MY REVIEWS - MANAGING REPORTS ASSIGNED TO YOU

Financial Disclosure Management

FDM has several tools to help you see and track a Filer's progress on their report. An FDM review chain participant or POC can easily check the status of reports in FDM by using the Worklist, Org Unit View Mode, Manage Exceptions or Review Review Reports. In addition, the Audit Trail function time stamps all activities on a given report.

USING THE WORKLIST

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

1. Go to **My Reviews | Dashboard**.

2. Under **Work List View Mode**, click the number link next to your reviewer role.

   Note: Click the **Next Role** button to view results in another FDM role that you may have.

3. The report list displays. You can use the provided filter columns to narrow your search:

   ◆ My Roles - Supervisor or 450 Certifier

   ◆ Form Type - OGE 450

   ◆ Year - the report year

   ◆ Reporting Status - All

   ◆ Review Status - Under Review

   ◆ Action - eSign

   ◆ Blank Reports(s) -click the checkbox to display reports that contain no reviewable data. Use this option to expedite the reviewing process of reports that require minimum time to certify.

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. Go to **My Reviews | Dashboard**.

2. Click on the **Go to Org Unit** link.

3. Select a reviewer role in the **Role** box.

4. Select the Org Unit from the Next Level Down drop-down list.

5. Select **Show My Filer's Reports** to see a listing of all of the reports you are responsible for reviewing.

6. Under the Search area, select the following and click **Search**.

   ◆ Form Type - OGE 450

   ◆ Year - The report year

   ◆ Reporting Status - All

   ◆ Review Status - All

MANAGE EXCEPTIONS

The Manage Exceptions List is a tool in FDM used by Certifying Officials (450 Certifiers, 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.

To view the Manage Exceptions list:

1. Go to **My Reviews | Dashboard**.

2. Under **Manage Exceptions**, click the number link next to your reviewer role.

3. Under Search, select your **Role** (if you hold more than one role in FDM), the **Year**, and then click on the **Search** button. Your search results display.

> **Note:** You also have the option of selecting **ALL** under both Search options to see all roles and all years.

EXPORTING A REVIEW LIST

Use the Export feature from the Worklist, Org Unit View Mode or Manage Exceptiosn to create a list of reports in Excel or a .csv document.

1. After generating a report from the Worklist, Org Unit View Mode or Manage Exceptions, click **Export** then select **Excel** or **Data Only (CSV)**.

2. Click **Save** to save the file to your computer.

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.

1. Click the **Review Status icon (eye graphic) button** next to the report.