



FDM Management Reports provide administrative and legal FDM users a tool for monitoring the filing and reviewing progress of disclosure reports. You may also use the My Reviews | Review Reports tab to monitor report completion progress.

Disclosure Reports

Registered Filer Summary	Disclosure tab - Provides a summary of your current Filer's submission status by Form Type and Year. Use this report to track how many Filers for the current year have or have not submitted disclosure reports in FDM.
Disclosure Detail Report	Disclosure tab - Provides disclosure reporting and reviewing status detail by Org Unit, Form Type and Year. Use this report to track review progress of a disclosure report.
Filer's with No Disclosure Report	Disclosure tab - Lists any registered Filers who have not started a report, assigned or not assigned, by the specified year and report type. Use this report to track delinquent filers in FDM. Note: Some Filers shown on this list who have not been assigned a report are not delinquent (e.g., they filed a New Entrant in last 60 days of prior year and do not owe the Annual or Incumbent until 2010).

Administration Reports

ADMIN - Supervisors' Org Units	Administration tab - Lists Supervisors and the Org Units they are assigned to in FDM. Use this report to manage Supervisor to org unit associations. You should consider deleting an org unit if a Supervisor is listed for an org unit that has no Filers.
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Currently Overdue

Currently Overdue OGE 450 Annual Reports	Currently Overdue tab - The Currently Overdue report can be used by DDAEOS, Senior Legal Counsels and 450 Certifiers to view data about late annual reports for the current year. A report will display if it was assigned, has a Review Status of Not Started or draft, and the reporting due date already occurred.
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Review Metrics

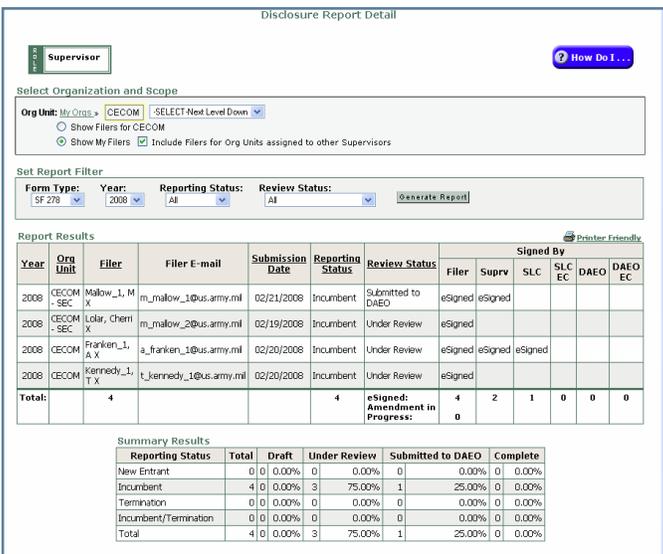
Review Progress Summary - Success Score for 450 Certifier	<p>Review Metrics Tab - Report Progress Summary – Success Score for 450 Certifiers shows 450 Certifiers how they are doing in reviewing reports within the Office of Government Ethics 60-day review rule. FDM displays for 450 Certifiers a summary table and a Success Score. The Report Progress Summary is available under Management Report Review Metrics.</p> <ul style="list-style-type: none"> - The FDM Success Score indicates how well an Ethics Official (i.e., 450 Certifier, SLC, or DAEO) is doing toward meeting the OGE 60-day report review standard. - A score of 1,000 indicates the Ethics Official has initially reviewed or completed all reports within 60 days of Filer's submission (eSign date). - The higher the Success Score the closer the Ethics Official is to achieving the OGE review standard on all reports. - The closer a score is to 0 the fewer reports being reviewed or completed within the OGE standard. <p>Note: The success score factors out reports that supervisors have not reviewed.</p> <p>Note: Report Notes created prior to Filer submission do not count as an initial review on the Review Progress Summary.</p>
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GENERATING A MANAGEMENT REPORT

1. Click **Management Reports** and then select the appropriate tab.
2. Click the Report title for the report you wish to generate.
3. Select the Org Unit of the filers whose disclosure filing or review status you wish to view.
4. Choose the appropriate view, **Show Filers for Org Unit, Show My Filers and Include Filers for Org Units assigned to other...**

Including/Excluding additional Org Units in your View

You can opt to include or exclude specific Org Units from your management report by selecting one of the "views" beneath the Org Unit Breadcrumb trail.



Show Filers for Org Unit...	Limits your report to disclosures for Filers in the currently selected Org Unit only.
Show My Filers	Lists the disclosure status for all of the Filers you are responsible for, in the selected Org Unit and any subordinate Org Units. For example, if you are responsible for 3 Org Units, CECOM and 2 subordinate Org Units, selecting Show My Filers lists the disclosure status for the Filers in your 3 Org Units.
Include Filers for Org Units assigned to other ...	Lists the disclosure status for all Filers in the Org Units you are responsible for and for the Org Units that are assigned to other FDM users with the same role. For example, if you are a Supervisor for 3 org units, selecting Include Filers lists the disclosure status for the Filers in your 3 Org Units plus the Org Units with different supervisors subordinate you.

5. Select the appropriate Report Filters to limit your report to a certain Form Type, Reporting Status, etc.

You can filter your Management Report in combination with sorting the column headings to change the information order.

6. Once you have made your filter selections, click **Generate Report**.

PRINTING A MANAGEMENT REPORT

1. Once you have generated your management report, click **Printer Friendly**.

Note: You can also copy the table and paste it in a Word document to give you the ability to add a column for notes.

2. Click **Print** to print your report at your local printer.

