Administer Delegations on Behalf of Supervisors

(Alternative to Administrative Delegation Memo for HR Admins)

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OVERVIEW

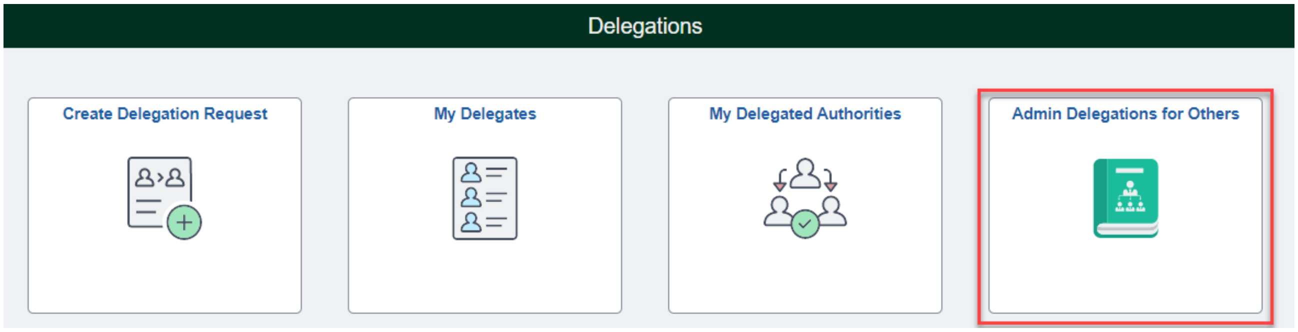
Supervisors are responsible for managing time & leave (T&L) approvals of their direct reports in the HIP system. When a supervisor needs to take leave or otherwise be away from the office, they must delegate their approval authority in advance. In the event a supervisor cannot set up a delegation for themselves, an Executive Branch Director may authorize the HIP service center to set up a temporary delegation on their behalf. This involves an HR Admin or Fiscal/ASO office submitting a Salesforce ticket with a completed Administrative Delegation Memo attached, which can be inefficient in emergency scenarios. An alternative process that accelerates the setup of approval delegations provides HR Admins with a streamlined method for setting up delegations when supervisors are unavailable, eliminating the need for a signed memo.

ACCESSING THE ADMINISTER DELEGATIONS PAGE

After logging into the HIP system, HR Admins will navigate to the following:

Manager Self-Service > Delegations

Notice, there is a new tile called **Admin Delegations for Others**:

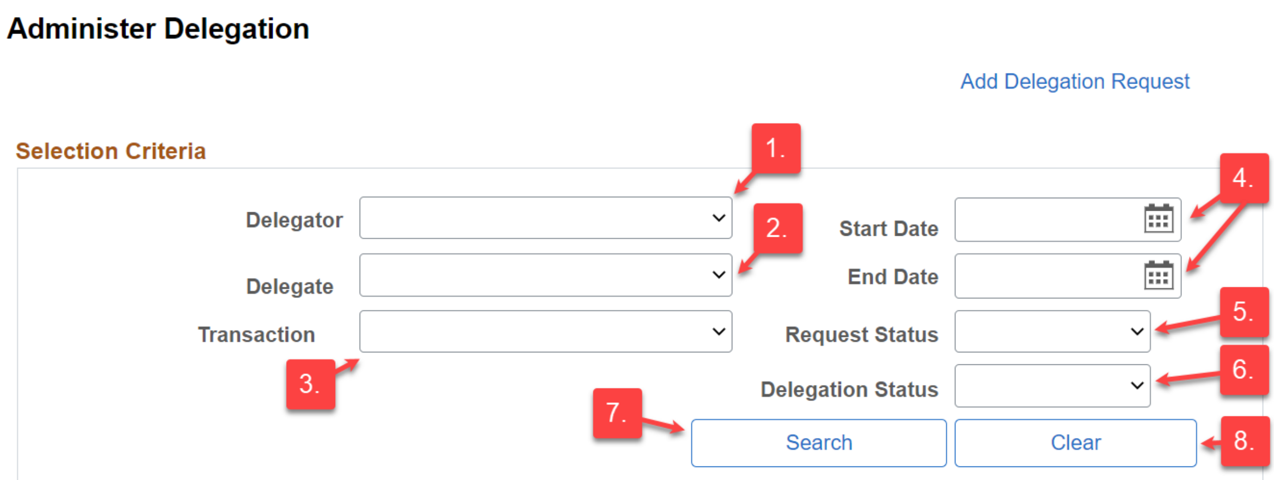


ADMINISTER EXISTING DELEGATIONS ON BEHALF OF A SUPERVISOR

Clicking on the Admin Delegations for Others tile will take you to the Administer Delegations page. This page allows you to search for and view any existing delegations for your employees and take action like revoking the delegation if the supervisor's leave circumstances change.

VIEWING EXISTING DELEGATIONS

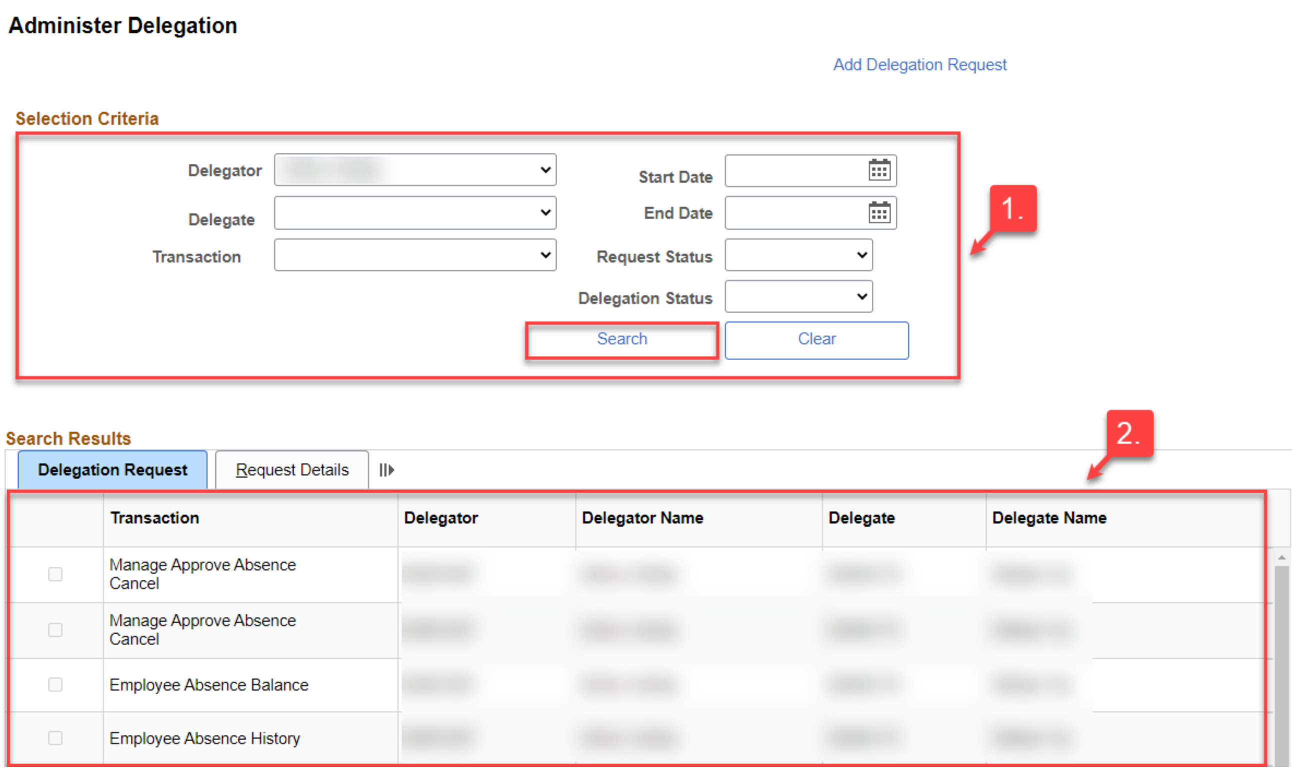
In the **Selection Criteria** section of the page there are parameters designed to help narrow your search to provide focused results when looking for existing delegations.



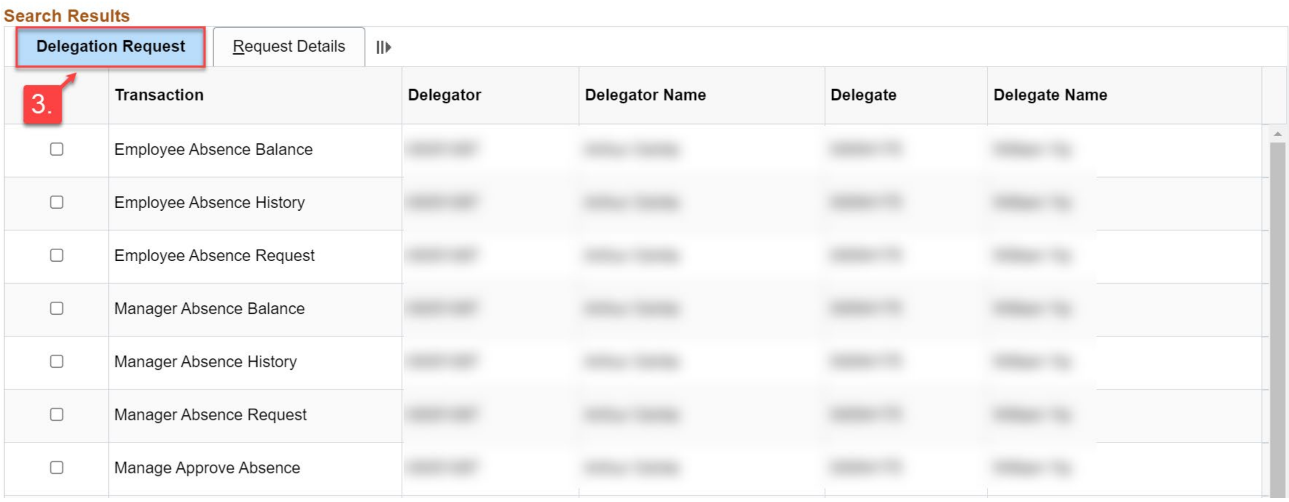
1. **Delegator** – Select a supervisor from a dropdown list.
2. **Delegate** – Select a delegate from a dropdown list.
3. **Transaction** – Select 1 of the 20 transactions possible transactions a supervisor can delegate to view all related delegations or leave this field blank to search for all available delegations. Click the following link to view a Delegation Transaction List designed to help understand the different types of delegations in the system and how they work.

4. **Start/End Date** – Define a date range a delegation is set up for. The system will return existing delegations with start/end dates that fall within the date range entered. NOTE: It is highly recommended to enter an end date to ensure a delegation is temporary and does not extend indefinitely.
5. **Request Status** – Statuses represent the stage of a delegation at a particular point in time. Select an option from the dropdown menu to view delegations for all your available employees that are in a particular status or leave this field blank to search for delegations of all statuses.
6. **Delegation Status** – Statuses represent whether the delegation you are searching for is active or inactive. Leave this field blank to search for delegations of all statuses.
7. **Search** – Click the Search button to prompt the system to search for existing delegations based off the parameters entered.
8. **Clear** – Click the Clear button to clear any previous search parameters that were used.

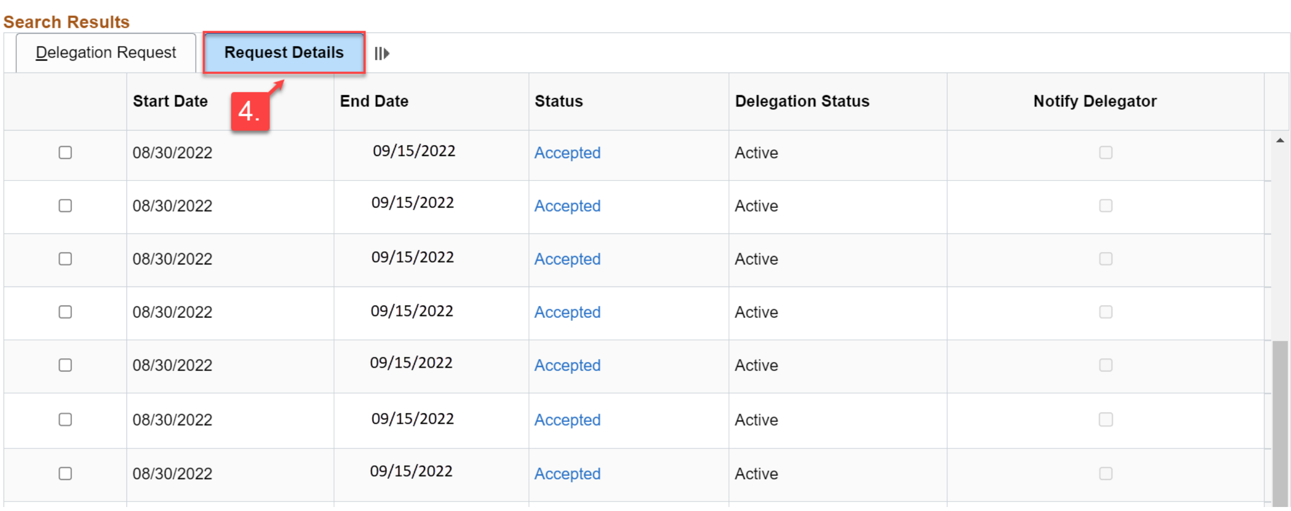
To find an existing delegation for an employee, an easy way to search is to select the **Delegator** from the dropdown menu.



1. In the **Selection Criteria** section, enter your search criteria, then click the **Search** button.
2. Scroll down to the **Search Results** section to view the delegation(s) you are looking for from the list of results.



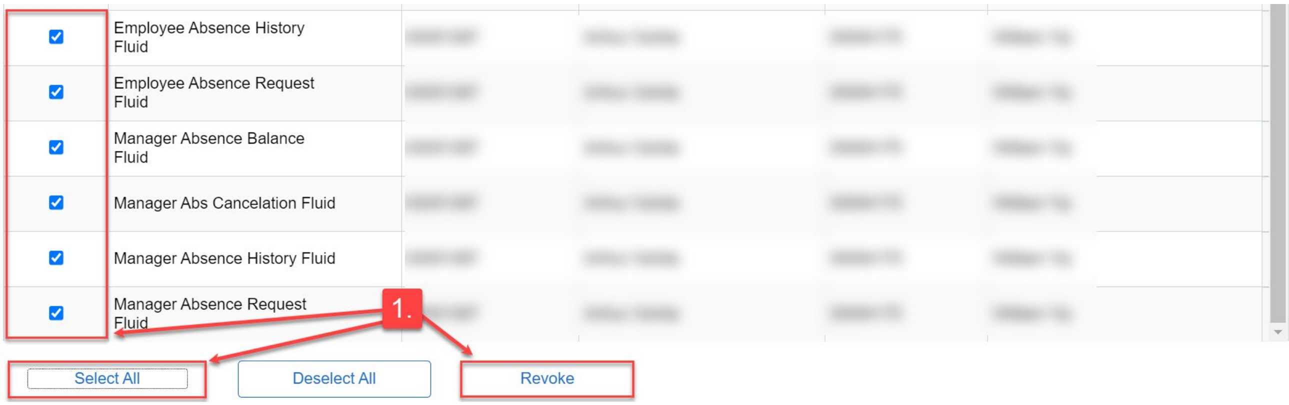
3. The system will default to displaying the **Delegation Request** tab, where you can view delegation details like the transaction type, the delegator EMPL ID and name, as well as the Delegate EMPL ID and name.



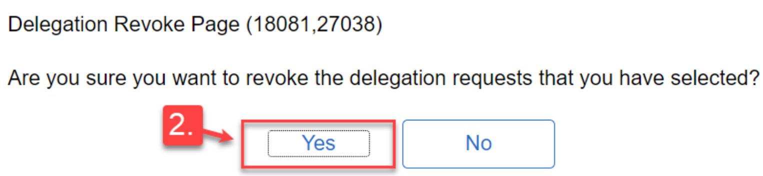
4. Clicking on the **Request Details** tab will show additional delegation details such as when the delegation start/end date, what stage of the process the delegation is in (Pending, Accepted, or Revoked), and the delegation status (Active or Inactive).

REVOKING EXISTING DELEGATIONS

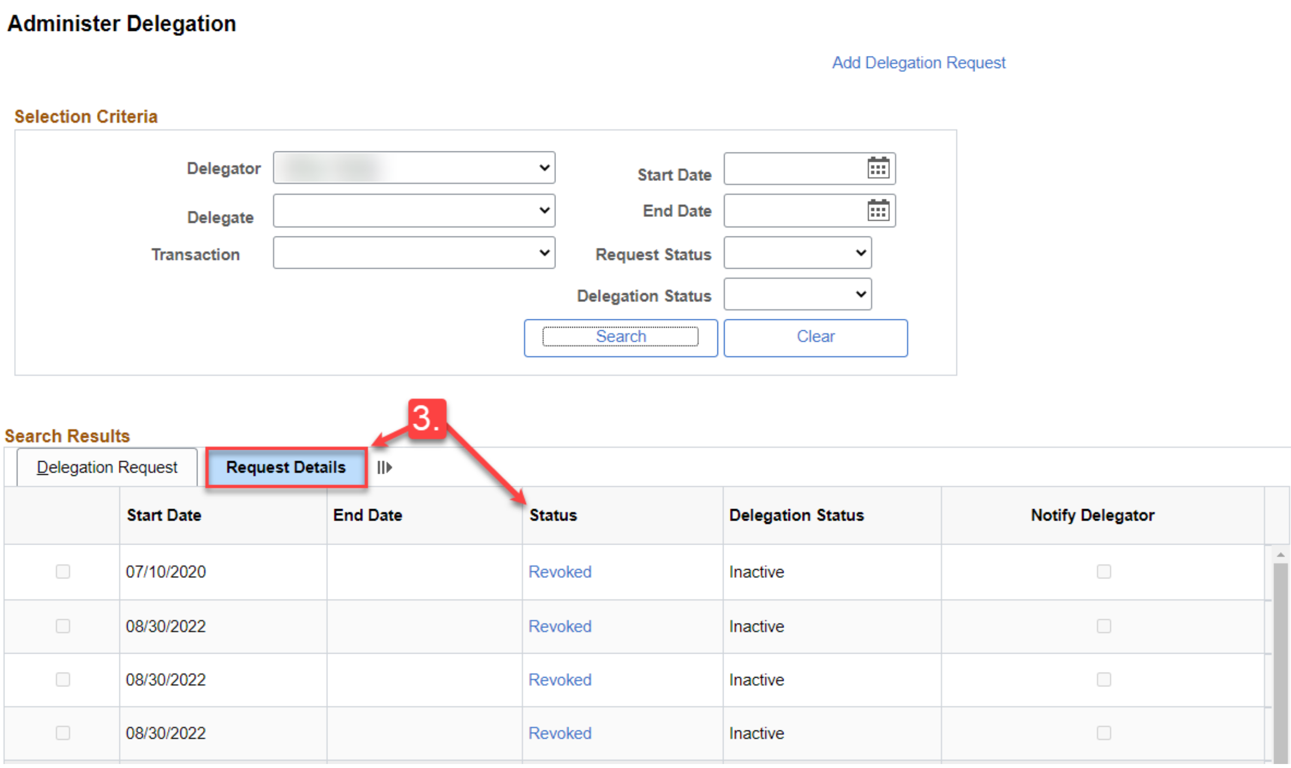
After finding the applicable delegation in the **Search Results**, you can revoke it if it is determined that it is not valid. For example, the supervisor's leave circumstances may have changed (i.e., they returned to work sooner than originally planned). Or a supervisor may have set up a delegation down to one of their employees, which creates a scenario where the employee can self-approve their own absence management or payable time requests.



1. To revoke a delegation, you can click the checkbox on the left-hand side of the screen to select it, or click the **Select All** button, then click the **Revoke** button.

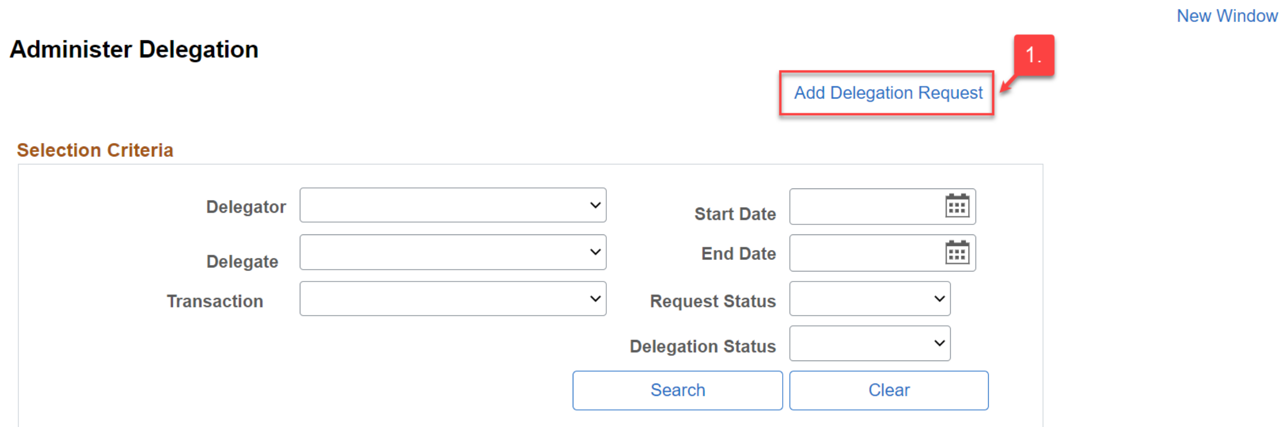


2. A pop-up window will appear asking to confirm revoking the delegation request(s) selected. Click the **Yes** button.

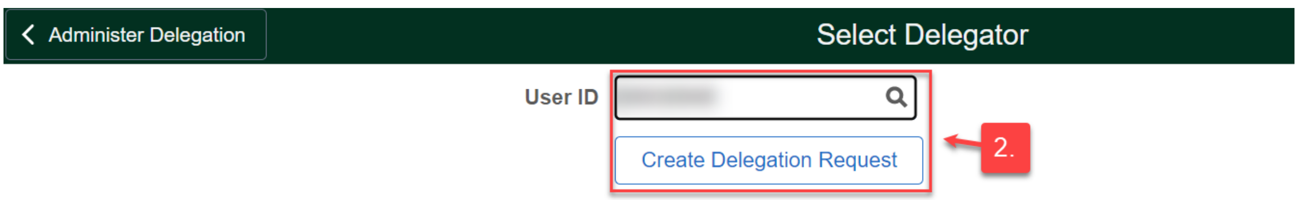


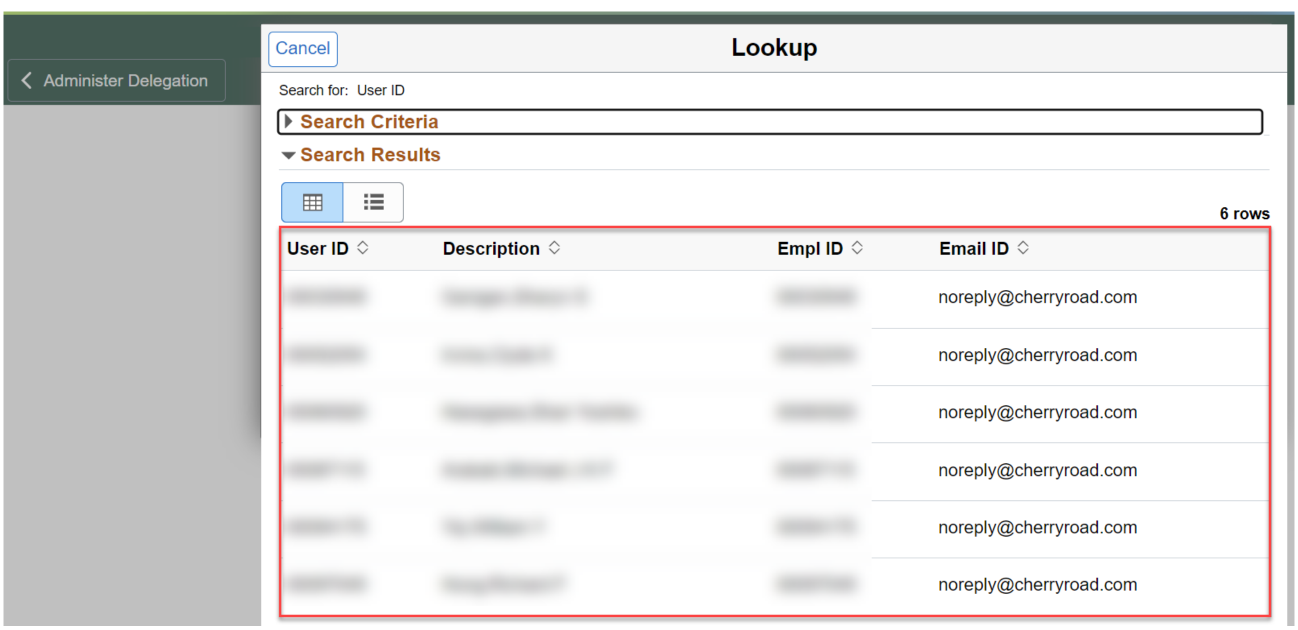
3. On the **Request Details** page, the delegation(s) statuses should now be **Revoked**.

SET UP A NEW DELEGATION ON BEHALF OF A SUPERVISOR

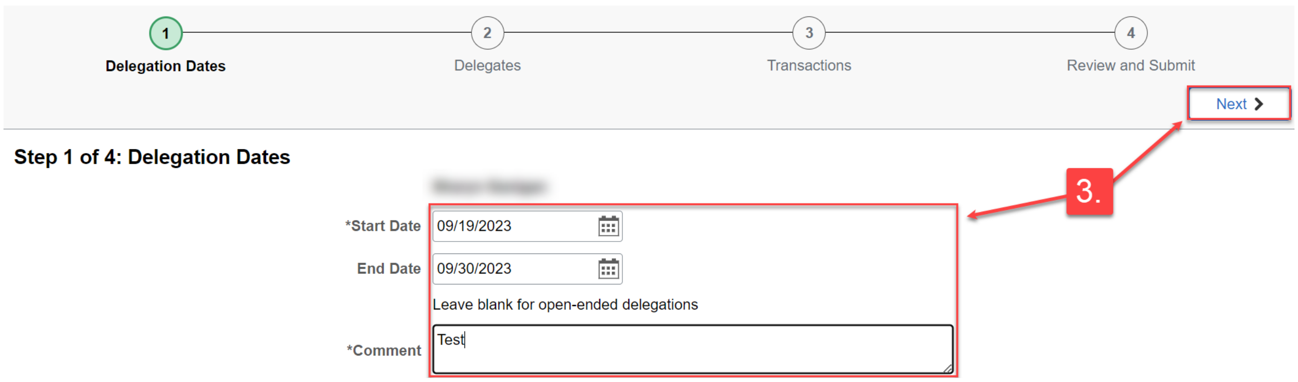


1. From the Administer Delegation page, click on the **Add Delegation Request** link.

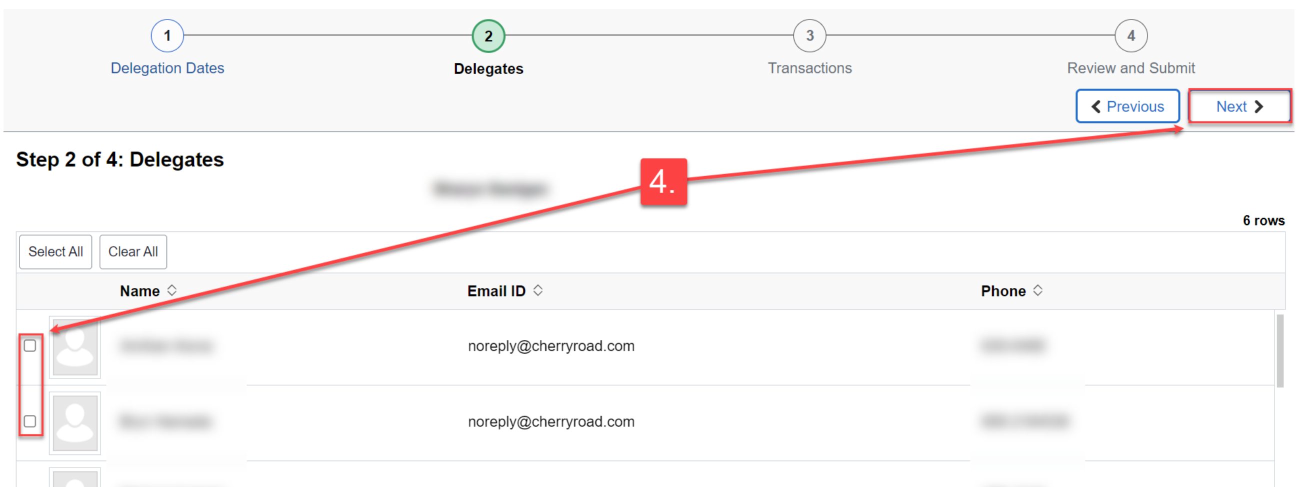




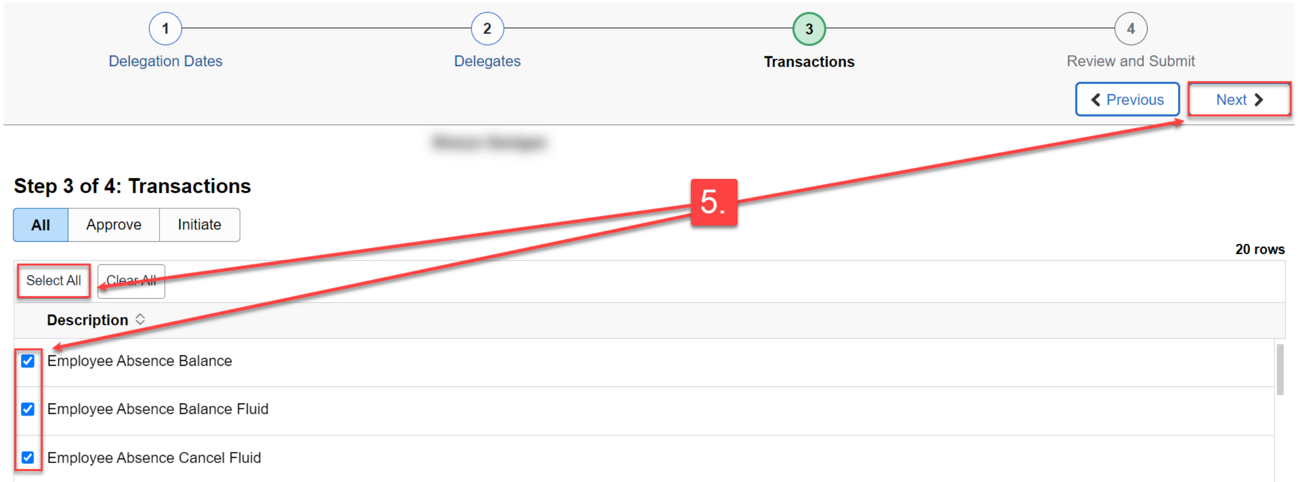
2. Enter an EMPL ID for a supervisor you want to create a delegation for in the **User ID** field and click on the **Create Delegation Request** button. NOTE: If you don't know the supervisor's EMPL ID, you can click on the **Magnifying Glass** icon to view a list of your available employees to select from.



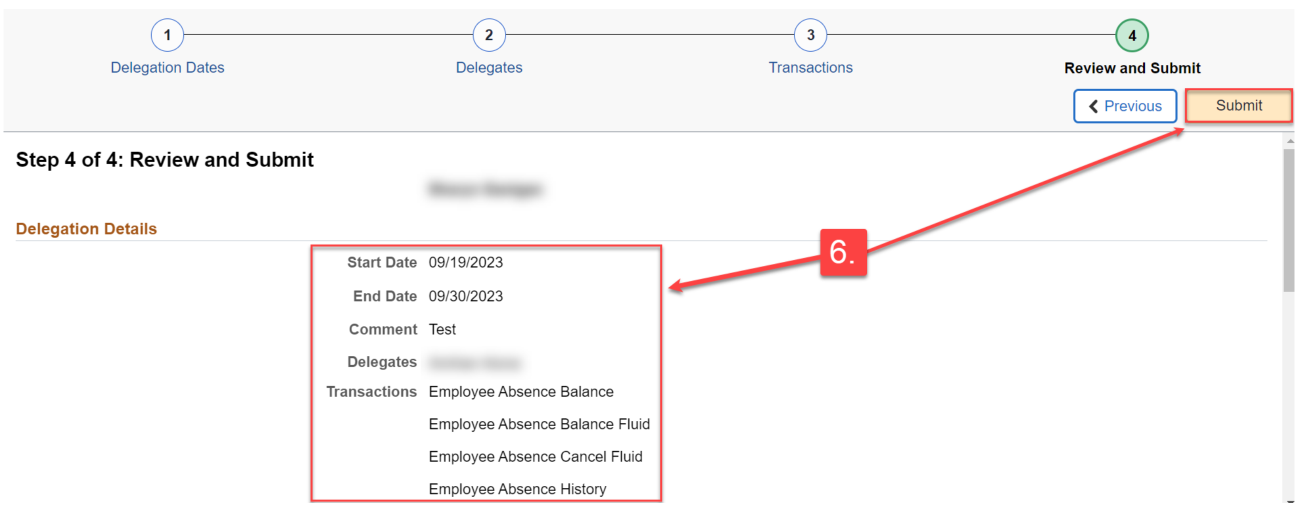
3. Define a **Start/End Date** range, enter any **Comments**, then click on the **Next** button. NOTE: If you do not enter an End Date, the delegation will be left open-ended. HR Admins can run the query **HIP_TL_CRNT_DELEGATIONS** to review the status of current delegations.



4. Select a **Delegate** from the list of results by clicking on the checkbox next to their name and click on the **Next** button.



5. Select the **Transactions** from the list to transfer to the Delegate, by clicking the checkboxes next to each transaction to transfer. Or click the **Select All** button to select all transactions to transfer to the delegate. Then click on the **Next** button. NOTE: In most scenarios you should transfer all transactions from the delegator to their delegate.



6. Review the **Delegation Details** and click on the **Submit** button.