

# ADMINISTRATIVELY CLOSE A REPORT



Administratively closing a report will reduce the effort in managing the OGE 450 and OGE 278 filing process by 'hiding' reports which should not or cannot be certified. Only DAEOs, DAEO ECs, DAEO Assistants, 450 Certifiers, 450 Certifier ECs and 450 Certifier Assistants can perform this function.

An assigned OGE 278 or OGE 450 or an unassigned, but started (e.g., Draft or Under Review (Filer has eSigned)) may be administratively closed when further processing of the OGE 278 or OGE 450 is not appropriate. For example, if a Filer mistakenly started a disclosure but left the agency before finishing and was removed from FDM as a Filer, that disclosure may not need to be finished. If so, a legal reviewing official (e.g., DAEO/DAEO EC for the OGE 278; 450 Certifier/450 Certifier EC for the OGE 450) could decide to administratively close the disclosure so it is removed from the Worklist and is not counted on FDM statistical reports (Management Reports).

Note: FDM allows for certification of OGE 278s and OGE 450s that should be completed in cases where part of the review was completed outside FDM. This is different from the Admin Close situation for those disclosures either mistakenly assigned or erroneously started by a Filer but not appropriate for processing. A Filer may delete a draft report, but cannot delete an Under Review disclosure. Admin Close allows for handling those disclosures that are Under Review and cannot be directly deleted.

There are also instances where a reviewer has not signed off on a submitted report, and the report never progresses to final legal certification.

The majority of these reports will appear on the Manage Exceptions List. However, some reports that may have to be administratively closed can appear on the Reports Worklist (a report assigned or started erroneously that is not 30 days past due). This new functionality enables certain reviewers to remove these reports from their worklist. However, this report *WILL* display on the Review Reports - Org Unit View mode.

When a report is administratively closed, the following applies:

- All Reviewer actions (excluding "Complete Without Signature") are enabled for a report based on its review status.
- The Filer of a report that is administratively closed will still have the capability to take action (edit, submit, amend, and recertify) on the report.
- Administratively closed reports will appear on the Filer's list of their reports and can be used to prepopulate.
- If an administratively closed report with a status of "Draft" or "Amendment in Progress" does get submitted/recertified by the Filer, the report will no longer be marked as administratively closed.
- If an administratively closed report does get certified by the certifying official, the report will no longer be marked as administratively closed.

## ADMINISTRATIVELY CLOSE A REPORT

### Close a Report from the Reports Worklist View or Org Unit View

To administratively close a report from the Reports Worklist View or Org Unit view:

1. Select the **My Reviews / Review Reports** tabs. The Review Reports - Worklist View Mode page is displayed.

**NOTE:** Click on the **OrgUnit View Mode** link in the upper right corner if you wish to view reports by Org Unit.

2. Set the **My Roles**, **Form Type**, **Year**, **Reporting Status**, **Review Status** and **Action** search criteria, then click on the **Search** button. Results of the search criteria are displayed.
3. Click on **View** next to the report you wish to close. The Getting Organized page is displayed.
4. Click on the **Review Status** tab.
5. On the Review Status page, click on the **Admin Close** button. The Confirm Administratively Closing this Report page is

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Report Data | Attachments | Comments | Flags | Audit Trail | View/Print | Review Status | Previous Reports | Notes

**Under Review - Myles Long, 2007 Incumbent SF 278 Report**

Report Progress: Assigned: No, Filer Started: 03/25/2009, Filer Assign and Submitted: 03/25/2009, Amended: Submitted for Certification: Completed.

Due Dates & Extensions: Current Due Date: 05/15/2007, Report Due Date: 05/15/2007.

View/Edit Due Date & Extensions

Admin Close | Submit to DAEO

Disclosure Report Reviews

Reviewer Role	Currently Assigned Reviewer	Notify	Reviewer Type	End Reviews	Assigned/Signatures
Supervisor	Warren, Peace	ES	Organization	03/25/2009	Peace, Warren
Supervisor SLC	Elsen, Left	C3	Organization	03/25/2009	Peace, Warren
Senior Legal Counsel	Elsen, Left	C3	Organization	03/25/2009	Peace, Warren
DAEO	Page, Turner	C3	Organization	03/25/2009	Peace, Warren

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displayed.

- In the reason text box, the default reason is *Report Administratively Closed*. However, you can enter your own text with a more detailed explanation.

### Include Report in Compliance Reporting

- If the report was an unassigned report and should be counted as an assigned report for compliance purposes, select the **Yes** radio button. In most cases, **No** would be selected and is the default.

**NOTE:** This option does not display when closing an assigned report. Also, an admin closed report is not reflected on any Management Reports in FDM.

- Click on the **Confirm** button. A message displays confirming that you wish to close this report.

- Click **OK**. You return to the Review Status page. The report has been administratively closed.

**NOTE:** Although the report is removed from the **My Reviews | Work List** view, this report will continue to display under My Reviews | Review Report in the **Org Unit View mode**.

## Close a Report through the Notes Tool

When a report has an open note attached to it, the report displays on the reviewer's Manage Exceptions List. This report can be administratively closed through the Notes tool from the Manage Exceptions page.

- Select the **My Reviews /Manage Exceptions** tabs. The Reports that Need Special Action page is displayed.
- Locate the report you wish to close, then click on the **Notes** button located next to the line item. The Notes page is displayed.
- Click on the **Admin Close** button. The Confirm Administratively Closing this Report page is displayed.
- In the reason text box, the default reason is *Report Administratively Closed*. However, you can enter your own text with a more detailed explanation.

### Include Report in Compliance Reporting

- If the report was an unassigned report and should be counted as an assigned report for compliance purposes, select the **Yes** radio button. In most cases, **No** would be selected and is the default.

**NOTE:** This option does not display when closing an assigned report. Also, an admin closed report is not reflected on any Management Reports in FDM.

- Click on **Confirm**. A message displays confirming that you wish to close this report.

- Click on **OK**. You return to the Notes page.

- On the Notes page, click on the **Back** button. You return to the Manage Exceptions page and the Filer's report is removed from that list. You can review this report by selecting My Reviews | Review Reports and click on the OrgUnit View mode link. This report will not display on the Report Worklist.

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Reports that Need Special Action

Search: My Roles: ALL, Year: 2008

Assigned	Filer	Org Unit	Supervisor	POC(s)	Year	Reporting Status	Exception Reason	Days in Review	Notes Description (partial)
Yes	Leaking, Rufus X	CERDEC ASD	Banger, Forrest	Calley, Carrie	2008	Incumbent	Open Notes		3/26/2009 by Turner, Paige - Need to speak to Filer about his report

View | Remove Assignment | Edit Review | Undo Submit To DAEO | eSign & Complete | Notes

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Submitted to DAEO - Rufus X. Leaking, 2008 Incumbent SF 278 Report

Notes

Start/Add More Notes | Cancel Changes | Save

Instructions: Use this page to make notes for follow-up action or other use as you review this report.

Notes: (Limit 10,000 characters)

3/26/2009 by Turner, Paige - Need to speak to Filer about his report

(9932 Characters Remaining of 10000)

Close Notes | Delete Notes | Admin Close

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Confirm Administratively Closing this Report

Please provide a reason for administratively closing this report.

Reason: (Limit 500 characters)

Report Administratively Closed: Filer has left service

(445 Characters Remaining of 500)

Should this be counted as an assigned report?

☐ Yes ☒ No

Confirm | Cancel

Windows Internet Explorer

Are you sure you want to administratively close this report?

OK | Cancel

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## Undo Admin Close

Once a report has been administratively closed, this action can be reversed by either going to the Review Status page or the Notes page as indicated above. On those pages, you can click on the **Undo Admin Close** button and the report will become active again. If there is a Combat Zone Extension or an open note attached to the report, it will display on the Manage Exceptions List. If not, the report will display on the Review Reports - Worklist and Org Unit View modes.