

Substitute Relationships Coding Guide

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WASHINGTON STATE
Office of Financial Management
State Human Resources & HRMS Data Stewards



Purpose

Use this guide to assist with coding and auditing substitute relationships for MyPortal Leave and My Modern Work Environment (MWE) approvers.

Substitutes are MyPortal Leave or MWE approvers who are assigned by another supervisor to approve leave and MWE requests on their behalf while they are out of the office.

Substitute relationships do not end automatically when supervisors change positions, so it is important that substitute relationships are audited regularly to ensure they are still appropriate.

HRMS Resources:

- [HRMS Support Hub](#)
- [Substitute Admin Transaction - Create New Substitute Relationship](#)
- [Substitute Admin Transaction – Delete Substitute Relationship](#)
- [Substitute Admin Transaction – Delimit Substitute Relationship](#)
- [MyPortal Substitution Report](#)

MyPortal Resources:

- [MyPortal – Manage my substitutes](#)
- [MyPortal – manage my planned substitutes](#)
- [MyPortal – manage my unplanned substitutes](#)
- [MyPortal –turn substitute for option on and off](#)

Note: Substitutes are especially important to agencies using MyPortal leave but are necessary for all agencies since the My Modern Work Environment (MWE) change request workflow is configured for all agencies.

Creating Substitute Relationships

All supervisors who are a Leave and/or Modern Work Environment (MWE) approver in MyPortal should assign one or more substitute approvers in the event they are unexpectedly out of the office.

- **Planned Substitutes** have a defined start and stop time for approving requests on behalf of another supervisor.
- **Unplanned Substitutes** do not have a defined start and stop time. It is strongly recommended that all MyPortal approvers have at least one unplanned substitute assigned.

When a supervisor creates a substitute relationship in MyPortal, they are limited to selecting their direct supervisor/manager or above in the organizational hierarchy. When supervisors are unable to create substitute relationships in MyPortal (such as the top manager in the organizational hierarchy), then Personnel Administration Processors or Payroll Processors should create any necessary substitutes on their behalf.

Ending Substitute Relationships

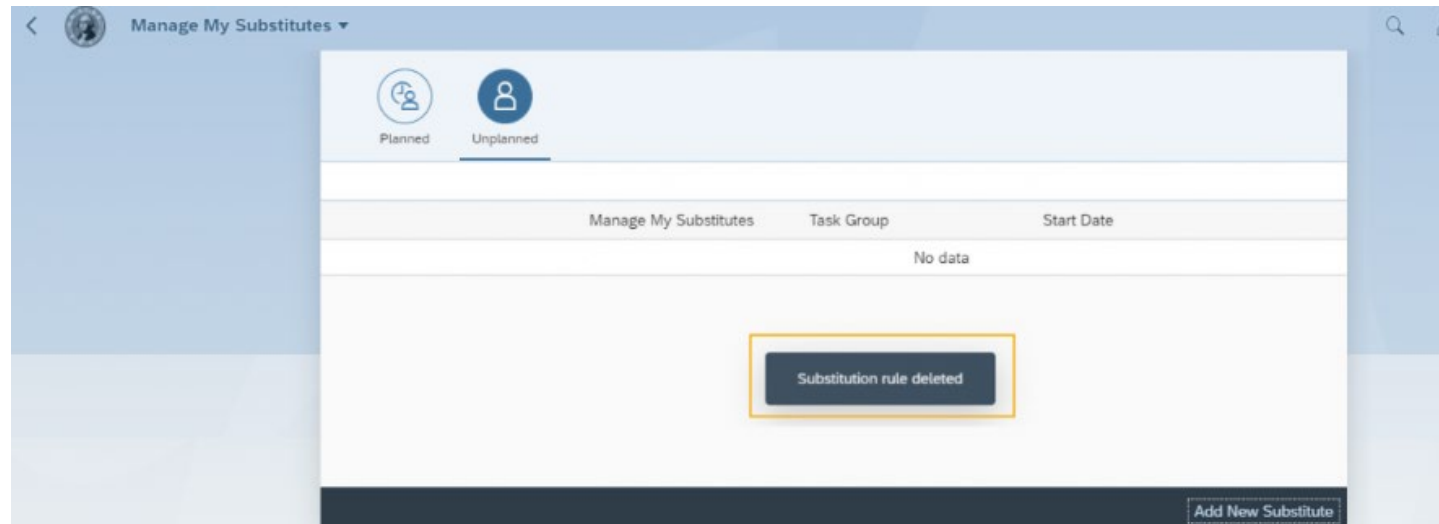
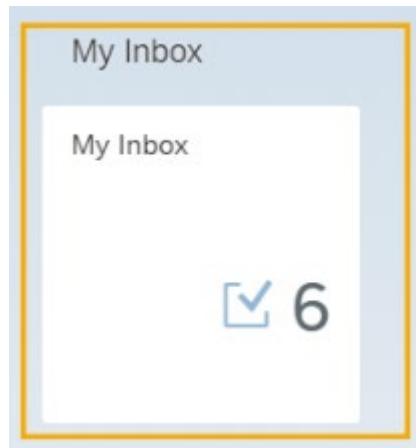
Once a substitute relationship is created, there are several scenarios where the relationship should be reviewed and possibly delimited or deleted:

- An assigned substitute changes positions, either within the agency or moves to a different agency.
- An assigned substitute separates from state service.
- A supervisor (MyPortal Leave/MWE approver) changes positions, either within the agency or moves to a different agency.
- A supervisor (MyPortal Leave/MWE approver) separates from state service.

While supervisors are responsible for creating and ending their substitute relationships as needed, agency processors can end relationships during certain personnel actions. A process should be established to audit substitute relationships each pay period. This will ensure prior substitutes do not have access to approve MyPortal leave or MWE requests after position changes or upon rehire.

Ending Substitute Relationships - Supervisors

Prior to a supervisor leaving their position, they should process all outstanding leave and Modern Work Environment (MWE) requests and end all substitute relationships.



Note: When a Leave/MWE approver position is vacated, the next supervisor in the chain of command of the organizational hierarchy will automatically have authority to approve leave and MWE requests and begin receiving the requests.

Ending Substitute Relationships - Actions

During Separation and Appointment Change actions, a popup box will appear if a MyPortal leave/MWE approver is vacating their position and has active substitute relationships. Personnel administration processors should review the substitution relationships and take appropriate action.

- **Delimit:** if the substitution relationship is dated prior to the action. Click the delimit button and delimit the relationship one day prior to the action date.
- **Delete:** if the substitution relationship is future dated. Click the Delete button and delete the future-dated relationship.
- **Cancel:** if the substitution relationship is still valid and should remain active upon the approver moving to a different position within the agency. Click the Cancel button to keep the relationship active.

The screenshot shows a web application titled "Personal Substitutes". It contains a table with the following data:

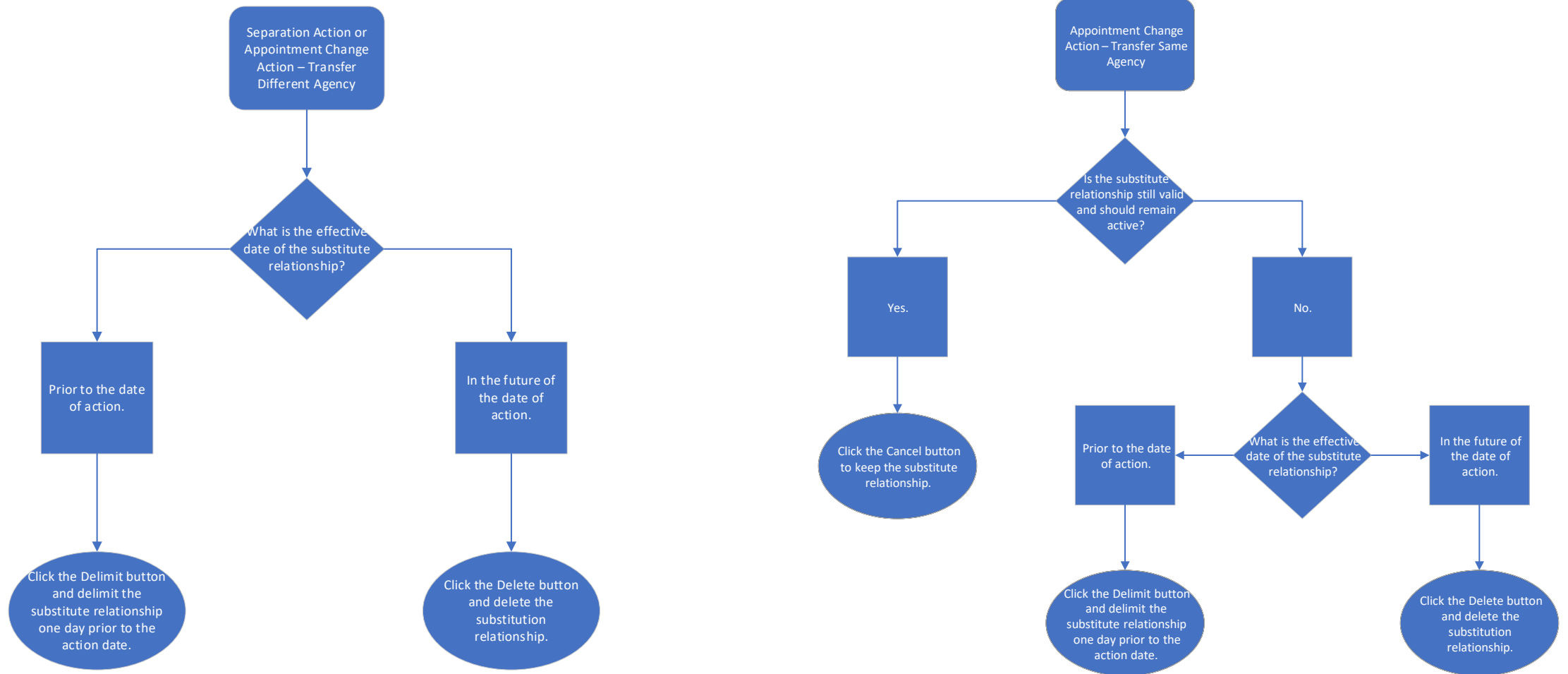
Name	Substitute Status (Acti...	Assigned as of	Assigned until
PAIGE TURNER			
HOPE FERSUN	Deactivated	07/15/2022	12/31/2072
ARAYA SUNSHINE	Deactivated	07/15/2022	12/31/2072

Annotations in the image point to specific UI elements:

- A box at the top right says "Sub should remain active: Cancel".
- A box at the bottom left says "Sub began prior: Delimit".
- A box at the bottom right says "Sub begins in the future: [Delete icon]".

The bottom of the interface shows a toolbar with icons for a checkmark, a person, a document, a trash can, and a magnifying glass, followed by the text "Substitutes for positions".

Ending Substitute Relationships - Actions



Auditing Substitute Relationships

It is likely that not all substitute relationships will be created and ended by Leave/MWE approvers when needed, so it is important that agency processors run the MyPortal Substitution Report (ZHR_ESS_SUBREPORT) each pay period to check for appropriate substitute relationships.

Check for the following:

- Substitutes with different Personnel Areas
- Withdrawn Leave/MWE approvers with active substitute relationships
- Withdrawn substitutes
- Leave/MWE approvers with no substitutes assigned

The screenshot shows the SAP MyPortal Substitution Report interface. At the top, there is a blue header bar with the SAP logo on the left and the text 'MyPortal Substitution Report' on the right. Below the header, there is a green checkmark icon and a dropdown menu. The main area is divided into three sections: 'Period', 'Selection', and 'Output Format'. The 'Period' section has a 'Key Date (As-of-Date)' field with a calendar icon. The 'Selection' section has a table with six rows: 'Business Area', 'Personnel Area', 'Pers Num (Leave Approver)', 'Emp Status (Leave Approver)', 'Pers Num (Substitute)', and 'Emp Status (Substitute)'. Each row has a text input field and a small square icon with a right-pointing arrow. The 'Output Format' section has a 'Layout Variant' field.

Note: The MyPortal Substitution Report has statewide layout variants with built in filters that may be helpful.

Auditing Substitute Relationships:

Substitutes with different personnel areas

Business Area	Business Area	Personnel Area	Personnel Area	Personnel Number	Name	Employment Status	Personnel Area	Personnel Number	Name	Employment Status	Start Date	End Date	Personnel Area	Personnel Number	Name	Employment Status	Active
Code	Area	Code	Area														
500	Commiss	500	Comm on	20	12 A	A 3-Active							1600	20	44 B	13-Active	A
1000	Office of tl	1000	Attorney G	20	48 S	al 3-Active							1030		39 J	13-Active	A
1000	Office of tl	1000	Attorney G	20	48 S	al 3-Active							1030	20	38 J	3-Active	A
1000	Office of tl	1000	Attorney G	20	48 S	al 3-Active							1030	20	58 C	13-Active	A
1030	Departme	1030	Departme		56 C	13-Active							4900	20	72 C	3-Active	A

Security Risk: A Substitute that has moved to another agency/personnel area can continue to view and approve Leave/MWE requests from a previous personnel area until they are removed.

Action Needed: Delimit or Delete all substitute relationships when the Leave/MWE approver and their assigned substitute(s) are no longer working in the same personnel area.

Auditing Substitute Relationships: Withdrawn Leave/MWE Approvers w/ Substitutes

Business Area Code	Business Area	Personnel Area Code	Personnel Area	Personnel Number (Leave Approver)	Personnel Name (Leave Approver)	Employment Status (Leave Approver)	Personnel Area (Planned Substituted)	Personnel Number (Planned Substituted)	Personnel Name (Planned Substituted)	Employment Status (Planned Substituted)	Start Date (Planned Substituted)	End Date (Planned Substituted)	Personnel Area (Unplanned Substituted)	Personnel Number (Unplanned Substituted)	Personnel Name (Unplanned Substituted)	Employment Status (Unplanned Substituted)	Active (Unplanned Substituted)
1000	Office of tl	1000	Attorney G	2 A		00-Withdrawn							1000	1 A		13-Active	
1000	Office of tl	1000	Attorney G	4 K		00-Withdrawn							1000	4 K		13-Active	
1000	Office of tl	1000	Attorney G	4 K		00-Withdrawn							1000	2	1 S	13-Active	
1000	Office of tl	1000	Attorney G 20	2 A		00-Withdrawn							1000	0 L		13-Active	
1000	Office of tl	1000	Attorney G 20	2 A		00-Withdrawn							1000	4 O		13-Active	
1000	Office of tl	1000	Attorney G 20	2 T		00-Withdrawn							1000	8 R		13-Active	X
1030	Departme	1030	Departme	5 L		00-Withdrawn							1030	2	8 A	13-Active	
1030	Departme	1030	Departme	5 L		00-Withdrawn							1030	2	8 M	13-Active	

Security Risk: If a separated supervisor is rehired, the substitute(s) will still be assigned and can view/approve Leave/MWE on behalf of the rehired employee.

Action Needed: Delimit or Delete all substitute relationships when a supervisor separates from state service.

Auditing Substitute Relationships: Withdrawn Substitutes

Business Area	Business Area	Personnel Area	Personnel Area	Personnel Number	Personnel Name	Employment Status	Personnel Area	Personnel Number	Personnel Name	Employment Status	Start Date	End Date	Personnel Area	Personnel Number	Personnel Name	Employment Status	Active
Code	Area	Code	Area		Approver	(Leave)	(Planned)	(Planned)	(Planned)	(Planned)	(Planned)	(Planned)	(Unplanned)	(Unplanned)	(Unplanned)	(Unplanned)	(Unplanned)
1000	Office of tl	1000	Attorney G	2	V	3-Active							1000			0-Withdr	X
1000	Office of tl	1000	Attorney G	9	V	3-Active							1000			0-Withdr	X
1000	Office of tl	1000	Attorney G	4	C	3-Active							1000			0-Withdr	X
1000	Office of tl	1000	Attorney G	6	C	3-Active							1000			0-Withdr	X
1030	Departme	1030	Departme	2	E	3-Active							1030			0-Withdrwn	
1240	Dept of Re	1240	Dept of Re	1	S	3-Active							1240			0-Withdrwn	
1260	State Inve	1260	State Inve	6	T	3-Active							1260	20		0-Withdr	X

Security Risk: If the withdrawn substitute is rehired, they will still be able to view/approve Leave/MWE requests on behalf of the original Leave/MWE approver.

Action Needed: Delimit or Delete all substitute relationships when a substitute separates from state service.

Auditing Substitute Relationships:

No substitutes assigned

Business Area	Business Area	Personnel Code	Personnel Code	Personnel Name	Personnel Name	Employment Status	Personnel Area	Personnel Number	Personnel Name	Employment Status	Start Date	End Date	Personnel Area	Personnel Number	Personnel Name	Employment Status	Active
Code	Area	Code	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area
1050	Office of F	1050	Office of F	3	F	F3-Active											
1050	Office of F	1050	Office of F	2	F	E3-Active											
1050	Office of F	1050	Office of F	2	F	C3-Active											
1050	Office of F	1050	Office of F	1	F	U3-Active											
1050	Office of F	1050	Office of F	1	F	F3-Active											
1050	Office of F	1050	Office of F	3	F	F3-Active											
1050	Office of F	1050	Office of F	3	F	T3-Active											
1050	Office of F	1050	Office of F	7	F	F3-Active											
1050	Office of F	1050	Office of F	1	F	F3-Active											
1050	Office of F	1050	Office of F	7	F	F3-Active											
1050	Office of F	1050	Office of F	7	F	E3-Active											
1050	Office of F	1050	Office of F	7	F	F3-Active											
1050	Office of F	1050	Office of F	5	F	F3-Active											

Security Risk: None. However, it is recommended that all Leave/MWE approvers have an assigned Unplanned Substitute in the event they are out of the office unexpectedly.

Action Needed: Assign one or more unplanned substitutes for each Leave/MWE approver.