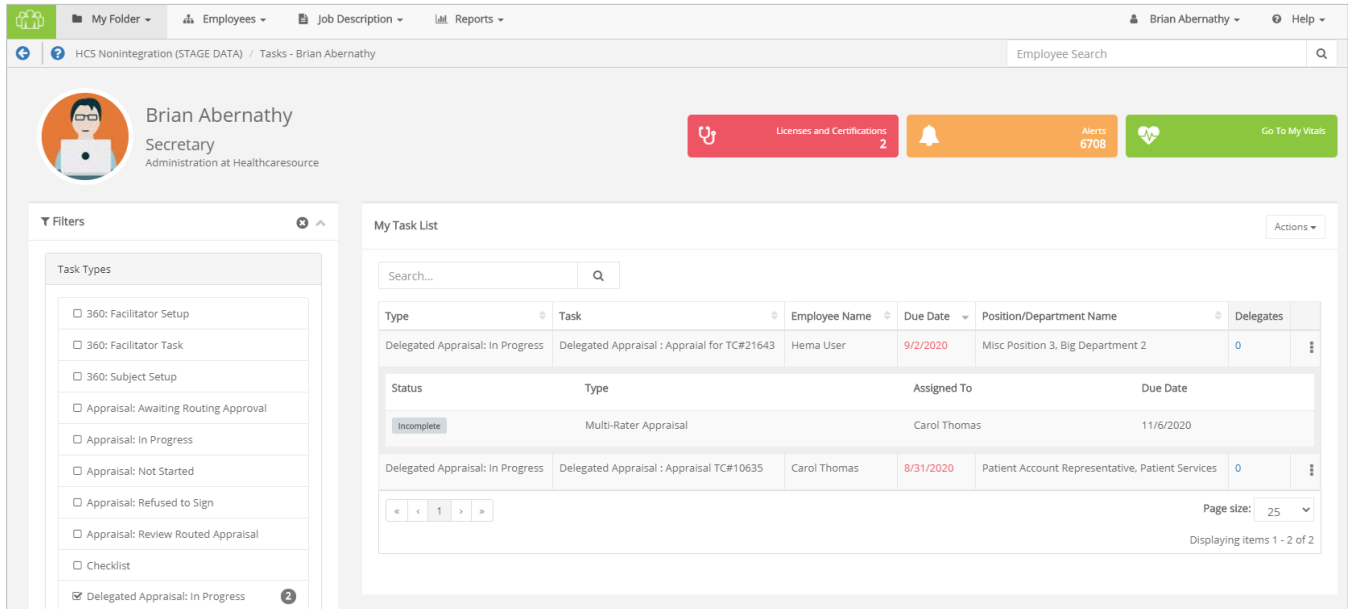


Feature Overview

Task Delegation

symplr Performance’s new **Task Delegation** feature provides busy managers a way to quickly delegate appraisal tasks to other employees capable of lending a hand. By delegating these tasks to others, managers can more efficiently complete their reviews, helping them to shrink an otherwise inundated to-do list.



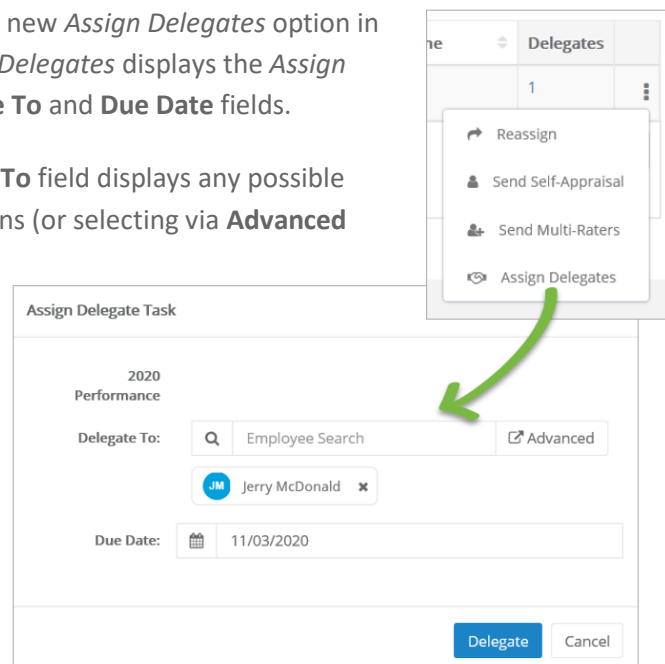
Delegating Tasks

Any tasks that can be delegated to employees display a new *Assign Delegates* option in the **task options** menu in the task list. Selecting *Assign Delegates* displays the *Assign Delegate Task* pop-up window, containing the **Delegate To** and **Due Date** fields.

Entering the first few letters of a name in the **Delegate To** field displays any possible additions underneath. Picking a name from these options (or selecting via **Advanced Search**) adds the individual as an assignee.

After choosing your delegate(s) and entering a due date, selecting **Delegate** assigns the task and notifies assignees of their new responsibility via email.

The **Delegates** column displays how many delegates have been assigned the task. Selecting this number shows the assignee’s name and the status of the task. Delegating tasks lets managers retain visibility and overall control of a task’s progression (features otherwise unavailable when selecting **Reassign Task**).



Completing Delegated Tasks

Any delegated tasks appear on an employee's **Task List**. A new **Delegated Task** filter is now available, so you can quickly locate specific tasks with these statuses. Selecting the task displays the appraisal for the employee to complete as normal.

Delegated Appraisal: Not Started

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Delegated appraisals have some key differences from reassigned appraisals. First, delegates are not required to answer every question in a delegated appraisal before submitting. That way if there are only specific team members able to speak to certain points, the task may also be delegated out to them.

As noted earlier, managers retain full visibility of delegated tasks, and can view any in-progress appraisals with a read-only view. However, they still can not make any changes while assignees have the appraisal open in symplr Performance. After the assignee completes their task, the manager is notified via email, and they can then edit as needed before selecting **Save** or **Save & Send** to complete the task.

The Fine Print

Nothing to worry about, just some additional details you should keep in mind regarding this feature.

- After a delegate marks their task as **Complete**, it cannot be undone by a manager or system admin. It can only be re-opened with help from a symplr Support specialist.
- Once enabled, Task Delegation will be available to managers and any employee with access to the *Employee List* page in symplr Performance.
- This feature needs to be activated by a symplr Support specialist. Give them a call at (866) 323-3030 or email talentsupport@symplr.com and they'll be happy to set it up.
- Access to Delegation is controlled by settings and permissions. For more details on configuring access to this feature, please refer to the **Configuring Delegate Access** topic in the symplr Performance online help.