Delegation Requests

Overview

Introduction

A delegation request in Direct Access (DA) allows an Approving Official (AO) to delegate approving authority to another AO who can then approve or deny requests that are forwarded to them.

Delegation Request Statuses

Once a delegation request is submitted, it will fall into one of the following statuses:

Status	Description	User	In this status, the user
Pending	Has been submitted by the Requester but has not yet been approved	Requester	CAN change details and then resubmit. The original request will be Terminated, and a new request will be submitted with the changes.
			CAN withdraw the request and status changes to Terminated
		Delegated Approver	CAN approve the request. Status changes to Approved.
			CAN deny the request. The status changes to Denied.
Terminated	Has been withdrawn by the Requester	Requester	CAN view the details, comments and approver but CANNOT make changes to the request.
		Delegated Approver	CAN view the details, comments and approver but CANNOT make changes to the request.
Approved	Has been approved by the Delegated Approver	Requester	CAN view the details, comments and approver but CANNOT make changes to the request.
		Delegated Approver	CAN view the details, comments and approver.
			CAN deny the request. Status changes to Denied and Requester can make changes to the Denied request.
Denied	Has been denied by the Delegated Approver	Requester	CAN change details and then resubmit. The original request will be Terminated, and a new request will be submitted with the changes.
		Delegated Approver	CAN view the details and comments. Approver CANNOT make changes to the request.

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Overview, Continued

Email Notifications

Email notifications will occur for the following instances:

User	Action	Email sent to
Requester	Submits a Delegation Request to the Approver	Approver/Delegated Approver
	Makes a change to their pending Delegation Request	
	Withdraws their pending Delegation Request	
	Makes a change to their denied Delegation Request	
Delegated Approver	Approves a pending Delegation Request	Requester/Approver
	Denies a pending Delegation Request	
	Denies an approved Delegation Request	

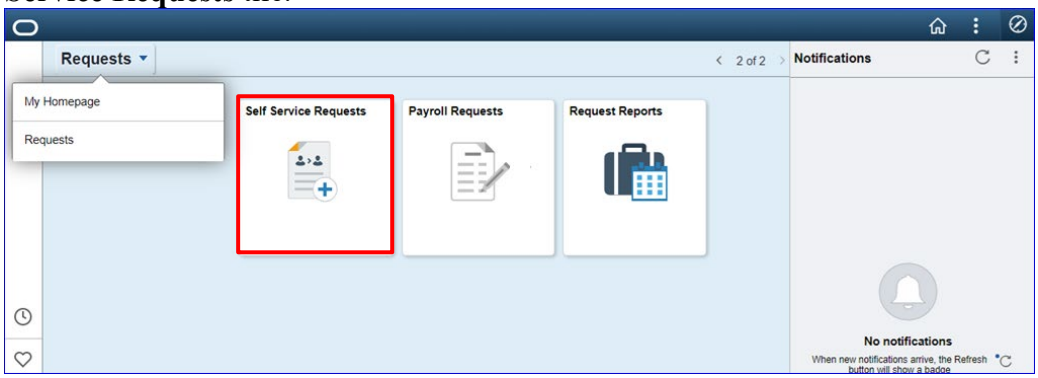
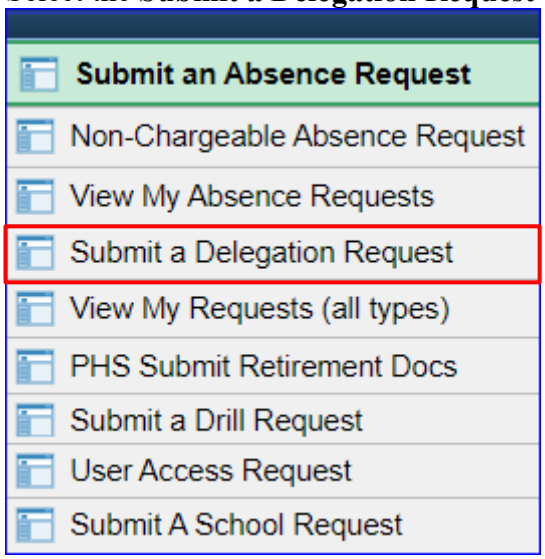
Contents

Topic	See Page
Submitting a Delegation Request	3
Accessing/Changing/Withdrawing a Submitted Request	6
Approving a Delegation Request	11
Changing an Approved Request	15

Submitting a Delegation Request

Introduction This section provides the procedures for submitting a delegation request in DA.

Procedures See below.

Step	Action
1	After selecting **Requests** from the My Homepage drop-down, click on the **Self Service Requests** tile. 
1.5	Select the **Submit a Delegation Request** option. 

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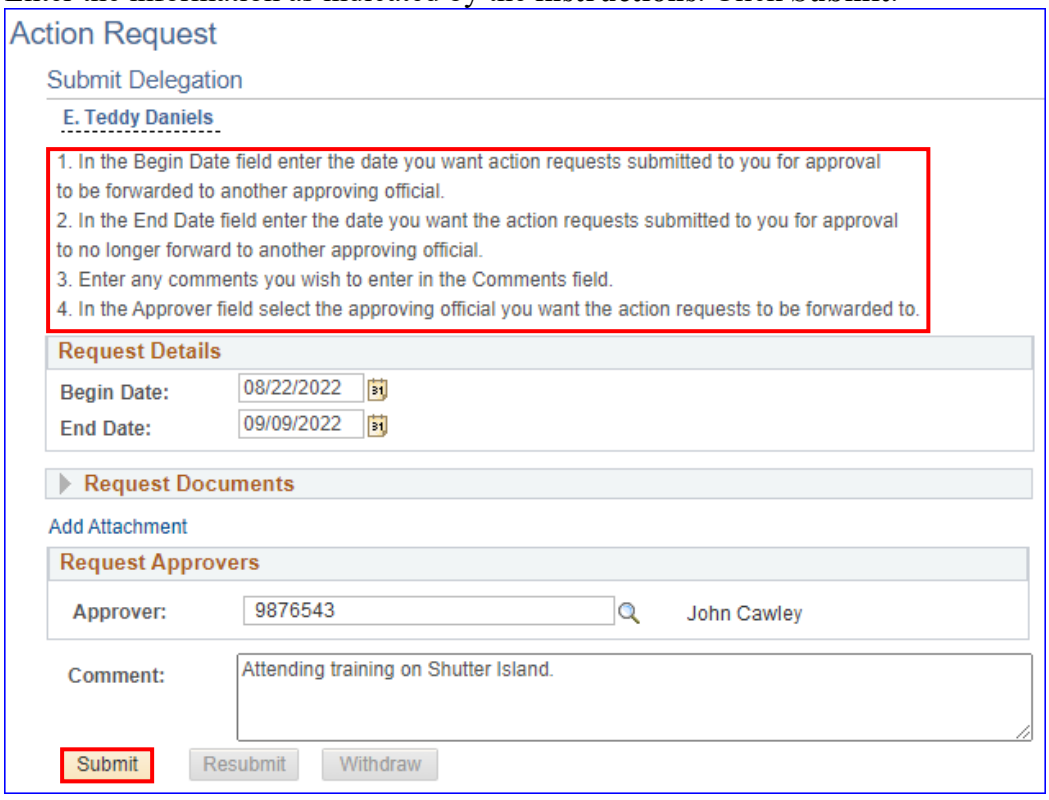
Submitting a Delegation Request, Continued

Procedures, continued

Step	Action
2	Enter the information as indicated by the **instructions**. Click **Submit**. 

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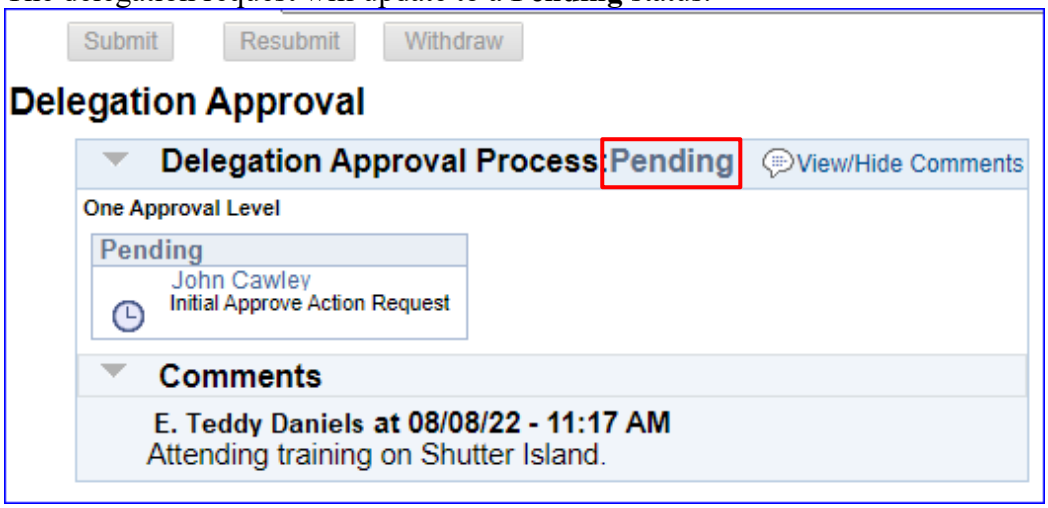
Submitting a Delegation Request, Continued

Procedures, continued

Step	Action
3	The delegation request will update to a **Pending** status. 
4	A system generated email will be sent to the delegated approver notifying them of the request. -----Original Message----- From: DoNotReply_V9@direct-access.us [mailto:DoNotReply_V9@direct-access.us] Sent: Monday, June 25, 2022 11:00 AM To: **Cawley, John YN1 < John.Cawley@uscg.mil>** Subject: [Non-DoD Source] Delegation Request Please take action to approve or deny the following Delegation Request. Teddy Daniels has submitted a Delegation Request for the following period: Delegation Begin Date: 2022-08-22 Delegation End Date: 2022-09-09 Click the link below to approve or deny the request: https://urldefense.proofpoint.com/v2/url?u=https-3A__hcenv5.direct-2Daccess.us_psp_HCENV5_EMPLOYEE_HRMS_c_CG-5FAWE-5FEXT.CG-5FACTN-5FREQUEST.GBL-3FPage-3DCG-5FACTN-5FREQUEST-26Action-3DU-26EMPLID-3D1367487-26EMPL-5FRCD-3D0-26CG-

Accessing/Changing/Withdrawing a Submitted Request

Introduction

This section provides the procedures for accessing, changing, or withdrawing a submitted delegation request in DA.

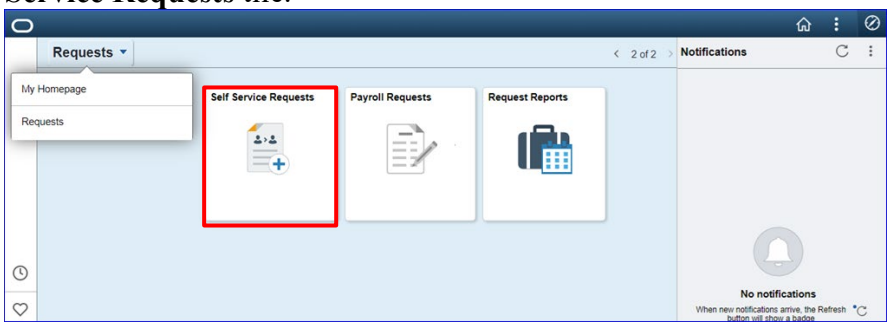
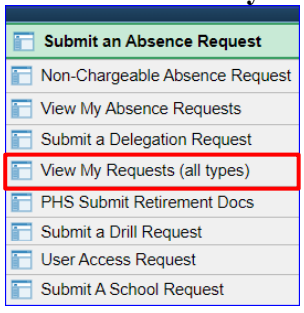
Transaction Statuses

NOTE: The status of the request will determine if the requester can change or withdraw the request. If the request is in a pending or denied status, the requester can only change the request. A request may only be withdrawn if it is in a pending status.

- **Pending** - delegation requests that have been submitted but not approved by the delegated approver
- **Approved** - delegation requests approved by the delegated approver
- **Withdrawn** - delegation requests that were withdrawn by the requesting official prior to being approved by the delegated approver (when this option is selected, the status of the request will show Terminated in the search results)
- **Denied** - pending or approved delegation requests denied by the delegated approver
- **All Statuses** - will show all delegated requests, regardless of status

Procedures

See below.

Step	Action
1	After selecting **Requests** from the My Homepage drop-down, click on the **Self Service Requests** tile. 
1.5	Select the **View My Requests (all types)** option. 

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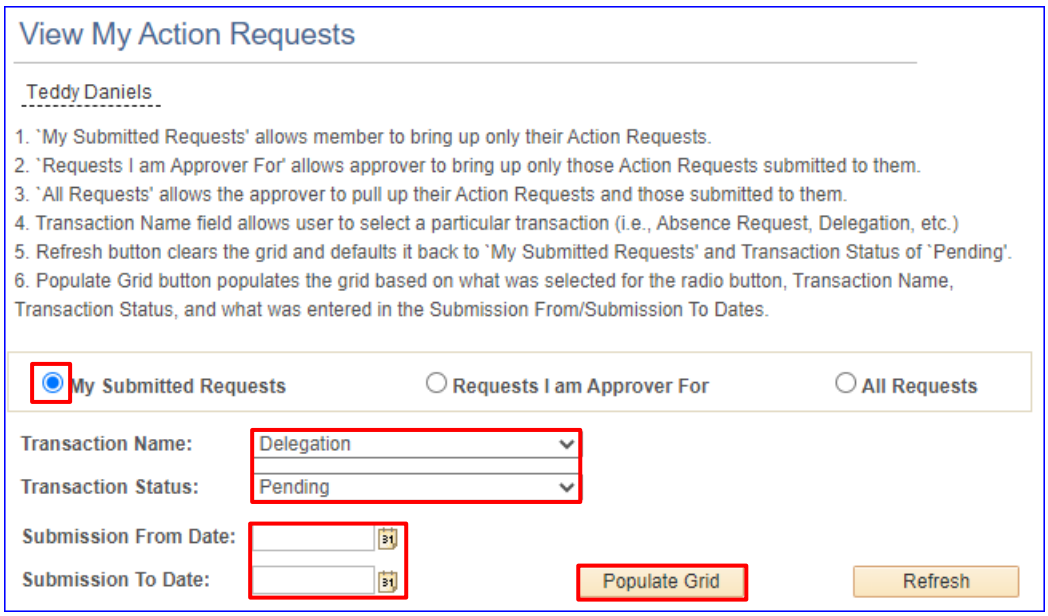
Accessing/Changing/Withdrawing a Submitted Request,
Continued

Procedures,
continued

Step	Action
2	The View My Action Requests page will display with the following defaults: • **My Submitted Requests** radio button is selected • **Transaction Status** is Pending • **Transaction Name** select Delegation from the drop-down. Click **Populate Grid**. **NOTE:** To narrow the search results, dates may be entered in the **Submission From Date** and **Submission To Date** fields. 
3	Click **View Details**.

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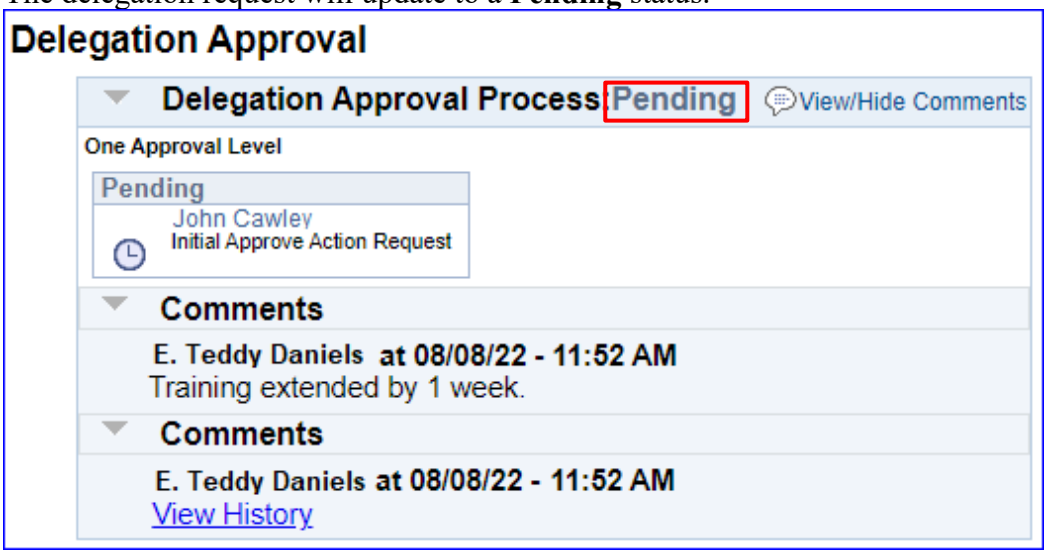
Accessing/Changing/Withdrawing a Submitted Request,
Continued

Procedures,
continued

Step	Action
4	To withdraw a request, skip to Step 7. To change a request, at least one of the following must be changed: • **Begin Date** • **End Date** • **Comments** - a reason for the change must be annotated within this block before it can be resubmitted Click **Resubmit**.
5	The delegation request will update to a **Pending** status. 

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Accessing/Changing/Withdrawing a Submitted Request,
Continued

Procedures,
continued

Step	Action
6	The delegated approver will receive two emails: the first email indicates the original request was withdrawn and the second email indicates the request was resubmitted. -----Original Message----- From: DoNotReply_V9@direct-access.us [mailto:DoNotReply_V9@direct-access.us] Sent: Monday, June 25, 2022 11:00 AM To: **Cawley, John YN1 < John.Cawley@uscg.mil>** Subject: [Non-DoD Source] Delegation Request Withdrawn Please take action to approve or deny the following Delegation Request. Teddy Daniels has withdrawn the delegation request during the following period: Delegation Begin Date: 2022-08-22 Delegation End Date: 2022-09-09 No other action is required at this time. -----Original Message----- From: DoNotReply_V9@direct-access.us [mailto:DoNotReply_V9@direct-access.us] Sent: Monday, June 25, 2022 11:00 AM To: **Cawley, John YN1 < John.Cawley@uscg.mil>** Subject: [Non-DoD Source] Delegation Request Please take action to approve or deny the following Delegation Request. Teddy Daniels has Resubmitted a Delegation Request for the following period: Delegation Begin Date: 2022-09-12 Delegation End Date: 2022-09-23 Click the link below to approve or deny the request: https://urldefense.proofpoint.com/v2/url?u=https-3A__hcenv5.direct-2Daccess.us_psp_HCENV5_EMPLOYEE_HRMS_c_CG-5FAWE-5FEXT.CG-5FACTN-5FREQUEST.GBL-3FPage-3DCG-5FACTN-5FREQUEST-26Action-3DU-26EMPLID-3D1367487-26EMPL-5FRCD-3D0-26CG-

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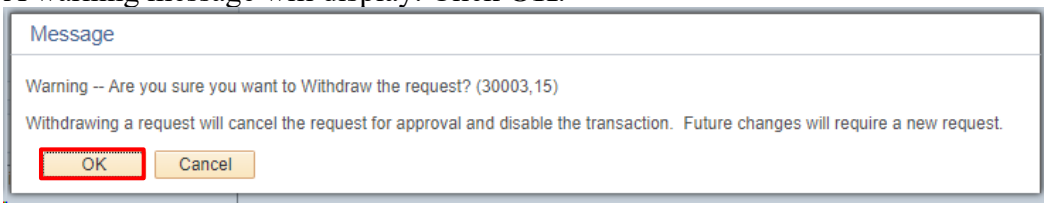
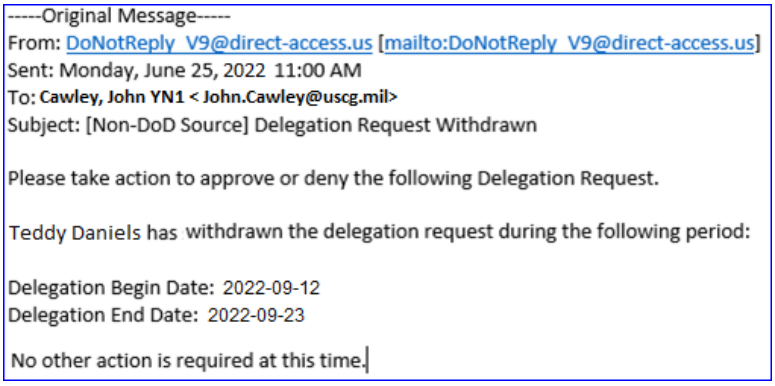
Accessing/Changing/Withdrawing a Submitted Request,
Continued

Procedures,
continued

Step	Action
7	To withdraw a request, enter a **Comment** and click **Withdraw**. **NOTE:** If the delegation request was sent to an incorrect approver or the delegated approver becomes unavailable, the request must be withdrawn and a new request submitted.
8	A warning message will display. Click **OK**. 
9	An email will be sent to the delegated approver indicating the request has been withdrawn. 

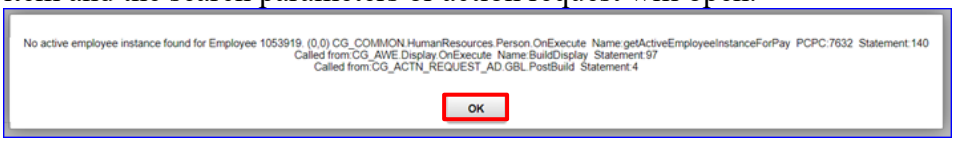
Approving a Delegation Request

Introduction

This section provides the procedures for approving a delegation request in DA.

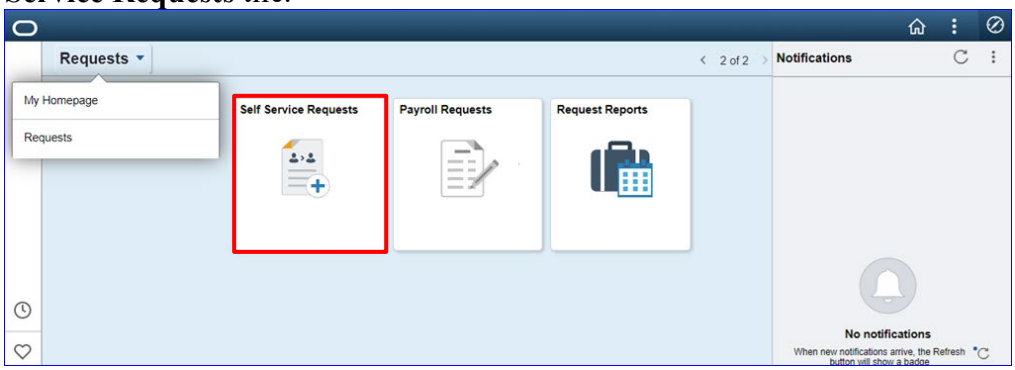
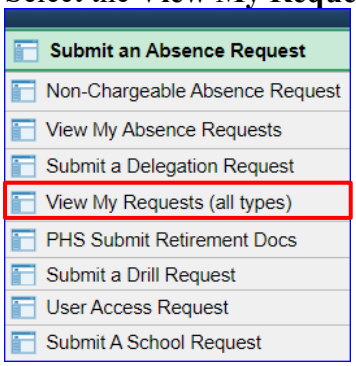
Important Information

If the error message below displays, click **OK**, then click any other menu item and the search parameters or action request will open.



Procedures

See below.

Step	Action
1	After selecting **Requests** from the My Homepage drop-down, click on the **Self Service Requests** tile. 
1.5	Select the **View My Requests (all types)** option. 

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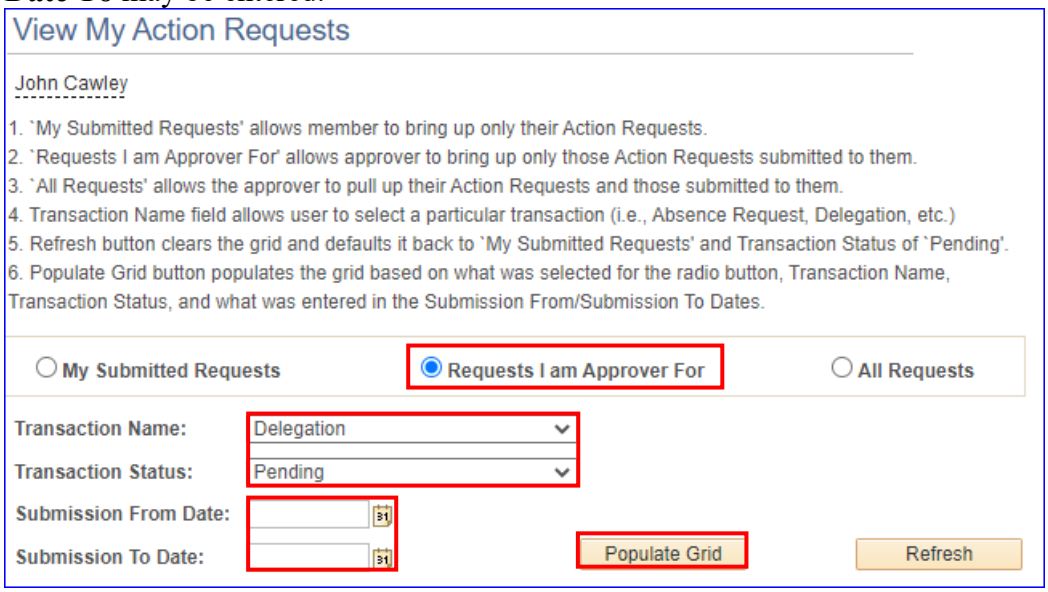
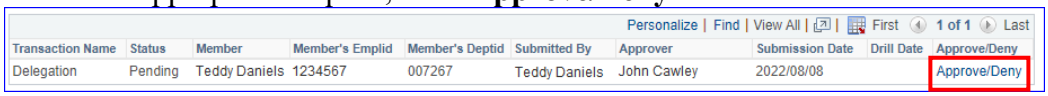
Approving a Delegation Request, Continued

Procedures, continued

Step	Action
2	Select **Requests I Am Approver For**. Change the **Transaction Name** to Delegation from the drop-down. Leave the **Transaction Status** at Pending. Click **Populate Grid**. **NOTE:** To narrow the search results, **Submission From Date** and **Submission Date To** may be entered. 
3	Select the appropriate request, click **Approve/Deny**. 

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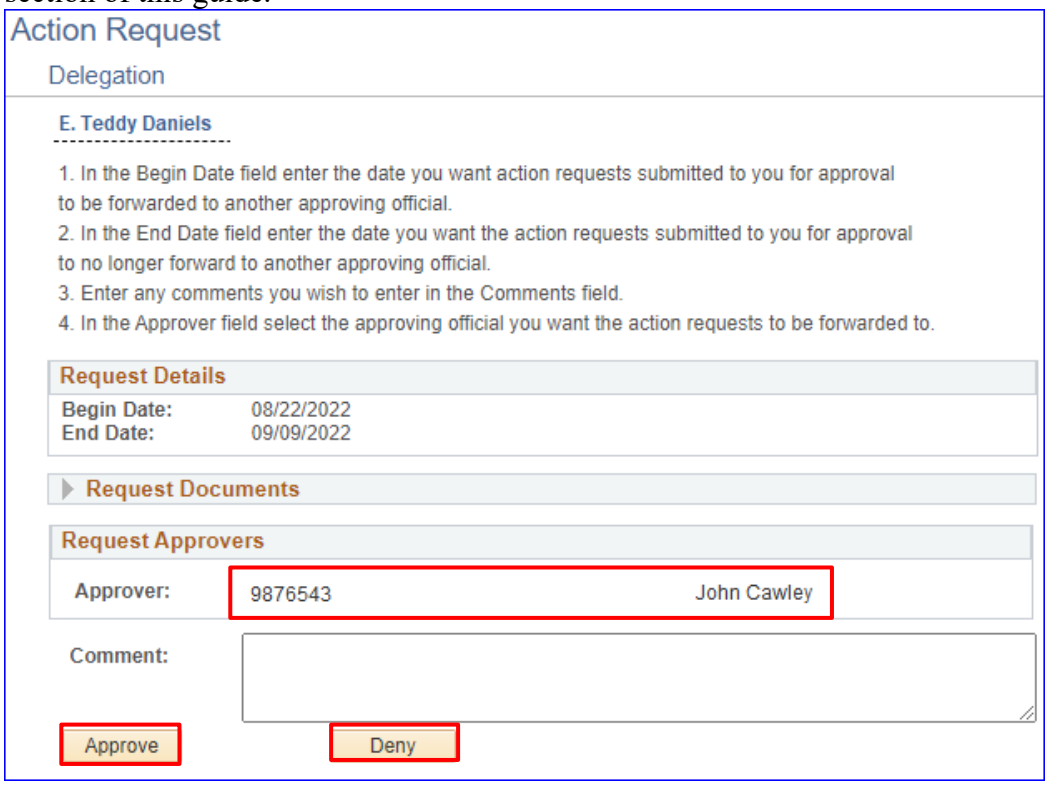
Approving a Delegation Request, Continued

Procedures, continued

Step	Action
4	Review the delegation request details; if the delegated approver will be available, click **Approve**. **Note:** If the delegated approver will be unavailable during the request dates, enter a **Comment** and click **Deny**. The delegated requester will need to withdraw their request and resubmit with a new approver. To withdraw a request, refer to the Accessing/Changing/Withdrawing a Submitted Request section of this guide. 

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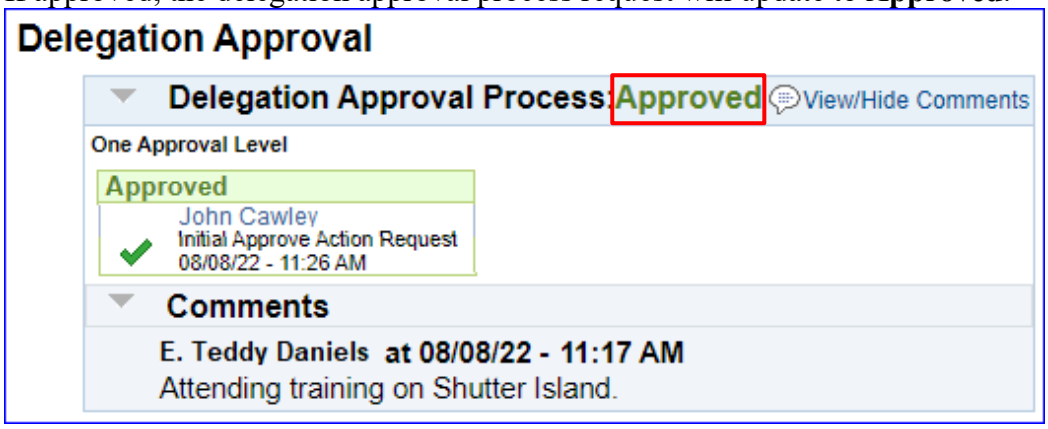
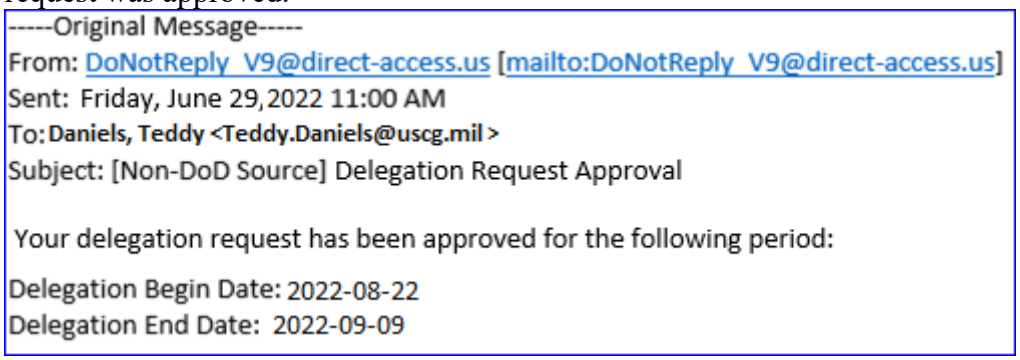
Approving a Delegation Request, Continued

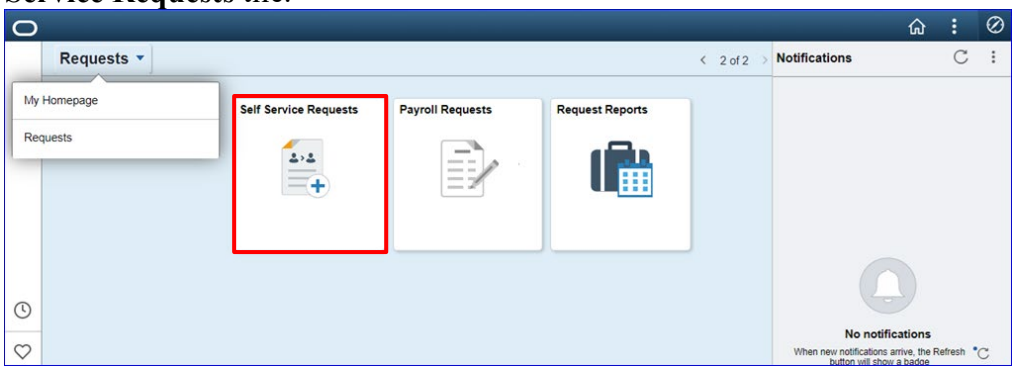
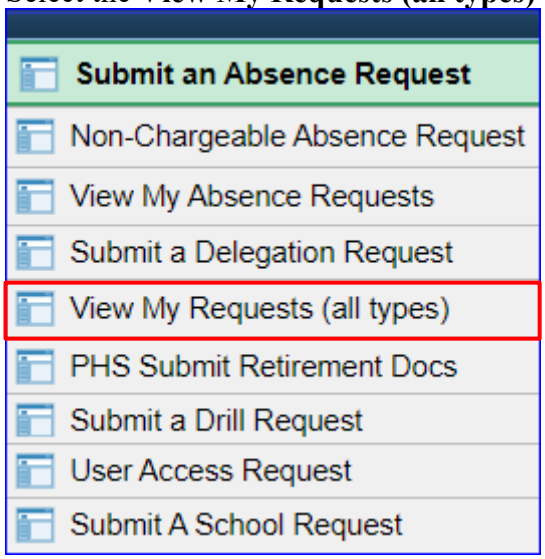
Procedures, continued

Step	Action
5	If approved, the delegation approval process request will update to **Approved**. 
6	Email notification will be sent to the delegation requester informing them their request was approved. 

Changing an Approved Request

Introduction This section provides the procedures for changing a delegation request that was approved in DA.

Procedures See below.

Step	Action
1	Notify the requester via email, phone, or in person that the request needs to be changed.
2	After selecting **Requests** from the My Homepage drop-down, click on the **Self Service Requests** tile. 
2.5	Select the **View My Requests (all types)** option. 

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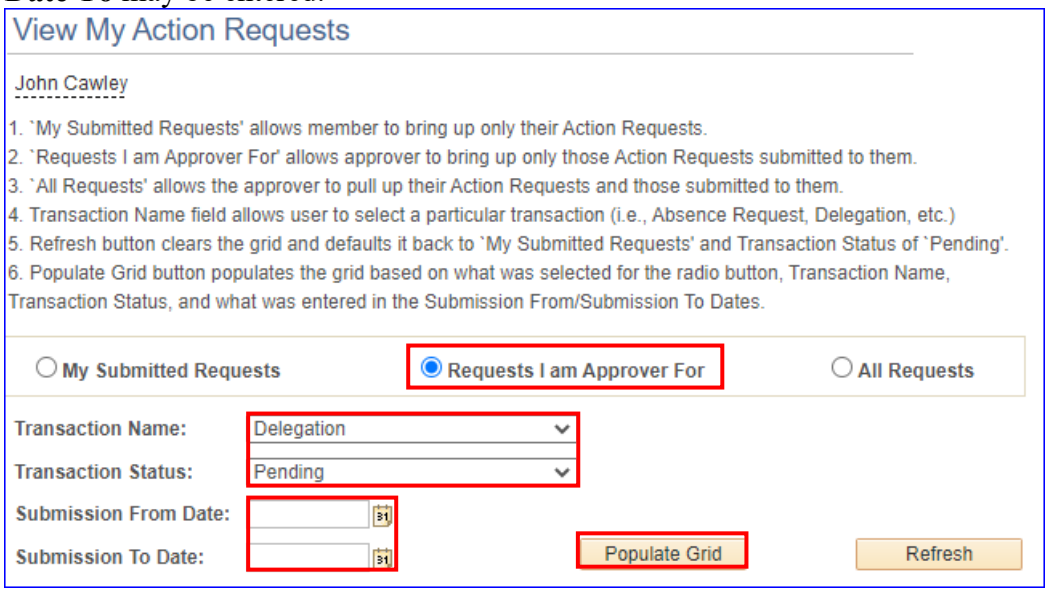
Changing an Approved Request, Continued

Procedures, continued

Step	Action
3	Select **Requests I Am Approver For**. Change the **Transaction Name** to Delegation from the drop-down. Leave the **Transaction Status** at Pending. Click **Populate Grid**. **NOTE:** To narrow the search results, **Submission From Date** and **Submission Date To** may be entered. 

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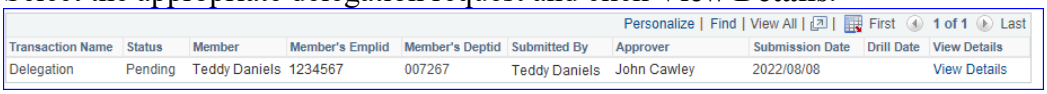
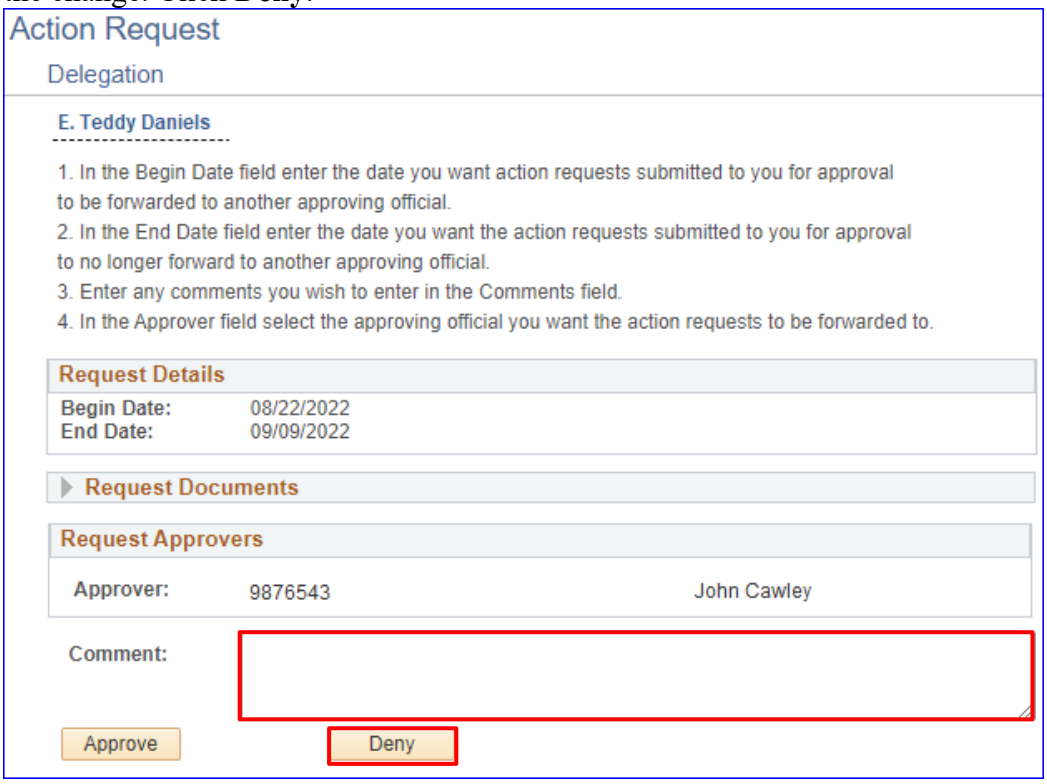
Changing an Approved Request, Continued

Procedures, continued

Step	Action
4	Select the appropriate delegation request and click **View Details**.  Personalize | Find | View All | First 1 of 1 Last Transaction Name: Delegation; Status: Pending; Member: Teddy Daniels; Member's Emplid: 1234567; Member's Deptid: 007267; Submitted By: Teddy Daniels; Approver: John Cawley; Submission Date: 2022/08/08; Drill Date: ; View Details: View Details
5	The request will open in a new tab. In the **Comments** field, enter the reason for the change. Click **Deny**.  Action Request Delegation E. Teddy Daniels 1. In the Begin Date field enter the date you want action requests submitted to you for approval to be forwarded to another approving official. 2. In the End Date field enter the date you want the action requests submitted to you for approval to no longer forward to another approving official. 3. Enter any comments you wish to enter in the Comments field. 4. In the Approver field select the approving official you want the action requests to be forwarded to. Request Details Begin Date: 08/22/2022 End Date: 09/09/2022 Request Documents Request Approvers Approver: 9876543 John Cawley Comment: Approve Deny

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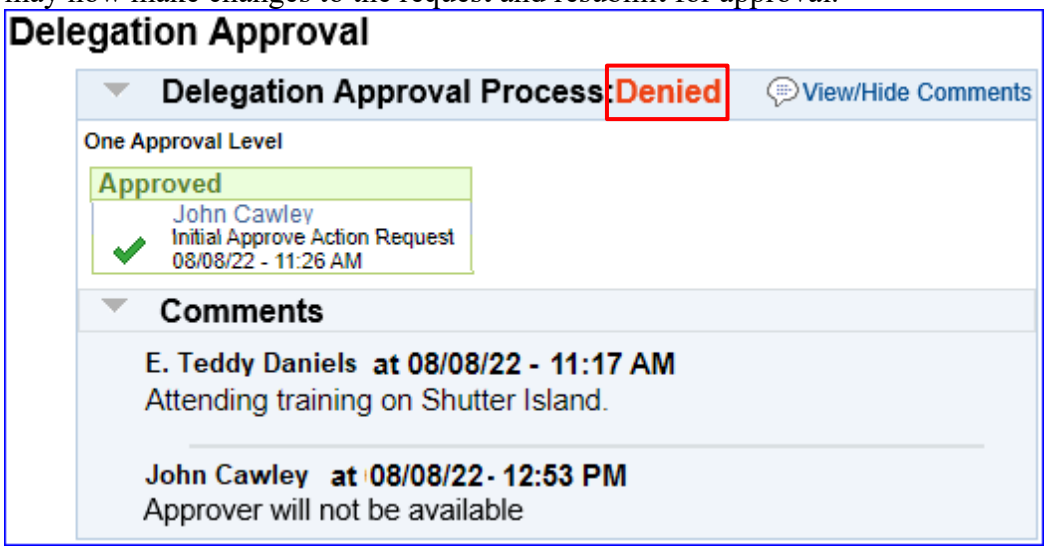
Changing an Approved Request, Continued

Procedures, continued

Step	Action
6	The delegation request will update to a **Denied** status. The delegation requester may now make changes to the request and resubmit for approval.