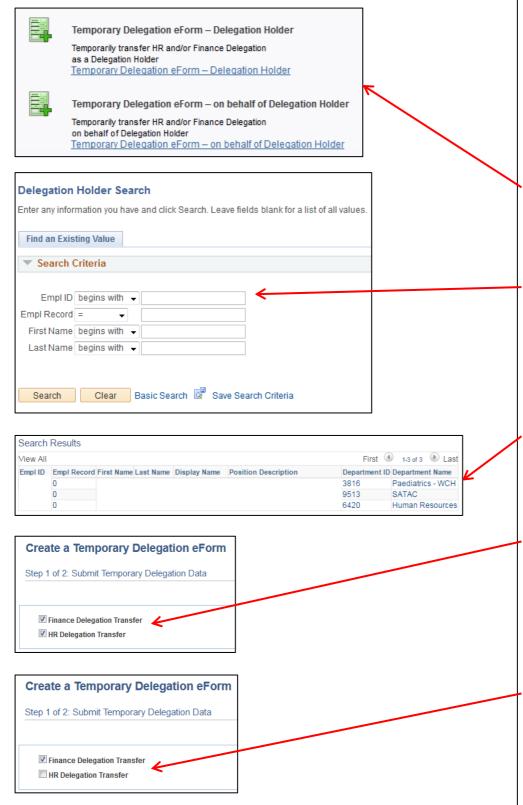


### Initiating a Temporary Delegations Form

#### Navigation: PeopleSoft HR > Main Menu > HR eForms > <u>HR eForms Homepage</u>



## 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.

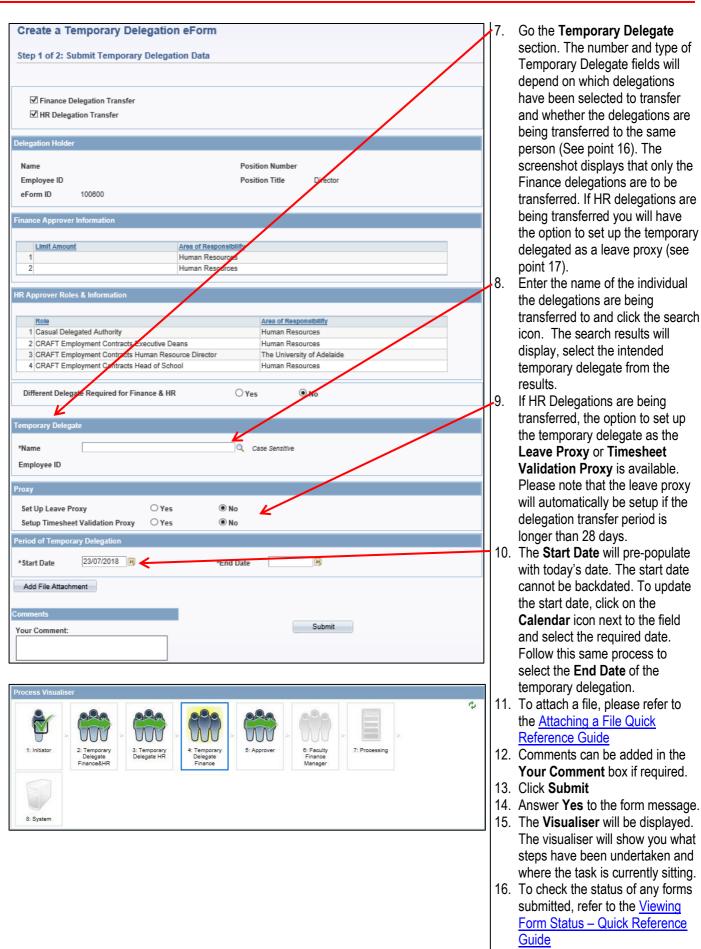
- Navigate to HR eForms Homepage and click on Create a HR eForm in PeopleSoft from SSO.
- Select either Temporary Delegation eForm – Delegation Holder or Temporary Delegation eForm – on behalf of Delegation Holder depending on who is initiating the form.
- If you have selected Temporary Delegation eForm – 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.
- 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.

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- Go 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
- point 17). 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.
- 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

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Different Delegate Required for Finance & HR

⊖Yes 🔍 No 🗲

- 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.
- 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
  - o Email forwarding
  - $\circ \quad \text{Remote files} \quad$
  - $\circ$  Voicemail
  - $\circ \quad \text{Global roaming} \quad$
  - 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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