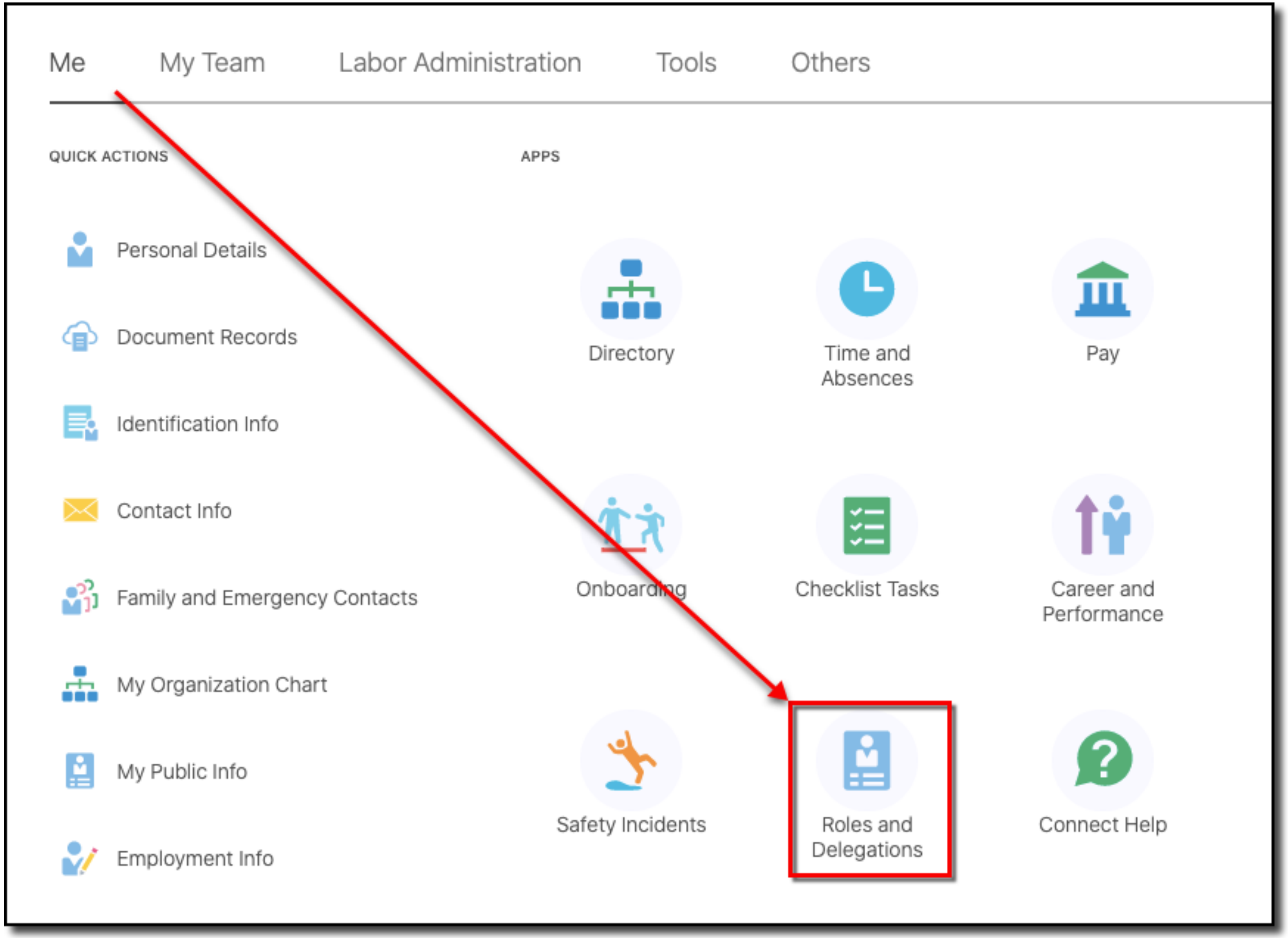
MSS – Submitting a Delegation Request

Note: Delegation allows managers to authorize other employees to act on their behalf for managing team time and absences.

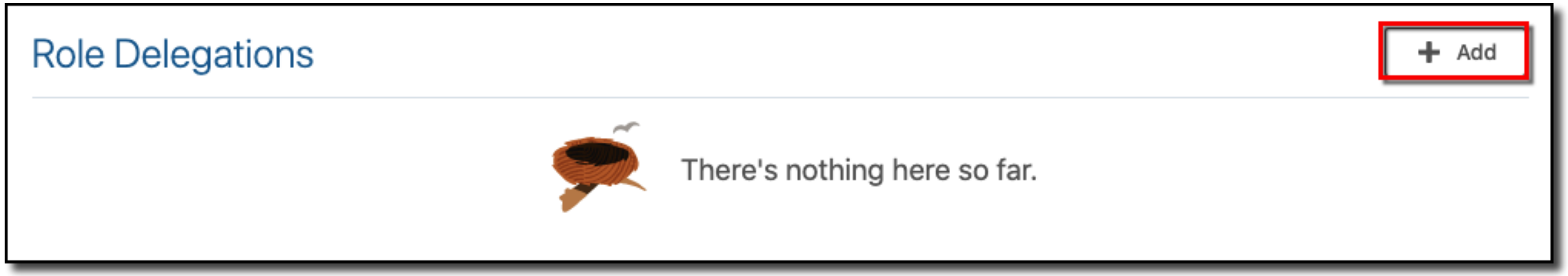
When delegated, managers will **not** receive time and absence approval notifications but can still view and act on their direct reports, even if delegated to someone else.

1. From the **Me** tab, click **Roles & Delegations**



MSS – Submitting a Delegation Request

2. Click **Add** within **the Role Delegations** section



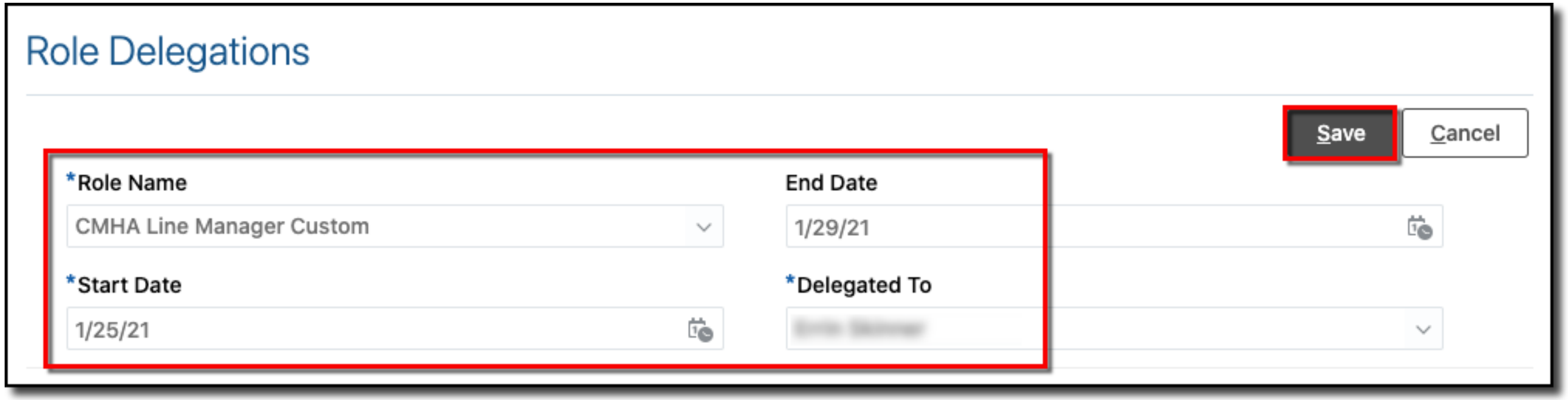
3. Select **CMHA Line Manager Custom** for the Role Name

4. Enter the **Start Date** the delegation will take effect

5. Enter the **End Date** if known or leave blank if ongoing

6. Key in the name of the person for whom you are **delegating to** then select the name from the list

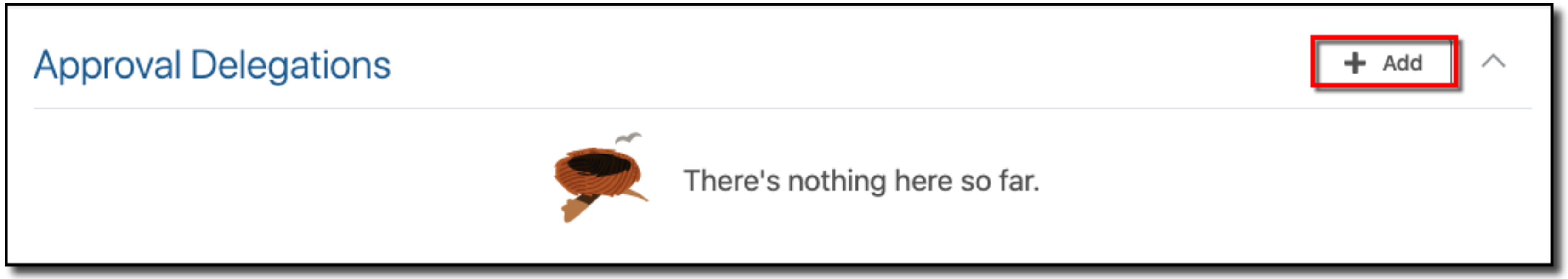
7. Click **Save**



MSS – Submitting a Delegation Request

8. Click the **Approval Delegations** drop-down arrow

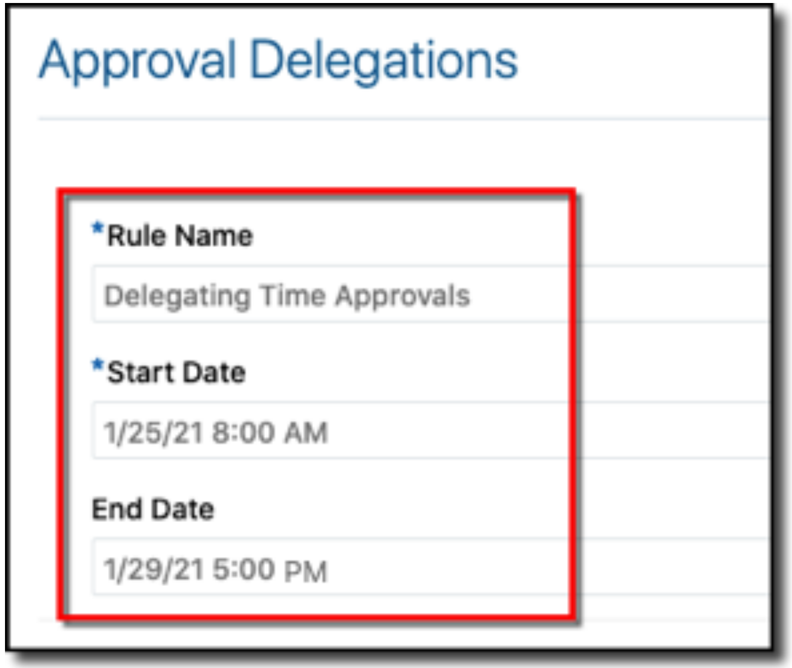
9. Click **Add**



10. Enter a **Rule Name** that reflects the nature of the delegation transaction you are submitting

11. Enter the **Start Date** and **Time** the delegated authority takes effect

12. If applicable, enter an **End Date** and **Time** or leave blank if ongoing

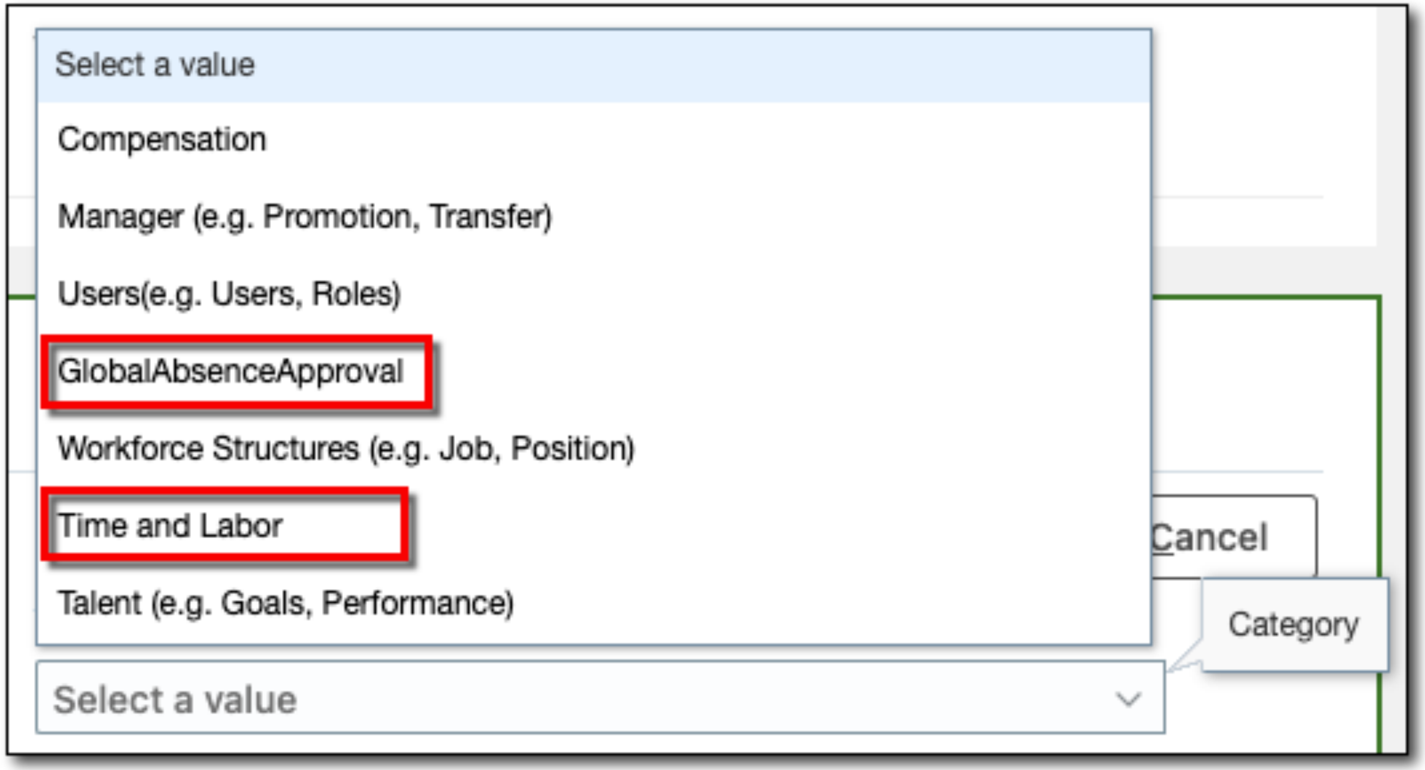


MSS – Submitting a Delegation Request

Note: Only 2 delegation functions should be used. They include:

- **GlobalAbsenceApproval** – Delegated proxy can act on your behalf for managing and approving absences
- **Time and Labor** – Delegated proxy can act on your behalf for managing and approving timecards

The other delegation functions should not be used at this time.



13. Select the desired delegation **Category**.

Note: You can only select one **category** at a time. Multiple assignments need to be handled through multiple delegation requests.

Note: Time and absence management can be delegated to the employee of your choice.

Connect

MSS – Submitting a Delegation Request

14. Enter the employee for whom you are delegating to.

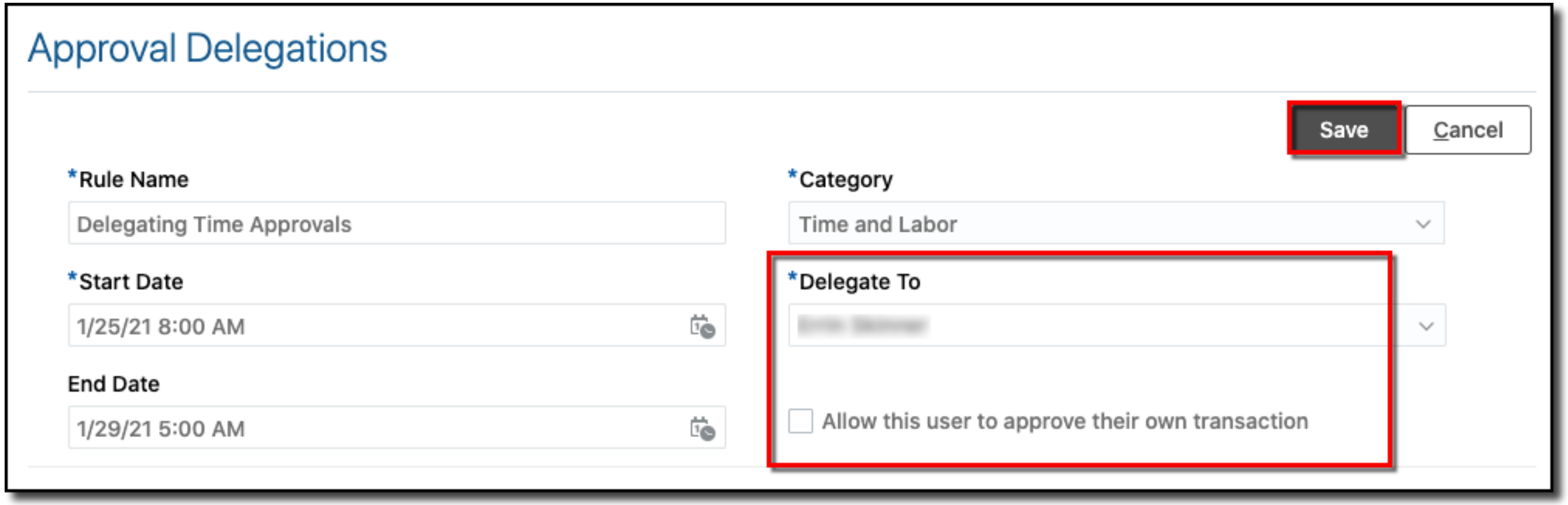
Note: This should be the same person selected above for the **Role Delegation**.

15. Select the **checkbox** if the delegated proxy can approve their own time and absences.

Note: This only applies if you are delegating to one of your direct reports. Clicking the checkbox will allow them to approve their own time card and absences. **<u>If you allow them to receive their own timecard, they can then 'reassign' it up the chain.</u>**

Leaving this unchecked, the direct report's time and absences will still come to you.

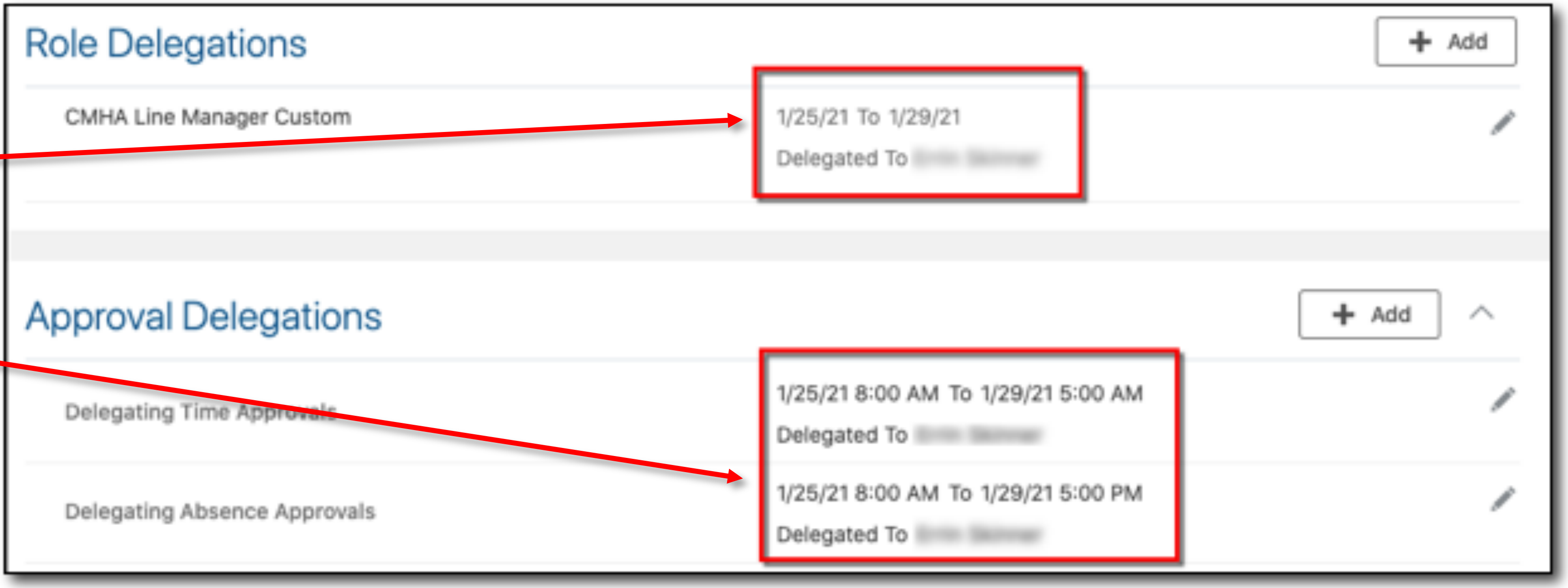
16. Click **Save**



MSS – Submitting a Delegation Request

Note: The **Role** and **Approval Delegation** requests have been submitted to the proxy. In this example, the **Role Delegation** only needs to be submitted once and the 2 **Approval Categories** were submitted to the same proxy.

Note: You don’t have to submit both delegation categories if you don’t need both.



Connect

MSS – Understanding Certain Delegation Rules

Please note the following as it pertains to Delegation:

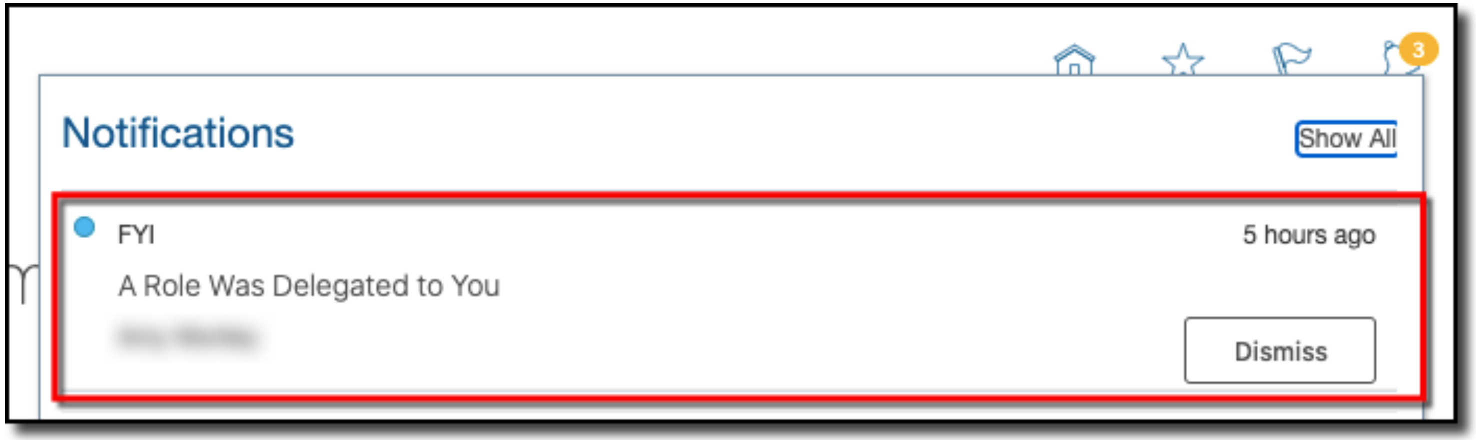
- If you, as a manager, already have pending approvals prior to completing the delegation request, you should act on those approvals if possible. Delegating time and absence capabilities does **not** transfer your existing approvals to the proxy. In other words, the proxy will **not** be able to approve anything that is still routed to you.

- If you are unable to act on your existing approvals for any reason, the employee should be instructed to resubmit their current time and/or absences after the delegation submittal has been completed. This will reroute the approval notification to the delegated proxy.

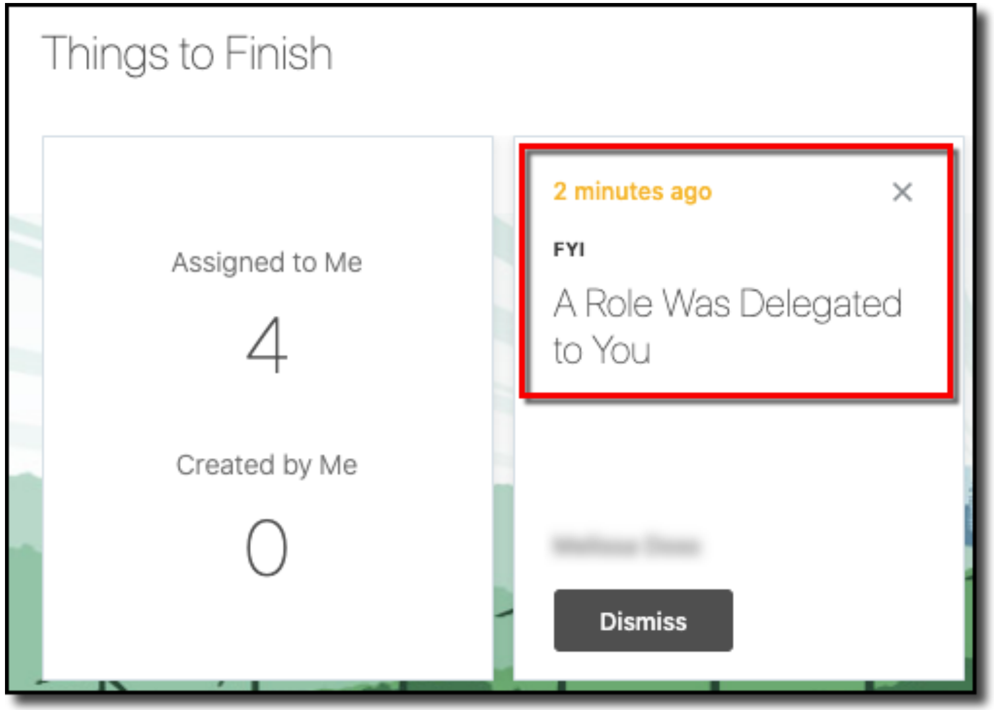
- Time and absence management can be delegated to the employee of your choice.

- If you are not a manager but are delegated to, you will automatically receive the ability to manage time and absences through the **My Team** function.

MSS – Reviewing Delegated Requests as a Proxy

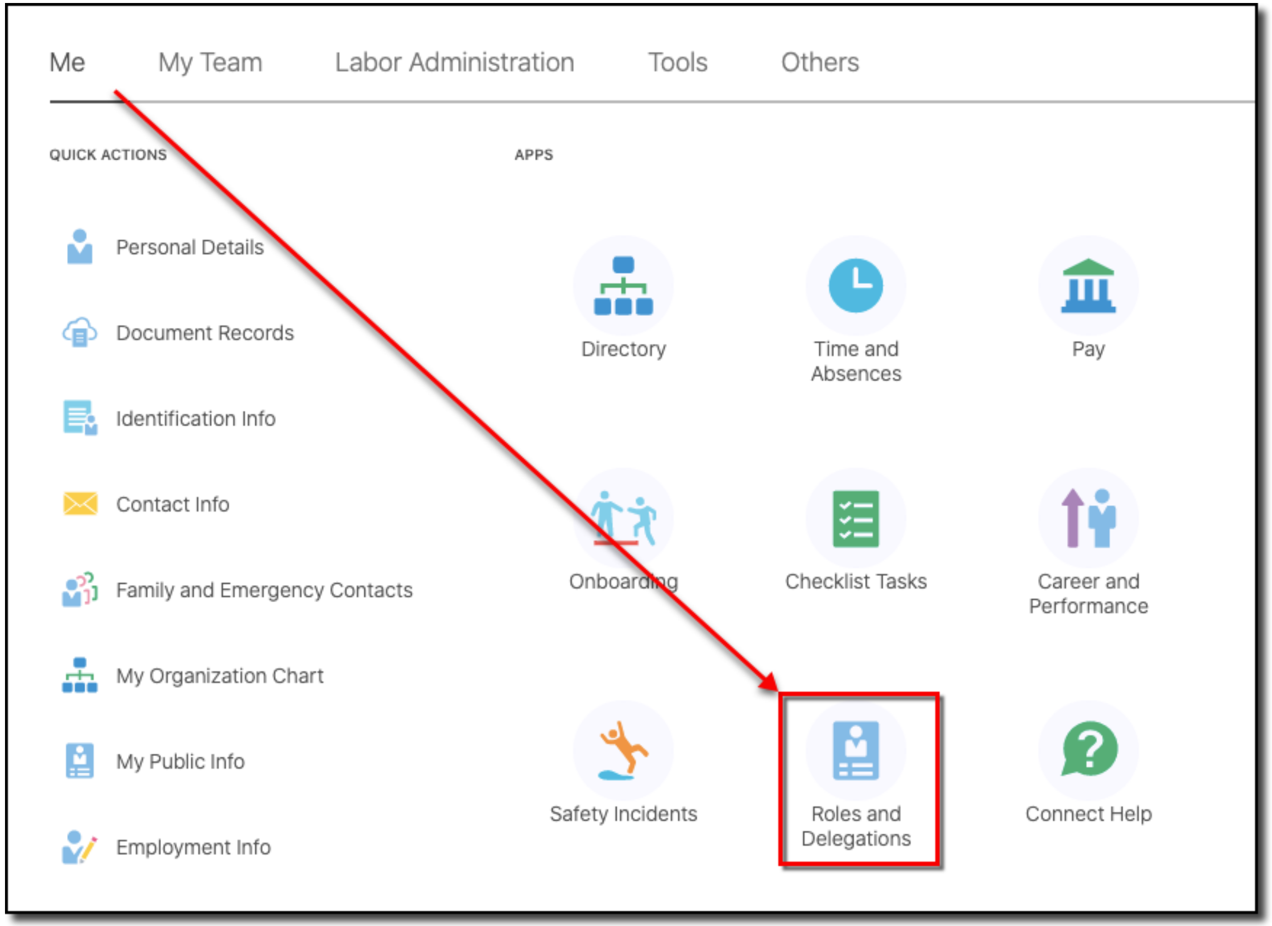


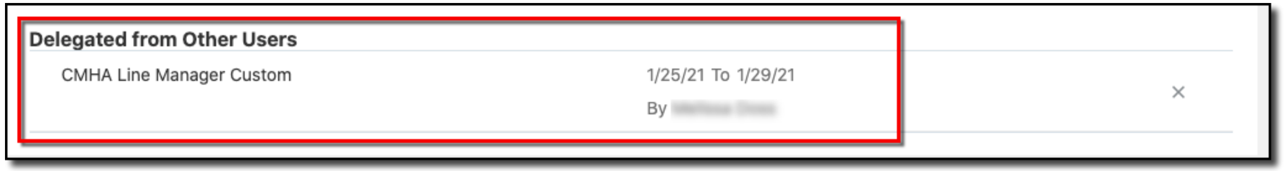
Note: When delegated to, you will receive a notification indicating that a role was delegated to you.



MSS – Reviewing Delegated Requests as a Proxy

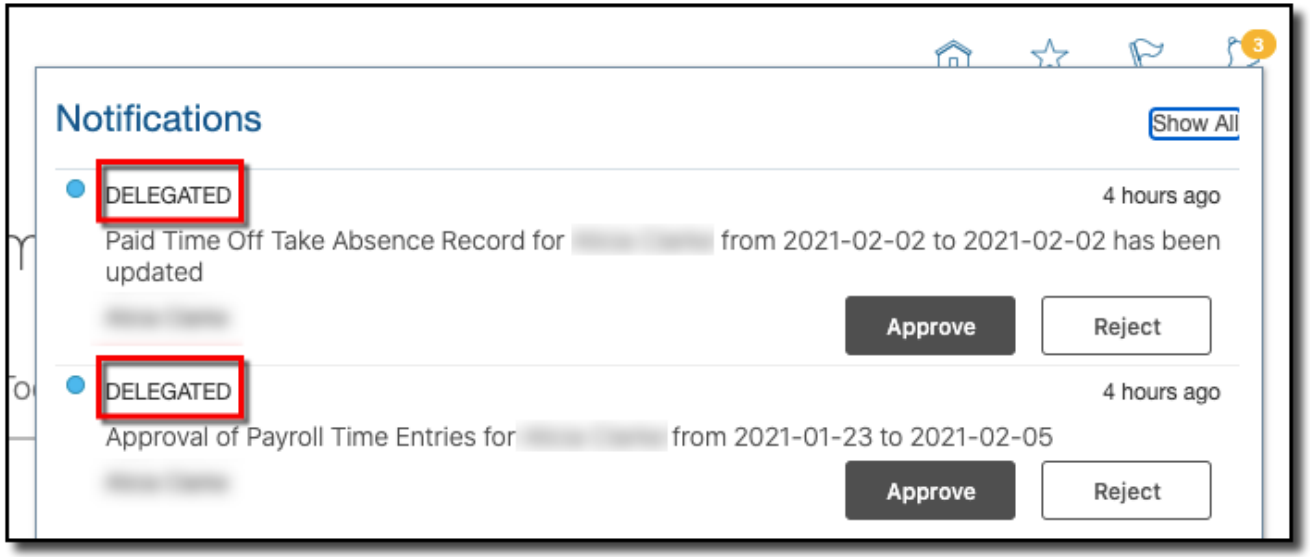
Note: From the **Roles and Delegations** page, you can see the delegation requests that have been assigned to you.

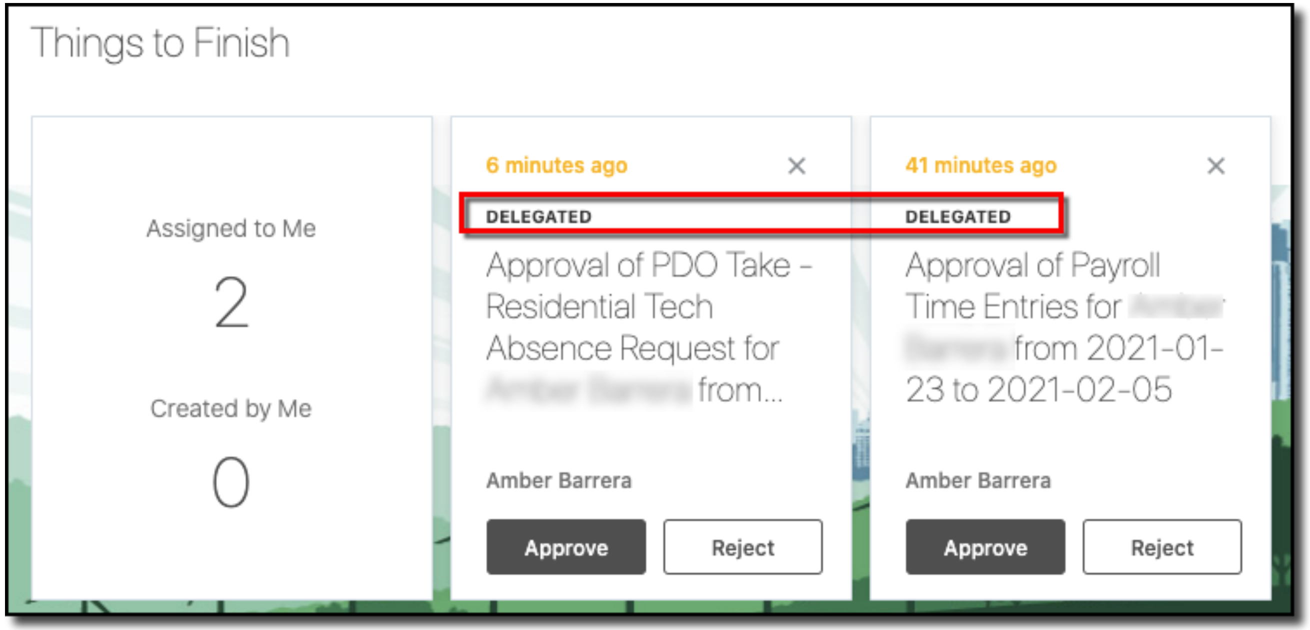




MSS – Identifying Delegated Approval Requests

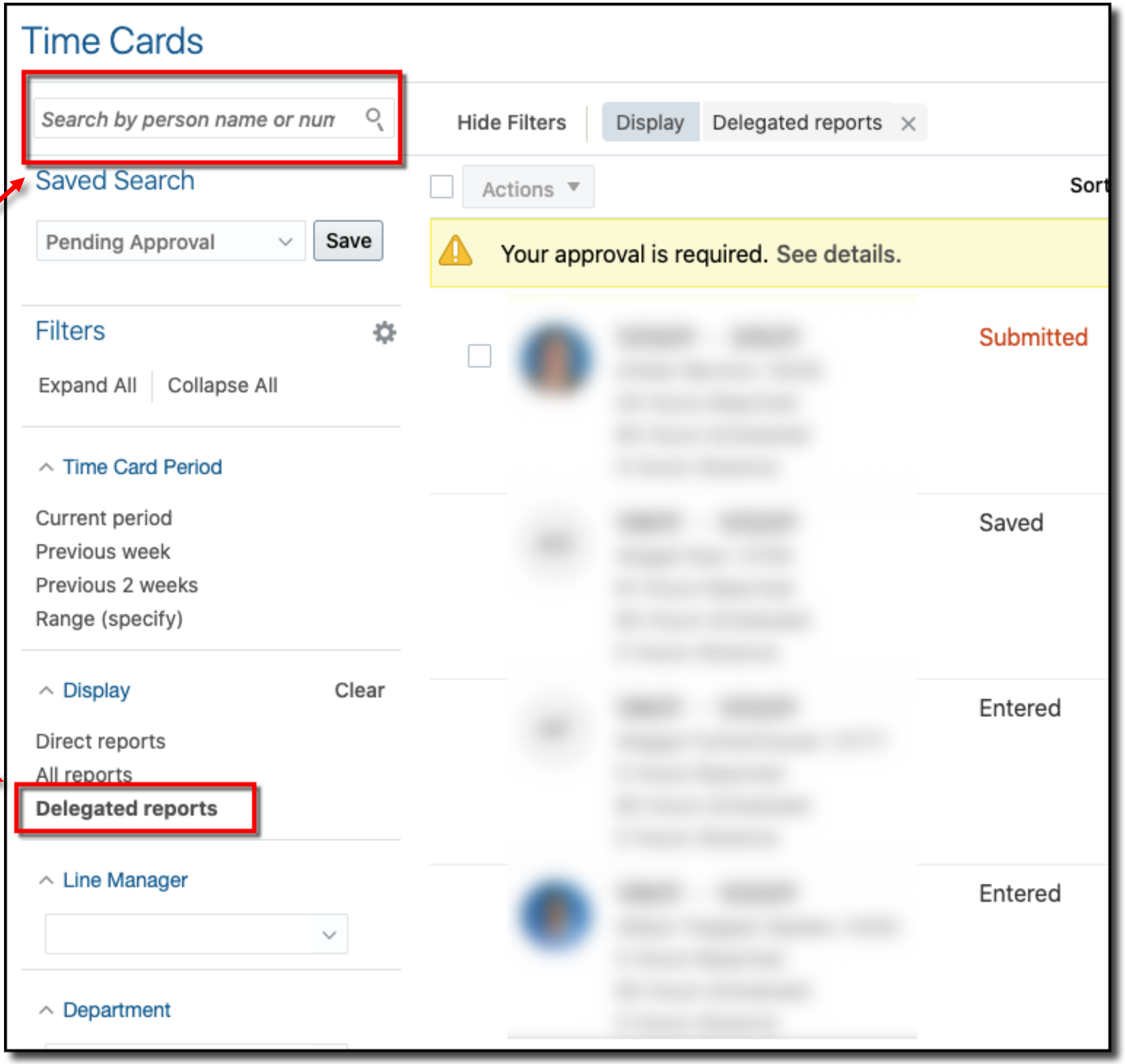
Note: To review a timecard or absence approval from a delegated employee, look for the “**Delegated**” approvals in your notifications.





MSS – Managing Delegated Team Time Cards

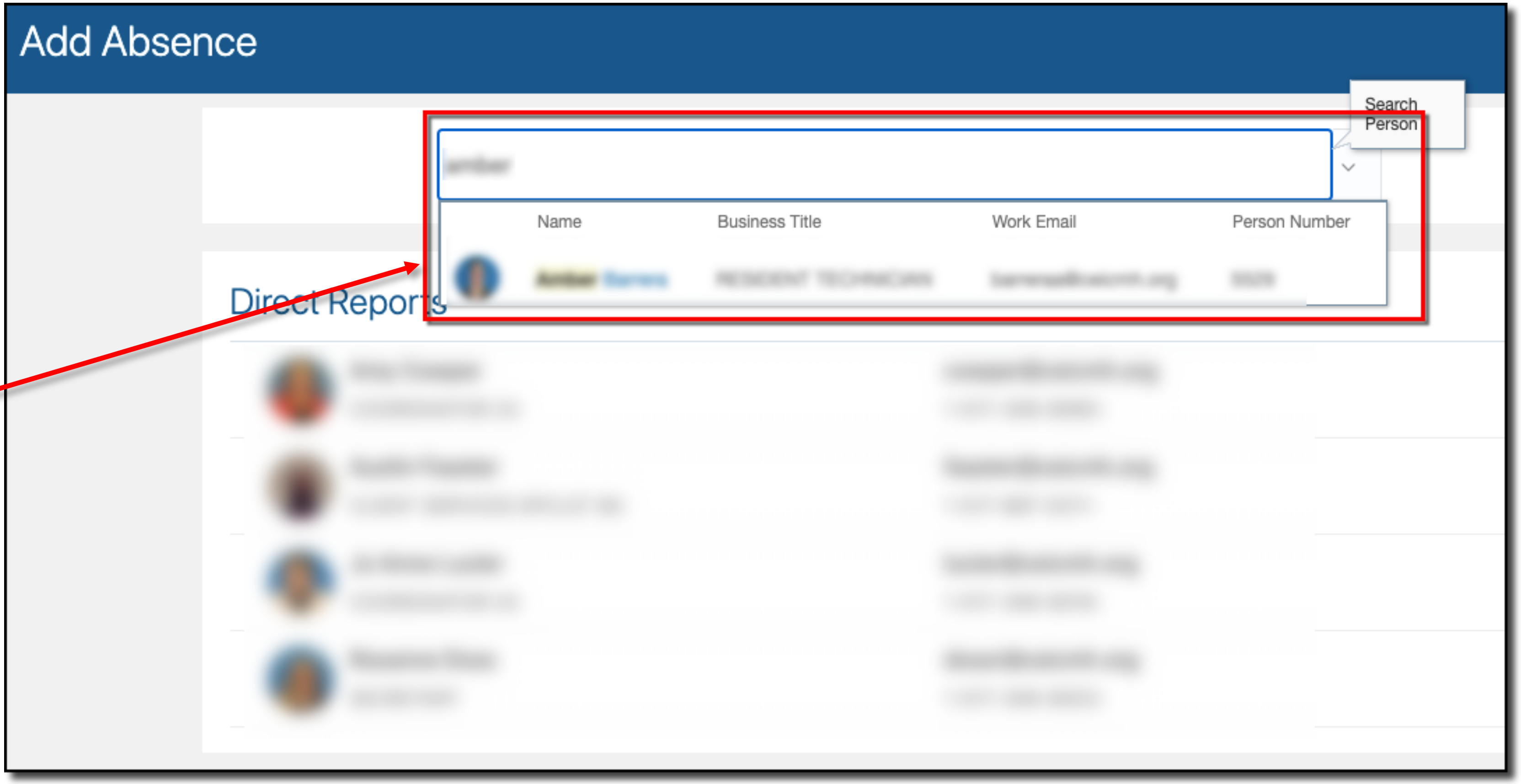
Note: To manage **Team Timecards** for delegated employees, either search for the delegated employee or select the "**Delegated Reports**" filter to see all delegated employees.



MSS – Managing Delegated Absences

Note: Delegated employees will not appear in your list of **direct reports** but will show up when searched.

Note: To manage **Absences** for delegated employees, search for and select the delegated employee from the **Search** field, then proceed with the absence details as you normally would.



MSS – Revoking Delegation Requests

Note: If you entered an **End Date** for the delegation period, the delegation authority will automatically terminate on the end date.

Note: If an **End Date** was not entered for the delegation period, you can **Edit** and **Delete** the delegated authority at any time.

End of Procedure