What are Delegations?

Workday allows you to delegate your tasks to an employee who is a peer or superior when you are unable to perform time-sensitive tasks due to time off, or a leave of absence.

To identify employees within the agency that have delegations setup, run the report below:

- HCM|Current Delegations by Organization

What is changing with Delegations when Time Off app goes live?

Action Required: Delegations under "Start on My Behalf"

When Time Off app goes live June 2, 2025, managers with delegations setup for peers or superiors with "Start On My Behalf" actions must update them with the new Time Off delegations.

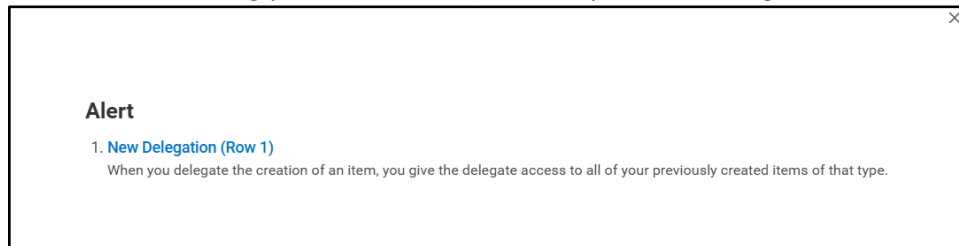**"Start on My Behalf" delegation options after June 2, 2025:**

- ***Edit Time Off for a Worker***
  - Necessary for delegations to work
- ***Edit Time Off for Self***
  - Not necessary unless the supervisor is not available to take this action.
- ***Request Time Off for a Worker***
  - Necessary for delegations to work.
- ***Request Time Off for Self***
  - Not necessary unless the supervisor is not available to take this action.
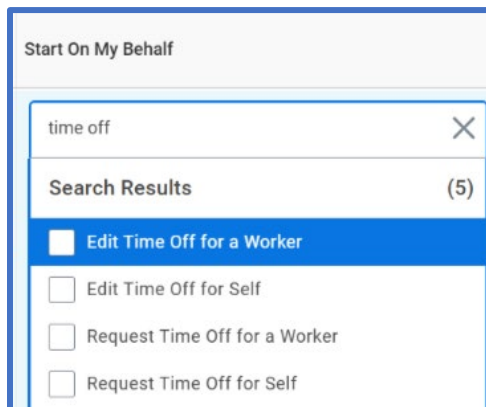
Steps to take to update delegations:

1. In Workday, Navigate to "***My Tasks***"
   a. From the left side menu Scroll down to ***"Manage Delegations"***
2. Click on the "**X**" to remove the following:
   a. Correct My Absence
   b. Correct My Time Off

   c. Enter Absence

   d. Correct Time Off

3. Type in "Time Off" in the "Start on My Behalf" search bar for the list of options to display and select the following from the list:

   a. Edit Time Off for Woker

   b. Request Time Off for a Worker

4. You will receive the following yellow (soft error) and can proceed through this error.

   a.

> **Alert**
>
> 1. New Delegation (Row 1)
>   When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

5. Click "Submit" to save changes and route to your supervisor for approval

6. Once your supervisor has approved the delegation it will be active.

Delegations under "***Do My Tasks on My Behalf***"

For most delegations, setup under *"Do My Tasks on My Behalf"* there will not be any changes needed when the new "Time Off" app goes live. However, DAS recommends that managers review these delegations and make sure the end dates are no further than 365 days out and they are in sync with "Start on my behalf" delegations.

Best Practices for managing delegations:

Managers are encouraged to review delegations currently setup in Workday, after the "Time Off" app goes live to make sure start and end dates are accurate, and updates noted below are made to activate the delegations.

Following are DAS recommendations for setup and management of Workday Delegations:

1. How To Setup a Delegation:

   a. Review Help Article: ***"Delegate My Tasks"***

   b. https://wd5.myworkday.com/oregon/email-universal/inst/25755$808/rel-task/2998$40834.htmld

   c. Start and end dates are required in the setup of delegations.

   d. End dates should be no more than 365 days from the start date.

2. Review your delegations:

   a. Go to "My Tasks" then scroll down to "Manage Delegations" to view or manage current delegations.

   b. Review delegations at least annually.

     i. ***Please note:*** Delegations do not end when someone changes jobs.

   c. Managers are encouraged to setup and update delegations in January to align with the calendar year.

   d. Delegation end dates should be no more than 365 days from the start date.

3. Manage Delegations:

      a.   Make edits to delegations as soon as you are aware of staff changes to keep them current.

      b.   Follow the steps below for making updates to delegations after the new Time Off app goes live.

4.   Regularly run the report noted below to identify employees within the agency that have delegations setup.

      a.   HCM|Current Delegations by Organization

Thank you for your review of this information regarding delegations. You are encouraged to share this within your agency for Managers and Employees that may have delegations setup.

Please create a case for **Workday | General Help** if you have questions regarding delegations and the new Time Off app.

We appreciate your continued partnership,

DAS Workday Team