

SOP Supervisor Task Delegation



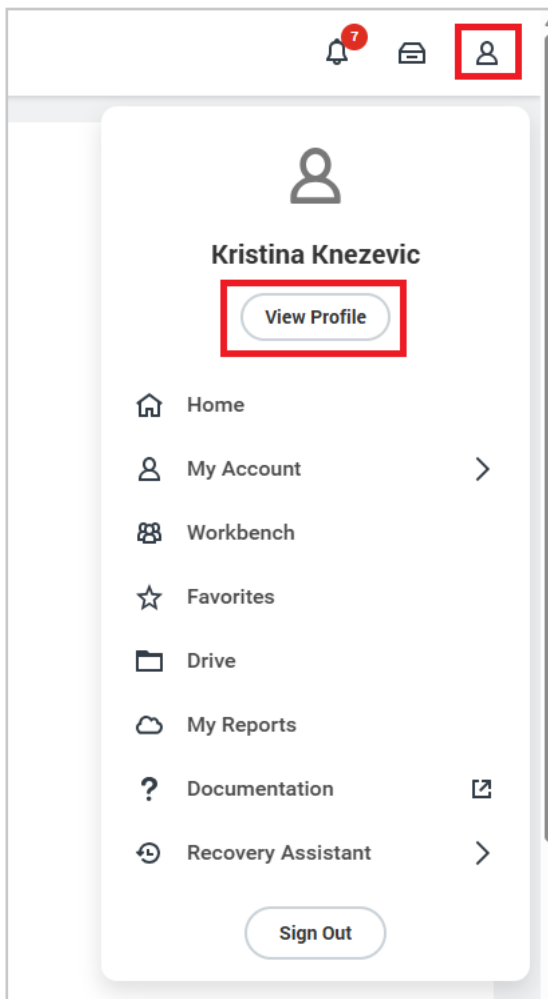
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Step-by-step guide to
delegating to another
manager/supervisor
in Workday



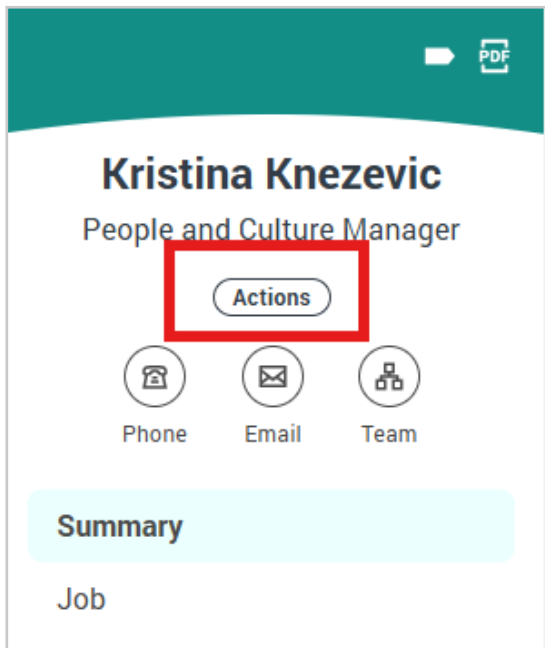
Sign In & Open Your Profile

- 1 Log in to Workday.
 - a) In the top-right corner, click your **profile photo/initials**.
 - b) In the dropdown, select **“View Profile”** (or simply click your name).



Go to Your Delegations

- 1 On your profile page, look for the **“Actions”**.
 - a) Click **“Actions”**, then **“Business Processes”**, then **“My Delegations”**.



Create a New Delegation

- 1 On the “**My Delegations/Manage Delegations**” screen, then click “**Manage Delegations**”.
 - a) A **Delegation Form** will open.

My Delegations

For Kristina Knezevic

[Current Delegations](#)[Current Task Delegations](#)[Delegation History](#)[Delegated Tasks](#)[Business Processes allowed for Delegation](#)

0 items

Delegation	Begin Date	End Date	Delegate
No items available.			

Manage Delegations

Set the delegation dates

- 1 In the **Delegation Form**, you'll normally see:
 - a) **"Begin Date"** – the start date when the delegation becomes active.
 - b) **"End Date"** – the date the delegation stops.

- 2 Set **"Begin Date"** to the first day you want the other manager/supervisor to act on your behalf.
 - a) Set **"End Date"** to the last day (or leave blank if your company allows open-ended delegations and that's what you want—but usually dates are required, especially for leave coverage).

Choose the Person You're Delegating to

- 1 Find the field typically called **“Delegate”, “Delegate” To, or “Delegation Recipient”**.
- 2 Click into that field and **search by the person's name** (the manager or supervisor who will handle your tasks).
- 3 **Select the correct person** from the search results.
Make sure you select the correct person – many organizations have people with similar names.

Select Which Tasks/Business Processes to Delegate

- 1 This is **the key part**. Usually you'll see something like:
 - a) **Click the box** to delegate all business process (Yes/No).

- 2 Typical options:

Option A: Delegate all business processes

- Choose Yes for **“Delegate all business processes”** (or equivalent).
- Optionally, you may see, **“Retain access to delegated tasks”**. Check this if you still want to see and act on items yourself while they also can.

The screenshot shows the 'New Delegation' form. The 'Begin Date' is 2025-12-15 and the 'End Date' is 2025-12-15. The 'Delegate' dropdown is set to 'Sarah Karalios'. The 'Do My Tasks On My Behalf' section has three radio buttons: 'For all Business Processes' (selected), 'For Business Process' (with a search box), and 'None of the above'. Below this, the 'Retain Access to Delegated Tasks within My Tasks' checkbox is checked. There is also a 'Delegation Rule' dropdown at the bottom.

Option B: Delegate specific business processes

- Select **“For Business Process”**, then in the white box, select **“by functional area”**.

Common options are:

- *Time Tracking: select all that apply*
- *In the comment box you can briefly note why and for which period, e.g.:
“Delegating approvals while I am on leave from Dec 22-January 3.”*

This is optional but helpful for audit trails and for HR if they review.

This screenshot shows the 'Do My Tasks On My Behalf' section. The 'For all Business Processes' radio button is unselected, and the 'For Business Process' radio button is selected. Below it, there is a search box and a list of functional areas: 'Academic Advising', 'Academic Faculty', 'Academic Foundation', 'Accounting Center', 'Action Items and Holds', and 'Adaptive Planning for Clinical Plans'. The 'Academic Advising' option is currently selected.

This screenshot shows the 'For Business Process' section. It lists several tasks with checkboxes: 'Reported Time Batch Event', 'Enter Time', 'Time Accumulator Threshold Rule Opt In', 'Time Accumulator Threshold Rule Opt Out', and 'Time Request'. Below this is a 'Time Tracking' section with checkboxes for 'Assign Work Schedule', 'Enter Time', 'Reported Time Batch Event', 'Time Accumulator Threshold Rule Opt In', 'Time Accumulator Threshold Rule Opt Out', and 'Time Request'. All checkboxes in the 'Time Tracking' section are checked.

Submit & confirm

- 1 Click **“Submit”** to finalize the delegation.
 - a) Your delegation **will go to your direct Manager for Approval**. The sooner you enter the delegation the better to avoid delays.