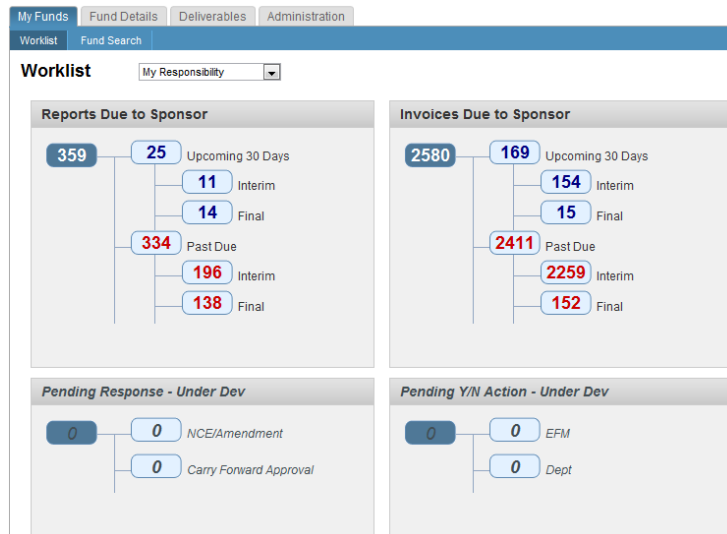


Work06– EFM Worklist

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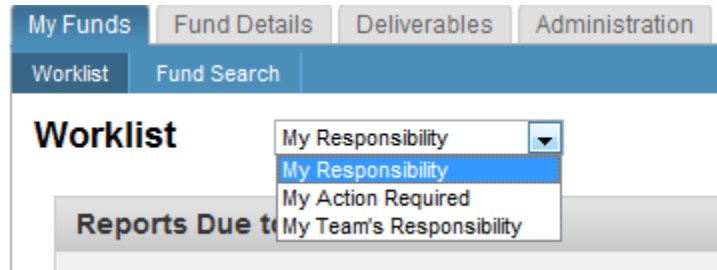
Purpose

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:



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:

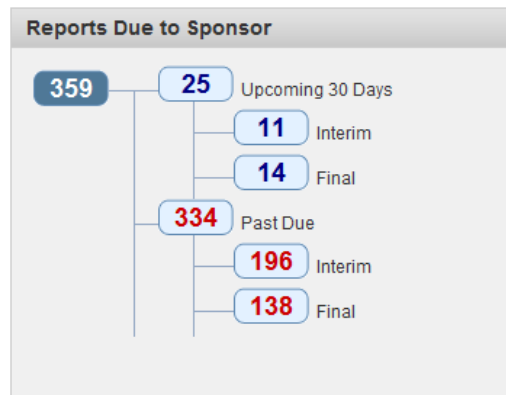


The default selection for the screen will be My Responsibility. The View drop-down affects all categories on this page as follows:

1. If the user chooses the My Team's Responsibility Team view, they will see all of the provisions for their team (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**.



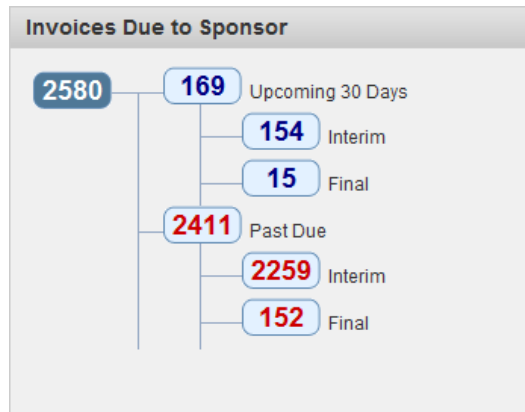
The provisions are categorized in this section as follows:

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

Invoices Due to Sponsor

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



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:

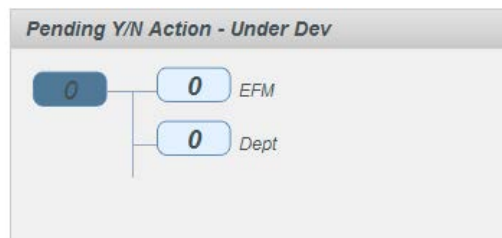


The results are categorized in this section as follows:

1. **NCE/Amendment:** 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”:





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 NCE/Amendment from the Worklist page:

 FILTERS

Fund #:	UCLA PATS No:	Responsible For: <input type="checkbox"/> Action Required Only		
<input type="text"/>	<input type="text"/>	--SELECT--		
Type:	Category:	Status:	From Due Date:	Due Date To:
--SELECT--	--SELECT--	Pending NCE	<input type="text"/> 	<input type="text"/> 
Organization:	Home PI: <input type="checkbox"/> Missing Managing PI Only			
<input type="text"/>	<input type="text"/>			
Division:	Sponsor Name:			
<input type="text"/>	<input type="text"/>			
Department Code:	Sponsor Award #:			
<input type="text"/>	<input type="text"/>			
<input type="button" value="Search"/>		<input type="button" value="Clear"/>		

Page Access

This page is viewable to all EFM users.