

# Financial Disclosure Management

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FDM Release 5.1  
Release Notes

FDM 5.1 Publication 1.0

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# Introduction

These Release Notes describe the changes to the FDM system for Release 5.1. The changes in this release are modifications of currently released functionality and includes two new features: National Emergency Extension and the Year over Year Comparison, which are described below. Management Reports are back and are available to a wider audience. Also, with the this new release comes new training materials.

Training materials on the new features can be found in the FDM Learning Center:  
<https://www.fdm.army.mil/learningCenter/learningCenter.htm>

Address questions about FDM to the FDM Help Desk:  
(Mail to: [monm-secfdmspt@conus.army.mil](mailto:monm-secfdmspt@conus.army.mil)) or call (732) 532-5566, DSN 992-5566

# Enhancements and Improvements

## Calculation & Presentation of Report Due Dates (670)

Required Activity due dates are now integrated into the Checkpoint screen in the Getting Started section in FDM. If no Required Activity is assigned, the date defaults to the regulatory due date for the disclosure. The displayed Required Activity date includes any overrides.

The screenshot shows the FDM system interface. At the top, there is a header with the text 'FDM\_QA\_TFST Test System' and 'Financial Disclosure Management'. Below this is a navigation menu with tabs: 'My Reports', 'My Info', 'Review Filers', 'Admin', 'Resources', and 'Management Reports'. A secondary menu includes 'Reports List', 'Report Data', 'Attachments', 'Comments', 'Flags', 'Audit Trail', 'View/Print', 'Review Status', and 'Compare'. The main content area is titled 'Draft - Asdc Sec, 2007 Incumbent SF 278 Report' and has a 'Checkpoint' section. Under 'Checkpoint', there are several tabs: 'Getting Started', 'Assets', 'Other Income', 'Transactions', 'Gifts, etc', 'Liabilities', 'Agreements', 'Positions', and 'Wrap Up'. The 'Getting Started' tab is selected and shows a message: 'Your report information has been saved. Please submit your report by 05/15/2007. Timely filing avoids a \$200 late filing penalty.' There are 'Back' and 'Continue' buttons. A callout box points to the date '05/15/2007' with the text: 'This date will display the statutory due date or the date overridden by the Required Activity which reflects any extensions granted.' On the right side, there is a 'Common Questions' sidebar with a list of questions: 'How do I change my reporting status?', 'Is there a "combat zone extension"?', 'What happens if I do not file by the due date?', 'How do I request an extension?', and 'Glossary'. At the bottom, there is a 'Security and Privacy Notice | Help' link.

## Watermarks (2557)

The watermark placement has been changed for SF 278 disclosures to the top and bottom of the page to prevent the watermark from obscuring disclosure information. The situations in which a watermark would appear i.e., should display on all unofficial report copies, remains the same. See samples below for each of the report statuses:



<b>CURRENTLY UNDER DAEO REVIEW</b>			
Reporting Individual's Name Sheridan, Mike		<b>SF 278 of Record Comments</b>	
Annotation:		Section: Report	Date: 08/20/2007
C O M M E N T  qwe		Author: Faye Baxter	
Annotation:		Section: Report	Date: 10/02/2007
C O sdasd		Author: Asdd Sec	

## New Notification Validations for subject lines (2717)

FDM now requires a Subject be entered for any notifications sent from FDM. If the subject line is blank, a dialog box will appear requesting an entry in the subject line before the notification can be sent.

The screenshot shows the FDM system interface with a navigation menu including 'My Info', 'Review Filers', 'Admin', 'Resources', and 'Management Reports'. Below the menu are various user roles like 'POCs', 'Supervisors', and 'Senior Legal Counsels'. The main content area is titled 'Notification Message to POC' and contains a form with fields for 'To:', 'CC:', 'Subject:', and 'Message:'. The 'Subject:' field is empty. A 'Notify' button is visible at the bottom of the form. A 'Microsoft Internet Explorer' dialog box is overlaid on the form, displaying a warning icon and the message 'Please enter a Subject' with an 'OK' button. A callout bubble points to the dialog box with the text: 'Dialog box displays if the Subject line is blank after the notify button is clicked.'

## "Add Multiple OGE 450 Filers" feature enhanced(2986)

In the past duplicate names appeared in the "Filers successfully added..." section of adding Multiple OGE 450 Filers processing results. This has been corrected.

**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: 6**

Name	Grade	E-mail Address	Phone	Status
Shivakumar, Jyothi		jyothi.shivakumar@us.army.mil	732-532-6873	Added
Shivakumar, Jyothi		jyothi.shivakumar@us.army.mil	732-532-6873	Added
Bengul, Enis	DB03	enis.bengul@us.army.mil	732-532-4101	Added
Bengul, Enis	DB03	enis.bengul@us.army.mil	732-532-4101	Added
Henley, Raymond E	GS09	raymond.henley@us.army.mil	732.532.4860	Added
Henley, Raymond E	GS09	raymond.henley@us.army.mil	732.532.4860	Added

**⚠ Filer(s) add process failed. Please try again to add the following filer(s):** **No. of Filer(s) failed: 3**

Name	Grade	E-mail Address	Phone	Status
Shivakumar, Jyothi		jyothi.shivakumar@us.army.mil	732-532-6873	Add Failed - Try Again
Bengul, Enis	DB03	enis.bengul@us.army.mil	732-532-4101	Add Failed - Try Again
Henley, Raymond E	GS09	raymond.henley@us.army.mil	732.532.4860	Add Failed - Try Again

**✗ 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
		gigi.harington@us.army.mil		Not Added - Not Found

[Add Multiple OGE 450 Filers](#) [My Filers](#)

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## Section Title added – Org Unit Search (2999)

The Search area on the Org Units page has been renamed to Org Unit Search. See sample below:

**Financial Disclosure Management**

**Org Units**

DAEO [Change](#) [How Do I...](#)

Org Unit:

**Org Unit Search**

Name:  [Search](#) [Clear](#)

1 to 1 of 1 **Items per page:** 20 [1](#)

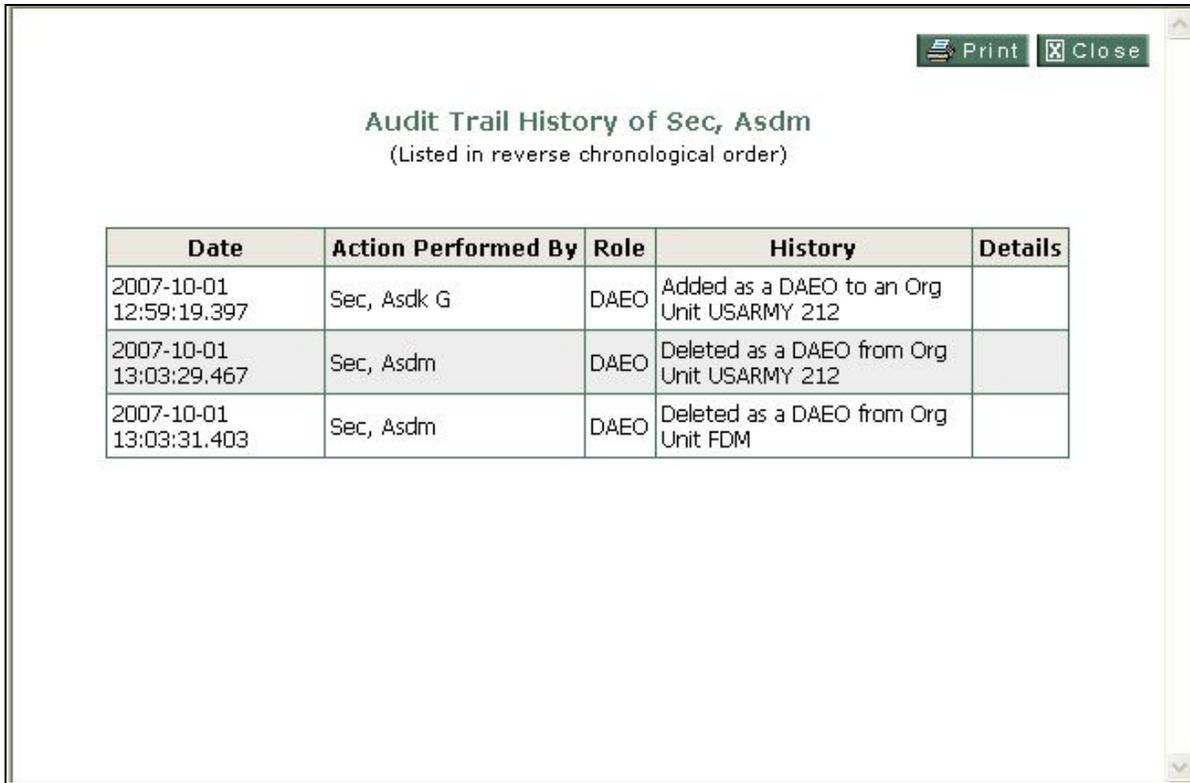
[Add New Org Unit](#)

Name	Description	Location	Supervisor Name	
UAT-Test	asdsd	... » USARMY	Fassold, Robert	<a href="#">Edit</a> <a href="#">Move</a> <a href="#">Delete</a>

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## DAEO Deletion Audit Event updated (3009)

Additional descriptive information is now available describing the Org Unit impacted by the deletion of a DAEO. See History column in the screen sample below:



Date	Action Performed By	Role	History	Details
2007-10-01 12:59:19.397	Sec, Asdk G	DAEO	Added as a DAEO to an Org Unit USARMY 212	
2007-10-01 13:03:29.467	Sec, Asdm	DAEO	Deleted as a DAEO from Org Unit USARMY 212	
2007-10-01 13:03:31.403	Sec, Asdm	DAEO	Deleted as a DAEO from Org Unit FDM	

## New Filer Notification sports a new subject line (3016)

A subject line has been added to New Filer Automatic Notifications.

## Contact Information screen enhanced with new email validation (3032)

A new validation was added requiring a properly formatted email address before the contact information is saved. See below:

The screenshot shows the 'Contact Information' form in the FDM system. The form includes fields for Last Name (Fassold), First Name (Robert), Middle Initial, Grade (dfg), Address Line 1 (dfg), Address Line 2 (dfg), City/Province (dfg), State (AA), Country (USA), Zip Code (45656), Telephone (732-427-6008), e-mail (robert.fassold), and Confirm e-mail (robert.fassold). A 'Save' button is at the bottom. An error message box from Microsoft Internet Explorer is overlaid on the form, stating 'A valid e-mail address is required.' with an 'OK' button.

## Agency Administrators are now restricted to Agency Org Units (3230)

Previously, Agency Administrators could be added to any Org Unit in FDM. Now, Agency Administrators can only be added to Agency level org units. The Assign and Delete buttons are not available if the Org Unit is not an Agency. See screen sample below:

The screenshot shows the 'Agency Administrators' screen in the FDM system. It features a navigation menu with 'Agency Admins' selected. The main content area includes a dropdown for 'Org Unit' set to 'UAT-Test', a search box for 'Agency Admin Search' with 'Last Name' and 'First Name' fields, and a table of results. The table has columns for 'Name', 'Org Unit Name', and 'Org Unit Description'. The first row shows 'Vacancy (Multiple, acting)' for 'UAT-Test' with description 'asdsd'.

Name	Org Unit Name	Org Unit Description
Vacancy (Multiple, acting)	UAT-Test	asdsd

## 3301 New Audit event added for DAEO EC assignments

An audit event is created each time a DAEO EC is added or deleted from FDM.

**Audit Trail History of Palrang, Joe**  
(Listed in reverse chronological order)

Date	Action Performed By	Role	History	Details
2008-02-11 14:07:54.03	Fassold, Robert	DAEO	Added as a POC to an Agency UAT-3	
2008-02-12 15:24:58.003	Fassold, Robert	DAEO	Added as a DAEO EC to DAEO Fassold, Robert	
2008-02-12 15:26:23.423	Fassold, Robert	DAEO	Deleted as a DAEO EC from DAEO Fassold, Robert	

## Combined National Emergency with Combat Zone Extension (3356)

A new extension type, National Emergency has been added for OGE 450 Extensions in FDM.

**Grant Extension**

Length of Extension: [ ] (Days)

Agency Extension  
Reason for extension: Extremely Pressing Assignments  
Other Reason: [ ]

National Emergency/Combat Zone (See 5 CFR 2634.908(d))

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## Report Count now displays correctly when Role is changed (3386)

Report list count now displays correctly when role is changed on the Review Filers | Reports List page.

**Financial Disclosure Management**

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

Reports List

Welcome Asdk Sec

Annual OGE 450 Reports are due 15 February.

Supervisor: [Change]

Org Unit: My Orgs > USARMY [-SELECT-Next Level Down]

Show Filer's Reports for USARMY  
 Show My Filer's Reports  Include Filer's Reports for Org Units assigned to other Supervisors

Search

Form Type: OGE 450 | Year: ALL | Reporting Status: ALL | Review Status: ALL

Last Name: [ ] First Name: [ ] Search Reset

Printer-Friendly | Take OGE 450 Survey

1 to 3 of 3 Items per page: 20 1

Filer▲	Registration Status	Year	Reporting Status	Review Status	Review Date	Signature Date	
Tummala, Mohini R.	Active	2007	New Entrant	Under Review	02/01/2008	02/01/2008	View
Tummala, Mohini R.	Active	2008	Annual	Under Review			eSign View
Tummala, Mohini R.	Active	2006	Annual	Under Review			eSign View

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## Correction made to Extension button Navigation (3443)

Previously, clicking the "Extensions" button on the Review Status screen brought the user to the wrong page under the Required Activity Tab. This has been corrected.

Extensions now brings your to the Grant/Edit Extensions screen appropriately.

**Financial Disclosure Management**

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

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

Grant/Edit Extensions

Grant/Edit extension for: Fassold, Robert - robert.fassold@us.army.mil

Required Activity: 2007 Incumbent

Due Date: 01/01/2007

Total Extension Days: 0

Current Due Date: 01/01/2007

Grant Extension

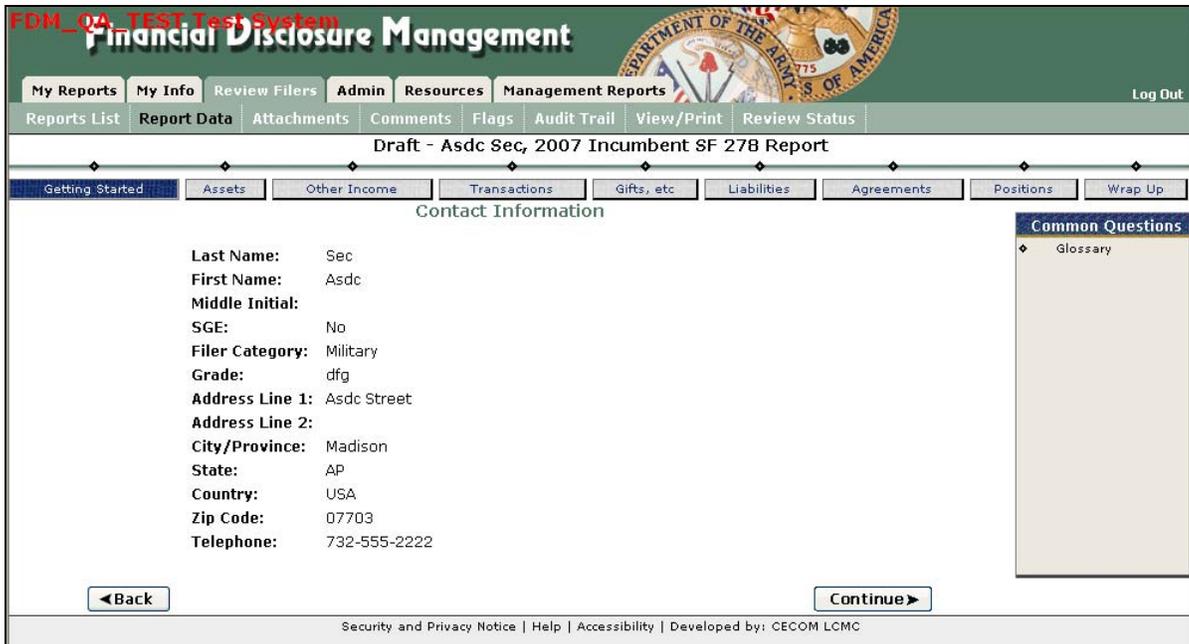
Type	Number of Days	Reason
There are no extension for this activity.		

Done

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## Filer Category field was corrected on the Contact Information Screen (3448)

When viewing contact information during the course of completing an SF 278 report, the Filer Category Field was mislabeled "SGE Category". It has been corrected to display "Filer Category".



The screenshot displays the 'Financial Disclosure Management' interface. At the top, there is a navigation menu with tabs for 'My Reports', 'My Info', 'Review Filers', 'Admin', 'Resources', and 'Management Reports'. Below this is a secondary menu with options like 'Reports List', 'Report Data', 'Attachments', 'Comments', 'Flags', 'Audit Trail', 'View/Print', and 'Review Status'. The main content area is titled 'Draft - Asdc Sec, 2007 Incumbent SF 278 Report' and features a series of tabs: 'Getting Started', 'Assets', 'Other Income', 'Transactions', 'Gifts, etc', 'Liabilities', 'Agreements', 'Positions', and 'Wrap Up'. The 'Contact Information' section is active, showing a list of fields and their values: Last Name: Sec, First Name: Asdc, Middle Initial: (blank), SGE: No, Filer Category: Military, Grade: dfg, Address Line 1: Asdc Street, Address Line 2: (blank), City/Province: Madison, State: AP, Country: USA, Zip Code: 07703, and Telephone: 732-555-2222. A 'Common Questions' sidebar on the right contains a 'Glossary' link. At the bottom, there are 'Back' and 'Continue' buttons, and a footer with 'Security and Privacy Notice | Help | Accessibility | Developed by: CECOM LCMC'.

## Attachments

The Notes Field on the Add Attachment page has been expanded to 250 characters.

## In the SF 278 PDF Watermark "ADAEO" changed to "DAEO" (3479)

## Agency Org Unit Defaults

Previously, when changing an FDM Agency default role, users received an error message. This has been corrected.

## OGE 450 New Entrant Appointment dates can now be changed (3488)

A change to the appointment date before signing a 450 new entrant report was not recorded and the originally entered appointment date remained. Now a change to an appointment date is recorded.

No sample screen provided.

## FDM Notification text now accept special characters (3532)

FDM Notifications with special characters were not being sent. Special characters are of two types: those that you can type on the keyboard e.g., (>, <, =, &, :, ',) and those invisible special characters imbedded in the text by various word processing programs such as MS Word.

In addition some special characters may not prevent sending the notification but may be converted to another character. For example quotes were converted to question marks when used in the notification. See sample of the problem below:

You are registered in FDM - URL: <https://www.fdm.army.mil>, as an OGE 450, Confidential Financial Disclosure Report Filer. Your 2008 OGE 450 Annual report is due 02/15/2008. Please consult your legal advisor or me, John Smith, xxx@us.army.mil, 123-456-7890 if you have questions.

Since this is the first time you have filed in FDM, the following URL has an excellent tutorial on [?Filing an OGE 450 Report.?](#)

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

Please review this tutorial before completing the OGE 450 Report. If you have filed an OGE 450 Report for the current position you hold, you are filing an [?Annual OGE 450 Report.?](#) If this is the first time [you've](#) filed an OGE 450 Report for the position you currently occupy, you are filing a [?New Entrant OGE 450 Report."](#)

Special Characters can now be included in the text.

## Supervisor will now be automatically notified (3552)

Previously, Supervisors were not automatically notified when a Filer submitted their disclosure in FDM. This has been corrected.

## Changes to My Filers screen (2872)

The "Delete Filers" button is now "Delete Filer Role" which is more appropriate to the action taken. See below:

**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

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

My Filers

DAEO:

Org Unit: My Orgs >  -SELECT-Next Level Down

Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

Filer Search

Last Name:  First Name:

Filer Role:

1 to 1 of 1 Items per page: 20

<input type="checkbox"/>	Name ▲	Filer Role	Org Unit	<input type="button" value="Edit"/> <input type="button" value="Move"/>
<input type="checkbox"/>	Browne, Arlen	278 Filer	UAT-Test	

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Upon completion of the Filer role removal a new informational dialog box displays. See screen sample below:

**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

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

My Filers

DAEO  ? How Do I...

Org Unit: My Orgs > UAT-Test -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOS

Filer Search  
 Last Name:  First Name:

Filer Role: 278 Filer   Items per page: 20

Name	Filer Role	Org Unit
Microsoft Internet Explorer 1 of the 1 filers selected were removed from the Filer roles <input type="button" value="OK"/>		

Sec... OM LCMC

Provides the count of how many filers had their filer roles removed and how many did not.

A new warning is given when moving filers with reports pending (3265)

**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

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

My Filers

DAEO  ? How Do I...

Org Unit: My Orgs > UAT-Test -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOS

Filer Search  
 Last Name:  First Name:

Filer Role: 278 Filer   1 to 1 of 1

Name	Filer Role	Org Unit	Edit Move	
<input type="checkbox"/>	Browne, Arlen	278 Filer	UAT-Test	<input type="button" value="Edit Move"/>

Microsoft Internet Explorer  
 ? Caution: The Filer has at least one (1) Disclosure Report that is under review. Moving the Filer to a different organization unit may change the review chain (Supervisor/Legal Advisor). You may first want to check the report review chain before continuing the move. If so, select Cancel to return to the My Filers screen and to check. Select OK to continue the move process.

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## New Supervisor Confirmation screen (3283)

When adding a new supervisor and Org Unit at the same time, FDM adds the Supervisor as Acting to the Org Unit if the Supervisor already exists at a higher level Org Unit. A new informational dialog will be presented informing the user that the new supervisor will not be directly assigned to the Org Unit but will become the acting supervisor of the new Org Unit. See sample below:

The screenshot shows the 'Supervisors' management screen in the FDM QA TEST1 SYSTEM. The page title is 'Financial Disclosure Management'. The navigation menu includes 'My Info', 'Review Filers', 'Admin', 'Resources', and 'Management Reports'. The main menu has 'POCs', 'Supervisors', 'Senior Legal Counsels', 'DAEOs', '450 Certifiers', 'Agency Admins', 'Users', and 'Org Units'. The 'Supervisors' section is active, showing a 'DAEO' field with a 'Change' button and a 'How Do I...' help button. The 'Org Unit' is set to 'UAT-Test 4'. A 'Supervisor Search' field is present. A confirmation dialog box is displayed, stating: 'Joe Palrang is already acting Supervisor and will not be added for this organization.' Below the dialog, a table shows the current state of the system:

1 to 1 of 1		Items per page: 20		1
Notify	Add Supervisor and New OrgUnit			
	Name ▲	Org Unit Name	Org Unit Description	
<input type="checkbox"/>	Vacancy (Palrang, Joe, acting)	UAT-Test 4	UAT-Test 4	Assign

At the bottom of the page, there is a footer: 'Security and Privacy Notice | Help | Accessibility | Developed by: CECOM LCMC'.

## Changes in New Filer Notifications (3630)

The Senior Legal counsel will receive notifications when SF 278 Filers are added. The OGE 450 Certifier will receive notifications when OGE 450 Filers are added.

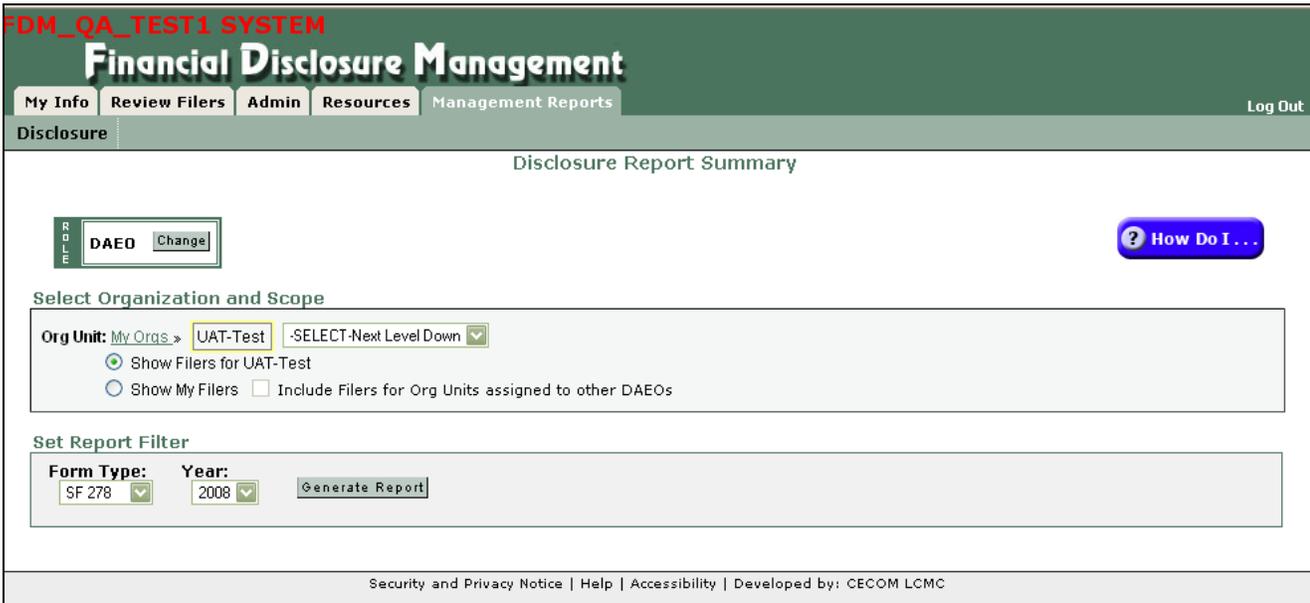
# New Features

## Management Reports

Management Reports are now available in FDM. All FDM roles can access management reports except for Filers and Filer Assistants. There are now three report options under the Disclosure category. See screen sample below:



Three sets of filtering are available: Role filtering, Org Unit Filtering, report filtering. See sample below:



## Disclosure Report Summary report

The Disclosure Report Summary report provides a summary of your current Filer's submission status by Form Type and Year. Use this report to track how many Filers for the current year have or have not submitted disclosure reports in FDM. Below is a sample of the Disclosure Report Summary and associated print friendly output.

FDM\_QA\_TEST1 SYSTEM

# Financial Disclosure Management

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

Disclosure

## Disclosure Report Summary

DAEO Change

? How Do I...

**Select Organization and Scope**

Org Unit: My Orgs » UAT-Test -.SELECT-Next Level Down

Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

**Set Report Filter**

Form Type: SF 278 Year: 2008 Generate Report

**Report Results**  Printer Friendly

Current filers that have submitted 2008 SF278 reports:	1	50.00%
Current filers that have drafted 2008 SF278 reports:	0	0.00%
Current filers that have not created 2008 SF278 reports:	1	50.00%
Total SF278 Filers for 2008:	2	100.00%

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Print  Close

**Financial Disclosure Management**  
**Disclosure Report Summary**  
 Created on: February 27 2008 at 17:22  
 Created by: Joe Palrang as DAEO  
 Org Unit: My Orgs » UAT-Test  
 Show Filers for UAT-Test;  Show My Filers;  
 Include Supervisors for Org Units assigned to other DAEO  
 Form Type: SF 278; Year: 2008

Current filers that have submitted 2008 SF278 reports:	1	50.00%
Current filers that have drafted 2008 SF278 reports:	0	0.00%
Current filers that have not created 2008 SF278 reports:	1	50.00%
Total SF278 Filers for 2008:	2	100.00%

## Disclosure Report Detail report

The Disclosure Report Detail provides disclosure reporting and reviewing status detail by Org Unit, Form Type and Year. Use this report to track review progress of a disclosure report.

The Year filter has an "All" option and the Review Status filter has a "All Except Draft" option. Below is a sample of the Disclosure Report Detail report filter options:



**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

Disclosure | Disclosure Report Detail

DAEO

**Select Organization and Scope**

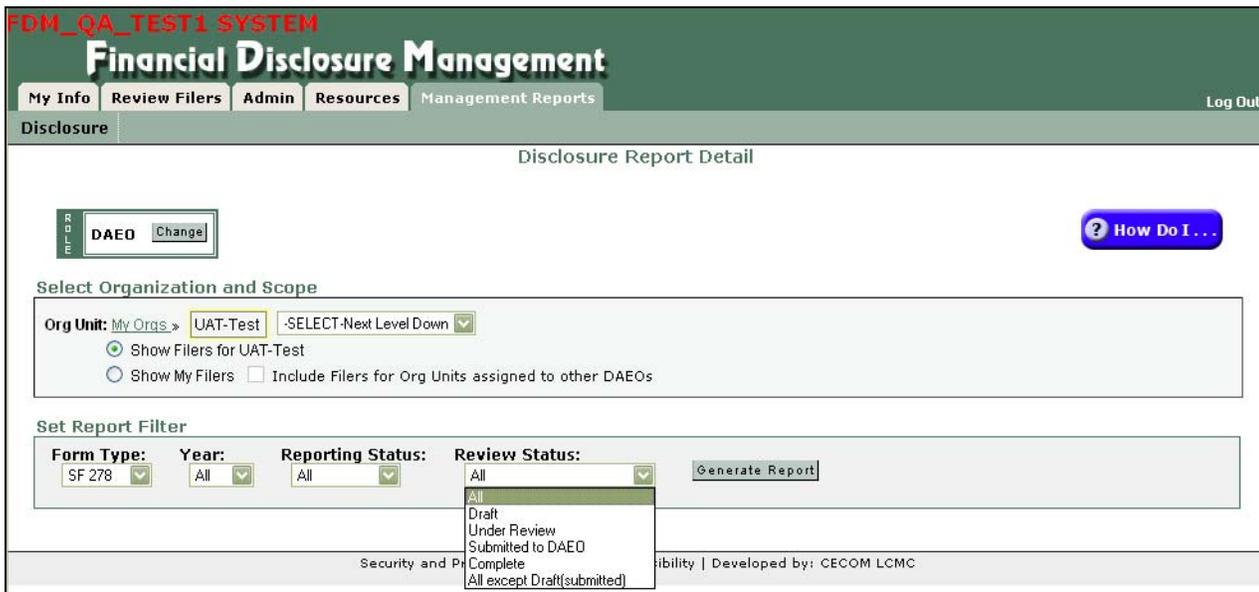
Org Unit: My Orgs > UAT-Test -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

**Set Report Filter**

Form Type: SF 278 Year: 2008 Reporting Status: All Review Status: All

All  
2008  
2007  
2006  
2005  
2004  
2003  
2002  
2001  
2000

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**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

Disclosure | Disclosure Report Detail

DAEO

**Select Organization and Scope**

Org Unit: My Orgs > UAT-Test -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

**Set Report Filter**

Form Type: SF 278 Year: All Reporting Status: All Review Status: All

All  
Draft  
Under Review  
Submitted to DAEO  
Complete  
All except Draft(submitted)

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Below is a sample of the Disclosure Report Detail report:

**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

Disclosure

### Disclosure Report Detail

DAEO  ? How Do I ...

**Select Organization and Scope**

Org Unit: My Orgs > UAT-Test | -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

**Set Report Filter**

Form Type: SF 278 | Year: All | Reporting Status: All | Review Status: All |

**Report Results** Printer Friendly

Year	Org Unit	Filer	Filer E-mail	Submission Date	Reporting Status	Review Status	Signed By						
							Filer	Suprv	SLC	SLC EC	DAEO	DAEO EC	
2008	UAT-Test	Browne, Arlen	robert.fassold@comcast.net	02/25/2008	Incumbent	Under Review	eSigned						
2005	UAT-Test	Browne, Arlen	robert.fassold@comcast.net	02/21/2008	New Entrant	Complete	eSigned		eSigned		eSigned		
<b>Total:</b>		<b>1</b>			<b>2</b>	<b>eSigned: Amendment in Progress:</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>

**Summary Results**

Reporting Status	Total	Draft	Under Review	Submitted to DAEO	Complete
New Entrant	1	0	0	0.00%	0
Incumbent	1	0	1	100.00%	0
Termination	0	0	0	0.00%	0
Incumbent/Termination	0	0	0	0.00%	0
<b>Total</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>50.00%</b>	<b>0</b>

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### Filers with No Disclosure Report

The Filers with no Disclosure Report provides a detailed listing of Filers who have not filed a report in FDM by Year. Use this report to track delinquent filers in FDM. Below is a sample of the Filers with No Disclosure Report:

**FDM\_QA\_TEST1 SYSTEM**  
**Financial Disclosure Management**

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

Disclosure

### Filers with No Disclosure Report

DAEO  ? How Do I ...

**Select Organization and Scope**

Org Unit: My Orgs > UAT-Test | -SELECT-Next Level Down  
 Show Filers for UAT-Test  
 Show My Filers  Include Filers for Org Units assigned to other DAEOs

**Set Report Filter**

Form Type: SF 278 | Year: 2008 |

**Report Results** Printer Friendly

Org Unit	Filer	Filer E-mail	Reporting Status	Due Date	Required Activity?	SLC	SLC E-mail	DAEO
UAT-Test	Gosling, James	james.gosling@us.army.mil	Unknown	--	N	Baxter, Faye	robert.fassold@us.army.mil	Palrang, Joe
<b>Total</b>	<b>1</b>							

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## New Feature – Compare (3060)

A new feature, Compare, allows Reviewers and Filers to easily compare changes/differences between two FDM reports if the Filer prepopulated the current report. To access this feature:

- On the Reports list page, click View beside a report.
- If the Filer prepopulated this report, the Compare tab will display.
- Click the Compare tab.

**Please Note:** It is best to prepopulate from a report due in the previous time period to the current. For example, if you have a 2006 and 2008 Incumbent SF 278 and need to create a 2007 report, it is best to prepopulate from the 2006 report so the Compare feature can accurately reflect the changes/differences.

The screenshot displays the FDM\_QA\_TEST1 SYSTEM interface for Financial Disclosure Management. The main navigation bar includes tabs for My Info, Review Filers, Admin, Resources, and Management Reports. Below this, a secondary navigation bar shows various report sections: Reports List, Report Data, Attachments, Comments, Flags, Audit Trail, View/Print, Review Status, and Compare. The 'Compare' tab is highlighted. The main content area shows 'Under Review - Arlen Browne, 2006 Incumbent SF 278 Report' with a progress bar for sections: Getting Started, Assets, Other Income, Transactions, Gifts, etc, Liabilities, Agreements, Positions, and Wrap Up. A 'Getting Organized' section contains a note about Adobe Reader and a 'TEST' button. A list of helpful information for preparing the report is provided, along with a 'Continue' button. A 'Common Questions' sidebar is on the right. A callout box points to the 'Compare' menu item with the text 'New "Compare" Menu Item'.

### Please Note:

For SF-278 Disclosure Reports the following Line Items are supported with comparison: Assets, Other Income, Liabilities, Agreements, Positions. No comparison is provided for Getting Stated, Contact Information, Position History, Job Description, Transactions, Gifts, or Compensation. However, for SF278, the Transactions are included in the Compare page.

For OGE-450 Disclosure Reports the following Line Items are supported with comparison: Assets, Non-investment income, Liabilities, Agreements, Outside Positions. No comparison is provided for Getting Stated, Contact Information, Gifts.

Complete - Cherri X. Lolar, 2008 Incumbent SF 278 Report

Disclosure Report Comparison

This is the report being reviewed

This is the report compared to

[Printer-Friendly](#)

<b>Compare-to Report</b>	Complete 2007 Incumbent
<b>Comparison Date</b>	March 03, 2008 14:46:27

Timestamp when the comparison was done

Change Summary				
	Changed	Added	Deleted	Unchanged
Assets	2	1	2	2
Income	0	1	1	1
Liabilities	0	1	0	0
Agreements	0	0	0	1
Positions	0	1	0	1

This table provides the summary counts of the line items that were unchanged, added, delete, or modified.

This table provides counts of items that will not be tracked as individual items

Current to Previous Disclosure Totals		
	Current Disclosure Report	Previous Disclosure Report
Transactions	0	2
Gifts	0	1
Compensations	*	*

\* Not reported

This is the Asset table as it appears in FDM annotated with icons depicting the types of changes in this case from a Complete 2007 Incumbent report and a Complete 2008 Incumbent report.

Legend			
	& strike through = Change		& faded text = Delete
	& blue text = Added		= Caution
	= Unchanged		

**Assets**

**Instructions:** For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income. Report personal savings and/or checking accounts in a single financial institution if they total more than \$5,000 (Note: This is a different requirement than for the OGE 450.).

Compare Result	Seq.#	Asset Name	Type of Asset	Owner	Value	Type of Income	Amount of Income
	1	Bank of Delaware	Checking, Savings, or Money Market Account	Spouse	\$250,001-\$500,000	Interest	\$2,501-\$5,000
		Yahoo NYSE	Stock, Bond,	Self	\$100,001-	Dividends	\$2,501-

...continued on the next image....

**Assets**

**Instructions:** For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income. Report personal savings and/or checking accounts in a single financial institution if they total more than \$5,000 (Note: This is a different requirement than for the OGE 450).

Compare Result	Seq.#	Asset Name	Type of Asset	Owner	Value	Type of Income	Amount of Income
	1	Bank of Delaware	Checking, Savings, or Money Market Account	Spouse	\$250,001-\$500,000	Interest	\$2,501-\$5,000
		Yahoo NYSE	Stock, Bond, Option, or Security	Self	\$100,001-\$250,000	Dividends	\$2,501-\$5,000
	2	Healthcare Real Estate Invest Trust	Mutual Fund, Investment Fund, or Pool	Spouse	\$500,001-\$1,000,000	Dividends	\$5,001-\$15,000
		Comcast NYSE	Stock, Bond, Option, or Security	Spouse	\$100,001-\$250,000	Dividends	\$2,501-\$5,000
	2.1	Assisted Living Inc., Pompano Beach, FL, USA (underlying asset of 4. Healthcare Real Estate Invest Trust)	Real Estate	Spouse	\$500,001-\$1,000,000	Dividends	\$5,001-\$15,000
	2.2	Smith Property Group, Ft Myers, FL, USA (underlying asset of 4. Healthcare Real Estate Invest Trust)	Real Estate	Spouse	\$500,001-\$1,000,000	Dividends	\$5,001-\$15,000
	3	BB Capital Partners, New York, NY, USA	LP Owned by BB&H	Joint	\$1,000,000		

Yahoo NYSE was deleted

The Asset name of this item was changed

**Other Earned or Non-Investment Income**

**Instructions:** For you, report the source and actual amount of earned and other non-investment income that exceeded \$200 during the reporting period from any one source. Such income includes: fees, salaries, commissions, compensation for personal services, retirement benefits, and honoraria. For your spouse, report the source and amount of honoraria that exceeded \$200 during the reporting period from any one source and the source, but not the amount, of any other non-investment income that exceeded \$1,000 during the reporting period. Note: reporting earned or other non-investment income of your dependent children is not required. Exclude any income from employment by the United States Government and from any retirement system of the United States (including the Thrift saving Plan) or from social security.

Compare Result	Source of Income	Owner	Type of Income	Amount of Income
	Whitmore Children's Trust	Spouse	Salary (other than Federal Government)	\$1987
	Hosing Develop Fund	Self	Salary (other than Federal Government)	\$55833
	Kroll Inc.	Self	Pension Plan Payments (other than Federal Government)	\$50000

Kroll, Inc. was added

**Transactions - Complete 2007 Incumbent Disclosure Report**

**Instructions:** For you, your spouse or dependent child, report any purchase, sale or exchange during the reporting period of real property, stocks, bonds, commodity futures, mutual fund shares, and other securities when the amount involved in the transaction exceeds \$1,000. Don't report: transactions on: a personal residence (not rented out); (2) money market, savings accounts or money market mutual funds; (3) U.S. Treasury bills, notes and bonds; (4) Qualified Blind, Qualified Diversified or Excepted trusts. Also, don't include transactions that occurred: (1) prior to your Federal Government employment; (2) solely by and between you, your spouse or dependent child.

Cherri X. Lolar answered NO to the Transactions Yes/No question in the previous Disclosure Report

**Transactions - Current Disclosure Report**

Asset Name	Type of Asset	Owner	Type of Transaction	Date	Amount	Divest
Yahoo NYSE	Stock, Bond, Option, or Security	Self	Sale	08/10/2007	\$250,001 - \$500,000	
Comcast NYSE	Stock, Bond, Option, or Security	Spouse	Sale	08/10/2007	\$250,001 - \$500,000	

**Liabilities**

**Instructions:** For you, your spouse or dependent children, report any liability over \$10,000 owed to any one creditor at any time during the reporting period. Exclude: the mortgage on your personal residence unless it is rented out; loans secured by automobiles, household furniture or appliances; and liabilities owed to certain relatives. See Common Questions for information on revolving charge accounts and liabilities owed to certain relatives.

Cherri X. Lolar answered NO to the Liabilities Yes/No question in the previous Disclosure Report

Compare Result	Creditors	Owner	Type of Liability	Year Incurred	Interest Rate	Term	Amount of Liability
	Bank of Delaware, Wilmington, DE, USA	Spouse	Mortgage, Wilmington, DE, USA	2007	7.25%	30	\$50,001-\$100,000