Work05– Department Worklist

Purpose

The purpose of Department Worklist screen is to provide users with a “task list”, and it is the first screen the user sees when they log into PAMS:

![Department Worklist Screen](image-url)
Screen View
Users have the option of three views: My Action Required, My Responsibility, and My Team’s Responsibility. These three views can be accessed by using the dropdown at the top of the page:

The default selection for the screen will be My Responsibility. The View drop-down affects all categories on this page as follows:

1. If the user chooses the My Team’s Responsibility Team view, they will see all of the provisions for their team (dept population).
2. If the user chooses the My Responsibility Individual view, they will only see provisions that are assigned to them.
3. If the user chooses the My Action Required view, they will only see provisions that they currently own.

Interim Reports and Invoices
This section of the Worklist Page displays the number of reports and invoices with the Type of “Interim” that require action.

For the department view, this will only include interim reports and invoices that EFM sends to the department for review or signature (i.e. that have a provision status of Pending Signatures).
Closeout Packets Due to EFM
This section of the Worklist Page displays the number of reports and invoices with the Type of “Final” and an associated COP that require action.

The reports and invoices are categorized in this section as follows:

1. **Upcoming 30 Days**: Any provision that has a due date to EFM or Home within 30 days of today, and the status is NOT one of the following values: Submitted, Completed, Submitted – Revised, Reviewed Not Submitted.
2. **Upcoming 30 Days - Missing Managing PI**: Any provision that has a due date to EFM or Home within 30 days of today, the Managing PI is blank, and the status is NOT one of the following values: Submitted, Completed, Submitted – Revised, Reviewed Not Submitted.
3. **Past Due**: Any provision that has a due date to EFM or Home before today, and the status is NOT one of the following: Submitted, Completed, Submitted – Revised, Reviewed Not Submitted.

Pending Response
This section of the Worklist Page displays the number of NCTE/Ammendments and Carry Forward Approvals with a status of Pending:

The results are categorized in this section as follows:

1. **NCE/Ammendment**: Any provision that has an NCE/Amendment request with the status of “Pending”. **Note**: This provision may also appear under Closeout Packets Due to EFM depending on the due date of the COP.
2. **Carry Forward Approval**: Any provision that has a Carry Forward Approval request with the status of “Pending”. **Note**: This provision may also appear under Closeout Packets Due to EFM depending on the due date of the COP.
**Pending Y/N**
This will be implemented in a future phase. For now, it will display with the title, “Under Development”:

![Pending Y/N Action - Under Dev](image)

**Navigation**
If users click on any of the links on the Worklist page, they will navigate to the Fund Search page. The Fund Search page will automatically be filtered to match the parameters of the link that was clicked (i.e. the same filters will apply to Fund Search as apply to the link).

Below is a sample screen shot of the Fund Search page (and its filters) as it would appear if accessed by clicking NCTE/Amendment from the Worklist page:

![Search For Funds](image)

**Page Access**
This page is viewable to all department users.