Purpose

The objective of this User Guide is to demonstrate how to make a review available to a people leader or indirect people leader who the employee does not report to. Doing this allows the added people leader to add ratings and comments. In the Employee Development Center (EDC), this action was done using the "*add co-planner*" feature. In Workday, this same action is done using the "*Delegate Task.*

Security Role

People Leader/Indirect People Leader

Contents

Add a People Leader or Indirect People Leader to a Performance Review – Delegate Task

1. Click on the performance review related task to which you wish to add a different manager.
2. Click on the task's *related actions.*
3. From the menu, select **Business Process > Delegate Task.**
4. On Delegate Task page click in **Proposed Delegate** field.
5. Search for the individual to whom you wish to delegate the review task.
6. Enter any message for this individual in the "enter your comments" text box.
7. Click **Submit.**

Complete a Delegated Performance Review Task

8. As the user who was delegated the performance review task, click on the designated task displayed in Awaiting Your Action on the homepage. Most Common Delegated Performance Tasks:
   a. **Set Content** task.
   b. **Complete Manager Evaluation** task.
9. Click Switch Account.
10. On Switch Account screen. confirm that you wish to continue by clicking OK. You are now accessing the other user's account.
    - **NOTE:** The access to the account is limited to just viewing items related only to the delegated tasks. All other options and actions available to the other user are hidden.
11. Click the My Tasks mailbox.
12. Click Get Started to begin completing the delegated task.
13. Upon completion and submittal of the task, log out.