

Financial Disclosure Management

6.0. 7 Release Notes

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Introduction

Previous Release Notes are posted on the FDM website:

<https://www.fdm.army.mil/helpSupport/releaseNotes.htm>.

Release 6.0.7 implements these enhancements:

6.0.7 Enhancements

Remind OGE 278 Intermediate Reviewer

Automatic Remind Senior Legal Counsels

Report Review Progress

Defects & Changes

Remind OGE 278 Intermediate Reviewer

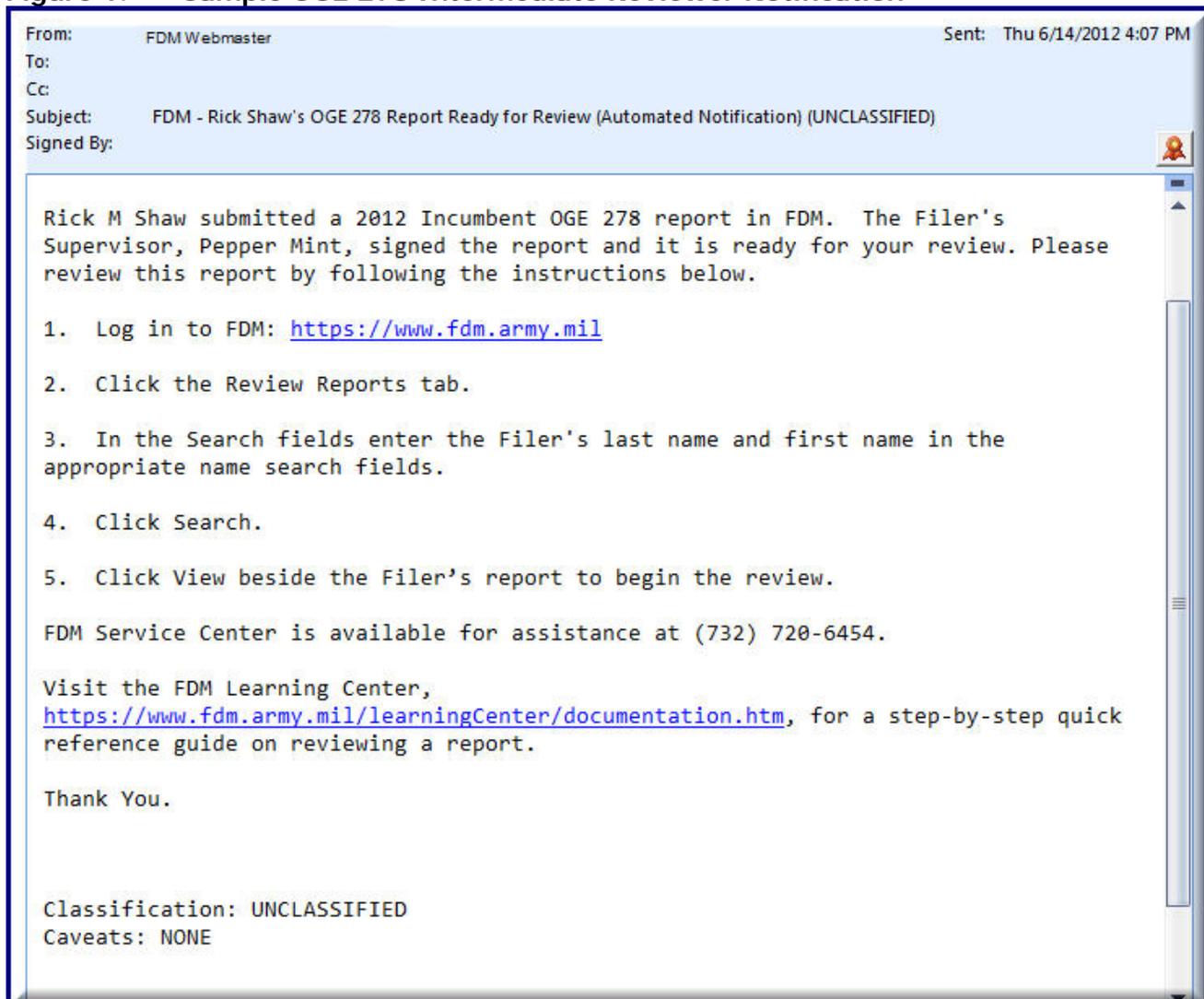
This release includes an Automatic Reminder option to send OGE 278 Intermediate Reviewers, Senior Legal Counsel, Supervisor Senior Legal Counsel and their ECs e-mail notifications to ensure timely report reviews. Senior Legal Counsels receive notifications only if a Filer's report meets the criteria listed below.

Note: Auto Remind is an FDM Agency preference and defaults to **No**, unless a FDM Agency chooses to opt in.

Senior Legal Counsels, Supervisor Senior Legal Counsels and their ECs receive auto remind notifications if:

- ❖ the Agency Preference for Send 278 Intermediate Reviewer Notifications? Is set to Yes. **And**
- ❖ the Supervisor **eSigns** and the SLC has not yet eSigned the 278.
- ❖ the Senior Legal Counsel **eSigns** and the Supervisor has not.
- ❖ the Supervisor **Ends Initial Review**.

Figure 1. Sample OGE 278 Intermediate Reviewer Notification



Automatic Remind Senior Legal Counsels

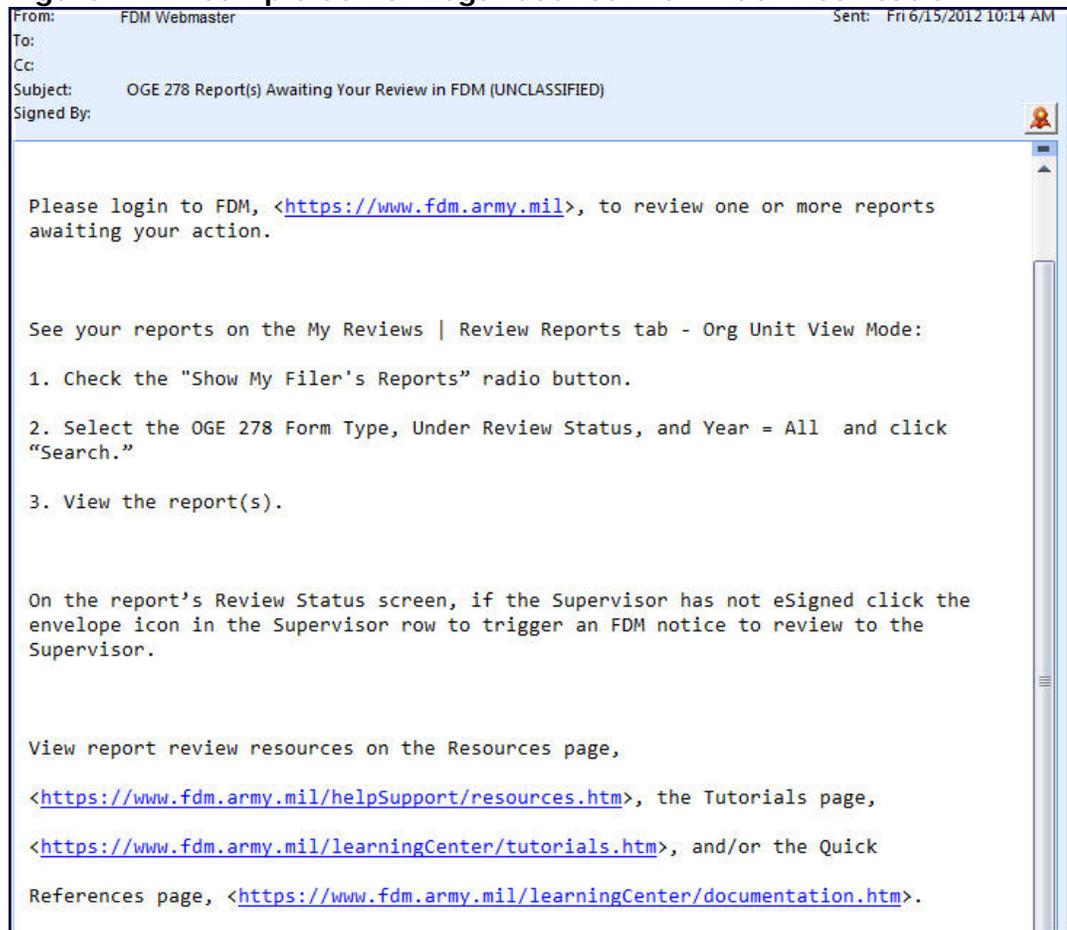
This release includes an Automatic Reminder option to send Senior Legal Counsel and their ECs e-mail notifications to improve Ethics Official review timeliness and compliance with OGE review requirements. Senior Legal Counsels receive notifications on a scheduled basis and only if a Filer's report meets the criteria listed below.

Note: Auto Remind is an FDM Agency preference and defaults to **No**, unless a FDM Agency chooses to opt out.

Senior Legal Counsels receive auto remind notifications if:

- ❖ the Agency Preference for Auto Reminder Notices to SLCs? Is set to Yes. **And**
- ❖ the report submission date is seven or more calendar days prior to the current calendar date.
- ❖ the Report is Assigned ***and***
- ❖ the Report is not Admin Closed ***and***
- ❖ the Report's Review Status is **Under Review** (*submitted or amended*)
- ❖ the Report's Year Label is within the current calendar year ***and***
- ❖ no End Review exists from the associated SLC and SLC ECs.

Figure 2. Sample Senior Legal Counsel Reminder Notification



Auto Remind Senior Legal Counsels Schedule

Auto Remind Senior Legal Counsels notifications are sent weekly.

Report Review Progress

FDM report reviewers, DAEOS, Senior Legal Counsel, 450 Certifiers, Supervisors, ECs and Assistants can now check a report's review progress direct from the Review Reports Work list View and Org Unit View. The Review Status on the Worklist and Org Unit View is now clickable.

To check a report's review progress, from either **Review Reports | Worklist View** or **Review Reports | Org Unit View**, click the **Review Status**, **Draft**, **Under Review**, **Under Review Amendment in Progress**, **Under Review Amended**, **Submitted to DAEO**.

Figure 3. Worklist with Report Review Progress

The screenshot displays the 'Review Reports - Worklist View Mode' interface. At the top, there are navigation tabs: My Info, My Reviews, Admin, Ethics Training, Management Reports, and Resources. Below these are sub-tabs: Filers, Review Reports, Manage Exceptions, and Expired Reports. A search bar and filters for 'My Roles' (DAEO), 'Action' (ALL), and 'Last Name Starts With' are visible on the left. The main content area shows a table of reports with columns: Assigned, Filer, Orq Unit, Supervisor, Form Type, Year, Reporting Status, Review Status, Days in Review, and My Review/Signature Date. A callout box points to the 'Under Review' status in the 'Review Status' column of the row for George X. Dalla, 2012 Incumbent OGE 278 Report. A pop-up window titled 'Under Review - George X. Dalla, 2012 Incumbent OGE 278 Report' displays a detailed table of 'Disclosure Report Reviews'.

Reviewer Role	Currently Assigned Reviewer	Reviewer Type	End Initial Review Dates	eSigned/Signatures
Supervisor	SupPoc X Public	Organization	06/15/2012 Public, SupPoc X. Supervisor	06/15/2012 Public, SupPoc X. Supervisor
Supervisor SLC	DAEO X Demo	Organization		
Senior Legal Counsel	Zachary X Taylor	Individual		
DAEO	DAEO X Demo	Organization		

Assigned	Filer	Orq Unit	Supervisor	Form Type	Year	Reporting Status	Review Status	Days in Review	My Review/Signature Date	
My Role: DAEO										
Yes	Brekinridge, John	Director Demo	Public, SupPoc X	OGE 278	2012	Incumbent	Complete	1	06/08/2012	View
Yes	Brekinridge, John	Director Demo	Public, SupPoc X	OGE 278	2009	New Entrant	Complete	0	06/07/2012	View
Yes	Calhoun, John	OGC	Public, SupPoc X	OGE 278	2012	Incumbent	Complete	1	04/19/2012	View
No	Calhoun, John	OGC	Public, SupPoc X	OGE 278	2011	New Entrant	Submitted to DAEO			View Assign End Initial Review Undo Submit To DAEO eSign & Complete
Yes	Dalla, George X	CIO	Public, SupPoc X	OGE 278	2012	Incumbent	Under Review	4		View Remove Assignment Submit To DAEO

Defects & Changes

SCR 6536 – FDM now informs users that “No special characters allowed.” when users try to enter any special characters in the text fields on the My Info | Contact Info page.

SCR 5364 – FDM now displays the correct Current Due Date on the Report Due Date page when an extension is recorded for an OGE 450.

SCR 6530 –The Printer Friendly option on the Review Reports | Worklist now displays the correct listing of reports.

SCR 6591 – The Printer Friendly option on the on Manage Exceptions now displays the correct listing of reports.