Delegation

If you are authorized to assign and manage another user to act as your delegate, you can assign someone to perform certain tasks within mySedgwick on your behalf. You can designate who will act as your delegate, specify the duration of their access, and select the actions they may perform. For example, if you will be unavailable and want your assistant to manage your employees during your absence, you can add the assistant as a delegate.

Delegators and Delegates

If you can delegate activities to another user or if you have been assigned to act on someone's behalf, the **Delegate** option on the navigation menu ☰ at the top of the page presents the following choices:

- **Act as Delegate**: Any user who has been assigned to act as a delegate for another can access this feature. You may only act as a delegate for someone else if they have assigned you to do so. See page 2 for details.
- **Manage My Delegates**: Those with access to this feature (typically managers or supervisors who oversee multiple employees) can assign others access to their employees' claims and select associated permissions. See page 2 for details.
- **Manage Others' Delegates**: Those responsible for overseeing many employees and managers can manage the delegates and permissions assigned for others. See page 6 for details.

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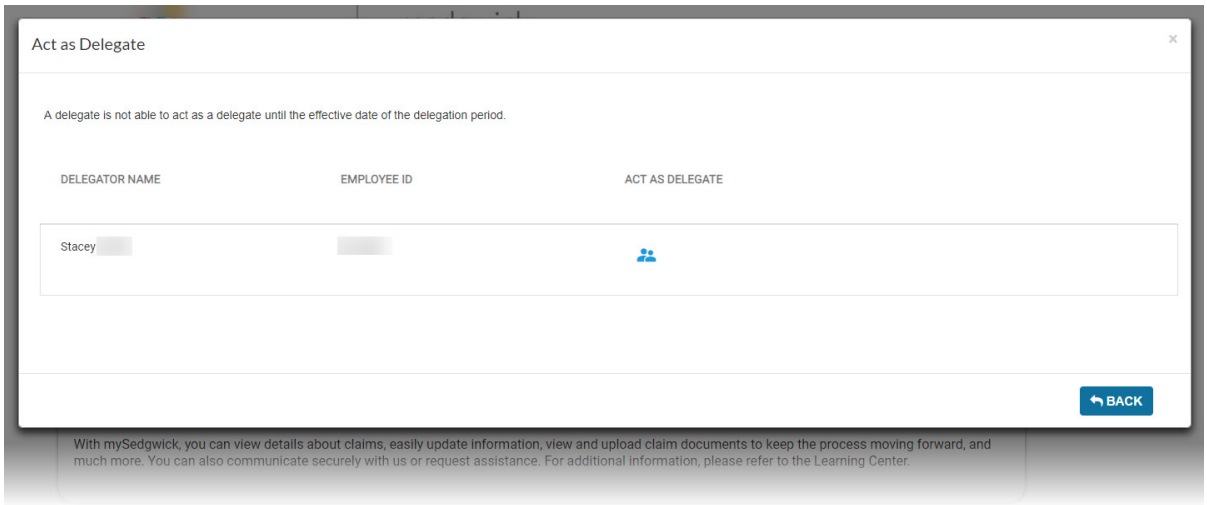
Act as Delegate

While acting as a delegate for another, you can view the claims of employees who report to the delegator and perform certain actions on those claims, such as confirm return to work dates or report new claims. You can only perform the functions for which you have been given permission, and you can only act on claims for employees assigned to the delegator. Delegates cannot act on their own claims.

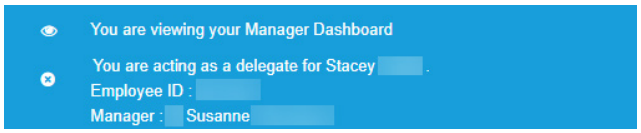
To act as a delegate:

1. Click ☰ at the top of any page to open the navigation menu.
2. Click **Delegate**, then select **Act as Delegate**. An Act as Delegate pane opens, listing the delegator(s) for whom you are currently assigned as a delegate:



3. Click **Act as Delegate** 👥.

The delegator's Manager Dashboard opens, displaying claims and employees to which they have access. Also, a message displays at the top of the dashboard and every subsequent page you visit, reminding you that you are acting as a delegate.



To stop acting as a delegate, click ⊗ in the message at the top of the page.

Manage My Delegates

There are three steps to establishing another mySedgwick user as a delegate to act on your behalf:

1. Search for an employee and select them as your delegate (page 3).
2. Edit the period during which they may act as your delegate (page 4).
3. Manage their permissions (page 5).

Note: Depending on your level of security or any employer-specific customizations, the features listed here may be limited or appear differently than described.

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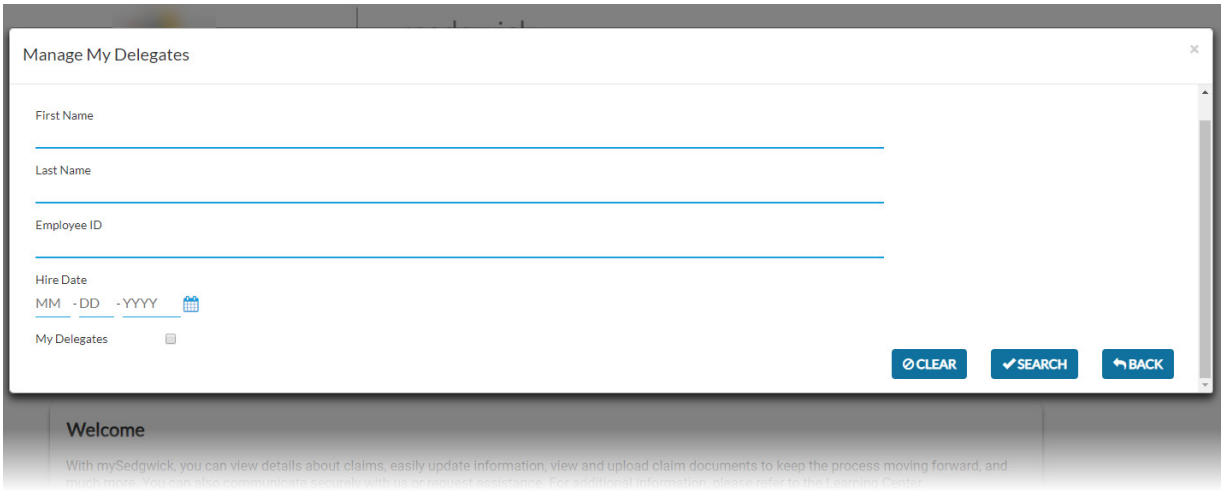
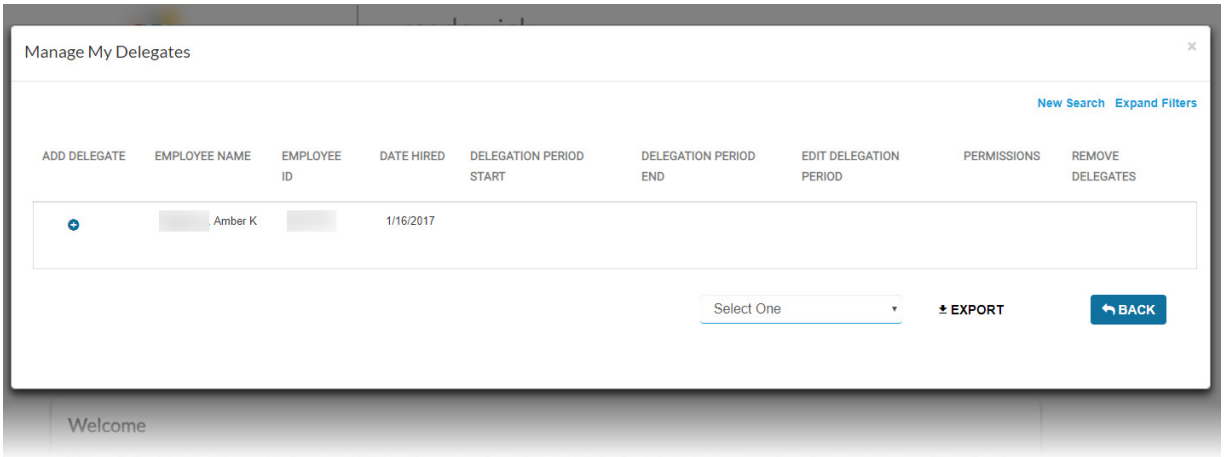
Searching For and Selecting a Delegate

To search for another mySedgwick user and designate them as your delegate:

1. Click ☰ at the top of any page to open the navigation menu.
2. Click **Delegate**, then select **Manage My Delegates**. A Manage My Delegates pane opens, providing fields where you can enter criteria for finding a user:



3. To list users you have previously designated as delegates, leave all search fields blank and select **My Delegates**.
4. After specifying your criteria, click **Search**. A list of users matching your search is displayed:



5. Click **Add Delegate** ⊕ beside the users you wish to designate as your delegate.

Once you have added a delegate, you can edit their delegation period and change their permissions.

To search for another user or modify your search criteria, click **New Search** or **Expand Filters**, respectively.

To end a delegate's access early, follow the steps above to locate them in the Manage My Delegates pane, then click **Remove Delegates** ⊘.

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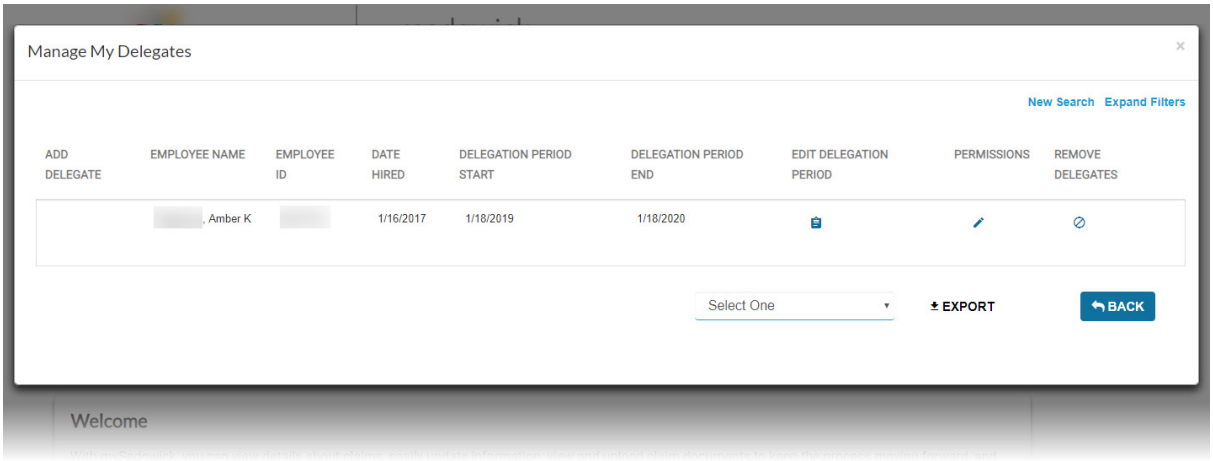
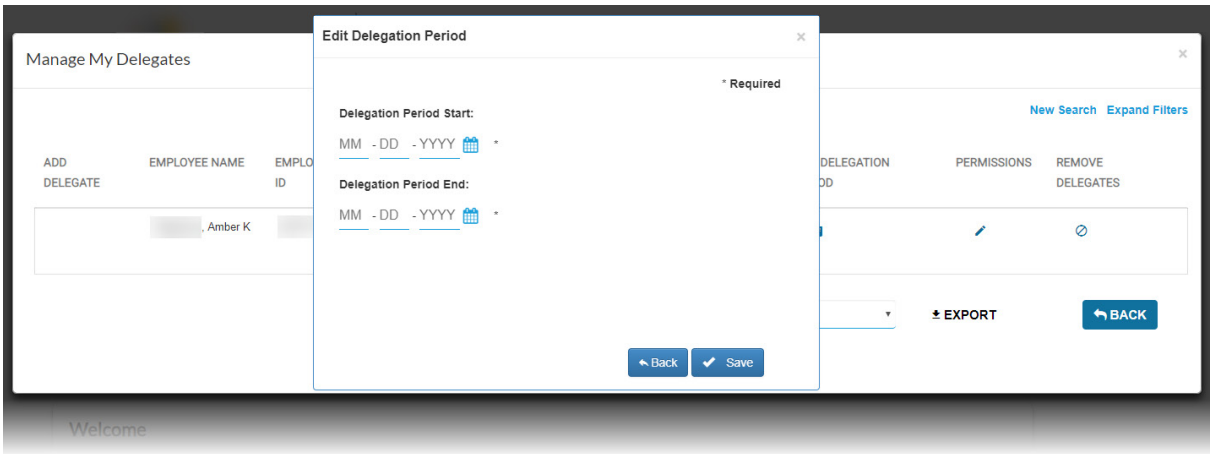
Editing the Delegation Period

The period during which your delegates can act defaults to set dates, beginning immediately. To edit the delegation period:

1. Search for a delegate, if necessary; see "Searching For and Selecting a Delegate" on page 3 for instructions. The Manage My Delegates pane displays the current delegation period:



2. Click **Edit Delegation Period**. An Edit Delegation Period pane opens:



3. Enter the **Delegation Period Start** and **Delegation Period End** dates, or click the calendar beside each field to select a date.
4. Click **Save**.

The new dates display on the Manage My Delegates pane.

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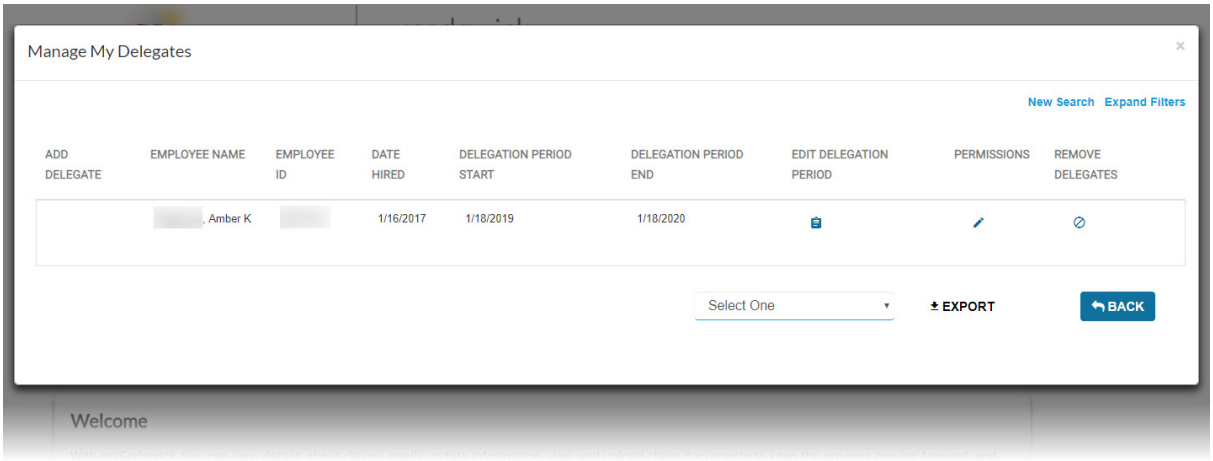
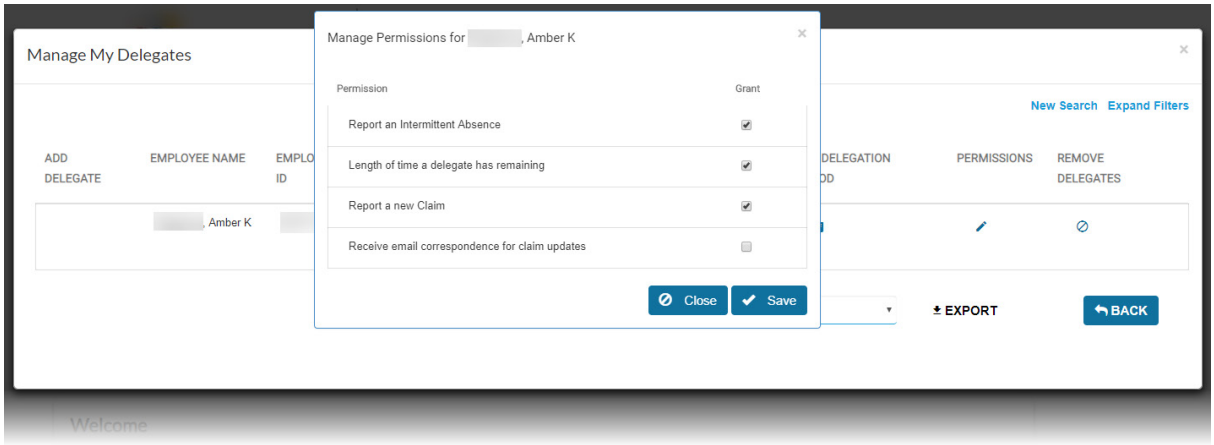
Managing a Delegate's Permissions

You can grant or deny the delegate permission to perform certain actions on your behalf. To manage a delegate's permissions:

1. Search for a delegate, if necessary; see "Searching For and Selecting a Delegate" on page 3 for instructions. The Manage My Delegates pane displays your delegates and a list of available actions:



2. Click **Permissions** . The Manage Permissions for <Name> pane opens:



3. Select or deselect the check boxes to grant or deny each permission as needed. The following permissions may be available, depending on a variety of factors:
   - **Report an intermittent absence:** The delegate can report intermittent absences for leave claims.
   - **Length of time a delegate has remaining:** The delegate can edit the delegation period for your delegates (including themselves).
   - **Report a new claim**: The delegate can report new claims for your employees (if applicable).
   - **Receive email correspondence for claim updates:** The delegate can receive emailed correspondence pertaining to your employees' claims.
4. Click **Save**.

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Manage Others' Delegates

This feature allows you to search for managers or similar roles and manage their assigned delegates.

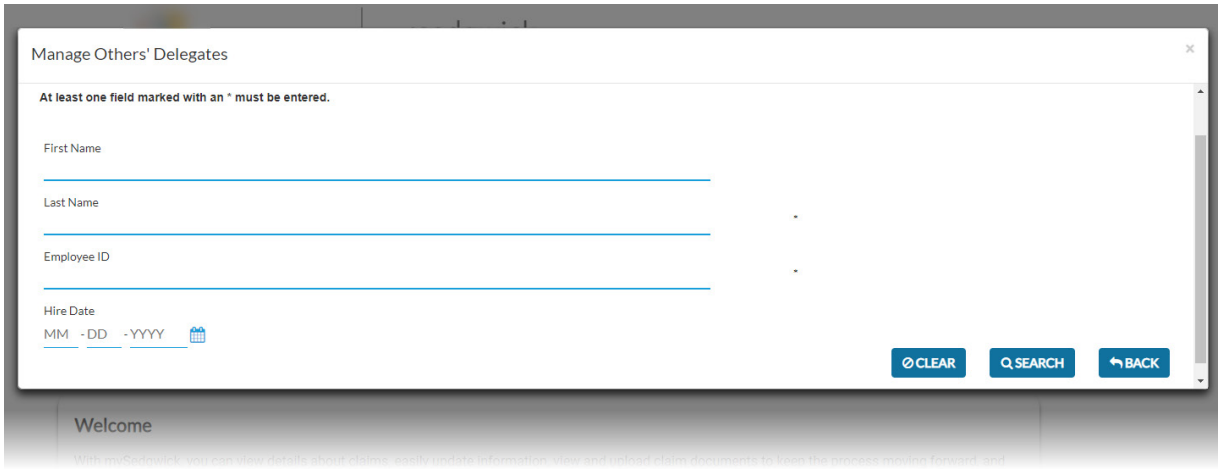
Example: This feature can be used to assign a delegate on behalf of a supervisor who goes out on leave unexpectedly and must have one or more delegates assigned to act on the supervisor's behalf during their absence.

Only users assigned to supervisor, OMNI, and overseer roles in mySedgwick can access this function, when allowed.

To manage others' delegates:

1. Click ☰ at the top of any page to open the navigation menu.
2. Click **Delegate**, then select **Manage Others' Delegates**.

   A Manage Others' Delegates pane opens, providing fields for finding a user (such as a supervisor) for whom you wish to manage delegates:



3. Enter your search criteria and click **Search**. A list of users matching your search is displayed.
4. Click **Manage Delegates** beside the user you wish to manage.

   The Manager Dashboard opens, indicating that you are now acting as a delegate for the selected user (i.e., you are impersonating them in mySedgwick) and have access to all functionality that person has in the application (except that you cannot view his or her personal claims).

5. Click ☰ and click **Delegate** again. This time, select Manage My Delegates. You can now assign or manage delegates for the other supervisor. See "Manage My Delegates" on page 2 for instructions on how to manage the user's delegates.

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