

REFERENCE GUIDE

mySedgwick Guide to Delegation

With mySedgwick, you can access up-to-date claim information in real time for your employees, see who is off work, contact their examiner, learn more about the claim process, and more. This guide will walk you through how to use mySedgwick's delegation features.

About delegation

Delegation allows one user to **view and take action on** employees' claims on behalf of another. There are several configuration options which define what you can see and do as a delegate.

ACTING AS A DELEGATE

When you are acting as a delegate, you can view and take action on employees' claims on behalf of another. Depending on how your level of access, you may be able to:

- Report an intermittent absence for an employee.
- Report a new claim for an employee.
- Receive email correspondence about claims.

You will not be able to view or modify your personal claims, nor the claims or settings of the person who assigned you to this role.

MANAGING DELEGATES

If you can manage delegates, you can assign someone else to act on your behalf for all claims to which you have administrative responsibility. This includes:

- Specifying how long they will be able to act on your behalf.
- Defining if this person will be able to take the following additional actions:
 - Report an intermittent absence.
 - Report a new claim.
 - Receive email correspondence for claims.

Note: You may also be able to manage delegates for others. If you have this access, you can do everything described in this section for other people.

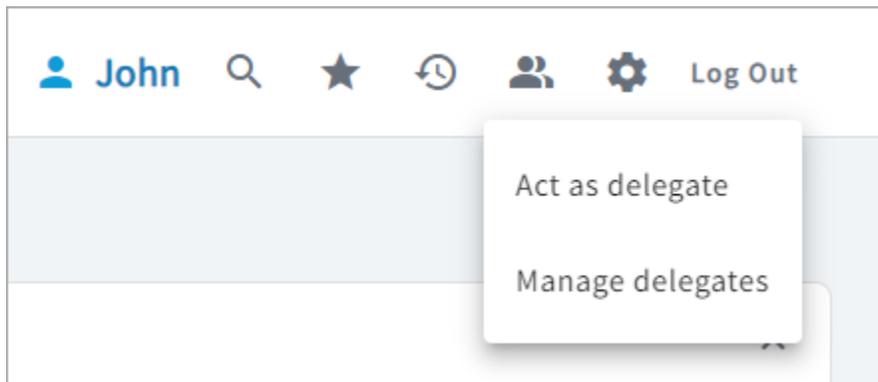
For example: Jan manages Steve and Rick. Rick begins an unexpected leave. Jan assigns Steve to act as a delegate on behalf of Rick.

It is necessary to understand that if you assign someone to be your delegate, they will have access to **all the same claims** to which you have administrative oversight. It is important to be thoughtful in how you use this feature.

The following sections walk you through how to use this feature.

Delegate Settings

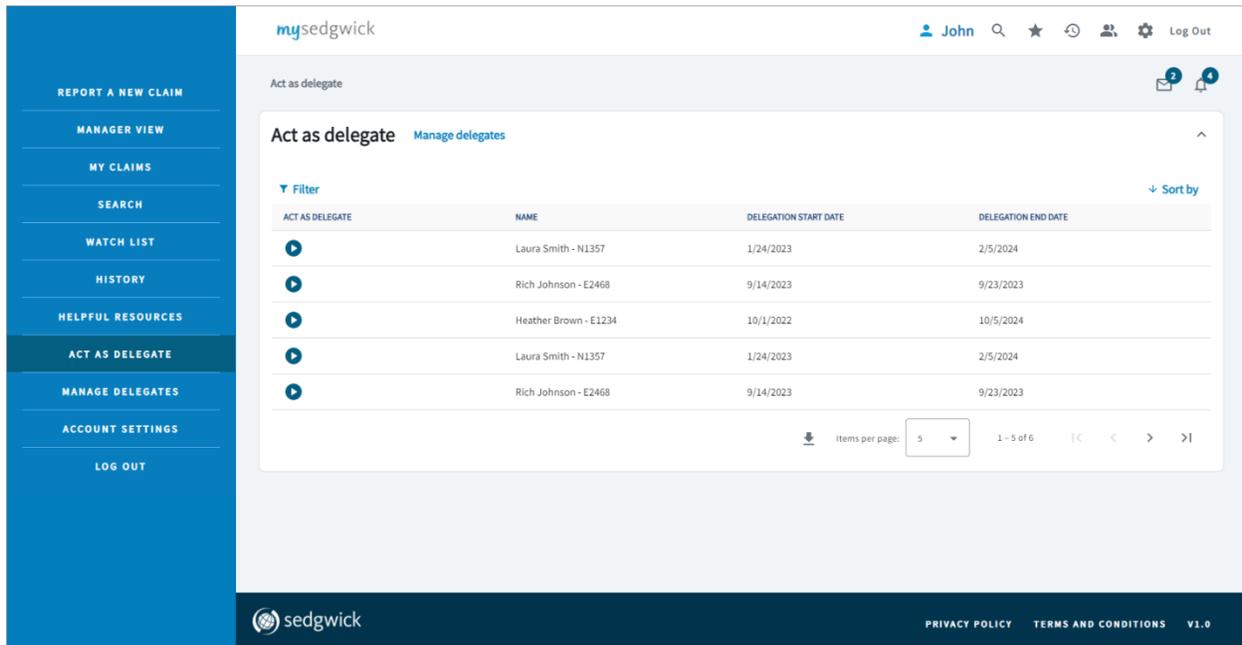
The **Delegate settings**  icon in the header allows you to access delegation features. Select **Act as delegate** or **Manage delegates**, depending on your access.



- **Act as delegate:** Displays the list of people that have appointed you to act on their behalf. See page 3 for details.
- **Manage delegates:** Allows you to manage your own delegates list and, if you have access, the delegates of another. See page 4 for details.

Act as delegate

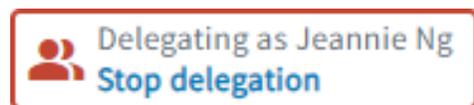
From the Act as delegate page, you can view the **Name(s)** of the people that have appointed you to act on their behalf, along with the **Delegation Start Date** and **Delegation End Date**. To act as their delegate, click the **Begin**  icon.



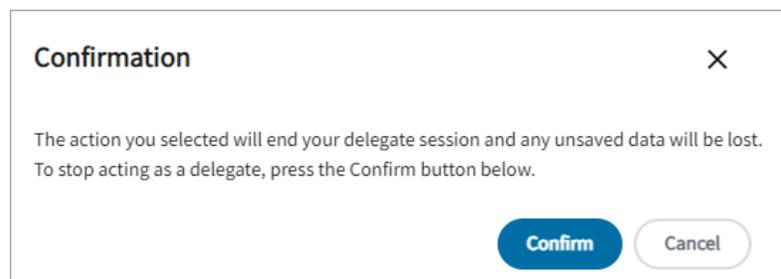
ACT AS DELEGATE	NAME	DELEGATION START DATE	DELEGATION END DATE
	Laura Smith - N1357	1/24/2023	2/5/2024
	Rich Johnson - E2468	9/14/2023	9/23/2023
	Heather Brown - E1234	10/1/2022	10/5/2024
	Laura Smith - N1357	1/24/2023	2/5/2024
	Rich Johnson - E2468	9/14/2023	9/23/2023

Once the **Delegation End Date** is more than 7 days in the past, the row disappears from this page. You can export a full list of delegation records to Excel by clicking **Export**.

While you're acting as a delegate, a red icon appears in the top header. To stop acting as a delegate, click **Stop delegation** from this icon.



In the confirmation window that appears, click **Confirm**.



Confirmation ✕

The action you selected will end your delegate session and any unsaved data will be lost. To stop acting as a delegate, press the Confirm button below.

Confirm Cancel

Manage delegates

The Manage delegates page allows you to manage the list of your delegates and what tasks each is allowed to perform on your behalf.

The screenshot displays the 'Manage delegates' interface in the mysedgwick system. On the left is a blue navigation sidebar with options like 'REPORT A NEW CLAIM', 'MANAGER VIEW', 'MY CLAIMS', 'SEARCH', 'WATCH LIST', 'HISTORY', 'HELPFUL RESOURCES', 'ACT AS DELEGATE', 'MANAGE DELEGATES', 'ACCOUNT SETTINGS', and 'LOG OUT'. The main content area has a search bar for 'Delegator' and a 'Manage delegates' table. The table lists delegates with their start and end dates and provides edit and remove actions. Below the table is a pagination control showing 'Items per page: 5' and '1 - 5 of 6'. A section titled 'Add a delegate' includes input fields for 'First Name', 'Last Name' (with 'smith' entered), and 'Employee Id', along with 'Search' and 'Clear' buttons. Below this, it shows '6 results found' and a table of search results with columns for 'ADD DELEGATE', 'NAME', and 'MANAGER'. The footer contains the Sedgwick logo and links for 'PRIVACY POLICY', 'TERMS AND CONDITIONS', and 'V1.0'.

This close-up shows the search filter for 'Manage delegate'. The search bar contains the text 'Johnson'. A dropdown menu is open, displaying two search results: 'Rich Johnson - EMP7890' and 'Jane Johnson - EMP7894'. The search bar has a clear button (X) on the right.

If you have additional access, you can also manage the delegates of another user by searching for and selecting their name from the **Manage delegate** filter at the top. Their delegates replace yours in the **Manage delegates** and **Add a delegate** sections until you clear the filter.

MANAGE DELEGATES SECTION

The **Manage delegates** section (the top half of the page) shows you the delegates you have set up to act on your behalf, along with the delegation periods for each. To add a name to this list, use the search feature in the **Add a delegate** section (refer to page 6). Click **Edit**  to modify the settings for a delegate (opens the Edit delegate window). Click **Remove**  to remove a delegate from this list.

Manage delegates

Filter Sort by

DELEGATE	DELEGATION START DATE	DELEGATION END DATE	EDIT	REMOVE
Laura Smith - N1357	1/24/2023	2/5/2024		
Rich Johnson - E2468	9/14/2023	9/23/2023		
Heather Brown - E1234	10/1/2022	10/5/2024		
Laura Smith - N1357	1/24/2023	2/5/2024		
Rich Johnson - E2468	9/14/2023	9/23/2023		

Items per page: 5 1 - 5 of 6

Add a delegate

From the Edit delegate window, you can set the **Start Date** and **End Date** for a delegate and specify what tasks they can perform. When finished, click **Save**.

Edit delegate

Laura Smith - N1357

Start Date: 03/25/2024 

End Date: 03/29/2024 

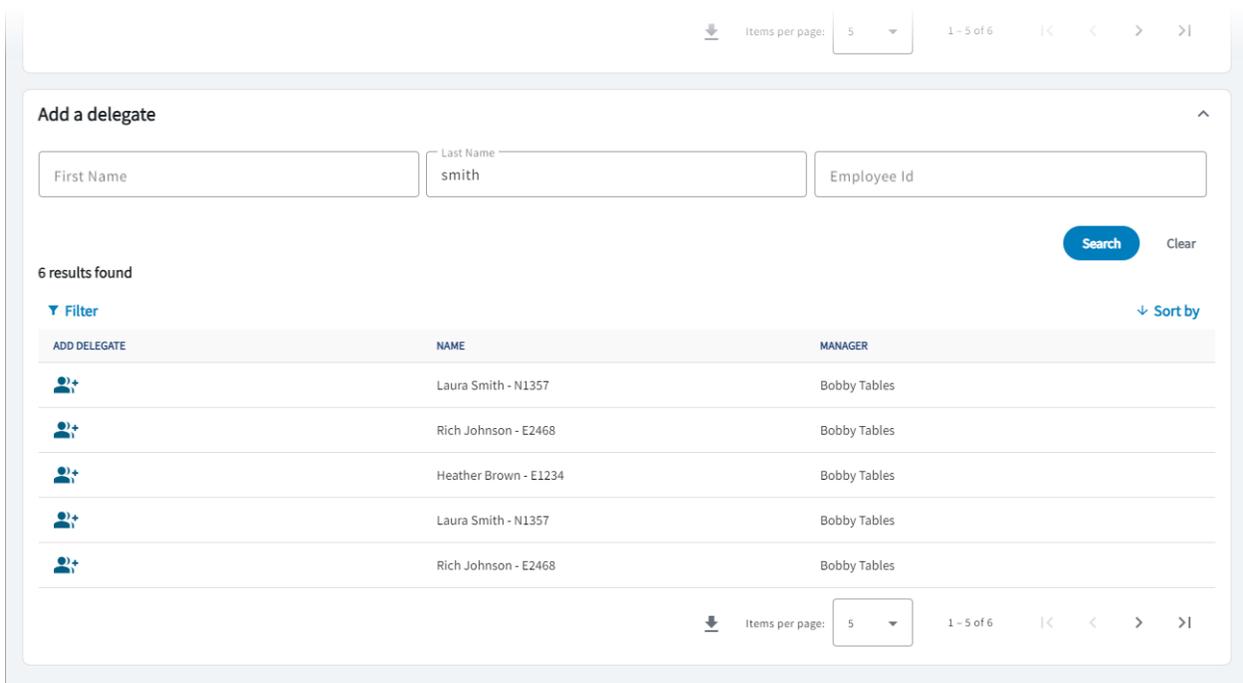
PERMISSIONS

- Report an intermittent absence
- Report a new claim
- Receive email correspondence for claim

Save Cancel

ADD A DELEGATE SECTION

The **Add a delegate** section (the bottom half of the page) allows you to search for and add a delegate to the **Manage delegates** section at the top. Enter your search criteria, then click **Search**; click the **Add delegate**  icon to open the Add delegate window for the user you select.



Items per page: 5 1 - 5 of 6

Add a delegate

First Name Last Name **smith** Employee Id

Search Clear

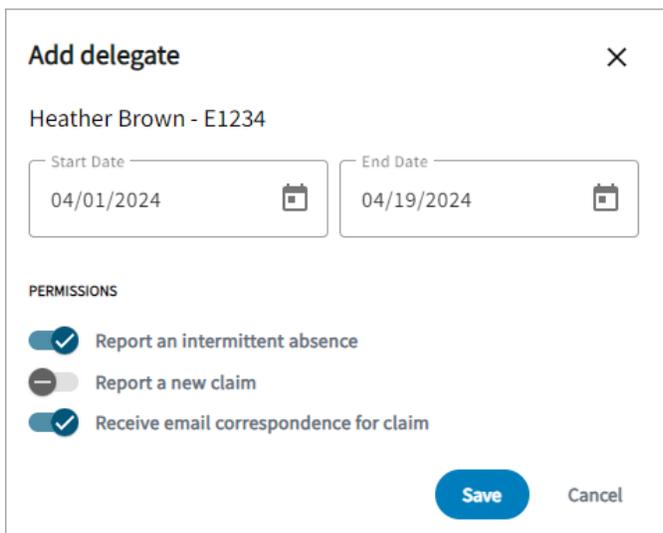
6 results found

Filter **Sort by**

ADD DELEGATE	NAME	MANAGER
	Laura Smith - N1357	Bobby Tables
	Rich Johnson - E2468	Bobby Tables
	Heather Brown - E1234	Bobby Tables
	Laura Smith - N1357	Bobby Tables
	Rich Johnson - E2468	Bobby Tables

Items per page: 5 1 - 5 of 6

From the Add delegate window, you can set the **Start Date** and **End Date** for a delegate and specify what tasks they can perform. When finished, click **Save**.



Add delegate

Heather Brown - E1234

Start Date: 04/01/2024 End Date: 04/19/2024

PERMISSIONS

- Report an intermittent absence
- Report a new claim
- Receive email correspondence for claim

Save Cancel