

## DHSS Job Aid 20: Delegation and Removal

1.	Delegations are to be used on a temporary basis who	en a Manager or Auditor is out of the office. A
	Manager can only delegate to another Manager. An Remember that leave information is confidential and	Auditor can only delegate to another Auditor.
2	On your home page under Settings select Manage	Delegations
۷.	On your nome page under Settings select Manage	Delegations.
	Time Entry	12 Schedules
	My Timesheet	My Calendar
	Edit Employee Time	Employee Calendars
	8 Edit Time for Groups	My Time Off
	Approve Time Sheets	5 Review Time Off Requests
		Assign Schedules
		Manage Group Schedules
	Reports	A My Swap Requests
		Review Swap Requests
	View Reports	•
	New Analytics Report	
	View Analytics	
		Settings
	🔍 Employees	My Contact Preferences
		Search Manage Delegations
	Maintain My Employees	
3.	Under Manager Delegations select Delegate Auth	ority.
	Manage Delegations	
	wanage Delegations	
	Delegate Authority	
	View/Revoke My Delegations	
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4.	The Enter Search Criteria window appears. This lets you search for one or more assignment groups that you have access to. Click Search. You can also leave the Enter Search Criteria "blank" and click Search to see the groups assigned to you.
	Enter Search Criteria Group Description: Cancel Search You may use * as a wildcard. For instance, ab* would match abc or abbey.
5.	The <b>Choose Delegation Options</b> window appears listing the assignment groups, along with the roles you are granted for each group.
	Assignment Group       Role to Delegate       Effective Date       End Effective Date       Allow Re-delegation         Soc Wkr Ca       (8)       Manager, Group       09/21/2015       09/28/2015       09/28/2015         Cancel       Next
6.	<ul> <li>For each assignment group being delegated, choose your options.</li> <li>In the Assignment Group column, select the checkbox next to the assignment group name.</li> <li>Assignment Group</li> <li>Soc Wkr Ca</li> </ul>
	<ul> <li>In the Role To Delegate column, use the drop-down menu to select the roles to be delegated for the assignment group. (Manager to Manager or Auditor to Auditor)</li> <li>Role to Delegate</li> <li>Manager, Group </li> </ul>
	• In the <b>Effective Date</b> and <b>End Effective Date</b> columns, enter the dates during which the assignment group roles will delegated.
	Effective Date     End Effective Date       09/21/2015     09/30/2015





	Choose	Assignment Group	R	ole to Delegate	Effective Date	End Effective Date	Allow Re-d	elegation	
		Soc Wkr Ca	Manag	er, Group 🔻	09/21/2015	09/28/2015	Γ		
				Cancel	Next				
~	The Sear	rch for Delegat	ion Recini	ents wind	low appears				
		ch for Delegat	ion Recipi		low appears.				
					Search for Delegation Recipients	ı			
				1.	Login ID:				
				2.	Last Name:				
				3.	First Name:				
					Middle Namer				
					Midule Name.				
				5.	Department:				
				6.	User Role:	_			
				0	nly those who can receive (	one			
					of the selected roles will be shown.	9			
					Cancel Search				
					Max Results: 100				
				You instr abb	i may use * as a wildcard. For ance, ab* would match abc or bev.				
I	n the sea	rch window, en	ter your sea	arch criter	ria. If blank, t	his will show	all users i	in that role	e at DHS
E	Enter the	name of the ma	inager/audi	tor you wa	ant to delegate	e to. You can	use a cha	racter strir	ng and/o
tl	he wildca	ard character (*	) to retrieve	e a list of	users matchin	g the characte	ers you en	ter.	
	• If	you are including	ng a wildca	urd, use th	e Max Result	ts field to lim	it the num	ber of disp	olayed
	ree	cords.							
		<b>rch</b> . A window	appears w	ith the res	sults of the sea	urch.			
0	Click <b>Sea</b>		aguita						
C	Click Sea	Search Re	esuits						
C	Click Sea	Search Re							
C	Click <b>Sea</b>	Search Re	esuits		Select				
C	Click Sea	Search Re	1. Log	jin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	5. Department	6. User Role	
C	Click Sea	Search Re	1. Log	jin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	5. Department 35	6. User Role none	
C	Click Sea	Search Re	1. Log	jin ID 2. Last I	Select Name 3. First Nar	me 4. Middle Name	5. Department 35 35	6. User Role none none	
C	Click Sea	Search Re	1. Log	gin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	<b>5. Department</b> 35 35 35	6. User Role none none none	
C	Click <b>Sea</b>	Search Re	1. Log	gin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	5. Department 35 35 35 35 38	6. User Role none none none none	
C	Click <b>Sea</b>	Search Re	1. Log	gin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	5. Department 35 35 35 35 38 35	6. User Role none none none none	
C	Click <b>Sea</b>	Search Re	1. Lo	gin ID 2. Last I	Select Name 3. First Nat	me 4. Middle Name	5. Department 35 35 35 35 38 35 35 35	6. User Role none none none none none	



10.	From the list, select only one user. Click Select.	
	Search Results	
	Select	
	Name 1. Login ID 2. Last Name 3. First Name 4. Middle Name 5. Department 6. User Role	
	O 35 none	
	O 35 none	
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	S 35 none	
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	35   none	
	35 none	
	■ 35 none	
	35   none	
	Role(s) successfully delegated to user Grace A Role Manager, Group on assignment group Soc Wkr Ca	
12.	If any delegation fails, a status message appears listing the unsuccessful delegation and wh For example, a delegation could fail because the assignment group is currently delegated to user.	y it failed. the selected
13.	To remove a delegation, under the Manage Delegation window, select View/Revoke My	Delegation.
	Manage Delegations           Delegate Authority           View/Revoke My Delegations	





	The <b>Enter Search Criteria</b> window appears. This lets you search for one or more of your assignment groups. In the search window, enter your search criteria or leave it blank, then click <b>Search</b> .
	Enter Search Criteria Group Description:
	First Name:
	Last Name:
	User ID:
	As Of Date:
	Cancel Search
	You may use " as a wildcard. For instance, ab" would match abc or abbey.
15.	A window appears with your delegations. Here you can view your delegations and revoke your
	delegation. To revoke your delegation select <b>Kevoke.</b>
	Chelegations
	Operation         Operation <t< th=""></t<>
	Back
16.	The <b>Revoke Delegated Roles</b> window appears. Here you can decide if you want to revoke immediately
101	or on a certain date.
	Revoke Delegated Roles
	Assignment Group Decisiont Effective Date End Effective Date Delegrated Dole My Current Dole
	Assignment Gloup     Recipient     Ellective bale     Ellective bale     Delegate tote       09/25/2015     10/02/2015     MANAGER_GROUP     MANAGER_GROUP
	Revoke Effective of the of day on 09/25/2015 C
	Revoke Effective     Immediately     At end of day on     09/25/2015     09/25/2015       S     M     T     T     F       3     M     T     T     S
	Assignment Globp       Recipient       Enecure bate       Enecure bate       Delegate hole       my current kole         Revoke Effective       Immediately
	Assignment Glop     Recipent     Life Life Une bale     Delegated Note     imy Current Note       Revoke Effective     Immediately     At end of day on     09/25/2015     10/02/2015     MANAGER_GROUP     MANAGER_GROUP       V     September 2015     >     Cancel     Cancel     Cancel       30     31     1     2     3     4     5       6     7     8     9     10     11     12       13     14     15     16     17     18     19       20     21     2     23     24     25     26       20     21     2     3     4     5
	Assignment Glop       Recipent       Cline Line Unite Date       Delegated Note       imy Current Note         Revoke Effective       Immediately
	Assignment Glop       Recipient       Enecure bate       Enecure bate       Delegated note       implement Glop         Revoke Effective       Immediately <ul> <li>At end of day on</li> <li>09/25/2015</li> <li>Cancel</li> </ul> S       M       T       V       T       S       At end of day on       09/25/2015         S       M       T       V       T       S       Cancel       Cancel         S       M       T       V       S       S       Cancel       Cancel         S       M       T       V       S       S       S       S       S         Q       21       2       3       4       5       Cancel       S       S         Q       21       22       32       4       20 <td< th=""></td<>
17.	Revoke Effective       Immediately       At end of day on       09/25/2015       Interactive bate       Delegated Note       Immediately         At end of day on       09/25/2015       Interactive bate       Interactive bate       Delegated Note       Immediately         Cancel       Interactive bate       Interactive bate       Delegated Note       Immediately       Interactive bate       Interactive bate       Delegated Note       Immediately       Interactive bate
17.	Cancel Revoke Effective Immediately At end of day on 09/25/2015 September 2015 F September 2015 F
17.	Assignment Group Revoke Effective Date belegated Role Revoke Effective Delegated Role Revoke Delegated Role Revok
17.	Vestiminent Group       recipient       Elective Date       Delegated Note       Iff Current Note         Ind Lincture Date       Delegated Note       Iff Current Note       MANAGER_GROUP       MANAGER_GROUP         Revoke Effective       Immediately
17.	Recover Effective       Immediately       At end of day on       09/25/2015       Canced         September 2015       Manager 2015         Moder 2015       Manager 2015         September 2015       Manager 2015         September 2015       Manager 2015         September 2015       Manager 2015         Revoke Effective       Manager 2015         Revoke Effective       Manager 2015
17.	Assignment Group       Recipient       Litecture Date       Directure Date       Wy Current Note         Revoke Effective       Immediately       Itend of day on       09252015       MANAGER_GROUP       MANAGER_GROUP         So at 1 to 2 status       So at 1 to 2 status       Cancel       So at 2 status       Cancel         So at 2 status       So at 1 to 2 status       Cancel       So at 2 status       So at 2 status         Once you have selected your effective revoke date select Revoke Delegation(s).       Immediately       So at 2 status       So at 2 status         Revoke Delegated Roles       Recipient       Effective Date       Delegated Role       Wy Current Role         Revoke Effective       Immediately       A tend of day on       09252015       Iuo22015       MANAGER_GROUP         MANAGER_GROUP       MANAGER_GROUP       MANAGER_GROUP       MANAGER_GROUP       MANAGER_GROUP         Revoke Effective       Immediately       A tend of day on       09252015       Iuo22015       MANAGER_GROUP         The system displays the operation performed successfully message in the banner.       Operation performed successfully.       Cancel