

# Financial Disclosure Management

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FDM Release 4.1  
Release Notes

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# Introduction

These Release Notes describe the changes to the FDM system for Release 4.1.

The changes in this release affect the following areas:

- ❖ Admin (Org Unit Tool, New Roles, Data Migration)
- ❖ Admin (Managing Roles)
- ❖ My Info (Review Chain, My Filers, Required Activity, Extensions, Bulk Registration, My Profile (View all roles, Edit Logons, View personal audit trail)
- ❖ Reports List (Org Unit Navigation, Alphabetic search by name)
- ❖ Review Status (Grant Extensions)
- ❖ New Audit Trail Events
- ❖ Website

Address questions about FDM to the FDM Help Desk:  
(Mail to: [monm-secfdmspt@conus.army.mil](mailto:monm-secfdmspt@conus.army.mil)).

Training materials on the new features can be found on the FDM website:

<https://www.fdm.army.mil/learningCenter/learningCenter.htm>

## Admin

### Org Unit Tool – Managing Org Units

FDM now features a new Org Unit tool to support filer management by allowing you to organize filers and reviewers by organization in FDM. Org Units allow you to group Filers into Org Units or departments based on their distinct report review chain.

#### Key Change from Release 3.1

Filers are now assigned to an Org Unit to allow for Deputy DAEO oversight.

#### New features

- ❖ Adding a new Org Unit
- ❖ Editing an Existing Org Unit (change Name, Description & Location)
- ❖ Changing an Org Unit's Location within the hierarchy (Moving an Org Unit)
- ❖ Deleting an Org Unit

#### Who can access the Org Unit Tool?

Administrative FDM users, including POCs, 450 Certifiers, 450 Certifier Ethics Counselors, 450 Certifier Assistants, Senior Legal Counsels, Senior Legal Counsels Ethics Counselors, Senior Legal Counsel Assistants, DAEOs, DAEO ECs, and System and Agency Administrators, can access the Org Unit tool.

## Navigating to the new Org Unit Tool

The new Org Unit Tool is on the Admin tab. The initial view of the Org Units page displays your Org Unit in a "Breadcrumb Trail" and any subordinate org units are listed below in a table. See sample screen below:

The screenshot shows the 'Org Units' page in a web application. At the top, there is a navigation bar with tabs for 'My Info', 'Admin', and 'Resources'. Below this is a secondary navigation bar with various roles like 'POC', 'Supervisors', 'Senior Legal Counsels', etc. The main content area is titled 'Org Units' and shows a breadcrumb trail: 'Org Unit: My Orgs » USARMY » CECOM'. Below the breadcrumb trail is a search box for org units with a 'Search' button and a 'Clear' button. A warning icon indicates a different POC is assigned to this org unit. Below the search box, there is a table of org units for 'CECOM'. The table has columns for 'Name', 'Description', and 'Supervisor Name'. The first row is 'CECOM - SEC' with a description of 'CECOM - Software Engineering' and supervisor 'Pluma, Brice'. The second row is 'CECOM - RDEC' with a description of 'CECOM - Research and Development Center' and supervisor 'Tepp, Winnifred'. The third row is 'SEC - ITED' with a description of 'SEC - Info. Tech En'. Each row has a down arrow icon next to the name. Callouts explain that the breadcrumb trail provides a listing of subordinate org units, the search box searches through the last selected org unit, and the down arrows allow users to drill down or view subordinate org units. Another callout notes that the triangle icon identifies org units with a different person assigned to the same role.

Name	Description	Supervisor Name
CECOM - SEC	CECOM - Software Engineering	Pluma, Brice
CECOM - RDEC	CECOM - Research and Development Center	Tepp, Winnifred
SEC - ITED	SEC - Info. Tech En	

## Adding a new Org Unit

There are two ways to add a new Org Unit to FDM:

1. From the Org Unit tab, click **Add New Org Unit**
2. From any of the role's tabs by clicking **Add New <FDM Role> and Org Unit**

See sample screen below.

### Important Information

- Only a System Administrator can add Org Units without restriction.
- All other Org Unit users can manage FDM Org Units within their level of authority.
- A set of default review chain participants exists at the Agency Org Unit level
- Each Org Unit inherits the review chain participants from the Agency Org Unit until a different review chain is assigned to the subordinate Org Unit.

## Editing an Existing Org Unit

Authorized users can update the Name, Description, and Location of an Org unit anytime in FDM. Your Agency will most likely update Org Units when it goes through a transformation or reorganization.

### Important Information

- Any changes made to an existing Org Unit effects the users associated to that Org Unit and any Org Units under that Org Unit.
- You can only edit those Org Units that are subordinate to your highest Org Unit.
- Multiple Org Units cannot have the same name at the same Org Unit level.

On the Org Units page, click **Edit** beside the Org Unit you wish to update. The Edit Org Unit page is displayed. See sample screen below:

## Moving an Org Unit

### Important Information

An Org Unit can be moved to a different location in the hierarchy in two ways:

1. Move an existing Org Unit
2. Move the Org unit at the time it is added.

## Moving an Existing Org Unit

You can move an Org Unit to align the filers and review chain participants appropriately after a transformation. On the Org Units page, click **Move** beside the appropriate Org Unit. The Move Org Unit page is displayed. After locating the Org Unit under which you want to position the Org Unit being moved, click **select**. To locate the Org Unit under which to position the Org Unit being moved you must first select the appropriate Scope:

Scope	Description
<b>Span of Control</b>	Allows you to view and manage all Org Units listed on the Org Units page. For example, a Senior Legal Counsel can manage users within their own Org Units and subordinate Org Units even if the subordinate Org Unit has a different Senior Legal Counsel.
<b>Span of Responsibility</b>	This scope limits your view to those Org Units that do not have another user with your same FDM role. For example, a Senior Legal Counsel can act as a Senior Legal Counsel to their Org Unit and all subordinate Org Units unless the sub Org Unit has different Senior Legal Counsel.
<b>Current Org Units Only</b>	This scope limits your view to the subordinate Org Units for the selected Org Unit.

After locating the Org Unit under which you want to position the Org Unit being moved, click **select**.

See sample screen below:

### Move an Org Unit at the time it is added

Both the Add and Edit Org Unit screen give you the option of moving the new Org Unit to a different location. See sample of the Edit Org Unit screen below.

Once a user clicks **Move** from either the Add or the Edit Org Unit screen, the steps to move an Org Unit are the same as the steps for moving an existing Org Unit.

### Deleting an Org Unit

#### Important Information

- An Org Unit can only be deleted after its subordinate Org Units and Filers have been re-associated with a different Org Unit.
- It is recommended that you view each Org Unit profile before attempting to delete an Org Unit to ensure that you are aware of what information will be deleted.

To Delete an Org unit, drill down to the Org Unit to be deleted. The subordinate Org Units are displayed for the selected Org Unit.

Review the list of matching results and then click **Delete** beside the Org Unit to be deleted. A warning message will be displayed.

Below is a sample of the Org Units screen with the Confirmation Dialog Box to Delete an Org Unit:

The screenshot displays the FDM\_PILOT SYSTEM Financial Disclosure Management interface. The top navigation bar includes tabs for My Info, Review Filers, Admin, and Resources, with a Log Out button on the right. Below this, a secondary navigation bar lists various roles: POCs, Supervisors, Senior Legal Counsels, DAEOs, 450 Certifiers, Users, and Org Units. The main content area is titled "Org Units" and features a sidebar with a "DAEO" button. A search bar is present with "Org Unit: My Orgs » UAT-Test" and "Name:" input fields, along with Search and Clear buttons. A confirmation dialog box from Microsoft Internet Explorer is overlaid, asking "Are you sure you want to delete Org Unit UAT-1? Click OK for yes, Cancel for no." with OK and Cancel buttons. Below the dialog, a table shows "Org Units for UAT-Test" with columns for Name, Description, Location, Supervisor Name, and actions (Edit, Move, Delete). The table contains one entry for "UAT-1" with a dropdown arrow next to its name. The footer includes "Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC".

## Existing FDM Users - Data Migration

As part of the FDM Release 4.1 upgrade, current FDM users were converted to the Org Unit structure. It is recommended that all FDM Admin Users review each of your Org Units that were created and make any necessary corrections.

### How were Org Units created and named?

A separate Org Unit was created for each FDM Supervisor who previously had Filers associated to them in FDM. The Organization Name is "OrgUnit" + Supervisor's last name, first name, middle initial and is limited to 20 characters. For example, if a supervisor's name is *Janey Sprain*, the Org Unit name will be *OrgUnit Sprain, Jane*.

The Org Unit Description will contain Job Description information from a user's most recent SF 278 or Branch/Unit information from the user's most recent OGE 450 to uniquely identify the Org Unit.

**Note:** If the Supervisor in FDM was not a Filer, the Org Unit Description will be the same as the Org Unit Name.

## Navigating New Roles Pages

### Key Change from Release 3.1

The appearance and functions of the FDM Admin screens have changed to incorporate the new Org Unit feature. In the previous releases, supervisors and legal reviewers were linked directly to a Filer. In the new release, supervisors and legal reviewers are assigned to an Org Unit of filers. The Admin screens allow users to assign roles (POCs, Supervisors, 450 Certifiers, SLCs, and DAEOs) to Org Units.

### New features

- ❖ Notifying Admin Users
- ❖ Role Inheritance Down the Org Unit Hierarchy (Show/Hide Acting)
- ❖ Assigning/Reassigning Roles to Org Units
- ❖ Adding a role to an FDM User and Creating a New Org Unit at the same time.

### New Roles

FDM Admin roles now include a 450 Certifier and the Supervisor Assistant has been renamed POC for "Point of Contact", a 450 Certifier EC and a 450 Certifier Assistant.

### New Admin Role Definitions

Admin Role	Authorizations
<b>450 Certifier</b>	Can add, move or delete a Supervisor, POC or Filer
<b>POC</b>	Can add, move or delete a Supervisor, POC or Filer

### Important Information

- Before a new role can be assigned to an FDM user, the user must be associated to a new or existing Org Unit.
- A new Org Unit inherits the legal reviewers from the Agency Org Unit until a different legal reviewer is assigned to that Org Unit.

Below is an example of one of the new Admin role screens. All the role screens (POC, Supervisor, Senior Legal Counsels, DAEO and 450 Certifier) operate in the same way. See the sample Supervisors screen below:

**Financial Disclosure Management**

My Reports | My Info | Review Filers | Admin | Resources | Management Reports

POCs | Supervisors | Senior Legal Counsels | DAEOs | 450 Certifiers | Agency Admins | Users | Org Units

Agency Admin | Change

Org Unit: My Orgs » USARMY » UAT-Test » UAT-1 | -SELECT-Next Level Down | Scope: Span of Responsibility

Supervisor Search  
Last Name: | First Name: | Search | Clear

Org Unit Search

1 to 2 of 2 | Items per page: 20

Notify	Name	Org Unit Name	Org Unit Description	
<input type="checkbox"/>	Vacancy (Hancock, George, acting)	UAT-1	UAT-1	Assign
<input type="checkbox"/>	Sec. Asst	UAT-2	UAT-2	Delete

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**Callouts:**

- On the POC, Supervisors, etc. pages you can search by either Org Unit or Role.
- Click Show Acting to display those Org Units that do not have a current level POC or supervisor association.
- You can now select to personally notify FDM users.
- You can add a new POC, Supervisor, SLC, etc. and the Org Unit all at the same time.
- Click Assign to associate a different POC, Supervisor etc. to the Org Unit.

## Search by Org Unit/Search by [Role]

The Search function gives you the option to locate a specific POC, Supervisor, Senior Legal Counsel, 450 Certifier and DAEO or Org Unit within your current Org Unit. If the complete name of the Org Unit or user is not known, type any portion of the name and click **Search**. Click **Clear** to remove the search text and return the Admin page to its initial state.

## Notify

Notify allows you to send e-mail messages to specific FDM users.

## Show/Hide Acting

You can click **Show Acting** to see the FDM users who are acting as interim POCs or Supervisors for FDM Org Units. This function can be disabled by clicking **Hide Acting**.

## Add (FDM Role) and New Org Unit

Anytime a new Supervisor, SLC, 450 Certifier or DAEO is added, a new Org Unit must be added as well. POCs are added to existing FDM Org Units. If you need to replace an old Supervisor with a new Supervisor, you must first delete the old Supervisor before adding a new one. See Assign/Delete below.

## **Assign/Delete**

To replace a POC, Supervisor, etc. of an Org Unit, you must first delete a POC, Supervisor, and etc. association with an Org Unit and then assign a new POC, Supervisor, etc.

# My Info

## My Profile

### Key Change from Release 3.1

New to the "My Profile" page is the ability to see all of one's roles and relationships to other FDM users in one place. In addition, three new features were added: Edit Logins, Audit Trail and access to the Org Unit profile. In the previous releases, "My Profile" was limited to just showing a user's "Review Chain".

My Profile can now be accessed from two places:

- Through "My Profile" for individuals wanting to see his or her own information
- Through the Admin > Users Tabs for Admin users wanting to see another's profile

### New features

- ❖ Edit Logins
- ❖ View Audit Trail

## Org Unit Profile

Below is a sample of the newly revised My Profile screen:

**Financial Disclosure Management**

My Reports | My Info | Review Filers | Admin | Resources | Management Reports | Log Out

Contact Information | My ECs | My Assistants | My Filers | **My Profile** | Required Activity

### My Profile

[Edit Logins](#) | [View Audit Trail](#)

#### General Org Unit Information

I am a member of Org Unit [dsfdfsafdfs](#)

**As 278 Filer, I have . . .**

- [Sec\\_Asdn](#) as SF278 Filer Assistant
- [Sec\\_Asdg](#) as SF278 Filer Assistant

**My Roles**

- ♦ [278 Filer](#)
- ♦ [450 Filer](#)
- ♦ [Supervisor](#)
- ♦ [450 Certifier](#)
- ♦ [450 Certifier Assistant](#)
- ♦ [450 Certifier EC](#)
- ♦ [SLC](#)
- ♦ [SLC Assistant](#)
- ♦ [DAEO](#)
- ♦ [DAEO EC](#)
- ♦ [Agency Admin](#)

Org Units also have profiles. The Org Unit profile provides the view of a filer's review chain.

All roles are now included in the profile.

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## Edit Logins

### Important Information

- The new login credential must be exact or else login will fail.
- Only credentials from the Agencies that have signed agreements with FDM to provide access to their directory are valid for use. As of 12/1/2007, credentials can be added from ARMY AKO, DoD smartcard, OGE, and VA only.

Clicking **Edit Logins** displays a listing of Login Credentials. A login credential is a userid and password or a smartcard that a user enters to gain access (login) to FDM. A user's Login Credential is used by FDM to identify the person, their reports, their privileges etc. This new feature allows an individual with different credentials (personas) to appear to be the same person in FDM.

This feature is helpful in three situations:

1. When a user moves from one agency to another and, loses their login credentials with his or her old agency, and has reports in FDM tied to their older login credential.
2. When a user also has access to a smartcard and wants to access FDM using the smartcard.
3. When the login credential is changed due to marriage, name change etc.

See a sample of the Login Credentials screen below:

The screenshot shows the 'Financial Disclosure Management' interface. The page title is 'FDM\_QA\_TEST Test System'. The main heading is 'Financial Disclosure Management'. The navigation menu includes: My Info, Review Filers, Admin, Resources, Contact Info, My ECs, My Assistants, My Filers, My Profile, and Required Activity. The current user is identified as 'Login Credentials for Fassold, Robert'. There is a 'How Do I...' help button. Below the header is a table with the following data:

Add Login Credential	
Credential Service Provider	User Name or Common Name
DODCAC	FASSOLD.ROBERT.1274679561
LDAP-USARMY	robert.fassold <a href="#">Delete</a>

At the bottom left is a '< Back' button. At the bottom of the page is the footer: 'Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC'. A callout box points to the table with the text: 'Credentials can be added or deleted. Note: the last credential cannot be deleted.'

By Clicking **Add Login Credential**, the Add Credential Screen is displayed. See a sample of the Add Credential screen below:

Add Credential for Fassold, Robert

[? How Do I...](#)

Credential Service Provider:

User Name or Common Name:

Password:

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## View Audit Trail

FDM is now auditing changes in administrative information regarding such things as associations to Org Units, changes in roles or in relationships with other FDM users. This audit information is accessed from the My Profile page in FDM.

Below is a sample of the Audit Trail screen:

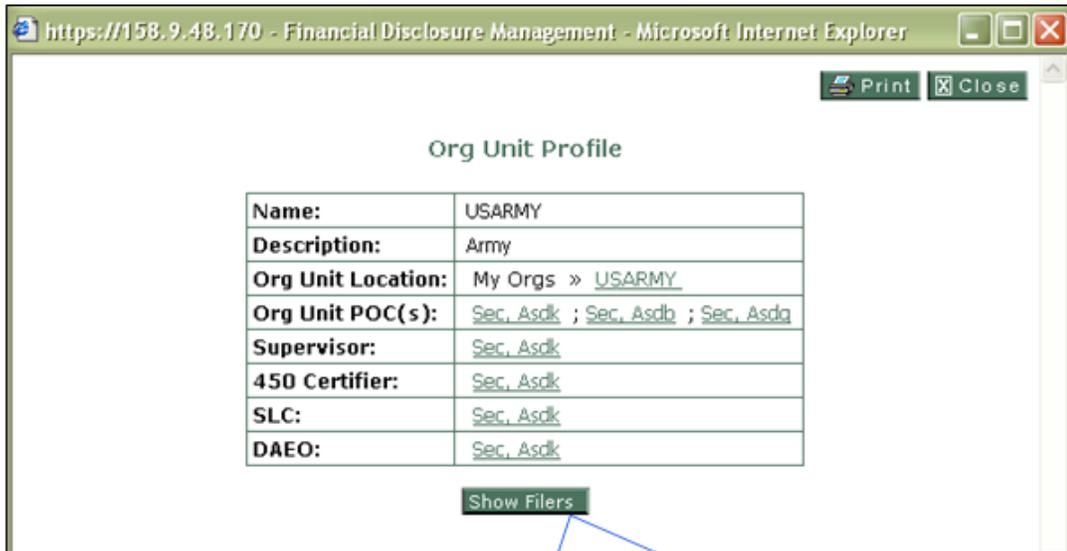
Audit Trail History of Fassold, Robert  
(Listed in reverse chronological order)

Date	Action Performed By	Role	History	Details
2007-10-11 13:22:14.257	Sec, Asdk	DAEO	Added as a 450 Certifier to an Org Unit Fassold 1	

[Print](#) [Close](#)

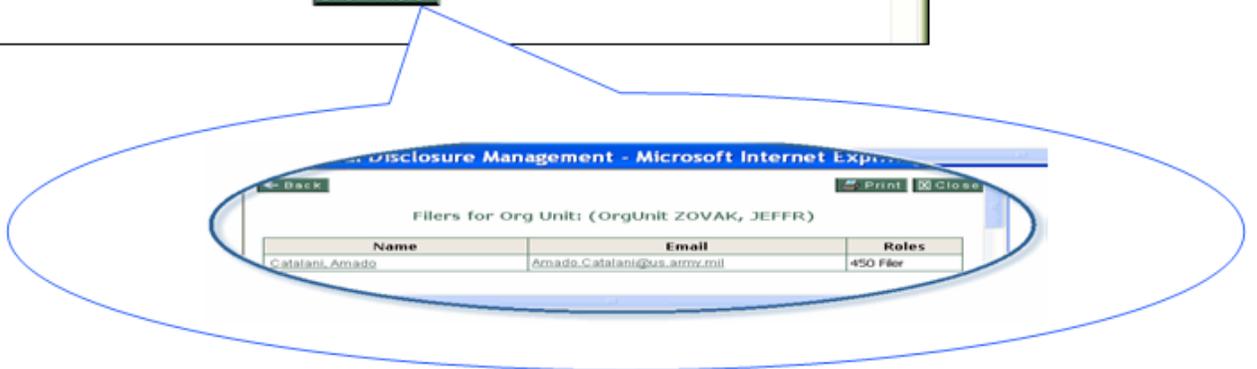
## Org Unit Profile

To identify the "Review Chain" of a filer within an individual organization, you must look at the assigned reviewers of the individual filer's Org Unit. This information is found on the Org Unit Profile which can now be accessed from "My Profile" and is also accessible from Admin>Org Units and then clicking on the description of an Org Unit. A sample of the Org Unit Profile is provided below:



<b>Name:</b>	USARMY
<b>Description:</b>	Army
<b>Org Unit Location:</b>	My Orgs » <a href="#">USARMY</a>
<b>Org Unit POC(s):</b>	<a href="#">Sec, Asdk</a> ; <a href="#">Sec, Asdb</a> ; <a href="#">Sec, Asda</a>
<b>Supervisor:</b>	<a href="#">Sec, Asdk</a>
<b>450 Certifier:</b>	<a href="#">Sec, Asdk</a>
<b>SLC:</b>	<a href="#">Sec, Asdk</a>
<b>DAEO:</b>	<a href="#">Sec, Asdk</a>

[Show Filers](#)



Name	Email	Roles
Catalani, Amado	Amado.Catalani@us.army.mil	450 Filer

## Required Activity

### Key Change from Release 3.1

A new sub-menu, Required Activity, is now available on the My Info tab. Required Activity allows you to assign a specific disclosure form and a due date to an individual filer or to a group of filers at one time.

### New features

- ❖ Notifying Filers
- ❖ Set Required Activity filter
- ❖ Assign/Edit a Required Activity
- ❖ Remove a Required Activity
- ❖ Granting, Editing & Deleting Extensions

### Important Information

- The Required Activity filter must be set before assignment/removal features become available.
- The check box to the left of the filer's name needs to be checked in order to select the person to be assigned an activity. More than one person at a time can be assigned an activity.
- A Required Activity must be assigned before an Extension can be granted.

### Who can manage required Activities?

- ❖ Manage OGE 450 Filer Required Activities and Extensions
  - The DAEO, DAEO EC, SLC, SLC EC, SLC Asst, 450 Certifier, 450 Certifier EC and 450 Certifier Assistant can manage filer activities. These same roles can grant, edit and delete extensions.
- ❖ Manage SF 278 Filer Required Activities
  - A DAEO, DAEO EC, SLC, SLC EC, SLC Asst can manage their Filer's required activities. However, only DAEO and DAEO ECs can edit required activities
- ❖ SF 278 Extensions
  - Only DAEO and DAEO ECs can manage SF 278 extensions.

Below is a sample of the new Required Activity screens:

Below is a sample of the new Assign Required Activity page:

**Due date is the statutory due date for filing a disclosure report.**

**This information pulls from the selection made in the Required Activity Filter.**

**Admin Due Date can be changed to a date later than the Due Date only if Override is selected.**

**\* The Admin Due Date cannot be later than the due date, unless Override Due Date is checked.**

**DAEO or DAEO EC can override an activity due date for SF 278 Filers and an SLC or SLC EC can override an activity due date for OGE450**

**Allows you to mark the disclosure report as complete. e.g., when a Filer has filed outside of FDM.**

- ❖ **Required Activity** - Allows you to assign a specific disclosure type to a Filer, e.g., SF 278 or OGE 450.
- ❖ **Due Date** - The Due Date is the statutory filer submission due date. The assigned Required Activity will be considered late if it is not complete by the Due Date.
- ❖ **Admin Due Date** - A date set by an Ethics Official for the completion of the Required Activity. This date initially defaults to the Due Date but can be changed if necessary.
- ❖ **Override Due Date** - An indication that a Certifying Official or their EC overrode the statutory due date. A reason must be included when overriding a Due Date in FDM.

### Required Activity Notification

The Notify Required Activity page is used to notify a filer that he/she has been registered in FDM and lists the type of report that should be filed along with the due date and the criteria required to file the report. Below is a sample of the Required Activity Notification screen:

## Extensions

In FDM there are two ways of granting an extension:

1. Granting an extension through the Required Activity, (this is especially useful in the case where a filer has not yet created a report).
2. Granting an extension on a report in progress (Access from the Review Status screen).

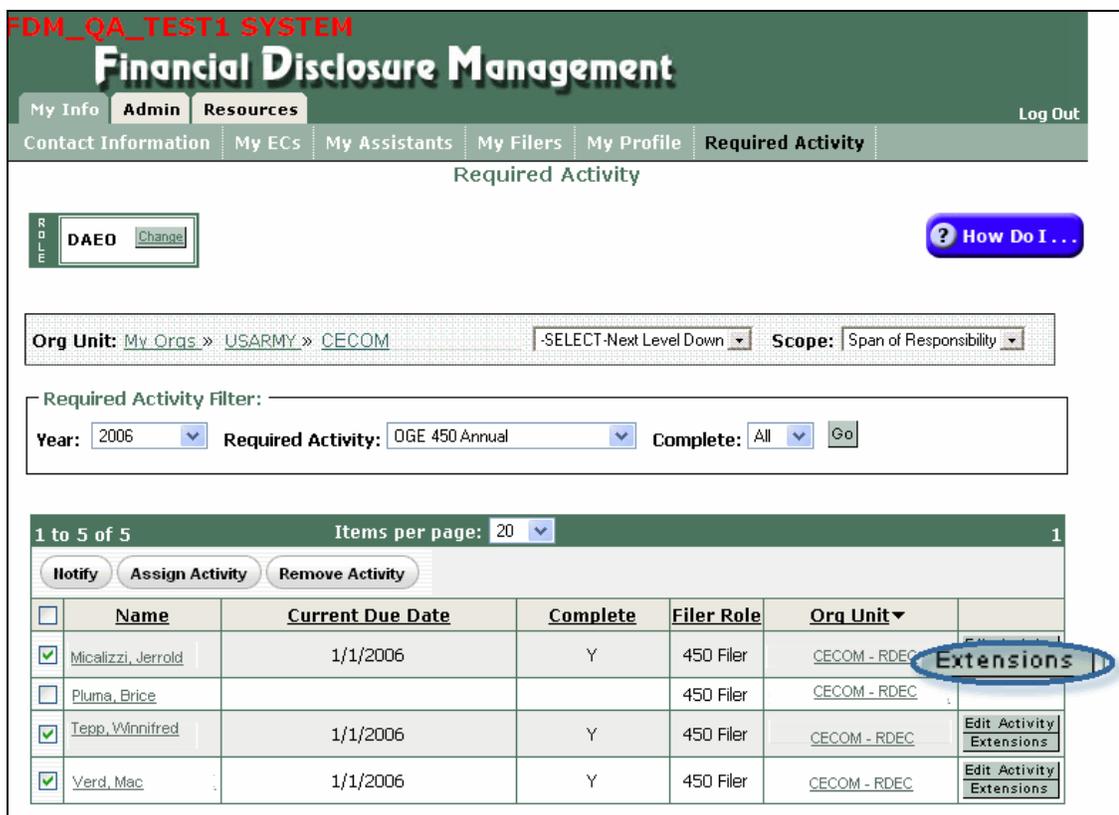
### Who can grant an extension?

- For 450 reports, DAEOs, DAEO ECs, SLCs, SLC EC, SLC Assts, 450 Certifiers, 450 Certifiers ECs and 450 Certifier Assts can grant extensions.
- For SF 278 reports, only DAEOs and DAEOS ECs can grant extensions.

### Important Information

- Extensions are cumulative. If a filer has an extension for "long period of travel" and then gets sick, a second extension can be granted for the period of sickness. The extension duration would be calculated as the sum of days for both extensions.

See sample page below for granting an extension from the Required Activity page:



The screenshot shows the 'Required Activity' page in the FDM system. The page header includes 'FDM\_QA\_TEST1 SYSTEM' and 'Financial Disclosure Management'. The navigation menu has 'My Info', 'Admin', and 'Resources'. The 'Required Activity' section is active, showing a 'DAEO' field with a 'Change' button and a 'How Do I...' help button. Below this are filters for 'Org Unit' (My Orgs » USARMY » CECOM) and 'Scope' (Span of Responsibility). A 'Required Activity Filter' section shows 'Year: 2006', 'Required Activity: OGE 450 Annual', and 'Complete: All'. The main table displays 5 items, with 'Items per page: 20'. The table has columns for Name, Current Due Date, Complete, Filer Role, and Org Unit. Each row has an 'Extensions' link in the right-hand column, which is highlighted with a blue oval. The table data is as follows:

<input type="checkbox"/>	Name	Current Due Date	Complete	Filer Role	Org Unit	
<input checked="" type="checkbox"/>	Micalizzi, Jerrold	1/1/2006	Y	450 Filer	CECOM - RDEC	Extensions
<input type="checkbox"/>	Pluma, Brice			450 Filer	CECOM - RDEC	
<input checked="" type="checkbox"/>	Tepp, Winnifred	1/1/2006	Y	450 Filer	CECOM - RDEC	Edit Activity Extensions
<input checked="" type="checkbox"/>	Verd, Mac	1/1/2006	Y	450 Filer	CECOM - RDEC	Edit Activity Extensions

See sample page below for granting an extension from the Review Status Screen:

FDM\_TRAIN Test System  
**Financial Disclosure Management**

My Info | Review Filers | Admin | Resources | Log Out

Reports List | Report Data | Attachments | Comments | Flags | Audit Trail | View/Print | Review Status

Draft - Training X. 450\_28, 2006 Annual OGE 450 Report

**Report Progress**

Created: 04/09/2007

Submitted:

Amended:

Completed:

**Signoff Progress**

Filed:

Supervisor:

Reviewer:

**Common Questions**

- What is the difference between Review Date and Signature Date?
- What is the Amended date and how does it differ from the Submitted Date?
- Glossary

**Extension**

Extension Type: Combat Zone Extension  
 Number of Days: 45  
 New Due Date : 05/16/2007

Currently Assigned Reviewers	Role	Review Date	Signature Date
Slc_450_1, Training X.	SLC		
Slc_450_1, Training X.	Supervisor's SLC		
Super_450_1, Training X.	Supervisor		

From either access point the Grant/Edit Extensions page is displayed next. See a sample of this page below:

FDM\_DEV TEST Test System  
**Financial Disclosure Management**

My Info | Admin | Resources | Log Out

Contact Information | My ECS | My Assistants | My Filers | My Profile | Required Activity

**Grant/Edit Extension**

Grant/Edit extension for: Brice, Pluma

Required Activity: 2007 New Entrant

Due Date: 02/15/2008

Total Extensions: 23

Current Due Date: 03/09/2008

Type	Number of Days	Reason	
Agency Extension	23	Long period of official travel	<input type="button" value="Grant Extension"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

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## Granting an Extension

Clicking **Grant Extension** from the Grant/Edit Extension page allows you to create a new extension even if there is an existing extension. See a sample of the Grant Extension page below:

**FDM\_DEV\_TEST Test System**  
**Financial Disclosure Management**

My Info | **Admin** | Resources

Contact Information | My ECs | My Assistants | My Filers | My Profile | **Required Activity**

### Grant Extension

Length of Extension:

Agency Extension

Reason for extension:

Other Reason:

Combat Zone Extension

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- ❖ When entering Agency Extensions, you must select a “Reason for Extension” from the drop-down menu. For Combat Zone extensions, you do not need to select a reason.
- ❖ The available Agency Extension Reasons are as follows:
  - Long Period of Travel
  - Significant Illness
  - Extremely Pressing Assignments
  - Convenience of Filing Combined Reports
  - Other

## Editing an Extension

To edit an extension already granted, click **Edit** on the Grant/Edit Extension page. See a sample of the Edit Extension page below:

The screenshot shows the 'Edit Extension' page. At the top, there is a header with 'FDM\_QA\_TEST1 SYSTEM' and 'Financial Disclosure Management'. Below the header is a navigation menu with tabs: 'My Reports', 'Assist Filers', 'My Info', 'Review Filers', 'Admin', 'Resources', 'Management Reports', and 'Log Out'. A secondary menu includes 'Contact Information', 'My ECs', 'My Assistants', 'My Filers', 'My Profile', and 'Required Activity'. The main content area is titled 'Edit Extension' and contains the following fields:

- Length of Extension:  (Days)
- Agency Extension
  - Reason for extension:
  - Other Reason:
- Combat Zone Extension

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

## Deleting an Extension

To delete an extension already granted, click **Delete** on the Grant/Edit Extension page. See a sample of the Delete Extension page with delete confirmation box below:

The screenshot shows the 'Grant/Edit Extension' page. The header and navigation menu are identical to the previous screenshot. The main content area is titled 'Grant/Edit Extension' and contains the following information:

- Grant/Edit extension for: [Name]
- Required Activity:
- Due Date:
- Total Extension Days:
- Current Due Date:

A 'Microsoft Internet Explorer' dialog box is overlaid on the page, asking: 'Are you sure, you want to delete this extension?' with 'OK' and 'Cancel' buttons.

Below the information is a table with the following data:

Grant Extension			
Type	Number of Days	Reason	
Agency Extension	45	Long period of official travel	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

At the bottom of the page is a 'Done' button.

# My Filers

## Key Change from Release 3.1

The appearance and functions of the My Filers screen has changed to incorporate the new Required Activity feature, the new Org Tool feature and the ability to search by name to enhance your user experience with FDM.

## New features

- Assign filers to the appropriate Org Unit
- Verify filer information
- Send notifications to multiple filers at the same time
- Assign required filing activities
- Remove multiple filers at the same time from your list.
- Adding Multiple OGE 450 filers (Bulk Registration)
- Moving a filer to a different Org Unit

## Who can Add OGE 450 Filers?

- DAEOs, DAEO ECs, SLCs, SLC ECs, SLC Assts., Supervisors, 450 Certifiers, 450 Certifier Assts. POCs, Agency Admins and System Admins can add and manage OGE 450 Filers.

## Who can Add SF 278 Filers?

- DAEOs, DAEO ECs, SLCs, SLC ECs, SLC Assts., POCs, Supervisors, Agency Admins, and System Admins can add SF 278 Filers.

## Navigating the new "My Filers" page

The screenshot shows the 'My Filers' page in the Financial Disclosure Management system. The page includes a navigation bar with 'My Info', 'Admin', and 'Resources' tabs, and a sub-navigation bar with 'Contact Information', 'My ECs', 'My Assistants', 'My Filers', 'My Profile', and 'Required Activity'. The main content area displays a list of filers with columns for Name, Filer Role, and Org Unit. Callouts provide instructions on how to use various features:

- Filer Role** allows you to sort your Filer list by OGE 450 or SF 278 Filers.
- You can select to personally notify Filers.
- Click **Assign Activity** to assign a filing activity to one or more FDM Filers at a time.
- Click **Add Filers** to Add a Filer to the selected Org Unit.
- Click **Delete Filers** to remove a Filer from an Org Unit.
- Click **Edit** to change a Filer's role, OGE 450 or SF 278 in FDM.
- Click **Move** to place a Filer within a different Org Unit.

Name	Filer Role	Org Unit
Verd, Mac	450 Filer	CECOM - RDEC
Tepp, Winiferd	450 Filer	

Several enhancements have been made to the My Filers page.

- ❖ **Breadcrumb Trail** -- Provides a listing of subordinate Org Units.
- ❖ **Org Unit Navigation**
  - **Next Level Down** - To view your Org Unit's hierarchy, expand the breadcrumb trail by selecting an Org Unit listed in the Next Level Down drop-down. The Org Units page then lists the subordinate org units.
  - **Scope** - Within each Org Unit, you can view subordinate Org Units using Span of Responsibility, Current Org Unit or Span of Control.

<b>Scope</b>	<b>Description</b>
<b>Span of Control</b>	Allows you to view and manage all Org Units listed on the Org Units page. For example, a Senior Legal Counsel can manage users within their own Org Units and subordinate Org Units even if the subordinate Org Unit has a different Senior Legal Counsel.
<b>Span of Responsibility</b>	This scope limits your view to those Org Units that do not have another user with your same FDM role. For example, a Senior Legal Counsel can act as a Senior Legal Counsel to their Org Unit and all subordinate Org Units unless the sub Org Unit has different Senior Legal Counsel.
<b>Current Org Units Only</b>	This scope limits your view to the subordinate Org Units for the selected Org Unit.

- ❖ **Notify** - Allows you to send e-mail messages to specific FDM users.
- ❖ **Select All/Clear All** - Allows you to select a group of FDM filers at the same time to assign a required activity or to notify.
- ❖ **Assign Activity** - Allows you to assign a disclosure filing activity to a specific filer or group of filers.
- ❖ **Delete Filers** - You can now remove multiple Filers from an Org Unit at the same time.
- ❖ **Move** - Allows you to move a Filer into a different Org Unit.
- ❖ **Sorting OGE 450/SF 278** - You can now sort the Filer table by disclosure report type.

## Changes to the Edit Filer Page

**Developer System** **Financial Disclosure Management**

My Info **Admin** Resources

Contact Information My ECs My Assistants **My Filers** My Profile Required Activity

DEPARTMENT OF THE ARMY  
OF AMERICA

### Edit Filer - Gosling, James C

Attribute	Value
Last Name	Verd
First Name	Mac
Middle Name	C
e-Mail	Mac.Verd@US.Army.Mil
Organization	CECOM - RDEC
Phone	
Agency	USARMY

Roles

OGE 450 Filer

SF 278 Filer (General Officers and Senior Executive Service)

**Assign a Filer Assistant**

Notice Mac Verd is a member of the Org Unit CECOM - RDEC

Notice Mac Verd is a SF 278 Filer

Assign a Filer Assistant only displays for DAEOs or DAEO ECs when adding SF 278 Filers.

The following new features have been added to the Edit Filer page:

- ❖ **Organization** – Org Unit is now shown on the Filer's profile.
- ❖ **Filer Assistant** – A Filer Assistant can be added from this page by a DAEO or DAEO EC for 278 Filers

## New Filer Notification Feature

Once a Filer has been added to FDM, you can send a personalized message notifying the person that he/she has been added to FDM using the "Notify" feature found on My Info | My Filers. A partially drafted message appears in the "Notify Filers" screen.

**Financial Disclosure Management**

Developer System

My Info Admin Resources

Contact Information My ECs My Assistants My Filers My Profile Required Activity

Notify Filers

To: Mac.Verd@US.Army.Mil; Wnifred.Tepp@US.Army.Mil

CC: Janey.Sprain@US.Army.Mil

Subject: FDM SF 278 Filer

Message: You have been registered as an SF 278 Filer in FDM. To access FDM, please fo to <https://www.fdm.army.mil/>.

Cancel Notify

## Adding Multiple OGE450 Filers (Bulk Registration)

A new menu item was added to the My Info | My Filers page: "Add Multiple OGE 450 Filers". This feature allows an administrative user to register up to 25 OGE 450 filers at one time. This replaces the self-registration feature offered in FDM release 3.1. See sample of the My Filers page below and note the location of the new "Add Multiple OGE 450 Filers" button:

**FDM\_QA\_TEST Test System**  
**Financial Disclosure Management**

My Info | **Review Filers** | Admin | Resources | Log Out

Contact Info | My ECs | My Assistants | **My Filers** | My Profile | Required Activity

My Filers

**450 Certifier** ? How Do I...

Org Unit: [My Orgs >](#)  -SELECT-Next Level Down  Scope:

Filer Search

Last Name:  First Name:

Filer Role:

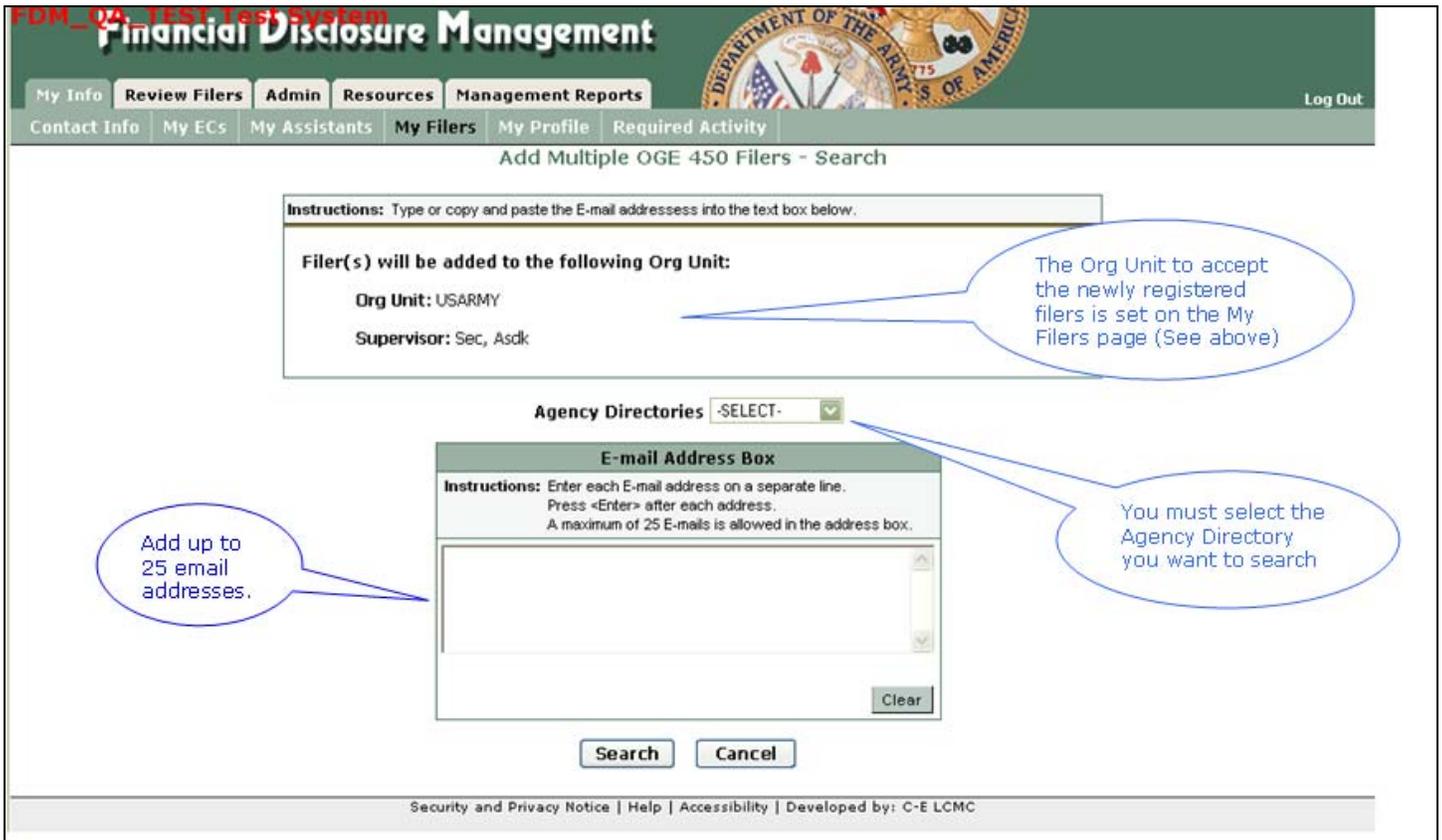
0 to 0 of 0 Items per page:

Name	Filer Role	Org Unit
No Filers found for the criteria selected		

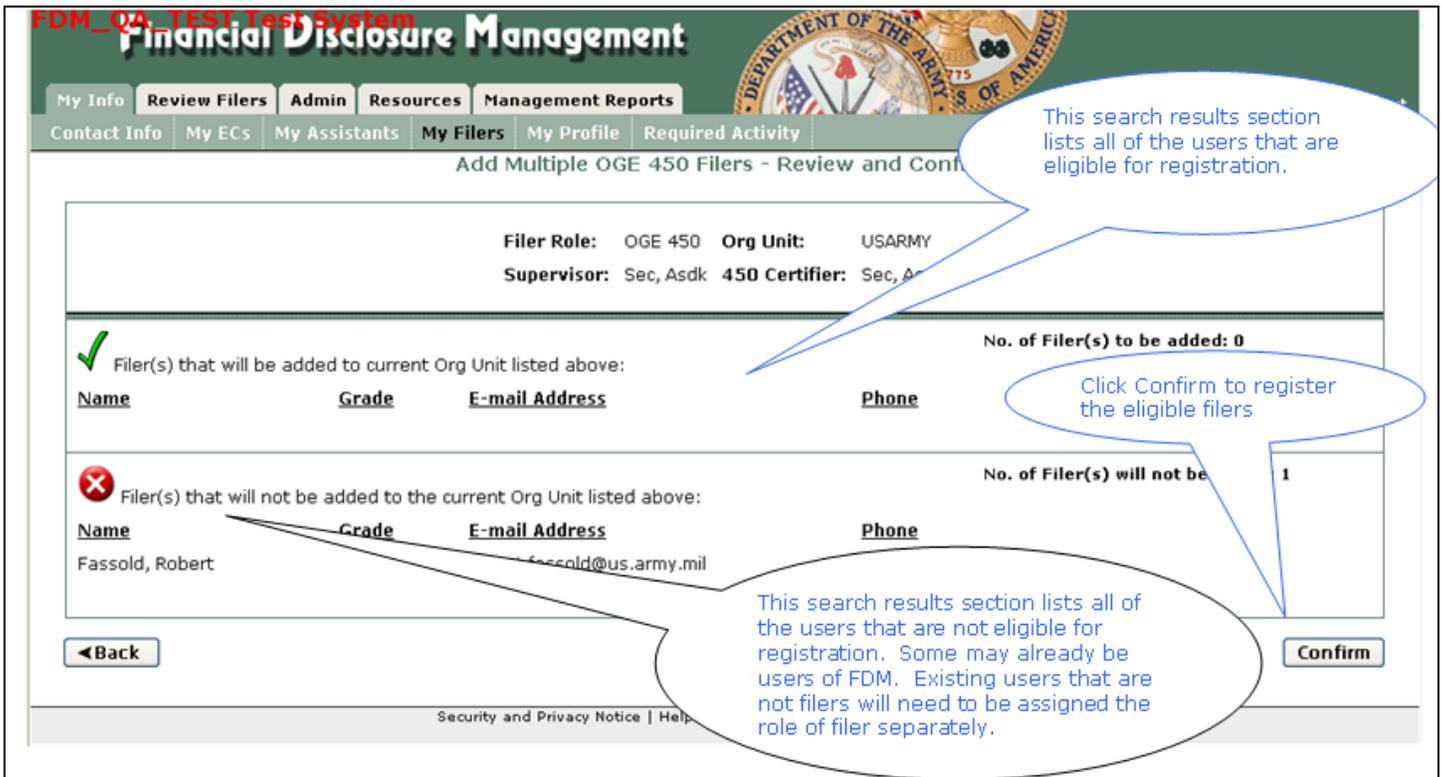
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## Navigating the new Add Multiple OGE 450 Filers pages

Upon clicking **Add Multiple OGE 450 Filers**, the new bulk registration feature displays an email address box where up to 25 Email addresses are entered or copied from an outside source (e.g., a 450 filer tracking spreadsheet (available at <https://www.fdm.army.mil/Documents/450TrackingSpreadsheet.xls>, a tool for organizing OGE 450 filers). The Agency Directory selected will be searched to both verify the accuracy of the email addresses entered and to obtain authentication information for use by FDM during a user's login. See a sample of the Search screen below:



Upon clicking **Search** FDM displays the search results screen for review and confirmation. See sample search results screen below:



Upon confirmation FDM offers two options to proceed: Go back to Add Multiple Filers and proceed to “My Filers” where the new registered filers can be assigned a required activity. See Summary screen below:

**Financial Disclosure Management**

My Info | Review Filers | Admin | Resources | Management Reports | Log Out

Contact Info | My ECs | My Assistants | My Filers | My Profile | Required Activity

Add Multiple OGE 450 Filers - Add Complete

Filer Role: OGE 450    Org Unit: USARMY  
Supervisor: Sec, Asdk    450 Certifier: Sec, Asdk

✓ Filer(s) successfully added to current Org Unit listed above:    No. of Filer(s) added: 0

Name	Grade	E-mail Address	Phone	Status

⚠ Filer(s) add process failed. Please try again to add the following filer(s):    No. of Filer(s) failed: 1

Name	Grade	E-mail Address	Phone	Status

✗ Filer(s) that were not added to the current Org Unit listed above:    No. of Filer(s) not added: 1

Name	Grade	E-mail Address	Phone	Status
Fassold, Robert		robert.fassold@us.army.mil	732-427-6008	Not Added - Exists in FDM

Add Multiple OGE 450 Filers    My Filers

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Note: The reason for exclusion is displayed here.

These buttons will navigate the user either to the “Add Multiple Filers” screen or to “My Filers” where existing users who are not filers can be added separately.

# My Reports/Review Filers

Two new features have been added to the Report List page: Alphabetic searching by Name and filtering for Org Unit. Filtering by Org Unit requires you to set scope. Scope is defined as follows:

Scope	Description
<b>Span of Control</b>	Allows you to view and manage all Org Units listed on the Org Units page. For example, a Senior Legal Counsel can manage users within their own Org Units and subordinate Org Units even if the subordinate Org Unit has a different Senior Legal Counsel.
<b>Span of Responsibility</b>	This scope limits your view to those Org Units that do not have another user with your same FDM role. For example, a Senior Legal Counsel can act as a Senior Legal Counsel to their Org Unit and all subordinate Org Units unless the sub Org Unit has different Senior Legal Counsel.
<b>Current Org Units Only</b>	This scope limits your view to the subordinate Org Units for the selected Org Unit.

These two features always work in conjunction with each other. Searching will occur within the Org Unit scope setting.

An Org Unit filter bar has been added to the "Review Filers" page.

Report Filter bar was expanded to include a search by name.

Common Questions

- What does it mean to "End" a review?
- What does Amended mean?
- What does Amendment in Progress mean?
- How do I see the reports assigned to me if I have more than one role in FDM?
- What does Complete Report mean?
- Glossary

My OGE 450 Filer's Reports

0 to 0 of 0 Items per page: 20

Filer	Registration Status	Year	Reporting Status	Review Status	Review Date	Signature Date
You currently have no reports to review.						

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# Management Reports

Only application and system administrators have access to the management reports tab.

## Features Removed

- Management Reports

