Financial Disclosure Management

Release 8.6.6.1

October 4, 2020

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Introduction

Previous Release Notes are posted on the FDM website: https://www.fdm.army.mil/helpSupport/releaseNotes.htm.

8.6.6.1 ENHANCEMENTS

Defects and Changes

My Reviews Enhancements



- The My Reviews tab now defaults to My Reviews | Dashboard.
- The Dashboard displays current year report counts for the Work List and Manage Exceptions.
- Org Unit View Mode, the Work List and Manage Exceptions are all accessible from the Dashboard.
- My Reviews | Review Reports is still available in the adjacent subtab.

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 On Manage Exceptions, the exception reason is now displayed via the green plus (+) button.

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 Both Work List and Org Unit View Mode maintain pre 8.6.6.1 release search criteria and functionality.

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 You can now create Excel or .csv exports from the Work List, Org Unit View Mode or Manage Exceptions by clicking the **Export** button in the top right hand corner of the screen.

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Marking Reports Signed Outside of FDM

The process for marking a Supervisor's signature as one that occurred outside of FDM can still be completed via the Review Status page.

This enhancement provides an additional work flow from the **Attachments** tab of a report that conveniently allows the certifier to record the signature in tandem with the signature document upload.

Previe ^w inancial Disclosure Management	
My Reports Assist Filers My Reviews My Expired Reports Admin Center Ethics Training Management Reports Noti	fications
Dashboard Review Reports Reack	
Report Data Attachments Comments Flags Audit Trail View/Print Review Status Previous Reports Notes	
Under Review - Supervisor Signed - Cassandra Lastname, 2020 New Entrant OGE 450 Report	
Attachments	Common Questions
Instructions: No attachments are required when filling an OGE 450. If you do have something to attach, click "Add Attachment" below. This report has no Attachments.	 May I submit my broker's statement instead of entering each stock and mutual fund separately? Glossary
Add Attachment	
Security and Privacy Notice Help Accessibility Developed by: CECOM LCMC	

- 1. Go to the **Attachments** tab of a report.
- 2. Click Add Attachment.

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	Add Attachment Common Questions
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Date:	entering each stock and 09/02/2020 mitual fund separately?
Originator:	Lastname, Ashley
Type:	
Notes: (optional)	Extension Request Late Fee Waiver Request Cautionary Notice <u>Sample Template</u> Disqualification <u>Sample Template</u> Supervisor Signed Outside of FDM Other (Limit 250 characters) (250 characters Remaining of 250) Click "Browse" or "Choose File" to select file then click "Upload". Filename: Choose File No file chosen Upload Cancel
	Security and Privacy Notice Help Accessibility Developed by: CECOM LCMC

- 3. Select the **Supervisor Signed Outside of FDM** button then click **OK** in the pop-up message to confirm the selection.
- 4. Click the **Choose File** button, select the document you want to upload then click **Open**.
- 5. Click **Upload** then **OK** to confirm the upload. The Attachments page displays.

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- 6. Click the Enter Signature Date button.
- 7. Select the **Record that the Supervisor signed outside of FDM** button and click **Continue**.
- 8. If needed, edit the Supervisor Name or Signature Date then click **Continue**.
- 9. Enter an explanation if needed then click **Continue**.
- 10. Select whom you want to send a notification to edit the message if needed then click **Continue**. The Final Confirmation and Save page displays.
- 11. Click Confirm.

Disclosure Detail Report

Disclosure Detail Report	Custon My Org	s » Kevin Sub Org >		-								 Supervisor Name Supervisor Email
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Managament Reports | Pariodic Paparte

- The enhanced Disclosure Detail Report provides reporting and reviewing status details by Org Unit, form type, year and various other filters.
- Use the customizable filters to track review progress of Filers' reports. *
- Saved customized filters are retained for each of your FDM roles, even after logging out of the system.
- A summary totals table is displayed beneath the generated results.
- Export generated results into an Excel or .csv document. *
 - 1. Go to Management Reports | Periodic Reports and click on **Disclosure Detail Report.**
 - 2. Select an Org Unit in the Org Tree.
 - 3. Select the Mode, Form Type and Year criteria.
 - 4. Click Customize Report Display to display additional filter selections on the right side of the page. Check/uncheck any of the optional filters.
 - 5. Click Apply and Save then OK to generate the report.

Defects and Changes

FDM 239 – Report Due Date is now displayed in the Worklist, Org Unit View Mode and Manage Exceptions.

FDM 2436 – Certifiers can now mark Supervisors' signatures 'Signed Outside of FDM' while attaching the signature document. (See page 7 for details.)

FDM 3053 – Users who are reviewing multiple reports from a generated Worklist can return (via the Back button) to an automatically updated Worklist without having to regenerate it.

FDM 3910 –FDM will no longer display the Amendment Request Complete message for reviewers if Outlook is not installed on their computer.

FDM 4161 – Not Submitted Reminder notifications sent by SLC ECs now reflect accurate audit trail details.

FDM 4300 – Request Filer for Additional Information Outlook messages now populate correctly.

FDM 4376 – Report audit trails now display Requests for Amendments and Requests for Additional Information.

FDM 4582 –My Reviews lists (Worklist View Mode, Org Unit View Mode and Manage Exceptions) can now be exported into Excel or .csv documents.

FDM 4863 – Clicking View/Print in OGE 278 reports no longer results in an application error.

FDM 4909, 5247 – Agencies now have the option to allow 450 Certifier Assistants to Request for an Amendment or Request Additional Information.

FDM 4978 – One day discrepancy on the Days in Review counts between My Reviews and Review Status has been corrected.

FDM 5170 – Language in the OGE 278 and OGE 450 instructions and common questions reflects new OGE guidance stating that Filers must report all gifts and travel reimbursements aggregating more than \$415 and do not need to report aggregate items worth \$166 or less.

FDM 5242 – Worklist View Mode and Manage Exceptions explanations are displayed by hovering over the related adjacent question marks found on the Dashboard.

FDM 5250 – A guide to FDM roles and their functionalities was developed and can be viewed via a link in the user profile section.

FDM 5353 – Clicking the View button on the Audit Trail History launched from the Review Due Date Info screen no longer causes an application error.

FDM 5359 – Org Tree searches on the Admin Center | Org Management | Org Unit Members no longer result in inaccurate Org Unit Member displays.

FDM 5374 – A warning message displays when unassigning a report informing the user that the action does not delete the report.

FDM 5520 – Filter searches are now accurate on Admin Center | User Admin.