



Job Aid: Assign Delegate

Purpose

The purpose of this job aid is to guide you, as a supervisor, through the step-by-step process of assigning a delegate to manage your employees. The delegate function is often used when a temporary replacement is needed to act on your behalf, for example, when you take an extended vacation or cannot access the VA TMS. To assign someone to manage an employee long-term, you should assign an alternate supervisor.

In this job aid, you will learn how to:

- A. Assign a delegate
- B. Edit a delegate
- C. Remove a delegate

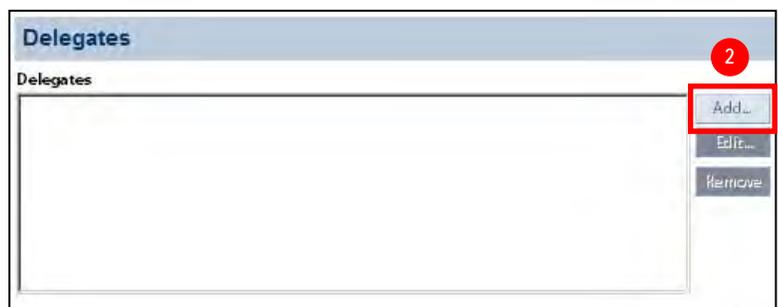
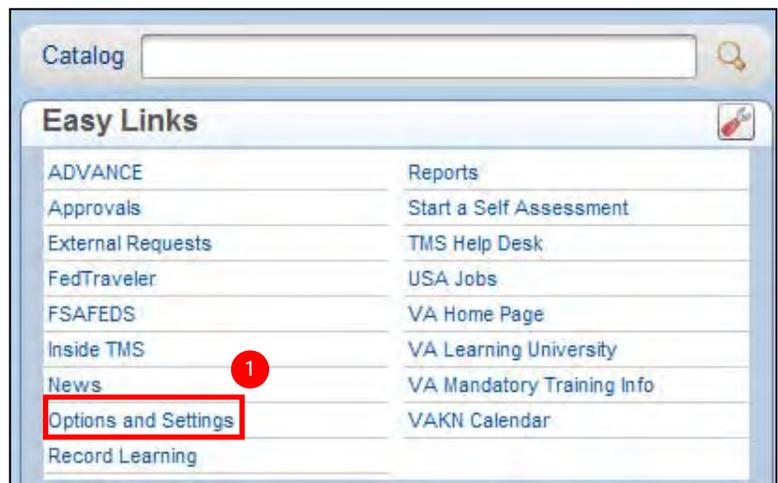


Task A. Assigning a Delegate

A delegate is another person that can take action on a supervisor's direct and indirect employees. By making people delegates, you are allowing them to perform a supervisor's work, such as approving training requests or assigning items to an employee's To-Do List. To assign a delegate:

1. Click the **Options and Settings** link from the *Easy Links* section of the *Home* page. You will be directed to the *Options and Settings* page.
2. Click the **Add** button, found in the *Delegates* section. This will open the *Add Delegate* window.

Note: This section is not available to all employees.



3. Click in the, **Enter delegate name** text field. Type the name of the person you wish to make a delegate, and select a delegate from the drop-down results

Or

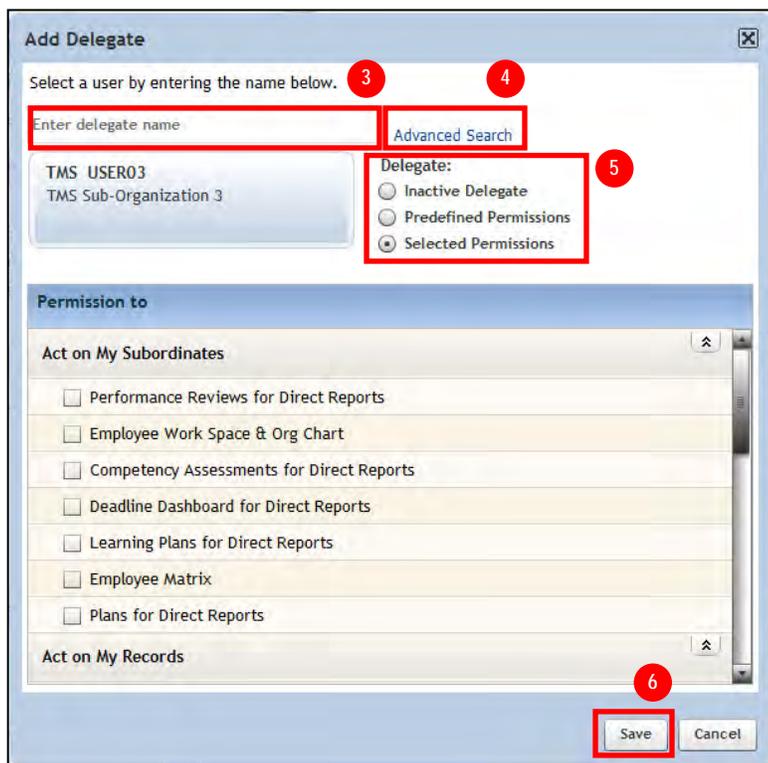
4. Click the **Advanced Search** link to access additional search parameters, such as user ID, first name, and last name.

5. Select the desired permission option from the *Delegate* radio button menu.

- *Inactive Delegate* does not assign permissions. This option may be used to identify one or more delegates that will be used in the future or to inactivate a delegate's permissions when you return from vacation, for example. Permissions would need to be updated later as needed
- *Predefined Permissions* assign all permissions to a selected delegate that has been defined by an administrator in the past
- *Selected Permissions* provide the ability to determine what permissions a delegate may be granted. If selecting this option, click the checkbox next to delegate from the *Permission to* menu

6. Click **Save**.

- A notification will be sent to inform the user of the assignment
- Those assigned as delegates will have a  **Delegate** icon on their *Home* page

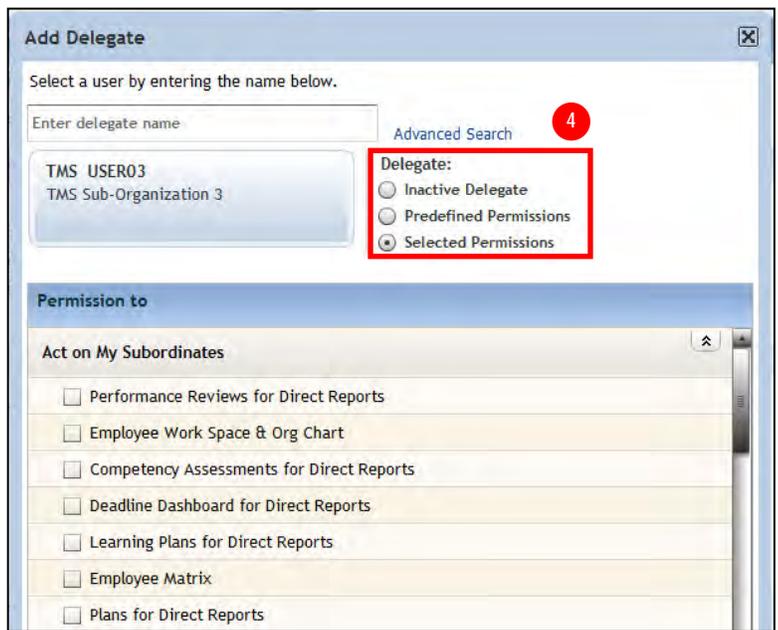




Task B. Editing a Delegate

You can edit the permissions of delegates to whom you have previously assigned. To do this:

1. Click the **Options and Settings** link from the *Easy Links* section of your *Home* page. You will be directed to the *Options and Settings* page.
2. Click the name of the delegate you wish to edit from the *Delegates* section.
3. Click **Edit**. This will open the *Add Delegates* window.
4. Select the desired permission option from the *Delegate* radio button menu.
 - *Inactive Delegate* does not assign permissions. This option may be used to identify one or more delegates that will be reactivated in the future. Permissions would need to be updated later as needed
 - *Predefined Permissions* assign all permissions to a selected delegate that have been defined by an administrator
 - *Selected Permissions* provide the ability to determine what permissions a delegate may be granted. If selecting this option, click the checkbox next to the desired permissions you wish to delegate from the *Permission to* menu





5. Click **Save**.

- A notification will be sent to inform the user of the assignment
- Those assigned as delegates will have a  **Delegate** icon on their *Home* page

Add Delegate

Select a user by entering the name below.

Enter delegate name Advanced Search

TMS USER03
TMS Sub-Organization 3

Delegate:
 Inactive Delegate
 Predefined Permissions
 Selected Permissions

Permission to

Act on My Subordinates

- Performance Reviews for Direct Reports
- Employee Work Space & Org Chart
- Competency Assessments for Direct Reports
- Deadline Dashboard for Direct Reports
- Learning Plans for Direct Reports
- Employee Matrix
- Plans for Direct Reports

Act on My Records

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Save Cancel



Task C. Removing a Delegate

You can remove delegates to whom you have previously assigned permissions. To do this:

1. Click the **Options and Settings** link from the *Easy Links* section of your *Home* page. You will be directed to the *Options and Settings* page.
2. Click the name of the delegate you wish to edit or remove from the *Delegates* section.
3. Click the **Remove** button to remove the selected delegate.

