

# Initiating a Temporary Delegations Form

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Search Results

| Empl ID | Empl Record | First Name | Last Name | Display Name | Position Description | Department ID | Department Name   |
|---------|-------------|------------|-----------|--------------|----------------------|---------------|-------------------|
| 0       |             |            |           |              |                      | 3816          | Paediatrics - WCH |
| 0       |             |            |           |              |                      | 9513          | SATAC             |
| 0       |             |            |           |              |                      | 6420          | Human Resources   |

## Initiating a Temporary Delegation Form

A form can be initiated by an active fixed term or continuing employee for themselves or another employee within their area.

1. Navigate to **HR eForms Homepage** and click on **Create a HR eForm** in PeopleSoft from SSO.
2. Select either **Temporary Delegation eForm – Delegation Holder** or **Temporary Delegation eForm – on behalf of Delegation Holder** depending on who is initiating the form.
3. If you have selected **Temporary Delegation eForm – on behalf of Delegation Holder** search for the employee you want to initiate the form for, using either **Empl ID**, **First Name** or **Last Name**. If you have selected **Temporary Delegation eForm – Delegation Holder** the form will be displayed with your details.
4. If there are multiple employees who meet your search criteria, select the desired employee from the **Search Results**. If multiple search results do not exist, the form will be displayed.
5. The form will pre-populate with the staff members current Finance and/ or HR delegations. If the Delegation Holder has both Finance and HR delegations both of the checkboxes at the top of the page will be ticked, if they only hold one the opposing checkbox will be ticked.
6. If only the HR or Finance delegations are to be transferred, untick the corresponding checkbox. The screenshot displays that only the Finance delegations are to be transferred.

|               |   |                 |              |             |
|---------------|---|-----------------|--------------|-------------|
| HR Handbook   | Information sheet Temporary Delegation eForm  | Effective Date: | 23 July 2018 | Version 1.0 |
| Authorised by | Associate Director, Client Services   | Review Date:    | 23 July 2019 | Page 1 of 3 |
| Warning       | This process is uncontrolled when printed. The current version of this document is available on the HR Website. |                 |              |             |

**Create a Temporary Delegation eForm**

**Step 1 of 2: Submit Temporary Delegation Data**

Finance Delegation Transfer  
 HR Delegation Transfer

**Delegation Holder**

|                 |                 |
|-----------------|-----------------|
| Name            | Position Number |
| Employee ID     | Position Title  |
| eForm ID 100800 | Director        |

**Finance Approver Information**

| Limit Amount | Area of Responsibility |
|--------------|------------------------|
| 1            | Human Resources        |
| 2            | Human Resources        |

**HR Approver Roles & Information**

| Role   | Area of Responsibility     |
|--|----------------------------|
| 1 Casual Delegated Authority                         | Human Resources            |
| 2 CRAFT Employment Contracts Executive Deans         | Human Resources            |
| 3 CRAFT Employment Contracts Human Resource Director | The University of Adelaide |
| 4 CRAFT Employment Contracts Head of School          | Human Resources            |

Different Delegate Required for Finance & HR  Yes  No

**Temporary Delegate**

\*Name  Case Sensitive  
 Employee ID

**Proxy**

Set Up Leave Proxy  Yes  No  
 Setup Timesheet Validation Proxy  Yes  No

**Period of Temporary Delegation**

\*Start Date   \*End Date

**Comments**

Your Comment:



7. Go to the **Temporary Delegate** section. The number and type of Temporary Delegate fields will depend on which delegations have been selected to transfer and whether the delegations are being transferred to the same person (See point 16). The screenshot displays that only the Finance delegations are to be transferred. If HR delegations are being transferred you will have the option to set up the temporary delegated as a leave proxy (see point 17).
8. Enter the name of the individual the delegations are being transferred to and click the search icon. The search results will display, select the intended temporary delegate from the results.
9. If HR Delegations are being transferred, the option to set up the temporary delegate as the **Leave Proxy** or **Timesheet Validation Proxy** is available. Please note that the leave proxy will automatically be setup if the delegation transfer period is longer than 28 days.
10. The **Start Date** will pre-populate with today's date. The start date cannot be backdated. To update the start date, click on the **Calendar** icon next to the field and select the required date. Follow this same process to select the **End Date** of the temporary delegation.
11. To attach a file, please refer to the [Attaching a File Quick Reference Guide](#)
12. Comments can be added in the **Your Comment** box if required.
13. Click **Submit**
14. Answer **Yes** to the form message.
15. The **Visualiser** will be displayed. The visualiser will show you what steps have been undertaken and where the task is currently sitting.
16. To check the status of any forms submitted, refer to the [Viewing Form Status – Quick Reference Guide](#)

|  |                           |                                     |
|--|---------------------------|-------------------------------------|
| Different Delegate Required for Finance & HR | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
|--|---------------------------|-------------------------------------|

17. If both HR and Financial Delegations are being temporarily transferred, an option will appear to have a different delegate for each delegation. By selecting **Yes** this will generate two separate sections to select a Temporary Delegate for Finance and Temporary Delegate for HR.
18. If the transfer is being made to fill a period of extended leave, please visit the ITS DIY guide to set-up the following (where appropriate):
- Email vacation messages
  - Email forwarding
  - Remote files
  - Voicemail
  - Global roaming
  - Desk phone diversion

**Further Information**

If you require further information please contact the HR Service Centre on 8313 1111, complete the [online enquiry form](#).

|               |   |                 |              |             |
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