

# ASSIGNING A REPORT TO FILE



Use the Assign feature to indicate to your Filers the type of report, OGE 450 (New Entrant or Annual) or SF 278 (New Entrant, Incumbent, Incumbent/Termination, or Termination); they are required to file in FDM.

## Annual OGE 450 Filers and Incumbent SF 278 Filers

Everyone who is required to file an OGE 450 or SF 278 report and has been registered in FDM will automatically be assigned an Annual OGE 450 Report or an Incumbent SF 278 on December 31. Once the Reports have been automatically assigned to all current Filers in FDM, you can then notify the Filers in their Org Units of their requirement to file. If a Filer has been added to your organization after the initial notification, you will have to assign a report to that Filer.

## ASSIGNING REPORTS

Once you have updated your Filer list, you can indicate to your Filers the type of report they are required to file, e.g., 450 New Entrant, 278 incumbent, etc. Since Filers are grouped by Org Unit, you can save time by assigning the same type of report to a group of filers. When you assign a report to a group of Filers, each Filer receives an e-mail notification prompting them to begin their filing process in FDM. To assign reports:

1. From any point within FDM, select **ADMIN|FILERS** tab.
2. Select a Filer's Org Unit from the Next Level Down drop-down list.
3. Click **Retrieve Filers**.
4. Select the check box beside the appropriate Filer(s) and then click Assign Report.

Select/Clear All	Name	Filer Role	Org Unit	Current Reports	Supervisor	
<input type="checkbox"/>	450Filer1, NorthEast X	OGE 450 Filer	North East Region	2009 Annual OGE 450	Sea, Stormy	<a href="#">View</a> <a href="#">Move</a>
<input type="checkbox"/>	450Filer1, SouthEast X	OGE 450 Filer	North East Region	2009 Annual OGE 450	Sea, Stormy	<a href="#">View</a> <a href="#">Move</a>
<input type="checkbox"/>	450Filer10, NorthEast X	OGE 450 Filer	North East Region	2009 Annual OGE 450	Sea, Stormy	<a href="#">View</a> <a href="#">Move</a>

## Entering the Report Information

5. Select the **Year** and **Reporting Status**.

*Note: This date may change when the Filer enters the Appointment Date. The New Entrant Report will then be due 30 days from the Appointment Date. The Due Date defaults to 30 days from the current date for New Entrant reports.*

## Overrides

Override Due Date is used to indicate that a Certifying Official or their EC override the due date, typically with new entrant Filers. Check the Override Due Date box and then enter the reason for the override in the Reason field.

6. When complete, click **Save**.
7. Click **OK** to the message confirming the report assignment.

Name	E-Mail Address
Coone, Ty X	training_450_3@us.army.mil
Lefte, Eileen X	dornbure@dodgoc.osd.mil

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

My Info | My Reviews | Admin | Management Reports | Resources | Log Out

Filers | POCs | Supervisors | Users | Org Units

### Report Assignment Notification

Would you like to notify your filer(s) of the Report Assignment?  
 Yes - Notify Now  
 No - Do not notify at this time

**Subject:** Your 2008 OGE 450 New Entrant report is due 12/31/2008 (Automated Notification)

You are registered in Financial Disclosure Management (FDM) - URL: https://158.9.48.244, as an OGE 450, Confidential Financial Disclosure Report Filer. Your OGE 450 New Entrant report is due 12/31/2008. Please consult your legal advisor or me, POC M X, Jefferson\_30, m.jefferson\_30@us.army.mil, 000-000-0000 if you have questions about this requirement to file a Financial Disclosure Report, or need an extension. Also, consult your legal advisor or me if you do not think you should file such a report.

- 5 C.F.R. 2634 and DoD 5500.7-R, Joint Ethics Regulation (JER), require identified individuals to file an annual confidential financial disclosure report, OGE Form 450. First line supervisors identify who must file, using criteria from the U.S. Office of Government Ethics (OGE).
- The FDM web site has several resources you may find helpful as a refresh on FDM or as an introduction for your first time using it to eFile: a

## Notifying Filer

- On the Report Assignment Notification screen, either click on **YES** to notify the person of their requirement to file a report; or click on **NO** to notify later.

*NOTE: The e-mail message can be edited by typing over the default message.*

- Click **CONTINUE** to send the e-mail and return to the My Filer's screen

## REMOVING AN ASSIGNMENT

- From any point within FDM, select **My Reviews | Review Reports - Worklist** tab.
- Select All in the Search area for **Form Type, Year, Reporting Status, Review Status** and **Action**.
- Click **Search**.

### View Report Assignments

- Under the Assigned column, you can see if the Filer has an assigned report.
- To remove a report assignment on any **Not Started** report, click on the **Remove Assignment** button.

*NOTE: You can also remove the Report Assignment from the Review Status screen.*

Financial Disclosure Management

My Info | My Reviews | Admin | Management Reports | Resources

Filers | Remind Filers | Remind Supervisors | Review Reports

### Review Reports - Org Unit View Mode

POC

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

Show Filer's Reports for Training Org  
 Show My Filer's Reports  Include Filer's Reports for Org Units assigned to other POCs

Search

Form Type: OGE 450 Year: 2008 Reporting Status: ALL Review Status: ALL

Last Name Starts With: Last Name: First Name:

1 to 29 of 29 Items per page: 100 Printer-Friendly

Assigned	Filer	Org Unit	Supervisor	Form Type	Year	Reporting Status	Review Status	Days in Review	My Review/Signature Date	
Yes	Adams 11, A X	Bus manmt Div	Super 1, Training X	OGE450	2008	New Entrant	Not Started			<input type="button" value="View"/> <input type="button" value="Remove Assignment"/>
Yes	Adams 22, A X	Bus man division	Price 17, R X	OGE450	2008	New Entrant	Not Started			<input type="button" value="View"/> <input type="button" value="Remove Assignment"/>
Yes	Collins, Christopher E	AMC Training	Jefferson 19, M X	OGE450	2008	New Entrant	Not Started			<input type="button" value="View"/> <input type="button" value="Remove Assignment"/>
Yes	Coone, Ty X	AMC Training	Jefferson 19, M X	OGE450	2008	New Entrant	Not Started			<input type="button" value="View"/> <input type="button" value="Remove Assignment"/>
Yes	Hamilton 10, L X	AMC B	Jefferson B, M X	OGE450	2008	Annual	Under Review	15		<input type="button" value="View"/> <input type="button" value="Remove Assignment"/>
			Jefferson G				Under			<input type="button" value="View"/>

## COMPLIANCE TRACKING OF FILING ACTIVITIES

Once the System Administrator has assigned Annual OGE 450 Reports to all current Filers in FDM, the POC can then notify the Filers in their Org Units of their requirement to file.

*Note: Filers who have completed their tasks will not show on the Remind Filers page.*

Additional options are available to track and notify OGE 450 Filers who have not started their reports, who have started their reports but have not eSigned, and for Filers who have passed the due date. For more information about on sending reminder notifications to filers in FDM, please see the **QRC Remind Filers**.