

## ASSIGNMENTS IN THE EFTS

1. **DO NOT ASSIGN UNTIL YOU HAVE ALL THE INFO IN THE EFTS THAT YOU WANT TO TRANSFER OVER.** (Make sure you are using Normal for the tracking type unless all bureaus have agreed to a different tracking type, such as complex.)
2. **Do not Assign unless the scope and fee issues are settled.** If they are not settled, it is necessary to get clarification from the requester on these and only Then Assign.
3. If ready to Assign, open in the EFTS and choose the ASSIGNMENTS TAB.
4. Click on the Assignment Button.
5. Scroll through the Bureaus menu and highlight the one(s) you want.
6. Type in your brief instructions in the Instruction box. Usually it will be something like “Please accept this referral for direct response to the requester; we are closing our EFTS entry today.” However, if your bureau is still going to also work on this FOIA, you will be writing: Please accept this referral for additional direct response (or for a coordinated response).
7. Make sure the Point of Contact is the person you want (defaults will appear); if not enter the correct name.
8. Now that you’ve got your bureau, contact, and instructions in place, Click “Add” to the right. The EFTS will generate a new “Child FOIA” number related to your parent FOIA, and it will appear in the Currently Assigned to box.
9. Select Edit Comments at the bottom.
10. Type in, for example, BLM-2006-00xxx is now XX-2006-00xxx. Hit Add or Save Comment Field (don’t save whole FOIA yet).
11. Double check to see if this new Comment entry is now the top line of the Comments field. If not, fix it so that it is the top line. Save Comment only (not whole FOIA yet).
12. Now the information in paragraph 10 should be visible on the Basic Form page at the top of the General Comments section. Now also, when you Save, the Assignment will take place, and both the parent and child FOIA will have this important assignment info visible at the top of General Comments on the Basic EFTS page.
13. If you are now done: and everything you want to transfer is in place, **SAVE YOUR ENTRIES** for the whole FOIA at the bottom. (Note – the EFTS often appears to lose some data such as the Perfected Date at this point. Don’t worry, if you log out and back in, it should reappear.) If this is also your final action in the EFTS for this FOIA, now choose CLOSE for the Disposition, and SAVE it again.
14. If your bureau is still working on the FOIA, leave it open. In this case, when you later complete the FOIA, you will be COMPLETING it (rather than closing it), since you did more than merely refer it. **SAVE YOUR ENTRIES** for the whole FOIA at the bottom.
15. If you got the FOIA first and are assigning, remember you will acknowledge the request on behalf of the responding bureaus, and will advise the requester of which new bureau(s) will process it.