

BOP Approvers Worksheet Instructions

The BOP Approval Routing Worksheet must be filled out to completion. The Approval Routing Request cannot be completed without all the necessary information.

The Form must be submitted by the Line Office Point of Contact and a phone number must be supplied.

The Form must go through CBS Client Services Help Desk.

I. Basic Definitions of Terms for setting up Approvers and Alternates:

One Time Rerouting – Rerouting BOPs to another Approver for a particular one time event. The key to One Time Rerouting is that the Rerouted Approver (to receive the documents), must already be set up as an Alternate Approver before documents can be rerouted.

Example: the Approver is unexpectedly out, the BOPs need to be approved before COB, this request would be made to reroute the BOPs to another Approver (Alternate) for that one time.

Temporary Rerouting – Rerouting BOPs to another Approver for a period of time (due to sick leave, extended leave, TDY, etc.). As with One Time Rerouting, this person must be set up as an Alternate Approver before documents can be rerouted.

Requester – Anyone with BOP access.

New Approver – This is an Approver who is not currently set up in the Document Approval Maintenance Screen (WF001).

Alternate Approver – This is an Approver who will be a Substitute Approver in case of extended absences, (vacations, sick leave, TDY, etc.). The Approver used for One Time Rerouting and Temporary Rerouting.

Replacement Approver – This is an Approver who is taking the place of/successor of a current Approver.

Replace Alternate Approver – This is an Alternate Approver who is taking the place of/successor of a current Alternate Approver.

Priority Level 1(FMC) – This is the First Level Approver. This Approver reviews the data entered for accuracy. Then either approves or returns the BOP to the requester with comments as to why the BOP was not approved.

Priority Level 2 (LO) – This is the Final Approver. The Approver reviews and approves the BOP once it has been approved by the Level 1 Approver. This Approver should not be selected as an Alternate Approver for a Priority Level 1 Approver.

II. Guidance:

1. BOPs are routed electronically based on priority established on the Document Approval Maintenance Screen (WF001).
2. First Level of BOP Approval is routed to Priority Level 1 (FMC).
3. Second Level/Final Level of BOP Approval is routed to Priority Level 2 (LO)
4. Priority Level 2 Approver cannot be selected as an Alternate for the Priority Level 1 Approver.
5. It is Highly Recommended to *Limit* the number of Approvers. This will avoid the BOP going through too many levels of approval.

III. Filling Out the Form:

1. Requested Change Field:

This field needs to be populated first. When the down arrow key is selected, the user can choose from the List of Values (LOV): Reroute BOPs, Establish New Approver, Replace Approver, Delete Approver, Modify Approver, Establish Alternate Approver, Replace Alternate Approver, and Delete Alternate Approver, Modify Alternate Approver. The value that is selected in the Requested Change Field will determine what part or parts of the form will be filled out.

If Reroute BOPs is selected, then the One Time or Temporary Rerouting Check Box needs to be selected. If any other value is selected, then there is no need to check these boxes.

2. One Time Rerouting:

Rerouting BOPs to another Approver for a particular one time event.

Example: The Reroute BOPS will be selected in the Request Change Field. The One Time Rerouting box will be selected. The Current Approver section will be filled in with Mr. Jones information. The Current Alternate Approve section would be filled in with Ms. Smith's information.

3. Temporary Rerouting:

Rerouting BOPs to another Approver for a period of time (due to sick leave, extended leave, TDY etc.).

Example: The Reroute BOPS will be selected in the Request Change Field. The Temporary Rerouting box will be selected. The Current Approver section will be filled in with Mr. Jones information. The Current Alternate Approve section would be filled in with Ms. Smith's information.

4. Current Approver Information:

This field needs to be populated for ALL actions.

Example: Update Approver Mr. Jones Organizational Code Ranges for approval. The Modify Approver will be selected in the Request Change Field. The Current Approver section will be filled in with Mr. Jones information. Then using the Additional ACCS Code Range page, fill in the From and To information as needed.

5. Current Alternate Approver(s):

This section needs to be populated when Updating, Replacing or Deleting an Alternate Approver.

Example: Update Alternate Approver Ms. Smith Organizational Code Ranges for approval. The Modify Alternate Approver will be selected in the Request Change Field. The Current Alternate Approver section will be filled in with Ms. Smith's information. Then using the Additional ACCS Code Range page, fill in the From and To information as needed.

6. New/Replacement Approver Information:

This section needs to be populated when you are establishing a New Approver or replacing an Approver or when there are any changes to the current Approver's information.

Example: Current Approver Mr. Jones is retired. His Replacement Approver will be Ms. Smith. The Replace Approver will be selected in the Requested Change Field. Then the Current Approvers section will be filled in with Mr. Jones information. The New/Replacement Approver section will be filled in with Ms. Smith's information.

7. New/Replacement Alternate Approver Information:

This section needs to be populated when establishing a new Alternate Approver or when replacing an Alternate Approver or when there are any changes to the current Alternate Approver's information. If there is more than one Alternate, enter them in the Name Field separating them by commas.

Example: Alternate Approver Mr. Jones is leaving. His replacement Alternate Approver will be Ms. Smith. The Replace Alternate Approver will be selected in the Requested Change Field. The Current Approver information will be filled in. The Current Alternate section will be filled in with Mr. Jones information. Then the New/Replacement Alternate section will be filled out with Ms. Smith's information as the new Alternate Approver.

8. Additional ACCS Code Ranges:

This second page of the BOP Approval Worksheet is used for the Additional ACCS Code Ranges that Approver and/or Alternates may approve for.