

**Delegation Administration for Supervisors Overview**

This Job Aid provides step-by-step instructions for delegating and revoking the Worklist to another person (proxy). This allows the Proxy to approve or deny designated transactions on their behalf. It also includes how to accept and reject a Delegation Request as well as how to view Delegation Requests based on their current status.

Approval authority should only be delegated to a user:

- With a Cardinal TL Supervisor role in Cardinal HCM and has the same direct supervisor as the (Reports To) in Cardinal HCM

OR

- The user is the direct supervisor (Reports To) in Cardinal HCM with the Cardinal TL Supervisor role

Delegation cannot be used when a Reports To position is vacant or when the Reports To supervisor is suspended or on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor.

**Note:** It is never recommended to delegate down to one of the direct report employees. If this is done, that employee will have the ability to approve their own time or absences as well as the time and absences for all of the other direct report employees. Self-approval of time and absences is strongly discouraged and is not a best business practice. See the [TA Delegation Example](#) at the end of this Job Aid for examples of best business practice delegation.

**Navigation Note:** Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.



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**Revision History**

Revision Date	Summary of Changes
12/3/2024	Baseline

### Delegating The Worklist

The following steps are used by a supervisor to delegate their Worklist to a Proxy who will process approvals on their behalf.

Delegation cannot be used when a Reports To position is vacant or when the Reports To supervisor is suspended or on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor.

Step	Action
1.	Navigate to the <b>Manage Delegation</b> page using the following path: <b>Menu &gt; Self-Service &gt; Manage Delegation</b>
<p>The <b>Manage Delegation</b> page displays.</p> <div data-bbox="241 770 1398 1209" style="border: 1px solid black; padding: 10px;"> <p><b>Manage Delegation</b></p> <hr/> <p>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.</p> <p style="text-align: right;"><a href="#">Learn More about Delegation</a></p> <p>Select <i>Create Delegation Request</i> to choose transactions to delegate and proxies to act on your behalf.</p> <p style="text-align: right;"><a href="#">Create Delegation Request</a></p> </div>	
2.	Click the <b>Create Delegation Request</b> link. <div data-bbox="293 1297 641 1360" style="border: 2px solid red; padding: 5px; display: inline-block;"> <a href="#">Create Delegation Request</a> </div>

Step	Action
	<p>The <b>Create Delegation Request</b> page displays. The <b>Enter Dates</b> section is displayed by default.</p> <div data-bbox="240 378 1396 1083" style="border: 1px solid black; padding: 10px;"> <p><b>Create Delegation Request</b></p> <hr/> <p><b>Enter Dates</b></p> <p>Environmental Manager II</p> <p>Enter the dates for your delegation request. Enter a <i>From Date</i> that is today or later. Enter a <i>To Date</i> that is the same as or later than your <i>From Date</i>. For open-ended delegation requests, leave the <i>To Date</i> blank.</p> <p><b>Delegation Dates</b></p> <p>From Date <input type="text" value="11/02/2022"/> </p> <p>To Date <input type="text" value="11/18/2022"/> </p> <p><input type="button" value="Next"/> <input type="button" value="Cancel"/></p> </div>
3.	<p>Enter the applicable from and to dates for the period of time needed for the person to act as a proxy on their behalf in the <b>From Date</b> and <b>To Date</b> fields.</p> <div data-bbox="300 1205 688 1352" style="border: 1px solid black; padding: 5px;"> <p>From Date <input type="text" value="11/02/2022"/> </p> <p>To Date <input type="text" value="11/18/2022"/> </p> </div>
	<p>For an open-ended Delegation Request, do not enter a date in the <b>To Date</b> field.</p>
4.	<p>Click the <b>Next</b> button.</p> <div data-bbox="292 1549 769 1629" style="border: 1px solid black; padding: 5px;"> <p><input type="button" value="Next"/> <input type="button" value="Cancel"/></p> </div>

Step	Action												
	<p>The <b>Create Delegation Request</b> page refreshes with the <b>Select Transactions</b> section.</p> <div data-bbox="380 380 1260 1104" style="border: 1px solid black; padding: 10px;"> <p><b>Create Delegation Request</b></p> <hr/> <p><b>Select Transactions</b></p> <p>Environmental Manager II</p> <p>Select the transactions that you want to delegate to a proxy. You can select one or many transactions.</p> <p><b>Delegate Transactions</b></p> <table border="1" data-bbox="383 678 1243 999"> <thead> <tr> <th data-bbox="383 678 467 730"></th> <th data-bbox="467 678 1243 730">Transaction</th> </tr> </thead> <tbody> <tr> <td data-bbox="383 730 467 783"><input checked="" type="checkbox"/></td> <td data-bbox="467 730 1243 783">Manage Approve Payable Time</td> </tr> <tr> <td data-bbox="383 783 467 835"><input checked="" type="checkbox"/></td> <td data-bbox="467 783 1243 835">Manage Approve Reported Time</td> </tr> <tr> <td data-bbox="383 835 467 888"><input checked="" type="checkbox"/></td> <td data-bbox="467 835 1243 888">Manage Reported Time</td> </tr> <tr> <td data-bbox="383 888 467 940"><input checked="" type="checkbox"/></td> <td data-bbox="467 888 1243 940">Manager Absence Balance Fluid</td> </tr> <tr> <td data-bbox="383 940 467 993"><input checked="" type="checkbox"/></td> <td data-bbox="467 940 1243 993">Manager Absence History Fluid</td> </tr> </tbody> </table> <p data-bbox="383 1020 654 1041"> <a href="#">Select All</a>      <a href="#">Deselect All</a> </p> <p data-bbox="383 1052 1021 1087"> <input type="button" value="Previous"/>      <input type="button" value="Next"/>      <input type="button" value="Cancel"/> </p> </div>		Transaction	<input checked="" type="checkbox"/>	Manage Approve Payable Time	<input checked="" type="checkbox"/>	Manage Approve Reported Time	<input checked="" type="checkbox"/>	Manage Reported Time	<input checked="" type="checkbox"/>	Manager Absence Balance Fluid	<input checked="" type="checkbox"/>	Manager Absence History Fluid
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<input checked="" type="checkbox"/>	Manager Absence Balance Fluid												
<input checked="" type="checkbox"/>	Manager Absence History Fluid												
5.	<p>Click the <b>Select All</b> link.</p> <div data-bbox="289 1192 698 1251" style="border: 1px solid black; padding: 5px;"> <p><a href="#">Select All</a>      <a href="#">Deselect All</a></p> </div>												
	<p>When creating Delegation Requests, always select all of the Transaction Types.</p>												
6.	<p>Click the <b>Next</b> button.</p> <div data-bbox="293 1451 1149 1524" style="border: 1px solid black; padding: 5px;"> <p> <input type="button" value="Previous"/>      <input checked="" type="button" value="Next"/>      <input type="button" value="Cancel"/> </p> </div>												

Step	Action																																																																						
	<p>The <b>Create Delegation Request</b> page refreshes with the <b>Select Proxy by Hierarchy</b> section. All eligible employees display for selection.</p> <div data-bbox="289 411 1349 1062" style="border: 1px solid black; padding: 5px;"> <p><b>Create Delegation Request</b></p> <p><b>Select Proxy by Hierarchy</b></p> <p>Environmental Manager II</p> <p>This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the <a href="#">Search by Name</a> hyperlink to search for proxies outside your hierarchy.</p> <p><b>Choose Delegate</b></p> <table border="1" data-bbox="293 617 1344 1016"> <thead> <tr> <th></th> <th>Name</th> <th>Empl ID</th> <th>Organizational Relationship</th> <th>Job Title</th> <th>Department</th> <th>Supervisor Name</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Environmental Manager I</td><td>Dairy and Foods</td><td>Cosmo Spacely</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Admin and Office Spec III</td><td>Dairy and Foods</td><td>Cosmo Spacely</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Compliance/Safety Officer IV</td><td>Dairy and Foods</td><td>Cosmo Spacely</td></tr> <tr><td><input checked="" type="radio"/></td><td></td><td></td><td>Employee</td><td>Environmental Manager I</td><td>Dairy and Foods</td><td>Cosmo Spacely</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Environmental Manager II</td><td>Meat and Poultry Services</td><td>Janice Hunt004</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Gen Admin Manager II</td><td>Animal and Food Ind Srv Admin</td><td>Green Tree06</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Veterinarian II</td><td>Veterinary Services</td><td>Janice Hunt004</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Environmental Manager I</td><td>Dairy and Foods</td><td>Cosmo Spacely</td></tr> <tr><td><input type="radio"/></td><td></td><td></td><td>Employee</td><td>Gen Admin Supv I/Coord I</td><td>Animal and Food Ind Srv Admin</td><td>Janice Hunt004</td></tr> </tbody> </table> <p>Previous    Next    Cancel</p> </div>		Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name	<input type="radio"/>			Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely	<input type="radio"/>			Employee	Admin and Office Spec III	Dairy and Foods	Cosmo Spacely	<input type="radio"/>			Employee	Compliance/Safety Officer IV	Dairy and Foods	Cosmo Spacely	<input checked="" type="radio"/>			Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely	<input type="radio"/>			Employee	Environmental Manager II	Meat and Poultry Services	Janice Hunt004	<input type="radio"/>			Employee	Gen Admin Manager II	Animal and Food Ind Srv Admin	Green Tree06	<input type="radio"/>			Employee	Veterinarian II	Veterinary Services	Janice Hunt004	<input type="radio"/>			Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely	<input type="radio"/>			Employee	Gen Admin Supv I/Coord I	Animal and Food Ind Srv Admin	Janice Hunt004
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7.	<p>Select the applicable proxy by clicking the corresponding <b>Select</b> radio button option.</p> <div data-bbox="293 1150 1482 1209" style="border: 1px solid black; padding: 5px;"> <table border="1"> <tr> <td style="text-align: center;"><input checked="" type="radio"/></td> <td style="text-align: center;">Employee</td> <td style="text-align: center;">Environmental Manager I</td> <td style="text-align: center;">Dairy and Foods</td> </tr> </table> </div>	<input checked="" type="radio"/>	Employee	Environmental Manager I	Dairy and Foods																																																																		
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8.	<p>Click the <b>Next</b> button.</p> <div data-bbox="293 1528 1122 1598" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Previous    <b>Next</b>    Cancel</p> </div>																																																																						

Step	Action
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The **Create Delegation Request** page refreshes with the **Delegation Detail** section.

**Create Delegation Request**

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**Delegation Detail**

Environmental Manager II

Proxy [Redacted]

From Date 11/02/2022

To Date 11/18/2022

**Transactions**

Manage Approve Payable Time	
Manage Approve Reported Time	
Manage Reported Time	
Manager Absence Balance Fluid	
Manager Absence History Fluid	

9. Review the information, and if accurate, click the **Submit** button to complete the Delegation Request.

Submit

Previous

Cancel



Use the **Previous** button to return to the previous sections and make updates as needed.

A **Confirmation** message displays indicating that the Delegation Request has been submitted.

**Create Delegation Request**

---

Environmental Manager II

You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

10. Click the **OK** button.

OK

### Revoking The Worklist

Delegations will automatically expire on the To Date defined (when applicable). Revoking the Worklist is only necessary if the user wants to take back their Worklist prior to the defined To Date or if a To Date was not defined.

The following steps are used to revoke (take back) the Worklist.

Step	Action
1.	Navigate to the <b>Manage Delegation</b> page using the following path: <b>Menu &gt; Self Service &gt; Manage Delegation</b>
<p>The <b>Manage Delegation</b> page displays.</p> <div data-bbox="237 732 1401 1253" style="border: 1px solid black; padding: 10px;"> <p><b>Manage Delegation</b></p> <hr/> <p>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.</p> <p style="text-align: right;"><a href="#">Learn More about Delegation</a></p> <p>Select <i>Create Delegation Request</i> to choose transactions to delegate and proxies to act on your behalf.</p> <p style="text-align: right;"><a href="#">Create Delegation Request</a></p> <p>Select <i>Review My Proxies</i> to review the list of transactions that you have delegated and the proxy for each transaction.</p> <p style="text-align: right;"><a href="#">Review My Proxies</a></p> </div>	
2.	Click the <b>Review My Proxies</b> link. <div data-bbox="302 1339 557 1398" style="border: 2px solid red; padding: 2px; display: inline-block; margin-top: 10px;"> <a href="#">Review My Proxies</a> </div>

Step	Action
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The **My Proxies** page displays.

**My Proxies**

Environmental Manager II

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.

Show Requests by Status    Refresh

**Choose Delegate**

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input checked="" type="checkbox"/>	Manager Absence Balance Fluid		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	<a href="#">i</a>
<input checked="" type="checkbox"/>	Manager Absence History Fluid		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	<a href="#">i</a>
<input checked="" type="checkbox"/>	Manage Reported Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	<a href="#">i</a>
<input checked="" type="checkbox"/>	Manage Approve Reported Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	<a href="#">i</a>
<input checked="" type="checkbox"/>	Manage Approve Payable Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	<a href="#">i</a>

[Select All](#)    [Deselect All](#)    Revoke

[Return to Manage Delegation](#)

3. Click the **Select All** link to select all of the Transaction Type(s) to revoke simultaneously.

Select All    [Deselect All](#)

4. Click the **Revoke** button.

Revoke

The **Revoke Delegation Request** page displays.

**Revoke Delegation Request**

Environmental Manager II

Are you sure you want to revoke the delegation requests that you have selected ?

Yes - Continue
No - Cancel

5. Click the **Yes – Continue** button to confirm.

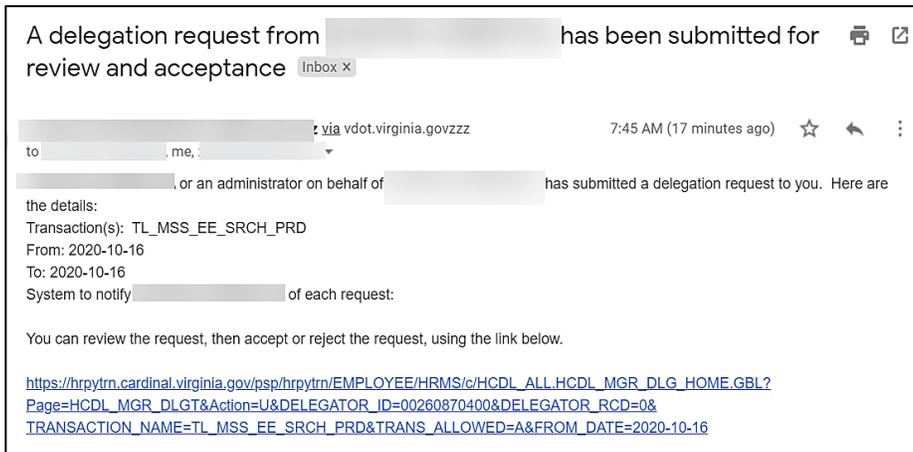
Yes - Continue
No - Cancel

Step	Action
	<p>A <b>Confirmation</b> message displays indicating that the Delegation Request has been successfully revoked.</p> <div data-bbox="293 411 1346 804" style="border: 1px solid black; padding: 10px;"><p><b>Revoke Delegation Request</b></p><hr/><p>Environmental Manager II</p><p>You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.</p><p style="text-align: center;"><input type="button" value="OK"/></p></div>
6.	<p>Click the <b>OK</b> button.</p> <div data-bbox="293 892 570 957" style="border: 1px solid red; padding: 5px; display: inline-block;"><input type="button" value="OK"/></div>

### Accepting or Rejecting a Delegation Request as a Proxy

The following steps are used to accept or reject a Delegation Request as the Proxy. When someone delegates transactions to another user, they will receive an email notifying the user of the delegation request.

Sample email:



Step	Action
1.	Navigate to the <b>Manage Delegation</b> page using the following path: <b>Menu &gt; Self Service &gt; Manage Delegation</b>
	<p>The <b>Manage Delegation</b> page displays.</p> <div data-bbox="261 1209 1377 1749" style="border: 1px solid black; padding: 10px;"> <p><b>Manage Delegation</b></p> <hr/> <p>[redacted]</p> <p>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.</p> <p style="text-align: right;"><a href="#">Learn More about Delegation</a></p> <p>Select <i>Create Delegation Request</i> to choose transactions to delegate and proxies to act on your behalf.</p> <p style="text-align: right;"><a href="#">Create Delegation Request</a></p> <p>Select <i>Review My Delegated Authorities</i> to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.</p> <p style="text-align: right;"><a href="#">Review My Delegated Authorities</a></p> </div>
	<p>If the user is logged into Cardinal, they can also click the link in the email to access the <b>Manage Delegation</b> page.</p>

Step	Action
2.	Click the <b>Review My Delegated Authorities</b> link. <div style="border: 1px solid red; padding: 2px; display: inline-block; margin-top: 5px;">             Review My Delegated Authorities           </div>

The **My Delegated Authorities** page displays.

**My Delegated Authorities**

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Environmental Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted Refresh

**Choose Delegate**

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/>	Multiple Transactions		Environmental Manager II	11/02/2022	11/18/2022	Submitted	Inactive	i

Select All Deselect All Accept Reject

[Return to Manage Delegation](#)

3.	View the Delegation Request(s) that have been submitted. Click the <b>Multiple Transactions</b> link to see a detailed list of the Transaction Types being delegated to the user. <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 5%;"></th> <th>Transaction</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="border: 1px solid red;">Multiple Transactions</td> </tr> </tbody> </table> </div>		Transaction	<input type="checkbox"/>	Multiple Transactions
	Transaction				
<input type="checkbox"/>	Multiple Transactions				

The **Multiple Transactions** page displays in a pop-up window.

Multiple Transactions x
Help

**Multiple Transactions**

Transaction	Name	From Date	To Date	Request Status	Delegation Status
Manager Absence History Fluid		11/02/2022	11/18/2022	Submitted	Inactive
Manager Absence Balance Fluid		11/02/2022	11/18/2022	Submitted	Inactive
Manage Reported Time		11/02/2022	11/18/2022	Submitted	Inactive
Manage Approve Reported Time		11/02/2022	11/18/2022	Submitted	Inactive
Manage Approve Payable Time		11/02/2022	11/18/2022	Submitted	Inactive

Return

Step	Action																		
4.	<p>Review the Transaction Types being delegated to the user and then click the <b>Return</b> button.</p> <div style="border: 1px solid red; padding: 5px; display: inline-block; margin: 10px 0;">Return</div>																		
<p>The <b>My Delegated Authorities</b> page returns.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p><b>My Delegated Authorities</b></p> <hr/> <p>Environmental Manager I</p> <p>This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details.</p> <p>Show Requests by Status: Submitted <span style="font-size: small;">▼</span> <span style="margin-left: 20px;">Refresh</span></p> <p><b>Choose Delegate</b></p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 20%;">Transaction</th> <th style="width: 20%;">Name</th> <th style="width: 15%;">Job Title</th> <th style="width: 10%;">From Date</th> <th style="width: 10%;">To Date</th> <th style="width: 10%;">Request Status</th> <th style="width: 10%;">Delegation Status</th> <th style="width: 10%;">Details</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>Multiple Transactions</td> <td>Cosmo Spacely</td> <td>Environmental Manager II</td> <td>11/02/2022</td> <td>11/18/2022</td> <td>Submitted</td> <td>Inactive</td> <td style="text-align: center;"><a href="#">i</a></td> </tr> </tbody> </table> <p>Select All <span style="margin-left: 20px;">Deselect All</span> <span style="margin-left: 20px;">Accept</span> <span style="margin-left: 20px;">Reject</span></p> <p><a href="#">Return to Manage Delegation</a></p> </div>			Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	<input checked="" type="checkbox"/>	Multiple Transactions	Cosmo Spacely	Environmental Manager II	11/02/2022	11/18/2022	Submitted	Inactive	<a href="#">i</a>
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details											
<input checked="" type="checkbox"/>	Multiple Transactions	Cosmo Spacely	Environmental Manager II	11/02/2022	11/18/2022	Submitted	Inactive	<a href="#">i</a>											
	<p>To accept a Delegation Request, proceed to Step 5. To reject a Delegation Request, proceed to Step 8.</p>																		
5.	<p>Click the <b>Select All</b> link.</p> <div style="border: 1px solid red; padding: 5px; display: inline-block; margin: 10px 0;"> <span>Select All</span> <span style="margin-left: 20px;">Deselect All</span> </div>																		
6.	<p>Click the <b>Accept</b> button.</p> <div style="border: 1px solid red; padding: 5px; display: inline-block; margin: 10px 0;"> <span>Accept</span> <span style="margin-left: 20px;">Reject</span> </div>																		

Step	Action
	<p>The <b>Accept Delegation Request</b> page displays with a <b>Confirmation</b> message indicating that the Delegation Request has been accepted.</p> <div data-bbox="292 411 1347 835" style="border: 1px solid black; padding: 10px;"> <p><b>Accept Delegation Request</b></p> <hr/> <p>Environmental Manager I</p> <p>You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.</p> <p style="text-align: center;"><input type="button" value="OK"/></p> </div>
7.	<p>Click the <b>OK</b> button. The process for accepting a Delegation Request is complete.</p> <div data-bbox="284 921 574 997" style="border: 1px solid black; padding: 5px;"> <input type="button" value="OK"/> </div>
8.	<p>Click the <b>Reject</b> button.</p> <div data-bbox="292 1083 781 1163" style="border: 1px solid black; padding: 5px;"> <input type="button" value="Accept"/> <input style="border: 2px solid red;" type="button" value="Reject"/> </div>
	<p>The <b>Reject Delegation Request</b> page displays with a <b>Confirmation</b> message indicating that the Delegation Request has been rejected.</p> <div data-bbox="253 1283 1386 1719" style="border: 1px solid black; padding: 10px;"> <p><b>Reject Delegation Request</b></p> <hr/> <p>Environmental Manager I</p> <p>You have rejected a delegation request. Refer to the My Delegated Authorities page to view rejected delegation requests.</p> <p style="text-align: center;"><input type="button" value="OK"/></p> </div>
9.	<p>Click the <b>OK</b> button. The process for rejecting a Delegation Request is complete.</p> <div data-bbox="284 1808 597 1883" style="border: 1px solid black; padding: 5px;"> <input style="border: 2px solid red;" type="button" value="OK"/> </div>

### Viewing the Status of Delegation Requests

Use these steps to view Delegation Requests based on their current status.

Step	Action
1.	Navigate to the <b>Manage Delegation</b> page using the following path: <b>Menu &gt; Self Service &gt; Manage Delegation</b>

The **Manage Delegation** page displays.

**Manage Delegation**

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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 Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

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](#)

2.	Click the <b>Review My Delegated Authorities</b> link.
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The **My Delegated Authorities** page displays.

**My Delegated Authorities**

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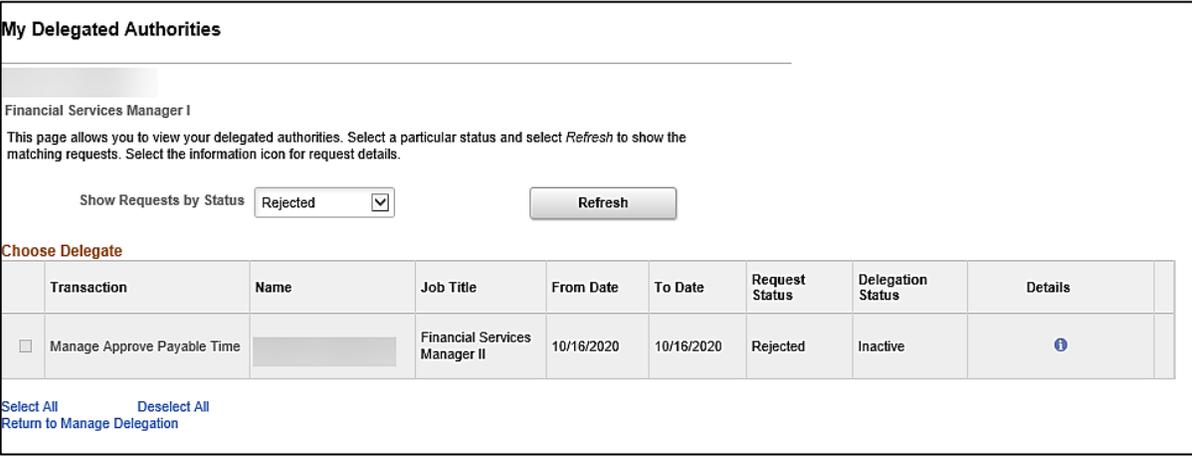
Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status  

[Select All](#)      [Deselect All](#)

[Return to Manage Delegation](#)

Step	Action
3.	<p>Select the applicable Request Status to view using the <b>Show Requests by Status</b> dropdown button.</p> 
	<p>The Request Status options are:</p> <ul style="list-style-type: none"> <li>• Accepted</li> <li>• Ended</li> <li>• Rejected</li> <li>• Revoked</li> <li>• Submitted</li> </ul>
4.	<p>Click the <b>Refresh</b> button.</p> 
<p>The <b>My Delegated Authorities</b> page refreshes with the search results.</p> 	
5.	<p>Review the Delegation Requests that meet the selected Request Status.</p> 

Step	Action																		
	<p>To view the Delegation Request(s) with another Request Status, select the applicable Request Status using the <b>Show Requests by Status</b> dropdown button and then click the <b>Refresh</b> button.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><b>My Delegated Authorities</b></p> <hr/> <p>Financial Services Manager I</p> <p>This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details.</p> <p style="text-align: center;"> <span>Show Requests by Status</span> <div style="border: 2px solid red; padding: 2px; display: inline-block;"> <ul style="list-style-type: none"> <li>Accepted</li> <li>Ended</li> <li style="background-color: #007bff; color: white;">Rejected</li> <li>Revoked</li> <li>Submitted</li> </ul> </div> <span style="margin-left: 50px; border: 2px solid red; padding: 2px 10px;">Refresh</span> </p> <p><b>Choose Delegate</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Transaction</th> <th>Name</th> <th>Job Title</th> <th>From Date</th> <th>To Date</th> <th>Request Status</th> <th>Delegation Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>Manage Approve Reported Time</td> <td>SUMITRA SHRESTHA</td> <td>Financial Services Manager II</td> <td>10/16/2020</td> <td>10/16/2020</td> <td>Accepted</td> <td>Active</td> <td style="text-align: center;"></td> </tr> </tbody> </table> <p style="font-size: small;"> <a href="#">Select All</a>      <a href="#">Deselect All</a>  <a href="#">Return to Manage Delegation</a> </p> </div>		Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	<input type="checkbox"/>	Manage Approve Reported Time	SUMITRA SHRESTHA	Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active	
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details											
<input type="checkbox"/>	Manage Approve Reported Time	SUMITRA SHRESTHA	Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active												

The page refreshes with search results based on the selected Request Status.

**My Delegated Authorities**

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Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status

Accepted ▼

Refresh

**Choose Delegate**

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/>	Manage Approve Reported Time	[Redacted]	Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active	

[Select All](#)      [Deselect All](#)  
[Return to Manage Delegation](#)

### TA Delegation Example (Best Business Practice)

