

# Manager Self Service Delegation

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2

4

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## OVERVIEW

Approvers can delegate the approval of time, overtime requests, and absence approval requests to a delegate (also known as a proxy). Supervisors can set up the delegation, but the proxy must approve the request prior to getting transactions routed to them.

The delegation must be done in advance of the days the proxy must act on your behalf. Delegations are not meant to circumvent the hierarchy in the organization. Please do not delegate down your organization to avoid situations where the proxy will have approvals route to themselves.

Note: Please review the state’s [Standard Operating Policies and Procedures](#) for further guidance on Supervisor responsibilities.

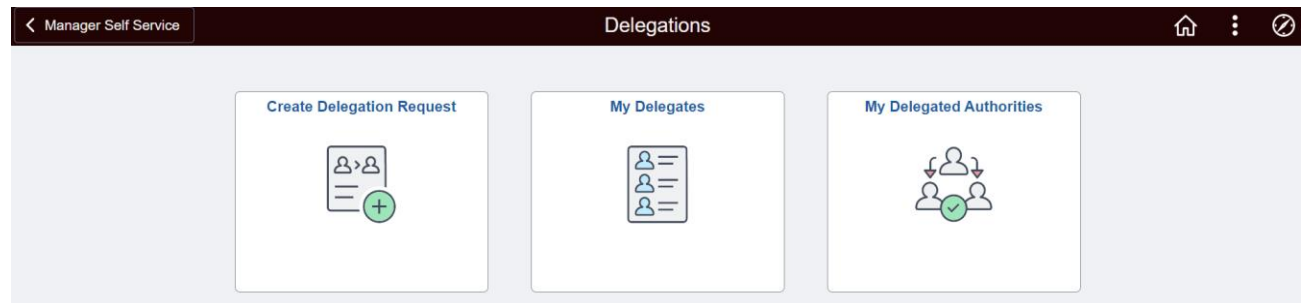
Please do not proactively delegate approvals if you are resigning or retiring as once you are deactivated in HIP, revocation of delegations you establish will require administrative help. It is recommended to discuss any need for delegation with your supervisor before your departure. Note that if you do not delegate your approvals, approvals will automatically route up chain to the person you report to after your HIP status is updated.



## DELEGATIONS TILE NAVIGATION

Upon clicking the **Delegations** tile, three tiles will appear in a supervisor's directory:

- **Create Delegation Request** – Menu to request a new delegation.
- **My Delegates** – Displays all created delegation requests that you have delegated to others.
- **My Delegated Authorities** – Displays all delegators who have designated you as the delegate.

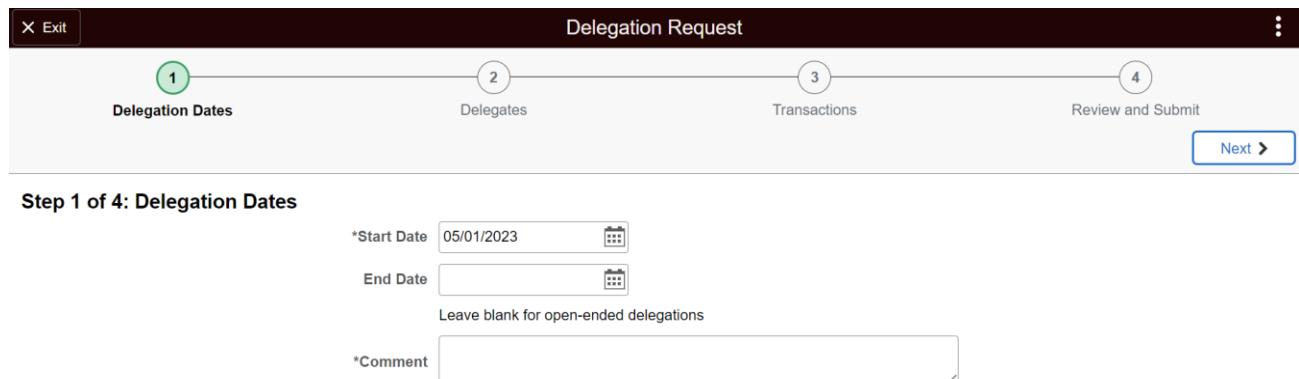


## CREATE DELEGATION REQUEST

Clicking on the tile will walk the user through a step-by-step process to add a new request.

Step 1: Request the dates for delegation.

**Note:** Only the Start Date is required. If you wish to have the delegation duration to be “indefinite”, leave the End Date blank.



**Step 1 of 4: Delegation Dates**

\*Start Date

End Date

Leave blank for open-ended delegations

\*Comment

Step 2: Select your delegate – A list will auto-populate based on your department ID. You can also now select more than one person to delegate transactions and approvals to.

If you need to add a person who is not on the list, click on **Add Delegate**.

✕ Exit
⋮
Delegation Request

1  
Delegation Dates

2  
**Delegates**

3  
Transactions

4  
Review and Submit

← Previous
Next →

**Step 2 of 4: Delegates**

If needed, click on Add Delegate to manually add a delegate that is not on the list.

Select All
Clear All
Add Delegate

18 rows

	Name	Email ID	Phone
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

**Note:** Please ensure that when manually adding a delegate that the person is within your organizational structure. If you are unsure, please consult with your supervisor or your HR office.

Step 3: Transactions – Select all transactions (whether to approve or initiate) that the delegate will be responsible for in your absence. Quick guide for more info on transactions:

<https://ags.hawaii.gov/hip/files/2020/09/Delegation-Guide.pdf>

Click on **Select All** if delegating all transactions.

✕ Exit
⋮
Delegation Request

1  
Delegation Dates

2  
Delegates

3  
**Transactions**

4  
Review and Submit

← Previous
Next →

**Step 3 of 4: Transactions**

All
Approve
Initiate

20 rows

Select All
Clear All

	Description
<input checked="" type="checkbox"/>	Employee Absence Balance
<input checked="" type="checkbox"/>	Employee Absence Balance Fluid
<input checked="" type="checkbox"/>	Employee Absence Cancel Fluid
<input checked="" type="checkbox"/>	Employee Absence History

Step 4: Review and Submit – Review the selections and types of delegations to ensure that they are correct, then submit the delegation request. An email notification from HIP will be sent to the designated delegate (“proxy”) to review the request.

✕ Exit
Delegation Request

1 Delegation Dates    2 Delegates    3 Transactions    4 Review and Submit

← Previous
Submit

### Step 4 of 4: Review and Submit

**Delegation Details**

Start Date	05/01/2023
End Date	05/31/2023
Comment	Test Delegation.
Delegates	<div style="background-color: #ccc; height: 15px; width: 100%;"></div>
Transactions	<div>Employee Absence Balance</div> <div>Employee Absence Balance Fluid</div> <div>Employee Absence Cancel Fluid</div> <div>Employee Absence History</div> <div>Employee Absence History Fluid</div>

A supervisor can also create a delegation request from their **Approvals** tile (while on the Pending Approvals screen) if they so choose, following the same process outlined earlier.

← Manager Self Service
Pending Approvals

View By Type

🌐 All 32

📅 Absence Request 7

👤 Delegation of Authority 1

🕒 Payable Time 24

All	
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Payable Time	Quantity for Approval 0 Hours
Absence Request	02 - Vacation, 48 Hours - ELIGIBLE

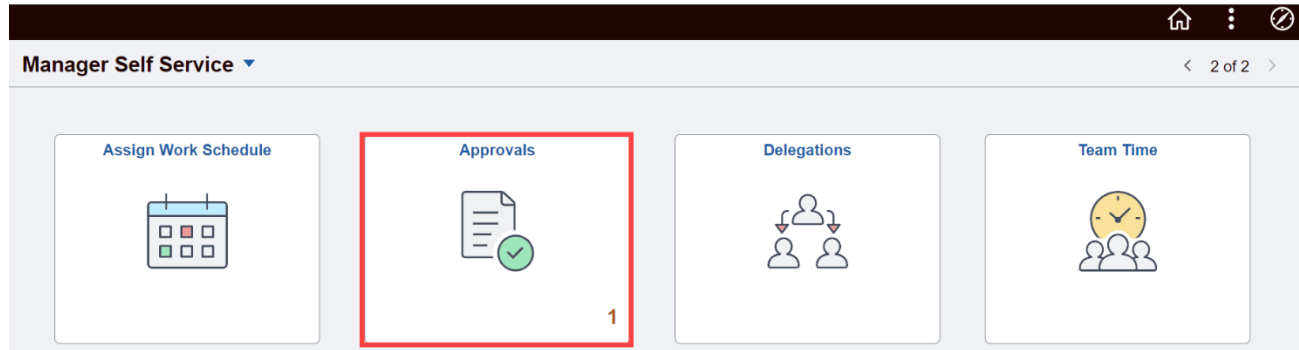
- Pending Approvals
- Review Approvals
- Approvals History
- Administer Approvals
- Create Delegation Request
- New Window
- Add to Homepage
- Add to NavBar
- Add to Favorites
- My Preferences

### REVIEWING AND APPROVING DELEGATION REQUESTS

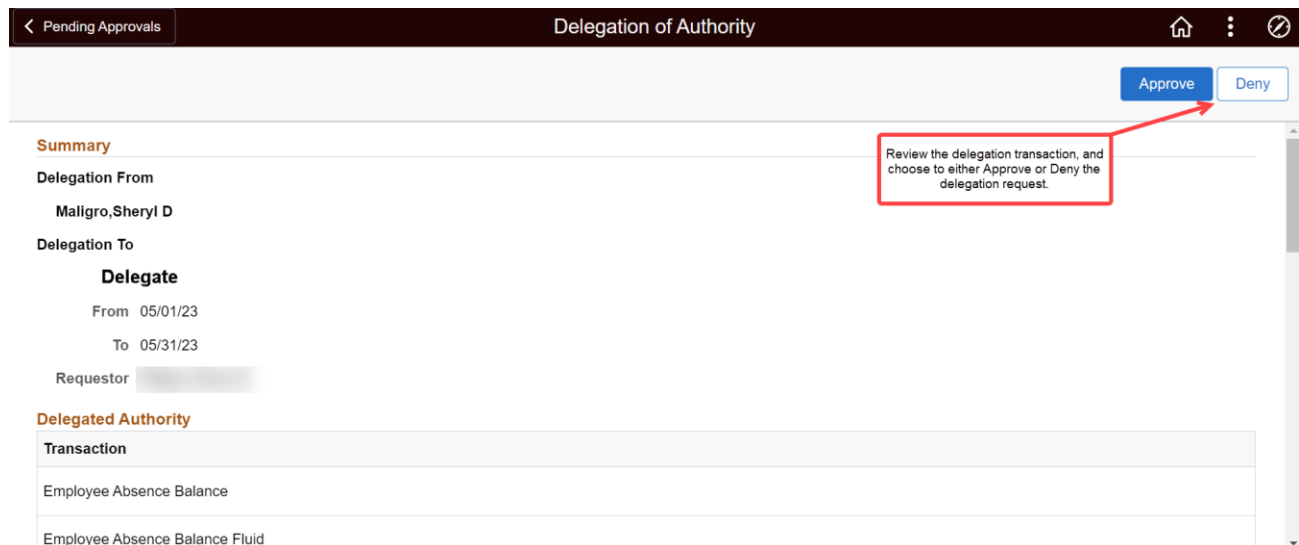
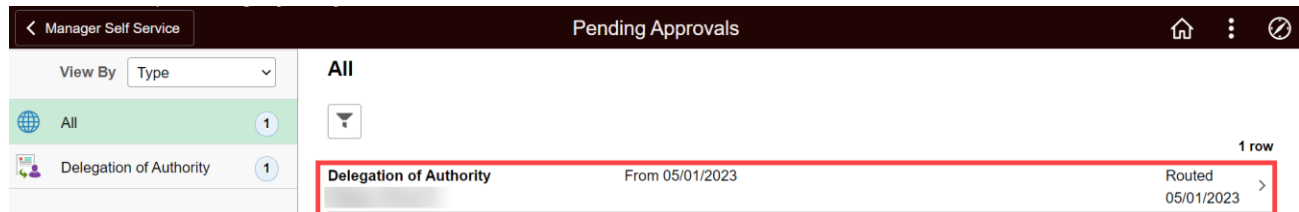
Once the supervisor sets up the delegation request, the proxy must approve the request prior to receiving delegated transactions. There are two ways that the proxy can review and approve the delegation request.

- 1.) The proxy can navigate to their **Approvals** tile and view the delegation requests on their Pending Approvals page.
- 2.) The proxy can also navigate to the **Delegations > My Delegated Authorities** tile to review and approve any new delegation request.

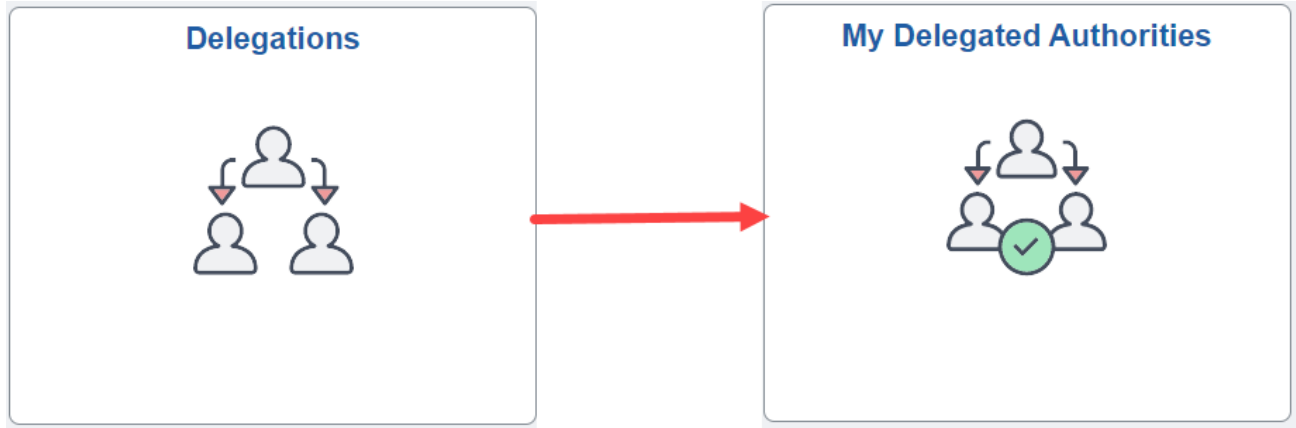
1. Click on the Approvals tile to review the delegation request



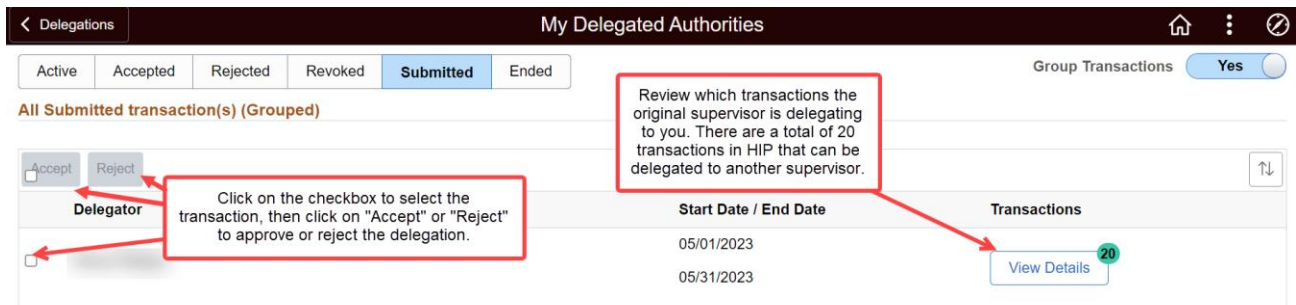
Click on the **Delegation of Authority** pending transaction to review.



Alternatively, navigate through the **Delegations > My Delegated Authorities** menu to review and accept/reject the delegation request.



The pending delegation request will appear under the **Submitted** section.



## MY DELEGATES

The **My Delegates** section allows a supervisor to view their created delegation requests separated by status:

- **Active:** Current delegations that have been accepted and have not yet ended.
- **Accepted:** Delegations that have been accepted.
- **Rejected:** Delegation requests that have been rejected by the designated delegate.
- **Revoked:** Delegations that have been revoked prior to their end date.
- **Submitted:** Delegation requests that have been created and are pending review by the delegate.
- **Ended:** Delegations that have ended due to the expiration from their end date.

It will list the delegate who has the transactions delegated to.

Delegations

My Delegates

Home
Notifications
More
Help

Active
Accepted
Rejected
Revoked
Submitted
Ended

Group Transactions Yes

All Active transaction(s) (Grouped)

Revoke

Delegates

Start Date / End Date

Transactions

Status

☐

03/27/2023

04/30/2023

View Details

20

Accepted

## REVOKING AN ACTIVE DELEGATION

To revoke an active delegation, navigate to the **My Delegates** page, search the active delegations, select the checkbox on the delegation, then click **Revoke**.

Delegations

My Delegates

Home
Notifications
More
Help

Active
Accepted
Rejected
Revoked
Submitted
Ended

Group Transactions Yes

All Active transaction(s) (Grouped)

Revoke

Delegates

Start Date / End Date

Transactions

Status

☐

03/27/2023

04/30/2023

View Details

20

Accepted

Once revoked, the proxy will no longer receive delegated approval requests.

## MY DELEGATED AUTHORITIES

**My Delegated Authorities** will display all delegations have been directed towards the supervisor. They are listed using the same statuses as **My Delegates**:

- **Active:** Current delegations that have been accepted and have not yet ended.
- **Accepted:** Delegations that have been accepted.
- **Rejected:** Delegation requests that have been rejected by the designated delegate.
- **Revoked:** Delegations that have been revoked prior to their end date.
- **Submitted:** Delegation requests that have been created and are pending review by the delegate.
- **Ended:** Delegations that have ended due to the expiration from their end date.

This page lists the delegator who has delegated their approval/initiate transactions:

Delegations

My Delegated Authorities

Home

Notifications

Menu

Logout

Active

Accepted

Rejected

Revoked

Submitted

Ended

Group Transactions

Yes

All Active transaction(s) (Grouped)

Accept

Reject

20

View Details