

Manager Self Service Delegation

CONTENTS

- Change Log1
- Overview1
- Possible Reasons to Delegate Approvals2
 - Situations Where Delegations Are Not Necessary2
 - Employees who are Temporarily Assigned (aka “TA”) to a Vacant Supervisory Position3
- Delegations Tile Navigation.....4
- Create Delegation Request5
 - Reviewing and Approving Delegation Requests.....8
- My Delegates10
- Revoking An Active Delegation11
- My Delegated Authorities11
- Possible Issues Related to Delegation Downward12
 - Self-Approval Transactions.....12
 - Delegating to Employees Without Manager Self Service Access13

CHANGE LOG

Description of Change	Date
Initial Iteration	May 3, 2023
Removed “Add Delegate” in step 2 of Create Delegation Request. Added “Possible Reasons to Delegate Approvals” section. Added “Possible Issues Related to Delegation Downward” section.	April 22, 2024
Added image of updated text box when approving delegation from My Delegated Authorities page (to address delegations downward and self-approvals).	June 28, 2024

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 in HIP 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 approvals will automatically route up chain to the person you report to after your HIP status is updated.



POSSIBLE REASONS TO DELEGATE APPROVALS

The following are general examples of when delegation of approvals should be done:

1. The supervisor will be on foreseeable leave (e.g. Sick or Vacation leave) for a period of at least two days or more.
2. The supervisor will be on a short-term Leave Without Pay (e.g. entered via Employee Self Service, Manager Self Service, or by a Leave Keeper) for a period of at least two days or more.
3. The supervisor will be on leave (paid or unpaid) during the **Timesheet Submission Deadline** or **Supervisor Approval Deadline** days (normally about a week prior to the end of the pay period). To view the days referenced in this point, please view the current year's payroll calendar here: <https://ags.hawaii.gov/hip/main/payroll-calendars/>.

SITUATIONS WHERE DELEGATIONS ARE NOT NECESSARY

The following are situations where delegations are not necessary because HIP will automatically change the approval workflow based on the data entered in HIP:

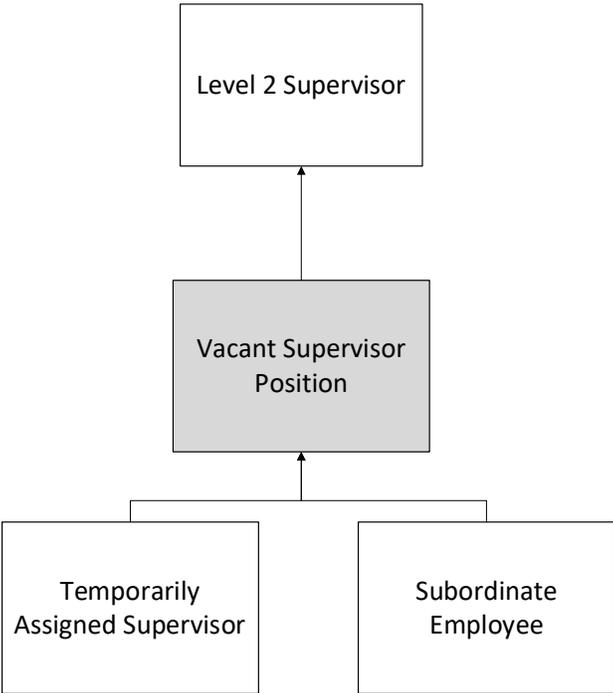
1. The supervisor is terminated (e.g. via resignation, discharge, retirement, etc.).
2. The supervisor is transferred to a different position.
3. The supervisor is placed on a Leave of Absence (LOA) or Paid Leave of Absence (PLOA) status by HR.
4. Department HR manually overrides the employee's reports-to supervisor on Job Data.

EMPLOYEES WHO ARE TEMPORARILY ASSIGNED (AKA “TA”) TO A VACANT SUPERVISORY POSITION

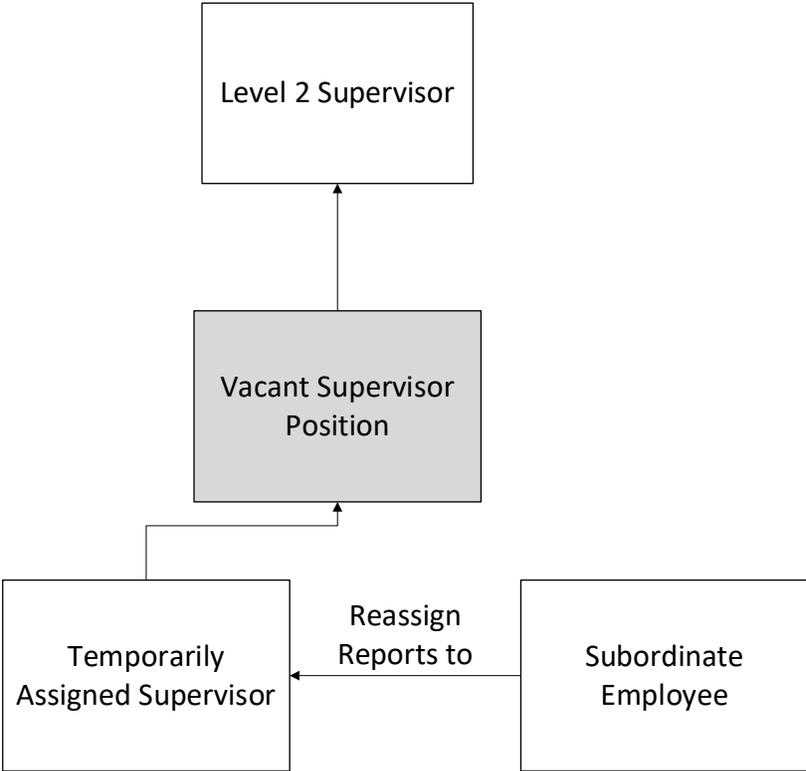
Employees who are temporarily assigned (also known as “TA”) to a vacant supervisory position may require the need to approve their temporary subordinates’ time and/or leave requests.

For employees who are TA in a vacant supervisory position, HIP approvals may require a secondary procedure with the assistance of a Timekeeper and/or Leave Keeper. Time/Leave approvals are based on the employee’s hierarchy, and since TA employees are not reassigned in the vacant position, HIP approvals will “bypass” the vacant position up the organization to the next supervisor.

Below is an example of what happens to approvals with a vacant position:



Since both the TA supervisor and the subordinate employee still report to the vacated position, approvals will route up to the next supervisor in the hierarchy. To address this, department HR may manually change the subordinate employees to report to the temporarily assigned supervisor. By changing the reports-to supervisor, the subordinate employees will have their time/leave requests routed to the TA supervisor until the position is filled.



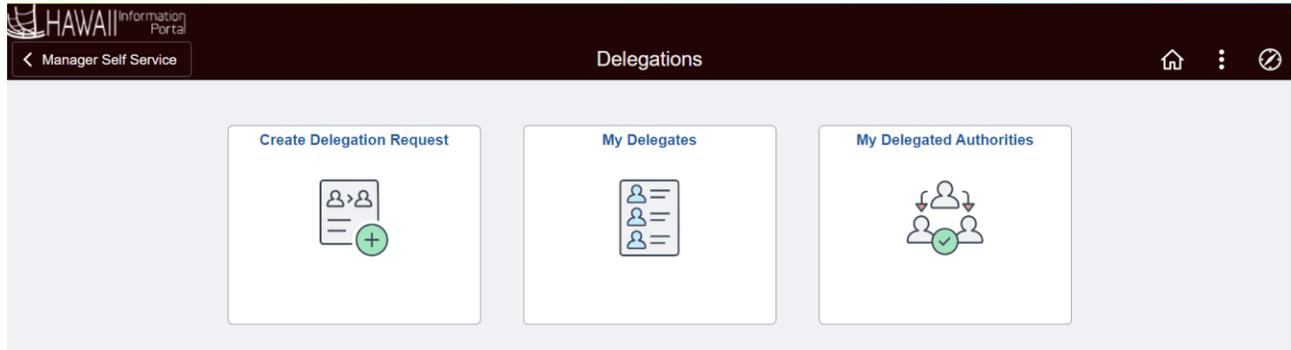
Therefore, it is recommended that TA supervisors keep records of their temporary subordinate employee’s time and leave requests and approve according to their own departmental standards and have their Timekeeper/Leave Keeper assist with the entry and approval if necessary.

Please note that the “Level 2” supervisor (the supervisor above the vacant position) will not be able to split approvals for only a certain group of employees (for those that may supervise different units of employees). The level 2 supervisor must review and approve all employees that end up reporting to them due to vacancy.

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.



Note: A 4th tile may be visible if the supervisor also has the HR Administrator role (for Time & Leave purposes). For more information on the functionality of that tile, please refer to the guide on how to administer delegations on behalf of supervisors here: <https://ags.hawaii.gov/hip/files/2023/10/HR-Admins-Administer-Delegations.pdf>

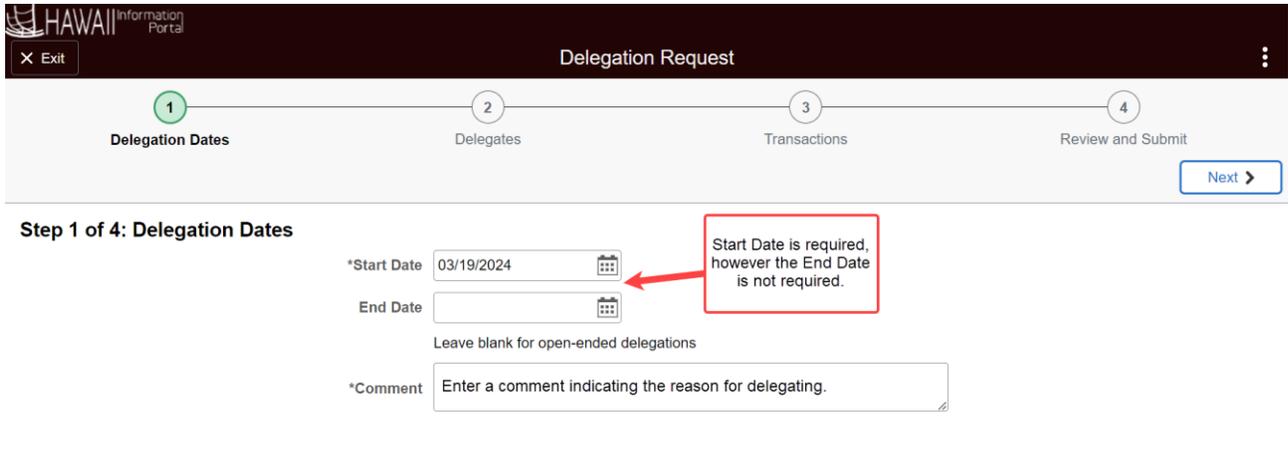


CREATE DELEGATION REQUEST

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 and enter a comment indicating the need to delegate.

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

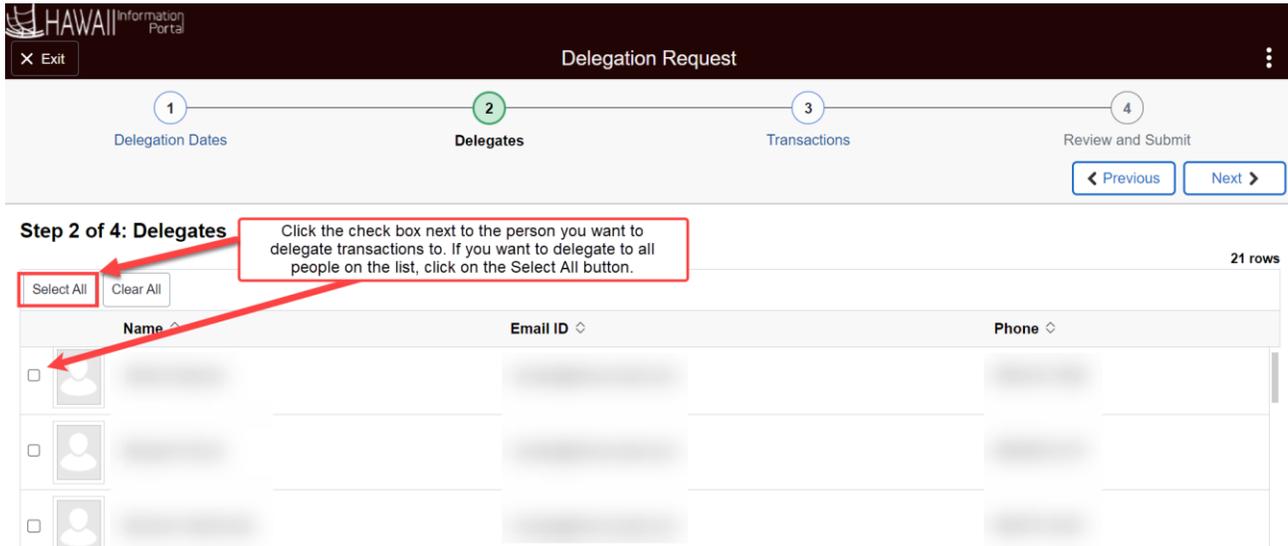
*Start Date 

End Date 

Leave blank for open-ended delegations

*Comment

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



Step 2 of 4: Delegates

Select All

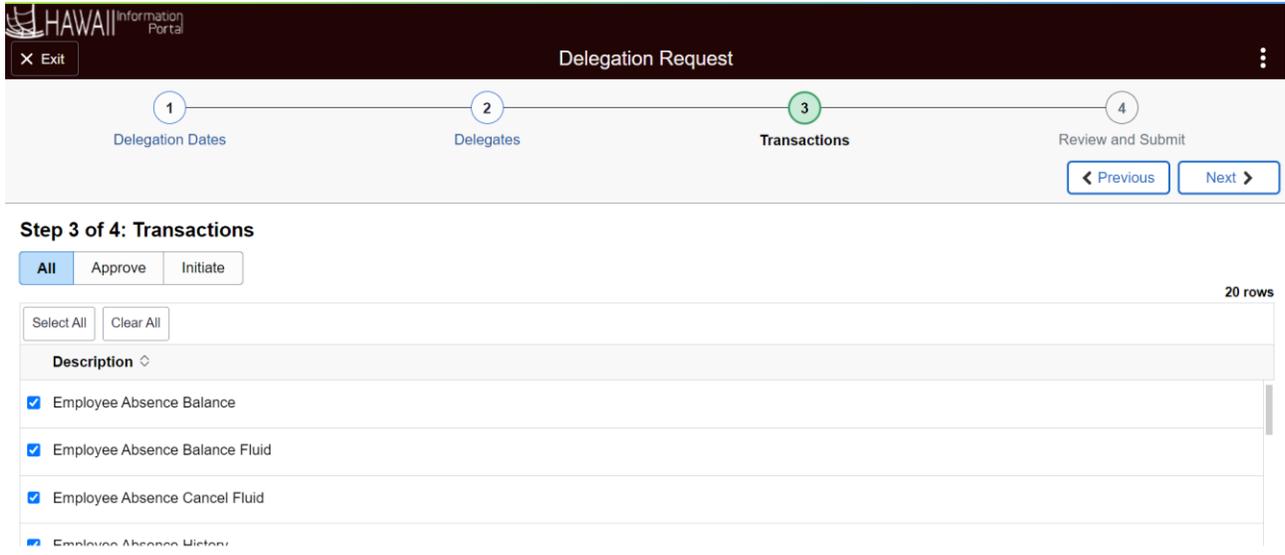
	Name	Email ID	Phone
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

21 rows

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:

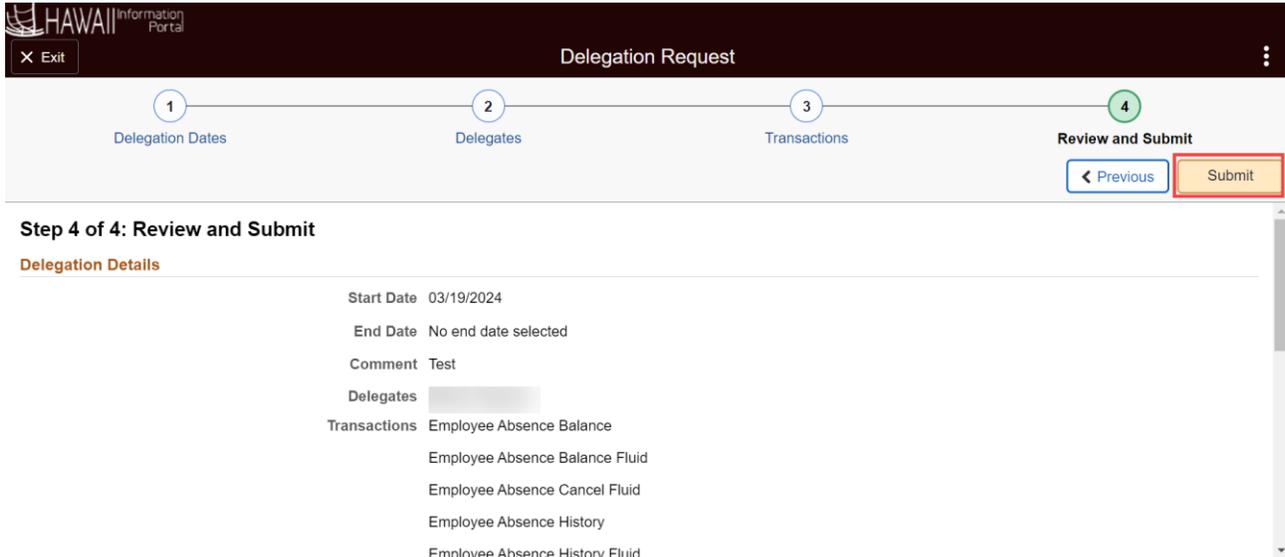
<https://ags.hawaii.gov/hip/files/2020/09/Delegation-Guide.pdf>

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



The screenshot shows the 'Delegation Request' interface with four steps: 1. Delegation Dates, 2. Delegates, 3. Transactions, and 4. Review and Submit. Step 3 is active. Below the progress bar, there are buttons for 'All', 'Approve', and 'Initiate'. A table lists transactions with checkboxes, including 'Employee Absence Balance', 'Employee Absence Balance Fluid', 'Employee Absence Cancel Fluid', and 'Employee Absence History'. The table indicates 20 rows.

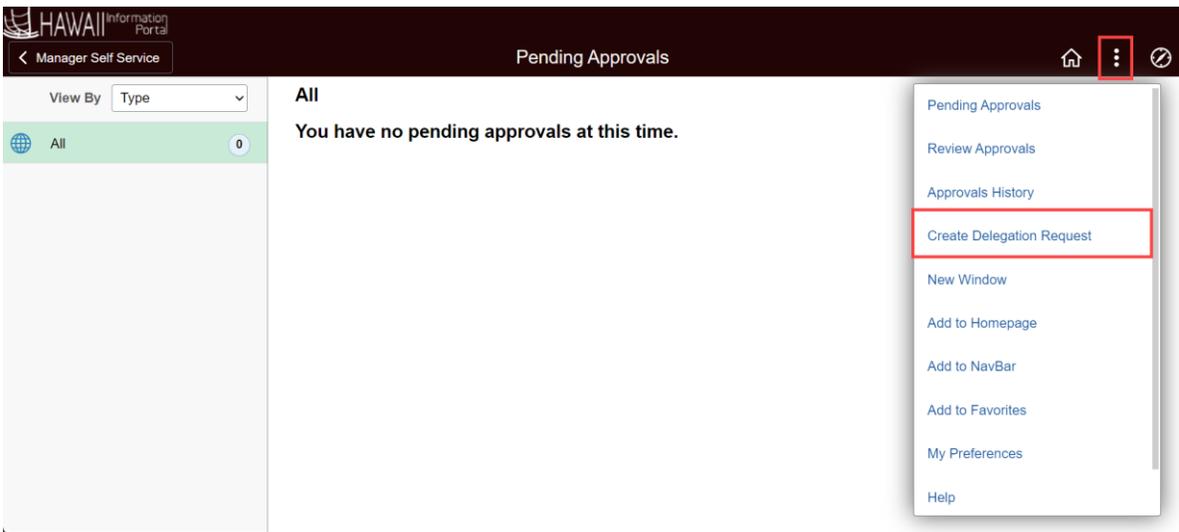
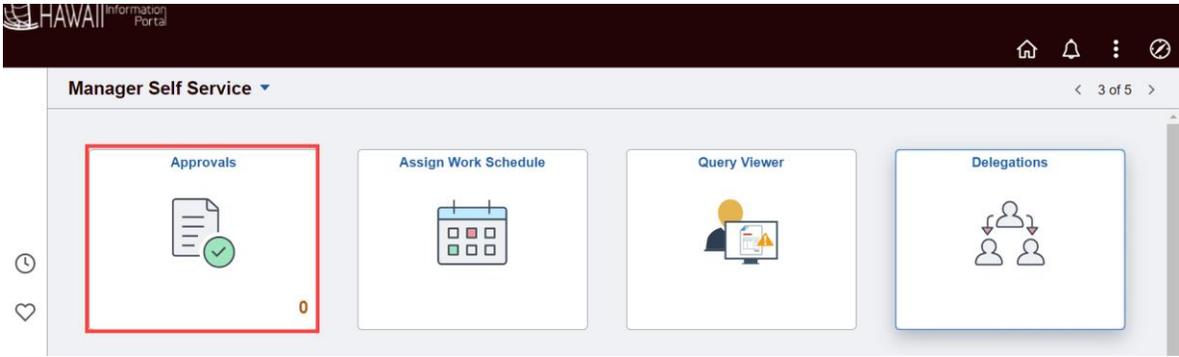
Step 4: Review and Submit – Review the selections and types of delegations to ensure that they are correct, then submit the delegation request. An email notification from HIP will be sent to the designated delegate (“proxy”) to review the request.



The screenshot shows the 'Delegation Request' interface with Step 4, 'Review and Submit', active. The 'Submit' button is highlighted with a red border. Below the progress bar, there is a 'Delegation Details' section with the following information:

- Start Date: 03/19/2024
- End Date: No end date selected
- Comment: Test
- Delegates: [Redacted]
- Transactions: Employee Absence Balance, Employee Absence Balance Fluid, Employee Absence Cancel Fluid, Employee Absence History, Employee Absence History Fluid

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

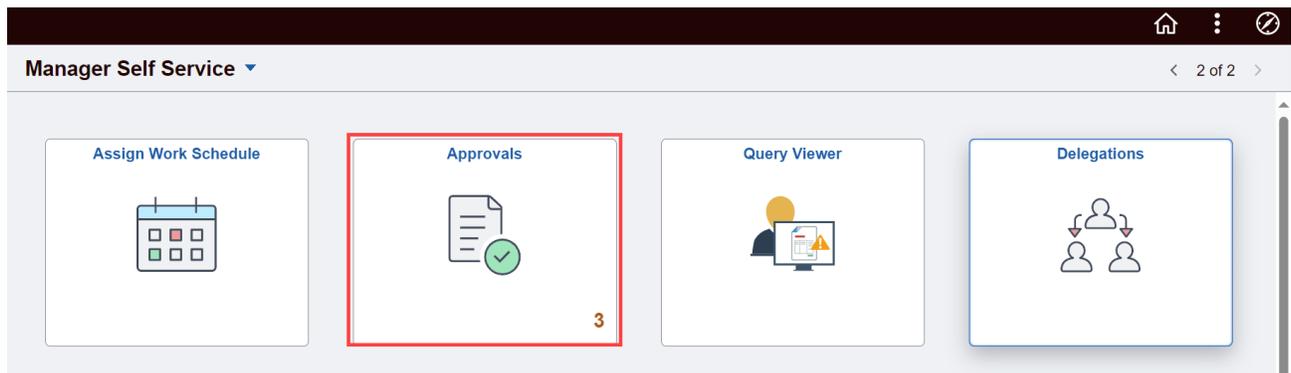


REVIEWING AND APPROVING DELEGATION REQUESTS

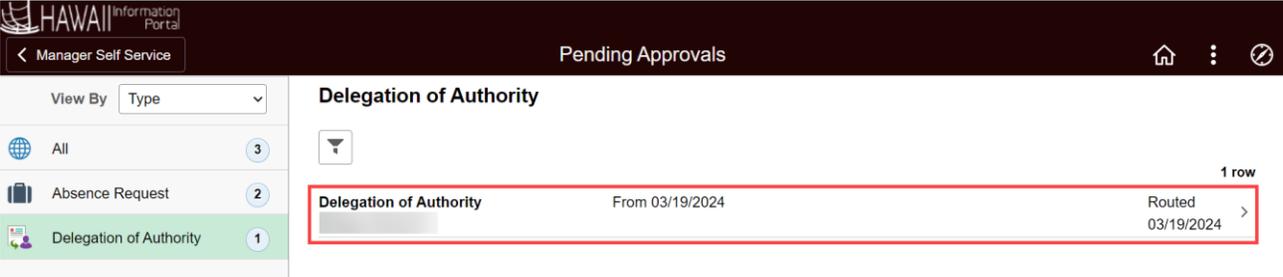
Once the supervisor sets up the delegation request, the proxy must approve the request prior to receiving delegated transactions. There are two ways that the proxy can review and approve the delegation request.

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.

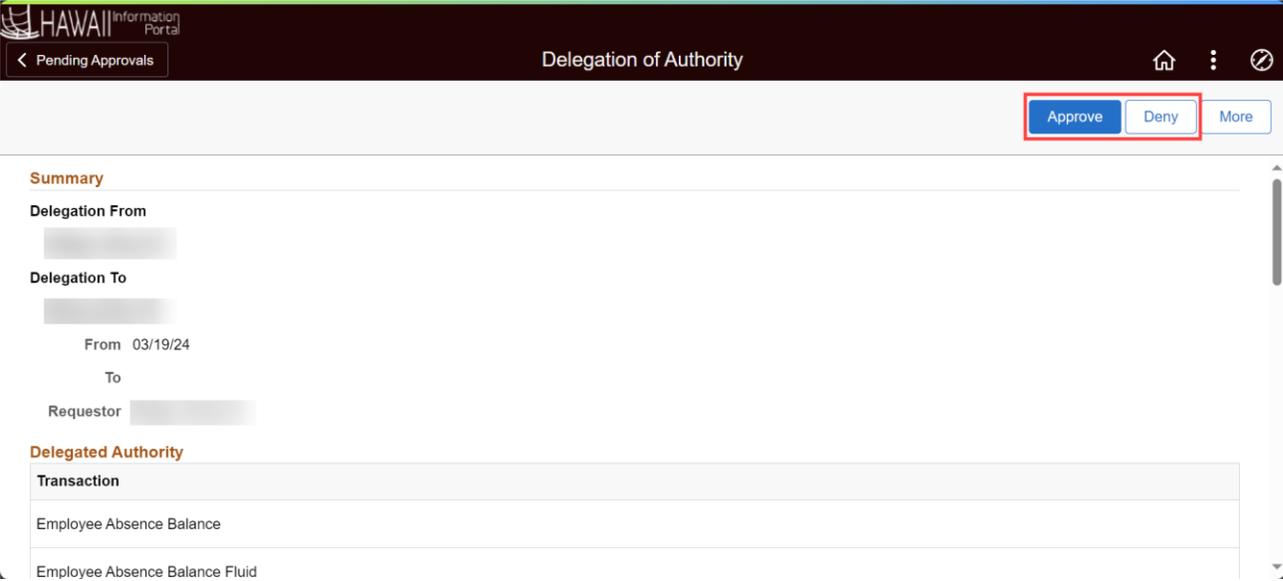
1. Navigate to **Manager Self Service** and click on the **Approvals** tile to review the delegation request.



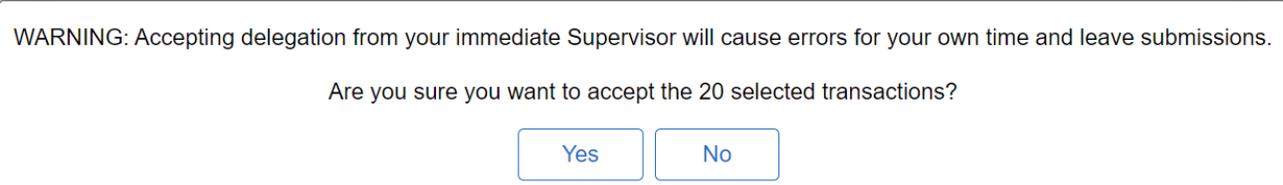
Click on the **Delegation of Authority** pending transaction to review.



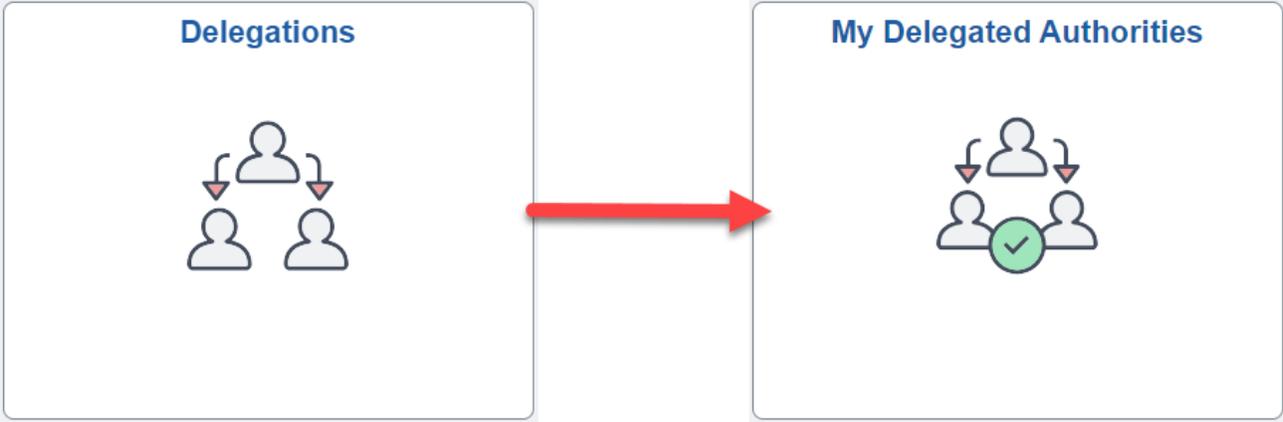
Review the delegation request and click to “Approve” or “Deny” the request.



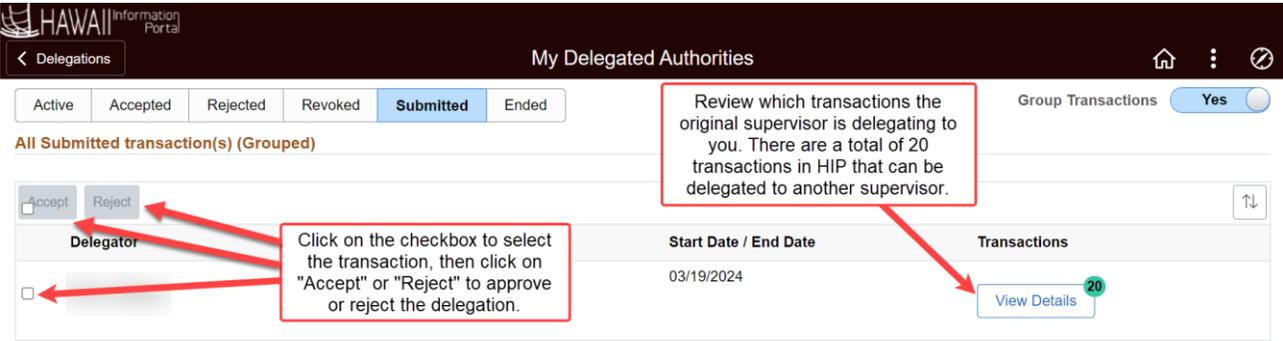
When approving the request, a text box will pop up. The warning is specifically for proxies who have been delegated from their immediate supervisor.



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



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

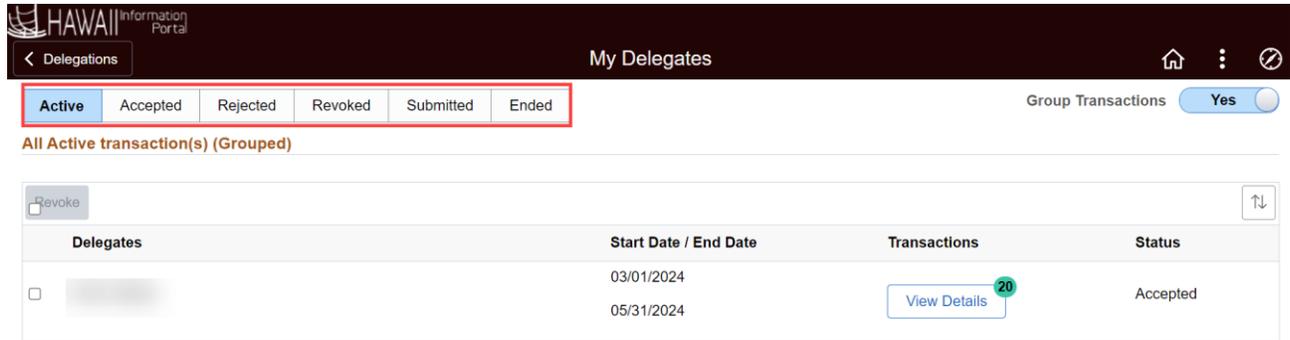


MY DELEGATES

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

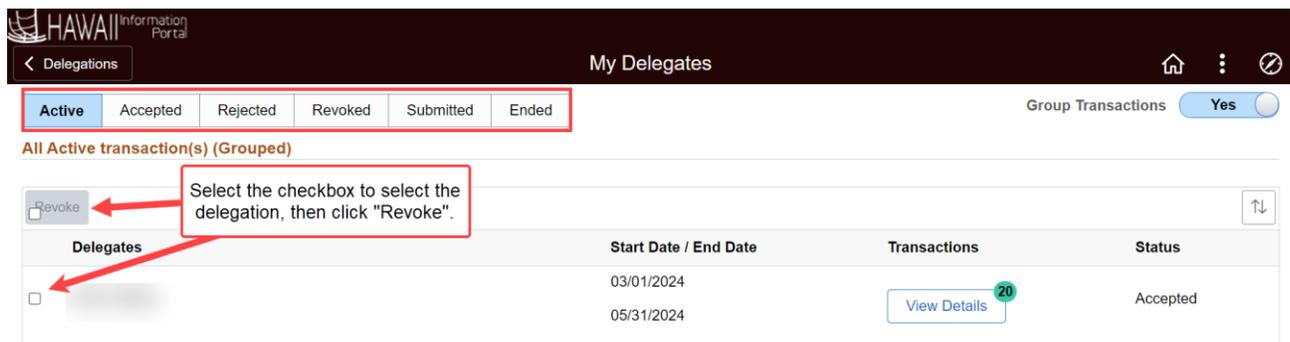
- **Active:** Current delegations that have been accepted and have not yet ended.
- **Accepted:** Delegations that have been accepted.
- **Rejected:** Delegation requests that have been rejected by the designated delegate.
- **Revoked:** Delegations that have been revoked prior to their end date.
- **Submitted:**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



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**.



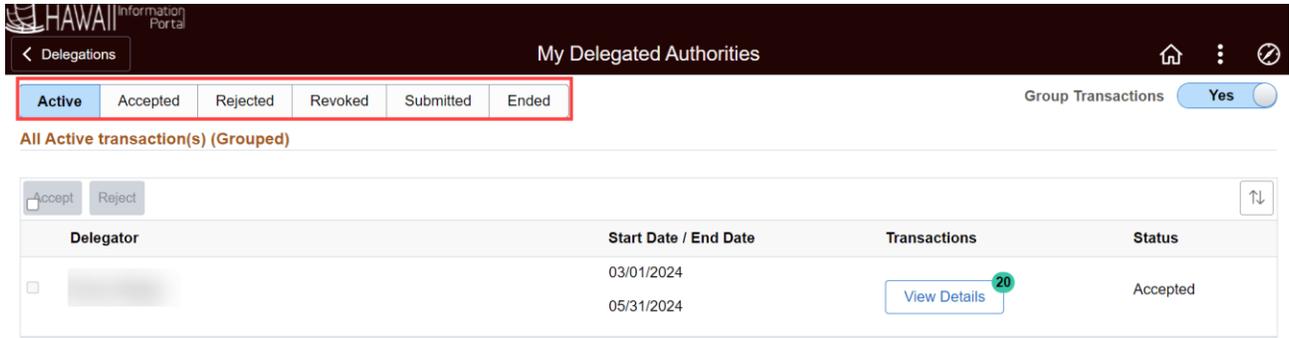
Once revoked, the proxy will no longer receive delegated approval requests.

MY DELEGATED AUTHORITIES

My Delegated Authorities will display all delegations that 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:

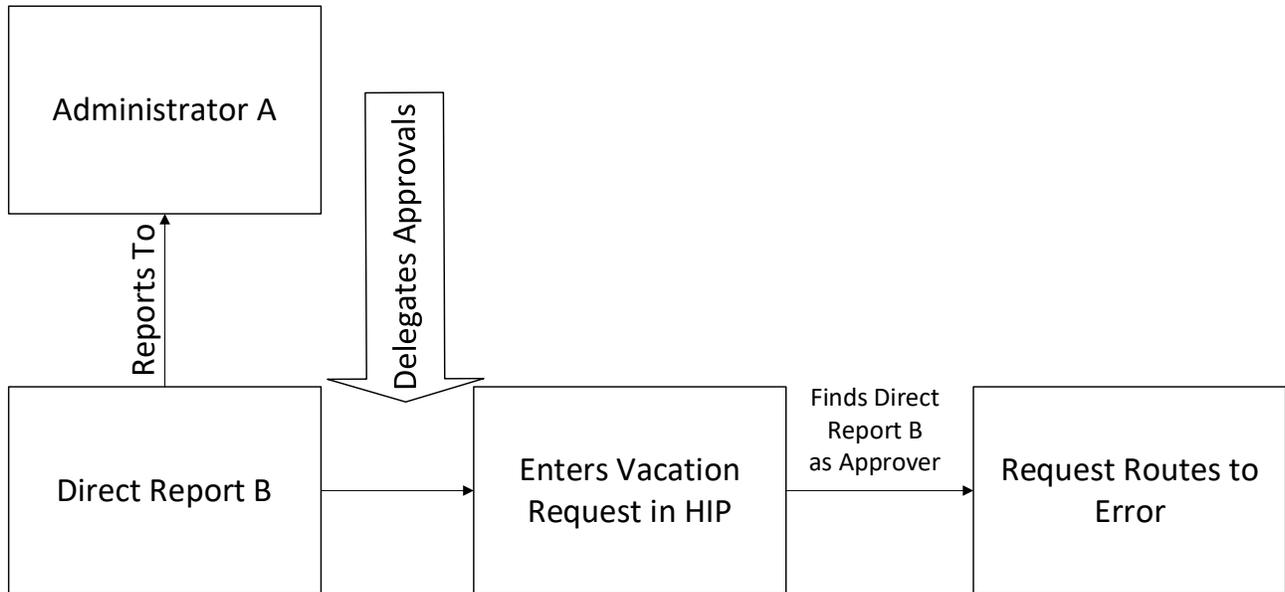


POSSIBLE ISSUES RELATED TO DELEGATION DOWNWARD

SELF-APPROVAL TRANSACTIONS

While HIP offers the capability for supervisors to delegate approvals down to one of their direct reports, this can create issues if the subordinate employee attempts to report time or leave for themselves since HIP does not allow for any self-approval.

For example, **Administrator A** has delegated all their approvals and self-service transactions downward to **Direct Report B** and **Direct Report B** initiates a vacation request for themselves. Once **Direct Report B** submits the vacation request, it will automatically route to “Error” status because **Direct Report B** is the approver of their own transaction.



The vacation request will then be routed to all the HIP Superusers, and **Direct Report B** will then need to ask their HR office for assistance with rerouting the request. Requests that remain in error will not be paid or processed unless the department identifies another approver.

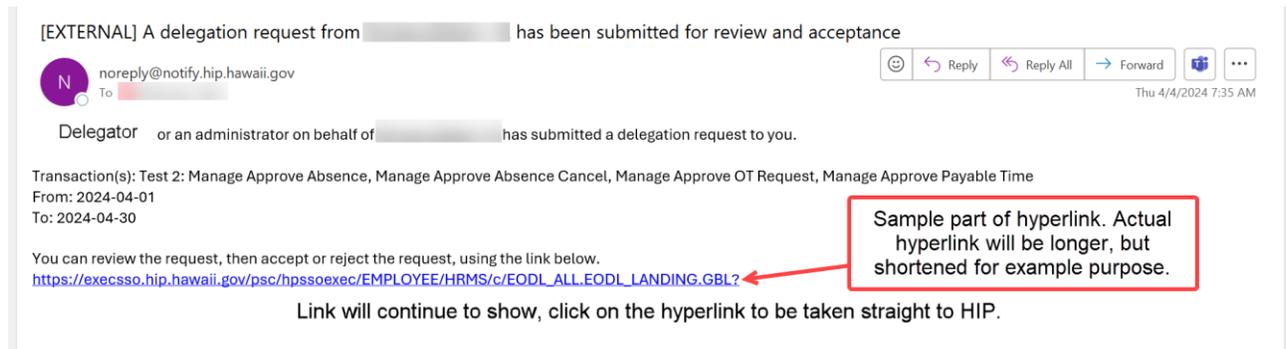
Departments should be running the **HIP_TL_APPROVAL_ERRORS** query to ensure that their department does not have any errored transactions.

Therefore, it is **highly recommended** that supervisors delegate their approvals up to their supervisor or laterally within their department whenever possible to ensure timely approvals.

DELEGATING TO EMPLOYEES WITHOUT MANAGER SELF SERVICE ACCESS

Employees who do not have Manager Self Service access (those who do not have any Time & Leave-related roles) that receive a delegation from their supervisor may encounter difficulties when attempting to accept the delegation or approving time/leave requests.

1. **Accepting the Delegation** – The employee will receive an email notification that a delegation request has been sent, requesting the employee to approve/deny the request through a hyperlink in the email.



[EXTERNAL] A delegation request from [redacted] has been submitted for review and acceptance

noreply@notify.hip.hawaii.gov
To: [redacted]

Delegator [redacted] or an administrator on behalf of [redacted] has submitted a delegation request to you.

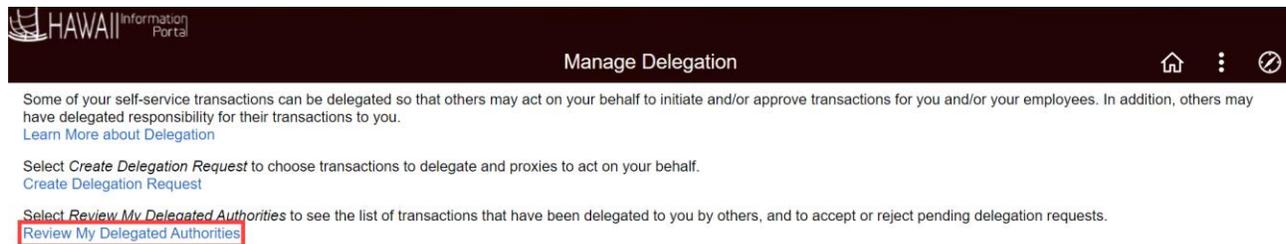
Transaction(s): Test 2: Manage Approve Absence, Manage Approve Absence Cancel, Manage Approve OT Request, Manage Approve Payable Time
From: 2024-04-01
To: 2024-04-30

You can review the request, then accept or reject the request, using the link below.
https://execsso.hip.hawaii.gov/psc/hpssoexec/EMPLOYEE/HRMS/c/EODL_ALL.EODL_LANDING.GBL?

Link will continue to show, click on the hyperlink to be taken straight to HIP.

Sample part of hyperlink. Actual hyperlink will be longer, but shortened for example purpose.

Employee will be taken to HIP to login with their credentials. It should take them to the **Manage Delegations** page. Click on the 3rd Option – **Review My Delegated Authorities**.



HAWAII Information Portal

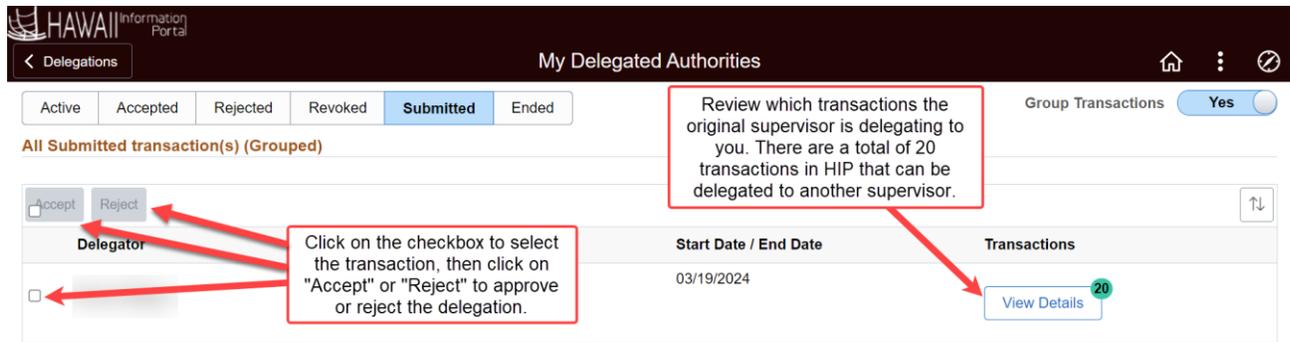
Manage Delegation

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.
[Learn More about Delegation](#)

Select **Create Delegation Request** to choose transactions to delegate and proxies to act on your behalf.
[Create Delegation Request](#)

Select **Review My Delegated Authorities** to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.
[Review My Delegated Authorities](#)

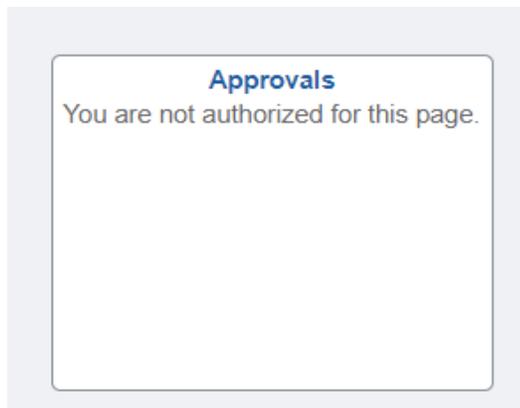
The employee will then be able to accept or reject the delegation request from this page.



After accepting the delegation, the employee should log out and back in to refresh their settings.

2. **Reviewing Time/Leave Requests** – Once the employee has accepted a delegation from their supervisor, HIP will automatically grant all the necessary roles to the employee, enabling them to access Manager Self Service (if approving payable time and/or absence transactions).

The employee may see the **Approvals** tile on MSS show something like below, however the employee will still be able to approve time/leave requests if they click on the tile.



If the employee does not see the **Manager Self Service** ribbon, they should log out and log back in to HIP to refresh their settings.

Note that the employee should approve all pending approvals prior to the end of the delegation period, or prior to the revocation of the delegation. If there are pending approvals at the end of the delegation, they will be rerouted back to the original supervisor for approval.

If the employee is still having trouble approving the delegation or approving time/leave requests after delegation has been accepted, please contact your HR office for assistance.