayed. Select the substitute employee name you wish to select. The substitute's name is displayed in the **Sub Name** field, and all leave associated with the employee's pay date that has not been created with the selected substitute or any other substitute is displayed. If the substitute's employee number is not known, click **Directory**. The Employees dialog box is displayed. To search for a specific employee, type data in one or more of the search fields. Click **Search**. A list of data that matches the search criteria is displayed. Select an employee number item from the list. Otherwise, click **Cancel**.

❑ Under **Emp Leave and Sub Pay Detail**, the tab is populated with existing data that is retrieved. If no data is retrieved, click in the substitute section, and click **+Add**. A new row is added to the substitute section.

Sub Type	Click ⌄ to select the substitute type code and the corresponding time of day. The Sub Type field is required prior to saving to create a substitute extra duty transmittal. The system is set to 1.000 in the Leave Used field; the **Sub Units** and **Sub Pay Amt** fields are populated from the substitute table. You may override the **Leave Used**, **Sub Units**, and **Sub Pay Amt** fields by entering different amounts.

Sub Type	The **Sub Pay Amt** and **Units Per Day** fields are set to the values in the substitute table for the new substitute type.
Abs Date	Type the date of the employee absence in the MMDDYYYY format.
Absence Reason	Click ⌄ to select the code for the type of employee absence (e.g., Personal Illness).
Leave Used	Type the amount of used leave.
Sub Units	Type the number of hours per day that position is authorized to work. This is a required field. **Note**: Depending on how your LEA's tables are set up, you can either enter .5 to represent a half-day or 1.0 to represent a full day.
Sub Pay Amt	Type the pay rate allowed for this position.

❏ Under **Distributions for Substitutes**:

❏ Click **+Add**. A new row is added in the substitute distribution section, and the cursor moves to the **Substitute Account Code** field.

Substitute Account Code	A list of the employee’s account distribution codes from which the substitute is paid is displayed, or type another account code. As you type the account code, a drop-down list of corresponding account numbers is displayed. Select an account number.
Campus ID	Click ⌄ to select the campus code that the employee was absent from and where the substitute was assigned to work.
Dept	The department is automatically populated if the employee is assigned by department code.
Percentage	Type what percentage to be allocated to the substitute account code.
Pay Amt	Type the amount to be allocated to the substitute account code.
User ID	The name of the user who is logged on to the system and is entering the data on this tab is displayed.

❏ Click **Save** to save the substitute pay (extra duty) transmittals without an employee leave.

Duplicate employee leave transmittals and substitute pay (extra duty) transmittals:

Once an initial employee leave transmittal and a substitute pay transmittal has been created and saved, you can highlight a substitute transmittal row to duplicate the information for a different date.

❏ Click **Duplicate Row**. A calendar page is provided to allow you to select one or more days (for a specific month) for duplication. If the employee has a calendar code attached to his primary job, that school calendar is displayed. If a calendar code or an employee record is not attached to the leave record, a regular calendar is displayed.

Note: You can only select one or more days for one month at a time. To select one or more dates for a different month, complete the first month's leave transactions, and then complete the next month's leave transactions. For example, if you have leave transactions for September and October, first select the date(s) for September, click OK, and then repeat the duplicate row process for the October date(s).

❏ Click **Save** to save the duplicated information, which includes all appropriate extra duty and leave transmittals.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.
Documents	View or attach supporting documentation.


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