

# CHECKING A REPORT'S STATUS



FDM has several tools to help you see and track a filer's progress on his/her report. An FDM review chain participant or POC can easily check the status of reports in FDM by using the Report List, Manage Exceptions or Review Status. In addition, the Audit Trail function time stamps all activities on a given report.

## Reports List

Once a Filer has started a report in FDM, you can view your Filer's report progress and status on the Reports list.

## Using the Worklist

Use the Worklist as a reminder of the reviewing activities you need to complete.

Note: POCs do not have access to the Worklist view.

1. Click **Review Reports | Reports list**.
2. Click **Search**.

## Using Org Unit View

The Org Unit view provides a quick summary at a glance of all reports for filers in a particular org unit.

1. On the Review Reports page, click **Org Unit View**
2. If you hold more than one role, ensure you have the appropriate role selected by clicking on **Change** in the Role field.
3. Select the Org Unit from the Next Level Down drop-down list.
4. Select **Show My Filer's Reports** to see a listing of all of the reports you are responsible for reviewing.
5. Under the Search area, select the following and click **Search**.
  - ♦ FORM TYPE - OGE 450 or OGE 278
  - ♦ YEAR - The current year
  - ♦ REPORTING STATUS - All
  - ♦ REVIEW STATUS - All

## Review Progress

To check a report's review progress, from either Review Reports | Worklist View or Review Reports | Org Unit View:

1. Click the Report Review Status, e.g., **Draft, Under Review**, etc. in the Review Status column.

**Review Reports - Worklist View Mode**

Search: My Roles: ALL, Form Type: ALL, Year: ALL, Reporting Status: ALL, Review Status: ALL, Action: Action Required

Assigned	Filer	Org Unit	Supervisor	Form Type	Year	Reporting Status	Review Status	Days in Review	My Review/Signature Date
No	Hamilton 22, L X	AMC	Bago, Winnie X	SF278	2009	Incumbent	Under Review	2	
Yes	Hamilton 24, L X	AMC	Bago, Winnie X	SF278	2009	Incumbent	Under Review	2	04/10/2009

**Review Reports - Org Unit View Mode**

Org Unit: My Orgs > TRAINING

Search: Form Type: ALL, Year: ALL, Reporting Status: ALL, Review Status: ALL

Assigned	Filer	Org Unit	Supervisor	Form Type	Year	Reporting Status	Review Status	Days in Review	My Review/Signature Date
Yes	Hamilton 22, L X	AMC	Bago, Winnie X	SF278	2007	New Entrant	Complete	0	
Yes	Hamilton 22, L X	AMC	Bago, Winnie X	SF278	2008	Incumbent	Complete	0	
No	Hamilton 22, L X	AMC	Bago, Winnie X	SF278	2009	Incumbent	Under Review	9	
Yes	Hamilton 22, L X	AMC	Bago, Winnie X	SF278	2009	Termination	Not Started		
Yes	Hamilton 23, L X	AMC	Bago, Winnie X	SF278	2008	Incumbent	Complete	0	04/01/2009
Yes	Hamilton 23, L X	AMC	Bago, Winnie X	SF278	2009	Incumbent	Draft		

**Under Review - George X. Dalla, 2012 Incumbent OGE 278 Report**

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
Supervisor SLC	DAEO X Demo	Organization		
Senior Legal Counsel	Zachary X Taylor	Individual		
DAEO	DAEO X Demo	Organization		

Click the report's Review Status to display the report progress table.

Assigned	Filer	Org Unit	Supervisor	Form Type	Year	Reporting Status	Review Status	Days in Review	My Review/Signature Date
Yes	Brekiridge, John	Director Demo	Public, SupPoc X	OGE 278	2012	Incumbent	Complete	1	06/08/2012
Yes	Brekiridge, John	Director Demo	Public, SupPoc X	OGE 278	2009	New Entrant	Complete	0	06/07/2012
Yes	Calhoun, John	DGC	Public, SupPoc X	OGE 278	2012	Incumbent	Complete	1	04/19/2012
No	Calhoun, John	DGC	Public, SupPoc X	OGE 278	2011	New Entrant	Submitted to DAEO		
Yes	Dalla, George X	CIO	Public, SupPoc X	OGE 278	2012	Incumbent	Under Review	4	

## Print the Reports List Page

1. Print the results on the Reports List page by clicking **Printer Friendly**.
2. Click the **Printer icon** on your browser's tool bar or right-click the report window and click **Print** on the menu that is displayed.

## Review Status Page

The Review Status page allows reviewers and POCs to take a closer look at the reporting progress, see if any extensions were granted and complete your review.

Note: POCs have access to the Review Status page only.

1. On the Reports List page, click **View** beside the Filer's disclosure.
2. Click the **Review Status** tab. The Review Status page is displayed showing the report and sign off progress, extensions and assigned reviewers.

## Manage Exceptions

The Manage Exceptions List is a tool in FDM used by Certifying Officials (DAEOs and SLCs) to manage disclosures for compliance or disclosures that require special attention. In this way, the Certifying Official's Worklist displays only those disclosures that require their review and signature. Disclosures remain on the Manage Exceptions List until the issue is resolved and the note is either closed or deleted, or the Certifying Official e-signs the report.

NOTE: When a disclosure moves from the Review Reports | Work List View Mode to the Manage Exceptions List, the disclosure still displays on the Review Reports | Org Unit View mode page.

1. Click on **My Reviews | Manage Exceptions**.
2. Under Search, select your Role (if you hold more than one role in FDM), the Year, and then click on the **Search** button.
3. You also have the option of selecting **ALL** under both Search options to see all roles and all years. Your search results display.

## Audit Trail

Note: POCs do not have access to the Audit Trail page.

In FDM, the Audit Trail time stamps report activities such as creation of a draft report, extensions and amendments. Assigned reviewers receive an automated e-mail message once a filer submits their financial disclosure report for review in FDM. View a report's audit trail to determine the timeliness of filing and review.

1. Select **Review Reports | Report List**.
2. Select **View** beside the appropriate report.
3. Click **Audit Trail**. The Audit Trail page displays.

