

# Approving Separation Orders

## Overview

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**Introduction** This section provides the procedures for Approving Separation Orders in Direct Access.

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**Before you begin** A SPO Supervisor in the Department's SPO tree must approve all Separation Orders. Any SPO Sup in the SPO tree may view and open the Approval Request. Only one user needs to approve the orders. Once approved, the order will no longer be available to other users for approval.

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### Order Status

Status	Meaning
Authorized	Separation Orders created by either the Sep Request or by the SPO
Ready	Separation Orders have been approved
Finished	Separation Orders have been through the Orders Integration Process
Cancelled	Cancelled orders

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### Contents

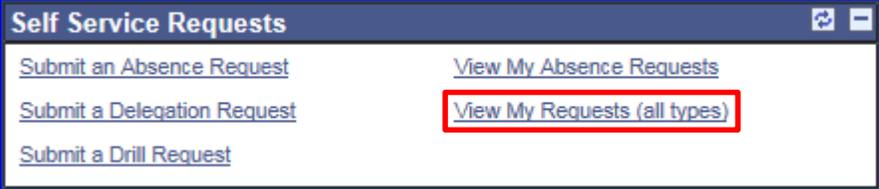
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# Procedures

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**Procedures** Follow these steps to approve a Separation transaction.

<b>Step</b>	<b>Action</b>
<b>1</b>	To view orders awaiting approval, click Requests from the Direct Access Portal Home page. 
<b>2</b>	Click on the <b>View My Requests (all types)</b> link. 

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## Procedures, Continued

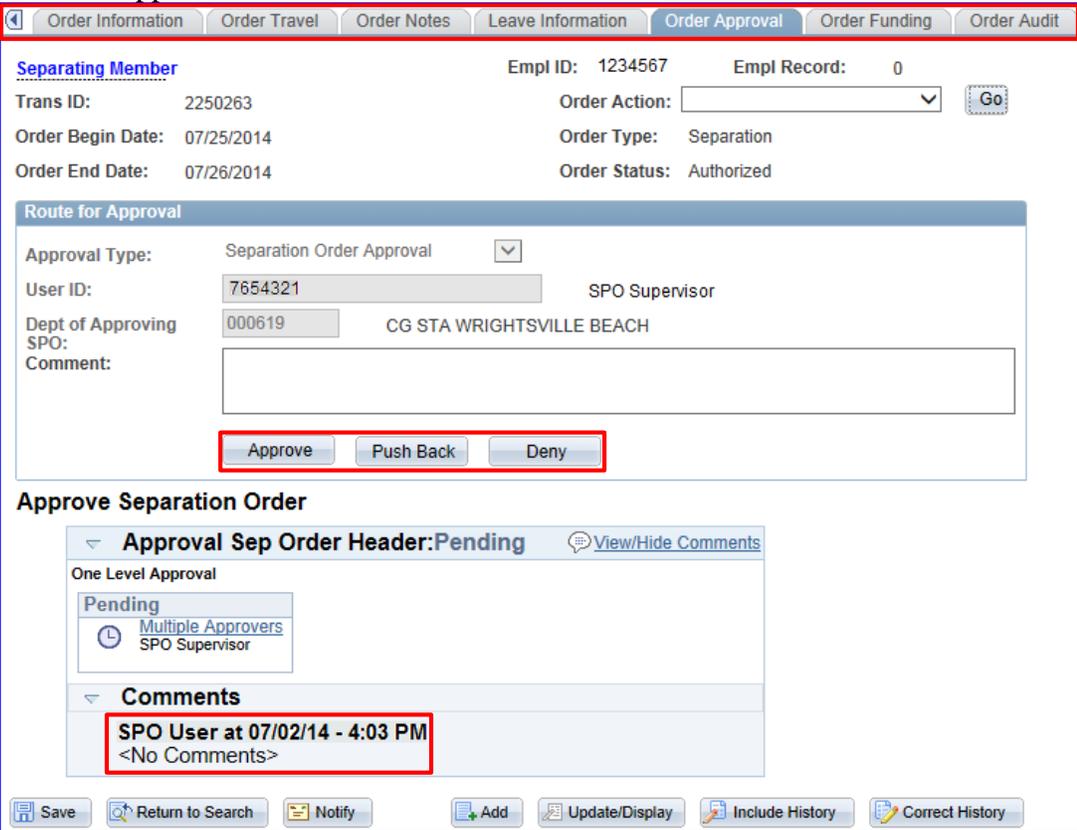
Procedures,  
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Step	Action																																																								
3	<p>Select <b>Requests I am Approver For</b>. Change the <b>Transaction Name</b> to <b>Approval Sep Order Header</b> to narrow the list to only display Separations approval requests. Leave the <b>Transaction Status</b> as <b>Pending</b>. The <b>Submission Dates</b> can also be used to filter requests. Click <b>Populate Grid</b>.</p> <div data-bbox="337 632 1414 1230" style="border: 1px solid blue; padding: 5px;"> <p><b>View My Action Requests</b></p> <hr/> <p>SPO Supervisor</p> <ol style="list-style-type: none"> <li>1. 'My Submitted Requests' allows member to bring up only their Action Requests.</li> <li>2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.</li> <li>3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.</li> <li>4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)</li> <li>5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.</li> <li>6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <input type="radio"/> My Submitted Requests              <input checked="" type="radio"/> <b>Requests I am Approver For</b>              <input type="radio"/> All Requests         </div> <p>Transaction Name: <span style="border: 1px solid red; padding: 2px;">Approval Sep Order Header</span> ▼</p> <p>Transaction Status: <span style="border: 1px solid #ccc; padding: 2px;">Pending</span> ▼</p> <p>Submission From Date: <input type="text"/> [B]</p> <p>Submission To Date: <input type="text"/> [B]</p> <div style="display: flex; justify-content: flex-end; gap: 10px;"> <span style="border: 1px solid red; padding: 2px 10px;">Populate Grid</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">Refresh</span> </div> </div>																																																								
4	<p>Click on the <b>Approve/Deny</b> link to view the Separation Orders.</p> <div data-bbox="337 1304 1414 1528" style="border: 1px solid blue; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="8" style="text-align: right;">Customize   Find   View All   First 1 of 1 Last</th> </tr> <tr> <th>Transaction Name</th> <th>Status</th> <th>Member</th> <th>Member's Emplid</th> <th>Submitted By</th> <th>Approver</th> <th>Submission Date</th> <th>Approve/Deny</th> </tr> </thead> <tbody> <tr> <td colspan="8" style="text-align: right;">Approve/Deny</td> </tr> <tr> <th colspan="8" style="text-align: right;">Order Approvals</th> </tr> <tr> <th colspan="8" style="text-align: right;">Customize   Find   View All   First 1-3 of 3 Last</th> </tr> <tr> <th>Transaction Name</th> <th>Status</th> <th>Member</th> <th>Member's Emplid</th> <th>Submitted By</th> <th>Approver</th> <th>Submission Date</th> <th>Approve/Deny</th> </tr> <tr> <td>Approval Sep Order Header</td> <td>Pending</td> <td>Separating Member</td> <td>1234567</td> <td>SPO User</td> <td>SPO Supervisor</td> <td>07/01/2014</td> <td style="border: 1px solid red;">Approve/Deny</td> </tr> </tbody> </table> </div>	Customize   Find   View All   First 1 of 1 Last								Transaction Name	Status	Member	Member's Emplid	Submitted By	Approver	Submission Date	Approve/Deny	Approve/Deny								Order Approvals								Customize   Find   View All   First 1-3 of 3 Last								Transaction Name	Status	Member	Member's Emplid	Submitted By	Approver	Submission Date	Approve/Deny	Approval Sep Order Header	Pending	Separating Member	1234567	SPO User	SPO Supervisor	07/01/2014	Approve/Deny
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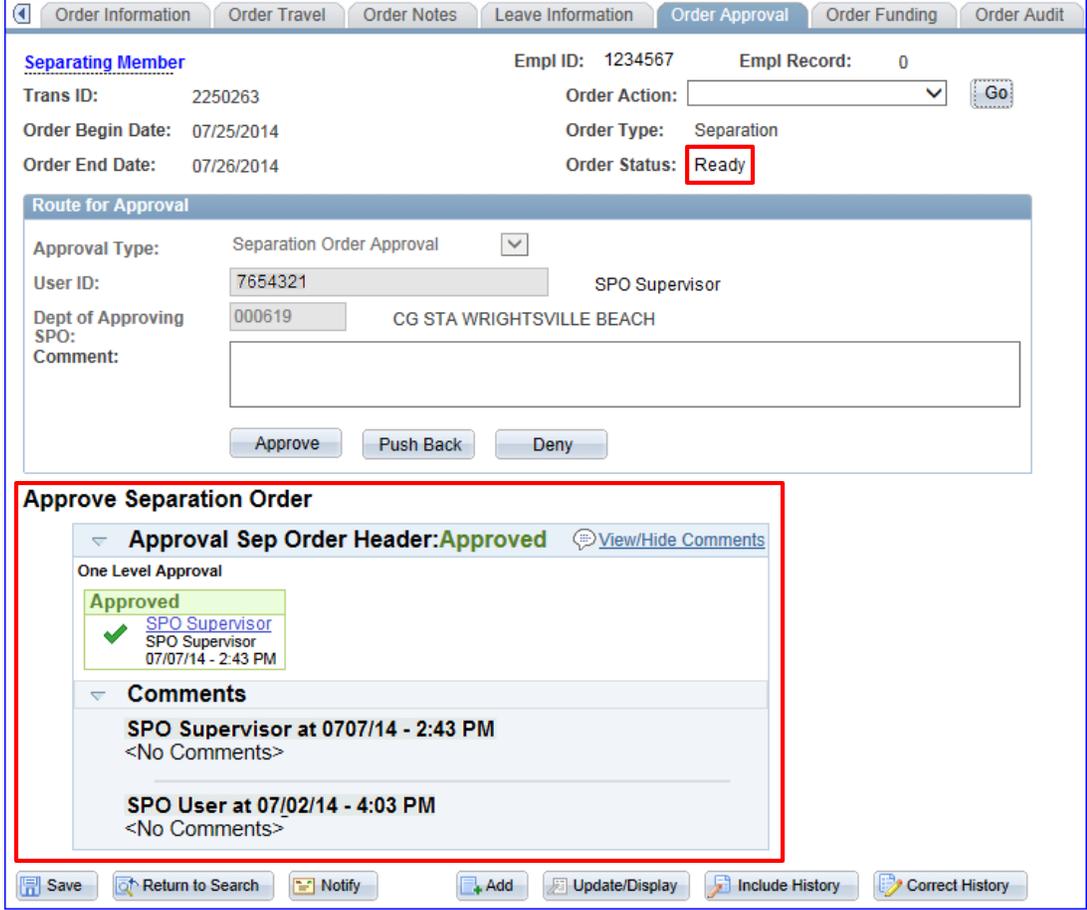
Procedures,  
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Step	Action
5	<p>The order will open to the <b>Order Approval</b> tab. Use the tabs at the top to audit the transaction. This approval will apply to all travel details and leave information for this order. If changes need to be made, use the <b>Push Back</b> button to send the orders back to the submitting SPO user. (Due to known issues, do not use the <b>Push Back</b> button.) The <b>Deny</b> button will remove the transaction from all of the SPO Supervisors' Action Requests and make the transaction available to any SPO user. Any comments entered by the SPO user will be shown below. The SPO Supervisor can add additional comments if necessary (required for Deny). Click the <b>Approve</b> button to approve the orders.</p>  <p>The screenshot shows the 'Order Approval' tab selected. At the top, there are navigation tabs: Order Information, Order Travel, Order Notes, Leave Information, Order Approval (highlighted), Order Funding, and Order Audit. Below the tabs, the 'Separating Member' section displays: Empl ID: 1234567, Empl Record: 0, Trans ID: 2250263, Order Action: (dropdown), Order Begin Date: 07/25/2014, Order Type: Separation, Order End Date: 07/26/2014, and Order Status: Authorized. A 'Route for Approval' section includes: Approval Type: Separation Order Approval, User ID: 7654321 (SPO Supervisor), Dept of Approving SPO: 000619 (CG STA WRIGHTSVILLE BEACH), and a Comment field. At the bottom of this section are 'Approve', 'Push Back', and 'Deny' buttons. Below this is the 'Approve Separation Order' section, which shows 'Approval Sep Order Header: Pending' and a 'Comments' section with a red box around the text 'SPO User at 07/02/14 - 4:03 PM &lt;No Comments&gt;'. At the very bottom are utility buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.</p>

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# Procedures, Continued

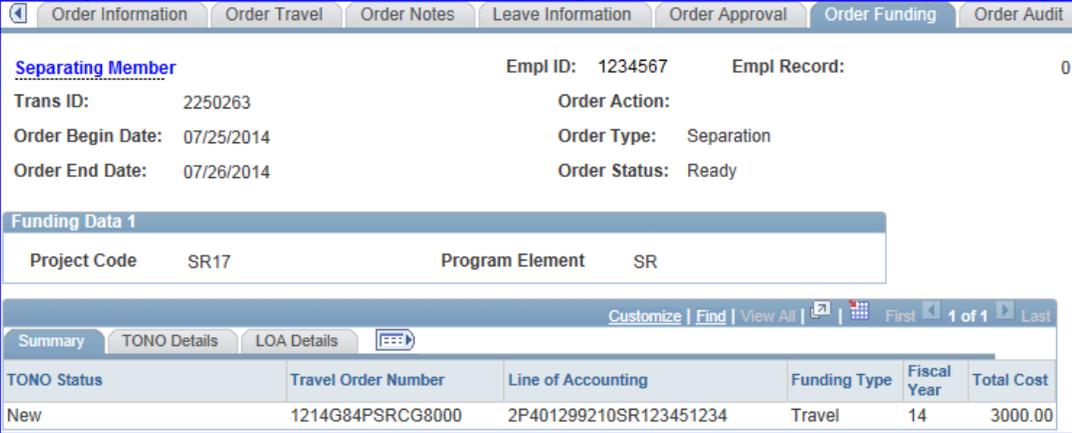
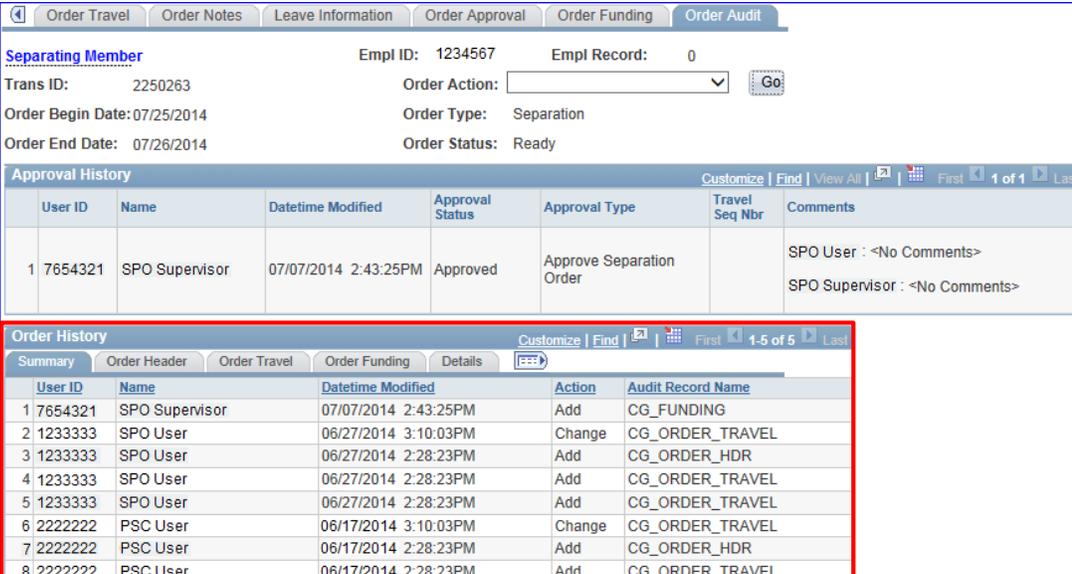
Procedures,  
continued

Step	Action
6	<p data-bbox="332 491 1334 562">Click the F5 key on the keyboard to refresh the page. Once approved, this will appear and the <b>Order Status</b> will change to Ready.</p> <div data-bbox="332 562 1419 1472"><p>The screenshot displays a web application interface for managing a 'Separating Member' order. At the top, there are navigation tabs: Order Information, Order Travel, Order Notes, Leave Information, Order Approval (selected), Order Funding, and Order Audit. The main content area shows the following details:</p><ul style="list-style-type: none"><li><b>Separating Member</b> (Empl ID: 1234567, Empl Record: 0)</li><li>Trans ID: 2250263</li><li>Order Begin Date: 07/25/2014</li><li>Order End Date: 07/26/2014</li><li>Order Action: [Dropdown]</li><li>Order Type: Separation</li><li>Order Status: <b>Ready</b> (highlighted with a red box)</li></ul><p>Below these details is a 'Route for Approval' section with the following information:</p><ul style="list-style-type: none"><li>Approval Type: Separation Order Approval</li><li>User ID: 7654321 (SPO Supervisor)</li><li>Dept of Approving SPO: 000619 (CG STA WRIGHTSVILLE BEACH)</li><li>Comment: [Text Area]</li><li>Buttons: Approve, Push Back, Deny</li></ul><p>A red box highlights the 'Approve Separation Order' section, which shows the following approval history:</p><ul style="list-style-type: none"><li><b>Approval Sep Order Header: Approved</b> (View/Hide Comments)</li><li>One Level Approval:<ul style="list-style-type: none"><li><b>Approved</b> (SPO Supervisor, 07/07/14 - 2:43 PM)</li></ul></li><li><b>Comments</b><ul style="list-style-type: none"><li>SPO Supervisor at 07/07/14 - 2:43 PM: &lt;No Comments&gt;</li><li>SPO User at 07/02/14 - 4:03 PM: &lt;No Comments&gt;</li></ul></li></ul><p>At the bottom of the interface, there are several utility buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.</p></div>

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# Procedures, Continued

## Procedures, continued

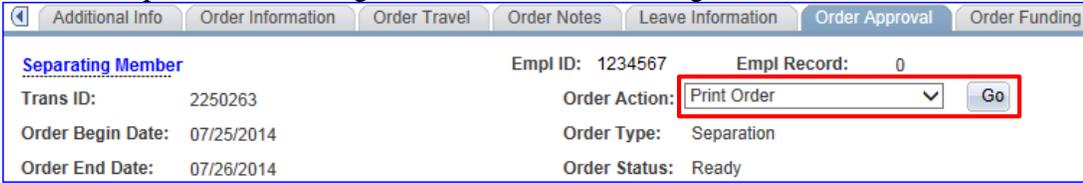
Step	Action
7	<p>Direct Access no longer automatically adds a Travel Order Number (TONO)/Line of Accounting (LOA) to Separation and Retirement orders. TONOs/LOAs are now added by DCMS-831 (PCS TONO Funds Manager) if the member elects to relocate upon separation/retirement to their Home of Record/Home of Selection. This change will ensure that the Coast Guard only allocates funds to members who are actually moving/incurred costs. Refer to the latest Sep/Ret TONO Process Change message.</p> 
8	<p>The <b>Audit Tab</b> displays the history of any users that have touched the Separation Orders.</p> 

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## Procedures, Continued

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Procedures,  
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Step	Action
9	<p data-bbox="334 491 1333 558">Users may generate printed copies of the approved orders by using the <b>Order Action</b> drop-down, selecting <b>Print Order</b> and clicking the <b>Go</b> button.</p> <div data-bbox="334 558 1417 741"><p data-bbox="354 611 516 636"><b>Separating Member</b></p><p data-bbox="846 611 1240 636">Empl ID: 1234567      Empl Record: 0</p><p data-bbox="354 646 591 667">Trans ID: 2250263      Order Action: <b>Print Order</b> <input type="button" value="Go"/></p><p data-bbox="354 680 610 701">Order Begin Date: 07/25/2014      Order Type: Separation</p><p data-bbox="354 714 610 735">Order End Date: 07/26/2014      Order Status: Ready</p></div>

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