



Job Aid: Assign Alternate Supervisor

Purpose

The purpose of this job aid is to guide you, as a supervisor, through the step-by-step process of assigning another employee as an alternate supervisor for one or more of your employees. This function is often used when an employee is going to work for another manager or supervisor for an extended period of time and you need to transfer the responsibility for completing supervisory tasks until the employee returns. To assign someone to manage an employee short-term, you should assign a delegate to manage the performance of employees on your behalf.

In this job aid, you will learn how to:

- A. Assign an alternate supervisor
- B. Identify employees that have been assigned an alternate supervisor
- C. Reassign an employee to a different alternate supervisor



Task A. Assigning an Alternate Supervisor

Alternate supervisors can approve training requests, assign learning to an employee's To-Do List, and/or fulfill other supervisory tasks, such as completing competency assessments and performance reviews. To assign an alternate supervisor:

1. Click the **My Employees** tab from the *Home* page.
2. Hover over the appropriate employee card within the *Employee Tree*. A pop-up menu will appear.
3. Click the **Manage Alternate Supervisors** link on the pop-up menu. A *Manage Alternate Supervisors* window will open.

The screenshot shows the TMS interface. At the top, there are three tabs: 'Home', 'My Employees', and 'Organization'. The 'My Employees' tab is highlighted with a red box and a red circle with the number 1. Below the tabs, there is a search bar and a 'Show:' dropdown menu. The main content area displays a list of employee cards. The card for 'TMS USER07' is highlighted with a red box and a red circle with the number 2. A pop-up menu is visible over the 'TMS USER07' card, showing a list of options: 'Record Learning', 'Manage Alternate Supervisors', 'Reports', 'External Requests', and 'Profile'. The 'Manage Alternate Supervisors' option is highlighted with a red box and a red circle with the number 3.



4. Enter the name of the employee you wish to make an alternate supervisor in the, *Choose Alt Supervisor* text field, and then select an alternate supervisor from the drop-down results

Or

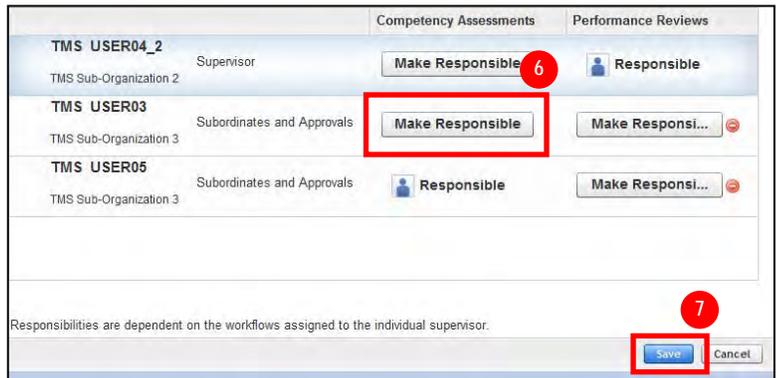
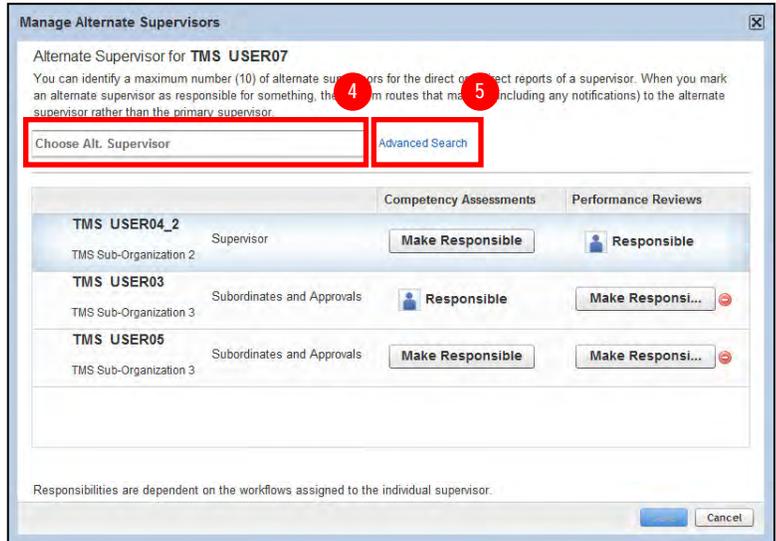
5. Click the **Advanced Search** link to access additional search parameters, such as user ID, first name, and last name.

6. Select the **Make Responsible** button under the appropriate person's functional responsibility column.

- Select the  **Remove** icon to remove responsibility for a specific function
- An alternate supervisor can only perform the actions that the primary supervisor can perform

7. Click **Save**.

- A notification will be sent to inform the user of the assignment
- Up to 10 people can be added as an alternate supervisor for an employee

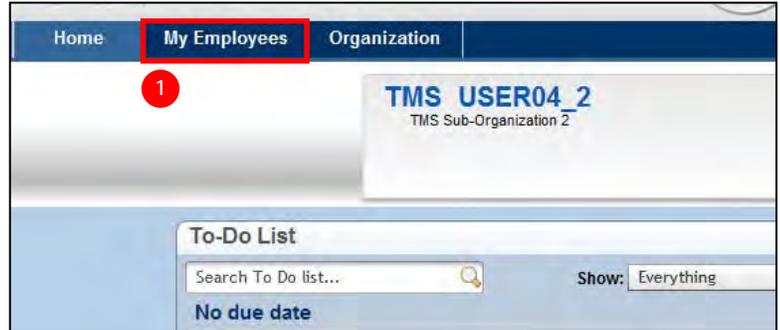




Task B. Identifying Employees that Have Been Assigned an Alternate Supervisor

To identify employees to which you have assigned an alternate supervisor:

1. Click the **My Employees** tab from the *Home* page.
2. Locate your employees within the *Employee Tree*. Employees that have been assigned an alternate supervisor will have an  **Alternate Supervisor** icon within their user cards.





Task C. Reassigning an Employee to a Different Alternate Supervisor

Reassigning an alternate supervisor for an employee follows the same process as assigning and alternate supervisor. To reassign an alternate supervisor:

1. Click the **My Employees** tab from the *Home* page.
2. Hover over the appropriate employee card within the Employee Tree. A pop-up menu will appear.
3. Click the **Manage Alternate Supervisors** link on the pop-up menu. A *Manage Alternate Supervisors* window will open.
4. Enter the name of the employee you wish to make an alternate supervisor in the, *Choose Alt Supervisor* text field, and then select an alternate supervisor from the drop-down results

Or

5. Click the **Advanced Search** link to access additional search parameters, such as user ID, first name, and last name.
6. Select the **Make Responsible** button under the appropriate person's functional responsibility column.

- Select the **Remove** icon to remove responsibility for a specific function
- An alternate supervisor can only perform the actions that the primary supervisor can perform

7. Click **Save**.
 - A notification will be sent to inform the user of the assignment
 - Up to 10 people can be added as an alternate supervisor for an employee

