Work06– EFM Worklist

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

![EFM 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:

![Dropdown Options](image)

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 (EFM team).
2. If the user chooses the My Responsibility 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.

**Reports Due to Sponsor**

This section of the Worklist Page displays the number of provisions with the following Category: Financial Report, and Report ARRA Quarterly.

![Reports Due to Sponsor](image)

The provisions 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.
   a. **Interim**: Any above provision with a Type of Interim
   b. **Final**: Any above provision with a Type of Final

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2. **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.
   a. **Interim:** Any above provision with a Type of Interim
   b. **Final:** Any above provision with a Type of Final

**Invoices Due to Sponsor**
This section of the Worklist Page displays the number provisions with the following Category: Invoice, Invoice Milestone, and Auto Payment.

![Invoices Due to Sponsor](image)

The provisions 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.
   a. **Interim:** Any above provision with a Type of Interim
   b. **Final:** Any above provision with a Type of Final
2. **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.
   a. **Interim:** Any above provision with a Type of Interim
   b. **Final:** Any above provision with a Type of Final

**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/Ammendment 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”:

**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:
Page Access
This page is viewable to all EFM users.