

Financial Disclosure Management

Release 8.6.6.1

October 4, 2020

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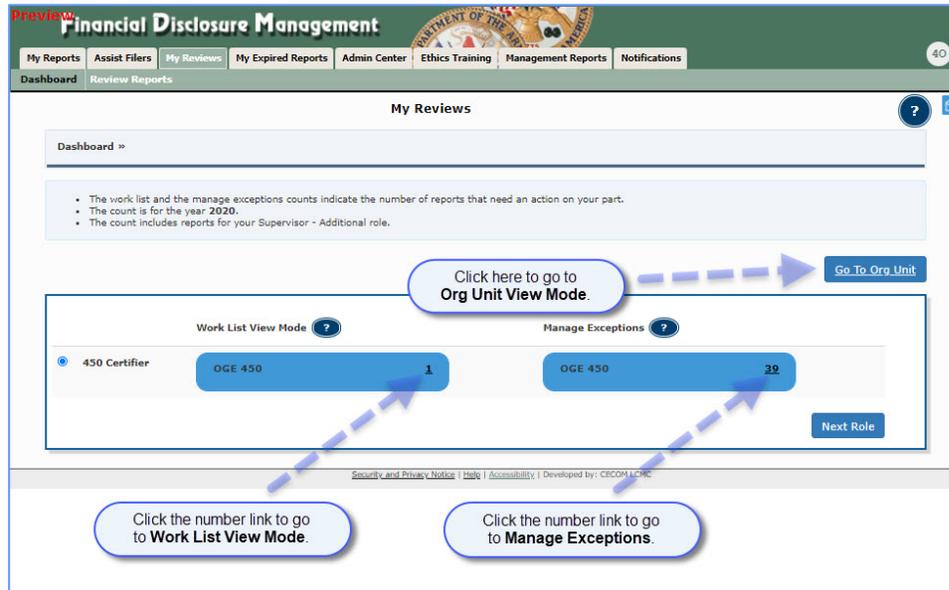
Introduction

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

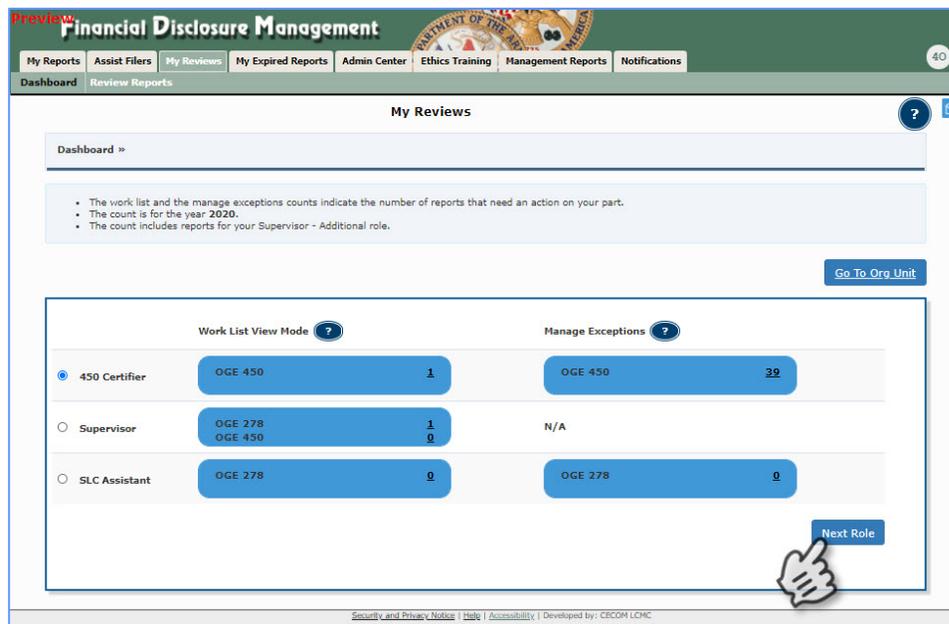
8.6.6.1 ENHANCEMENTS

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 sub-tab.



- ❖ To view additional reviewer roles on the Dashboard, click **Next Role**.

Click the plus (+) button to view additional information.

Access different review modes via the Change drop-down selection.

Click the Export drop-down to export a review list into Excel.

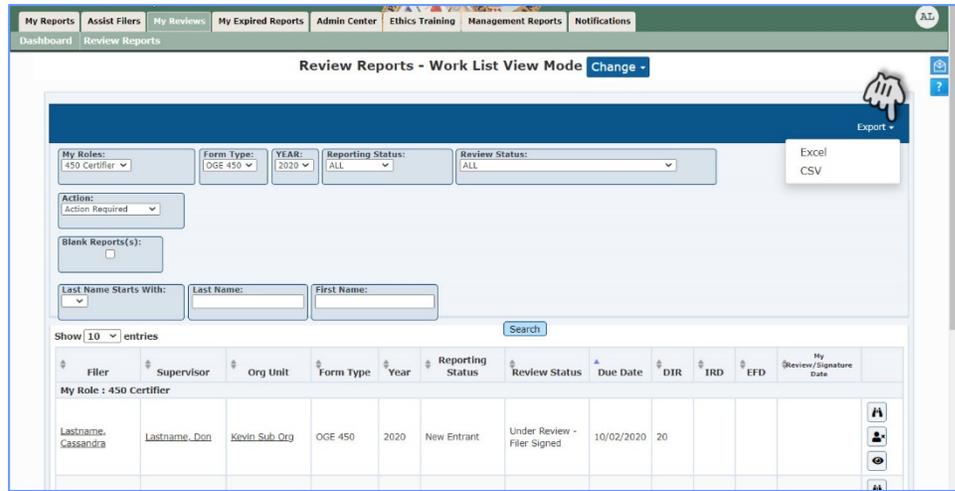
Filer	Supervisor	Year	Reporting Status	Review Status	Due Date	Days In Review	Initial Review Days	Excess Filer Days
Lastname, Ronnie	Lastname, Don	2019	New Entrant	Under Review - Filer Signed	05/12/2020	132		
Lastname, Robin	Lastname, Don	2020	Incumbent	Draft				
Lastname, Kai	Lastname, Don	2019	New Entrant	Not Started	05/22/2020			
Lastname, Juanita	Lastname, Don	2019	New Entrant	Draft	06/27/2020			

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

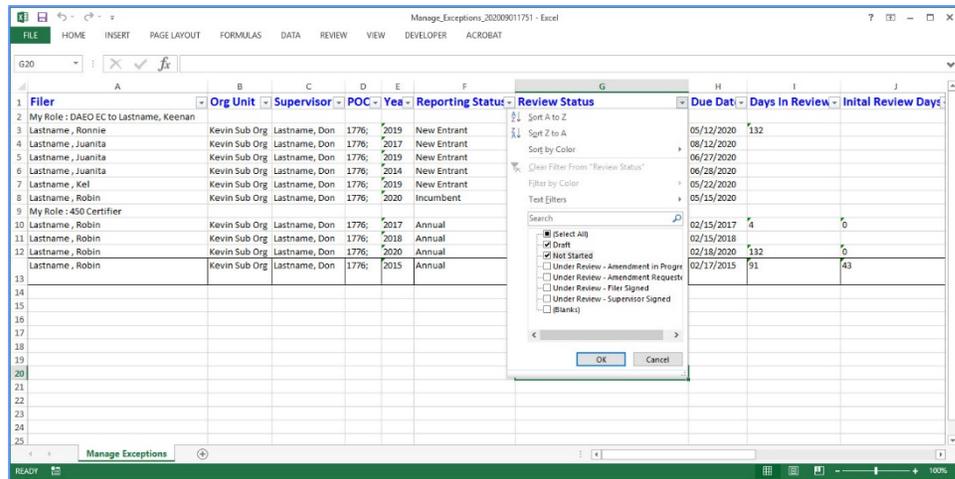
Filer	Supervisor	Form Type	Year	Reporting Status	Review Status	Due Date	Days In Review	Initial Review Days	Excess Filer Days	My Review/Signature Date
Lastname, Bobbo	Lastname, Don	OSE 450	2020	Annual	Under Review - Amendment in Progress	02/18/2020	133	0	92	
Lastname, Bonnie	Lastname, Don	OSE 450	2020	New Entrant	Complete	05/13/2020	9	9	1	04/22/2020
Lastname, Bobbo	Lastname, Don	OSE 450	2020	New Entrant	Complete	05/28/2020	12	12		06/02/2020
Lastname, Bobbo	Lastname, Don	OSE 450	2020	New Entrant	Under Review - Amendment in Progress	05/29/2020	142	2	133	

Filer	Supervisor	Form Type	Year	Reporting Status	Review Status	Due Date	Days In Review	Initial Review Days	Excess Filer Days	My Review/Signature Date
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Lastname, Bobbo	Lastname, Don	OSE 450	2020	New Entrant	Complete	05/28/2020	12	12		06/02/2020
Lastname, Bobbo	Lastname, Don	OSE 450	2020	New Entrant	Under Review - Amendment in Progress	05/29/2020	142	2	133	

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



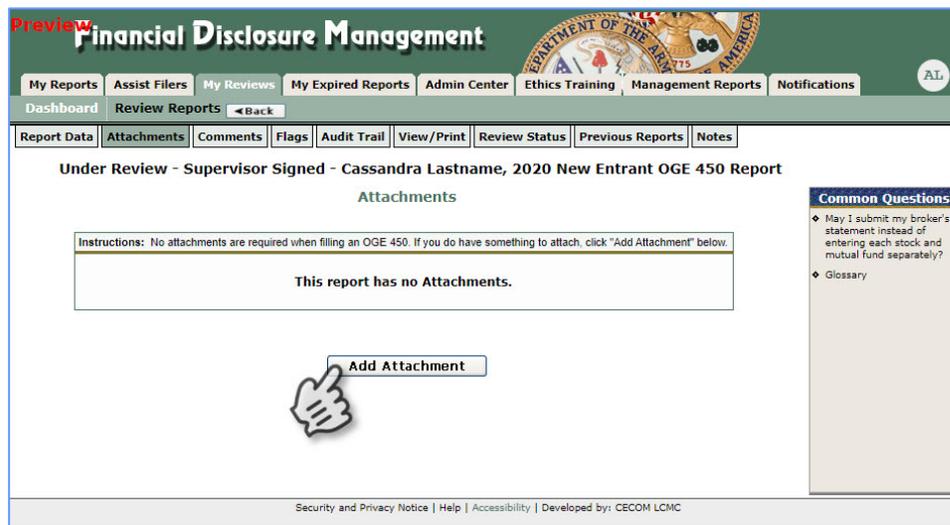
- ❖ You can now create Excel or .csv exports from the Work List, Org Unit View Mode or Manage Exceptions by clicking the **Export** button in the top right hand corner of the screen.



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.



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

Under Review - Supervisor Signed - Cassandra Lastname, 2020 New Entrant OGE 450 Report

Add Attachment

Instructions: Consult your ethics counselor or ethics official for use of this feature.

Date: 09/02/2020

Originator: Lastname, Ashley

Type:

- Job Description
- Extension Request
- Late Fee Waiver Request
- Cautionary Notice [Sample Template](#)
- Disqualification [Sample Template](#)
- Supervisor Signed Outside of FDM
- Other

Notes: (optional)
(Limit 250 characters)
(250 Characters Remaining of 250)

Click "Browse" or "Choose File" to select file then click "Upload".

Filename: No file chosen

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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.

Under Review - Supervisor Signed - Cassandra Lastname, 2020 New Entrant OGE 450 Report

Attachments

Date Attached	Originator	Type	Name	Category	Notes	
09/02/2020	Lastname, Ashley	Supervisor Signed Outside of FDM	Supov Signature.docx			<input type="button" value="Replace"/> <input type="button" value="Enter Signature Date"/> <input type="button" value="Delete"/> <input type="button" value="Make of Record"/>

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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

Management Reports | Periodic Reports

Customize Report Display

My Orgs » Kevin Sub Org »

Disclosure Detail Report

Filter(s): Mode: Show My Form Type: OGE 450 Year: 2020 Apply Filters

Click **Customize Report Display** to initiate the filter selection seen on the right side of this screen.

Show 25 entries

Year	Filer Name	Org Unit	Report Type	Review Status	Extension Days	Current Due Date	Submission Date	Supervisor Signature Date	End In
2020	Lastname, Cassandra	Kevin Sub Org	OGE 450 New Entrant	Under Review - Filer Signed	0	10/02/2020	09/02/2020		
2020	Lastname, Don	Kevin Sub Org	OGE 450 New Entrant	Under Review - Supervisor Signed	0	10/02/2020	09/02/2020	09/02/2020	
2020	Lastname, Jason	Kevin Sub Org	OGE 450 New Entrant	Under Review - Supervisor Signed	0	10/02/2020	09/02/2020	09/02/2020	
2020	Lastname, Kel	Kevin Sub Org	OGE 450 New Entrant	Under Review - Supervisor Signed	0	10/02/2020	09/02/2020	09/02/2020	
2020	Lastname, Kevin	Kevin Sub Org	OGE 450 New Entrant	Under Review - Amendment in Progress	0	05/29/2020	04/13/2020		04/15/20
2020	Lastname, Robin	Kevin Sub Org	OGE 450 Annual	Under Review - Amendment in Progress	40	03/29/2020	04/22/2020		04/22/20
2020	Lastname, Robin	Kevin Sub Org	OGE 450 New Entrant	Complete	0	05/28/2020	05/21/2020	06/02/2020	06/02/20
2020	Lastname, Ronnie	Kevin Sub Org	OGE 450 New Entrant	Complete	0	05/13/2020	04/13/2020	04/22/2020	04/22/20

Currently showing page 1 of 1 page(s). 8 Records Found.

Summary Totals									
Reporting Status	Total	Draft	%	Under Review	%	Complete	%		
New Entrant	7	0	0.00%	5	71.43%	2	28.57%		
Annual	1	0	0.00%	1	100.00%	0	0.00%		
Total	8	0	0.00%	6	75.00%	2	25.00%		

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Apply and Save

- ❖ 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.