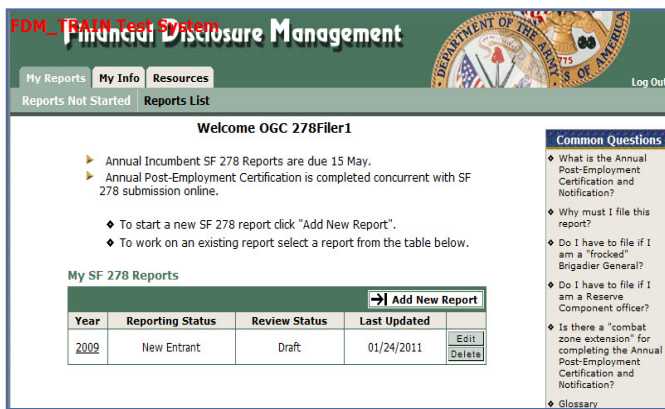


This guide covers the basic steps for filing, viewing and amending an OGE 278 report in FDM.

## ADDING AN 278 REPORT

- To create a new OGE 278 report, go to either:
  - The **Reports Not Started** tab, if you have been assigned a specific report to file in FDM and click **Start This Report**.
  - The **Reports List** tab, if you need to create a different report than the one assigned and click **Add New Report**.



## Getting Started

- Review the information on the page and then click **Continue**.

## Special Government Employee & Filer Category

- Select if you are or are not a Special Government Employee and your Filer Category and then click **Continue**.

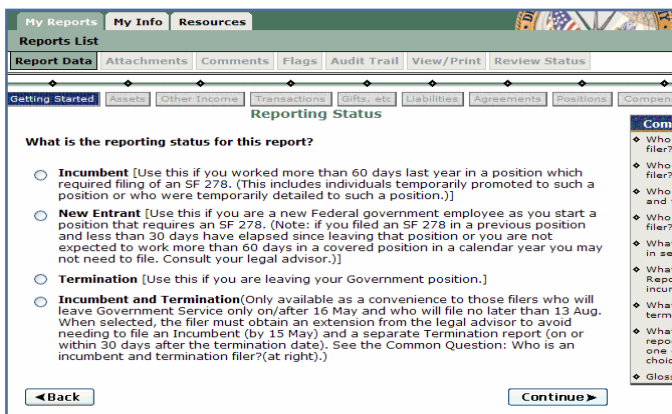
## Reporting Status

- Select the appropriate Report Status and click **Continue**.

The following screens vary depending upon the Reporting Status you selected.

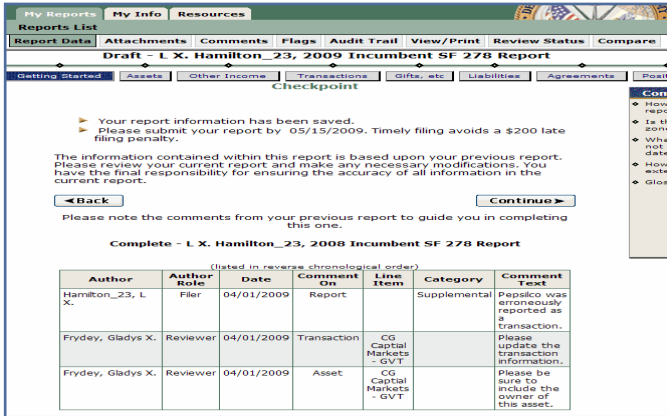
- Incumbent filers select a report to use to Pre-populate.
- New Entrant filers select if you are a Reserve Component.
- Termination filers fill enter your Termination Date.
- Incumbent and Termination filer enter your Termination Date.

The OGE 278 has four different report statuses:



<b>Incumbent</b>	Select <b>Incumbent</b> if you filed a report in the previous year and are still in the same position as when you filed your last disclosure report. An Incumbent report is due annually, no later than May 15th following the covered reporting calendar year.  Note: If you plan to leave your position before May 15th (the due date for the Incumbent), you probably should file a Termination instead of an Incumbent report. Please consult your legal advisor.
<b>New Entrant</b>	Select <b>New Entrant</b> if this is the first time you are filing a disclosure report or if you have over 30 days break in service between covered positions. The New Entrant report is due within 30 days of assuming the position.
<b>Termination</b>	Select <b>Termination</b> if you are leaving a covered position, which required you to file an OGE 278.

**Incumbent/Termination** Incumbent/Termination is available as a convenience to those filers who will leave Government Service only on/after 16 May and who will file no later than 13 Aug. When selected, the filer must obtain an extension from the legal advisor to avoid needing to file an Incumbent (by 15 May) and a separate Termination report (on or within 30 days after the termination date).



**Common Questions**

Common Questions contain relevant financial disclosure reporting questions and answers.

**Checkpoint**

- If you do not have any existing reports in FDM, the Checkpoint page displays a reminder message regarding the date this report is due. Review the information on the screen and then click **Continue**

**Pre-Populate Report**

FDM simplifies the maintenance of financial disclosure reports by allowing you to carry over any previously entered financial disclosure reporting information when creating new reports.

Note: You can only pre-populate from reports created after 12/2/2006 in FDM. Any reports created before this date, will not be available to be selected for pre-population.

- Select an existing report to pre-populate this report or select Don't Pre-populate and click **Continue**.
- Review the Due Date, Contact Information pages and click **Continue**. The report now has a draft Review Status.

**Position History**

You must list all covered positions held with the Federal Government during the applicable reporting period.

- Click **Add New Position** to add information about the position for which you are filing this disclosure report otherwise, click **Continue**.

**Attaching a Job Description**

- Click **Add Job Description** to upload a Job Description.

**Report Data**

Information in the Report Data sections relates to the Filer, spouse and dependent children. You must click through all sections of the OGE 278 being sure to select **No** even if you do not have any information to disclose for that section.

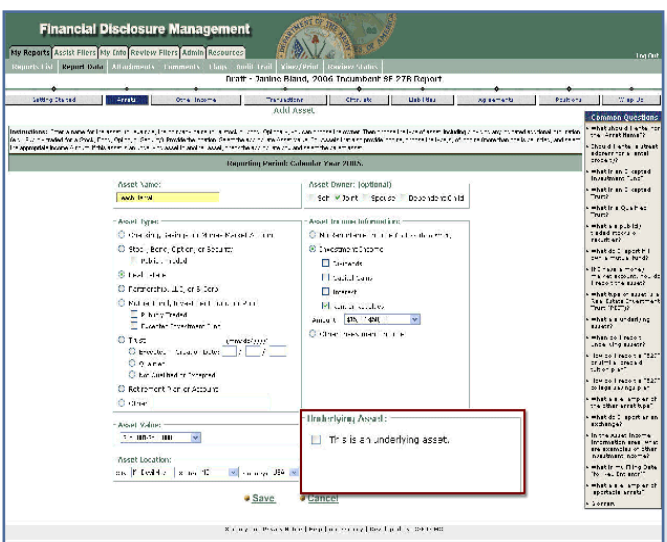
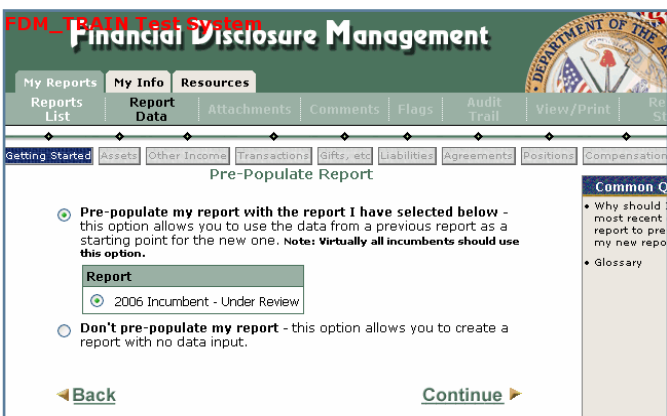
The process for entering report data is the same no matter what type of information you need to report.

**Assets**

- Select **Yes**, and then click **Continue**.
- Type the appropriate asset information and then click **Save**.

**Underlying Assets**

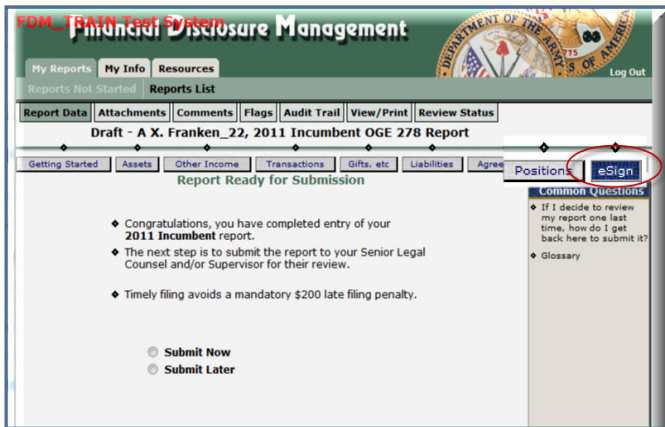
Some assets are collections of other assets that must also be reported. FDM's "underlying asset" feature/tool allows you to keep those assets together for reporting purposes.



Be sure to click **Add Underlying Asset** beside the appropriate asset on the Assets page or be sure **"This is an Underlying Asset"** is selected on the Add Asset page.

FDM has a report progress bar that is customized to the type of report you are preparing. The progress bar tabs correspond to the appropriate sections of the OGE 278.

- Other Income
- Transactions- New Entrant and Nominee filers do not have to complete the Transaction section of the OGE 278 disclosure report.
- Gifts - New Entrant filers do not have to complete the Gifts section of the OGE 278 disclosure report.
- Liabilities
- Agreements
- Positions
- Compensation - Only New Entrant and Nominee filers must complete the Compensation section of the OGE 278 disclosure report.

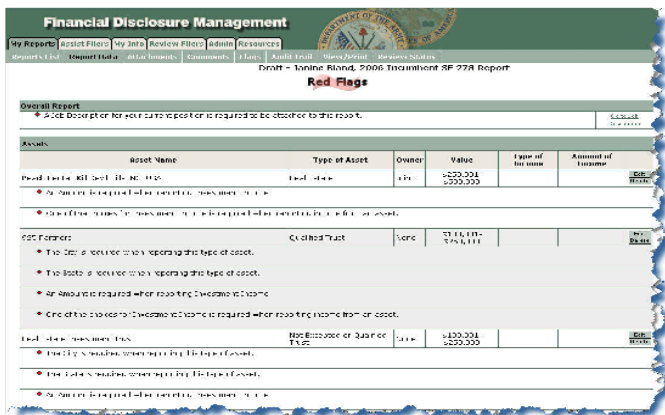


**eSign**

The Report Ready for Submission page alerts you of any incomplete or missing information.

Review your report flags and correct any errors before submitting your report. A red flag indicates required information is missing and that it should be provided before the report is submitted. A yellow flag indicates that information is missing but is not required in order to submit your report. Contact your legal advisor if you have flags and have questions about appropriate action or need to submit the report with the flags unresolved.

OGE 278 Filers can submit the report with the errors if you must meet a deadline.



**Reviewing Flags**

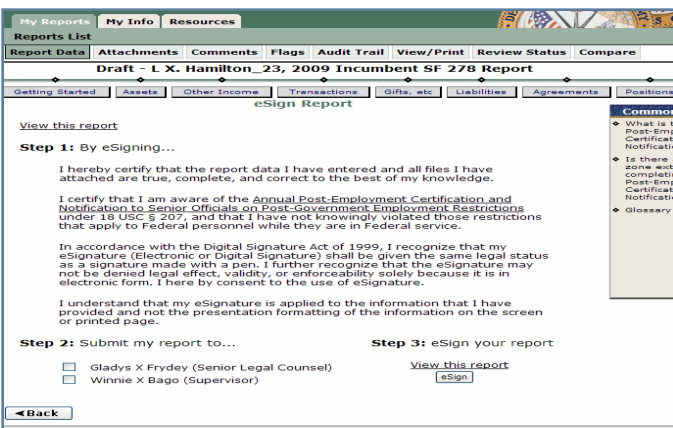
12. Select **Review My Flags** and click **Continue**.
  13. Click **Edit** beside any flagged area to adjust that entry.
  14. When complete, click **eSign**.
- Report Ready for Submission**
15. On the Report Ready for Submission page, select **Submit Now** to submit your report for review to your SLC and Supervisor.
  16. Click **Continue**.

Note: You can also opt to select **Submit Later** if you cannot complete your report at this time.

**eSigning an OGE 278**

16. Before eSigning your report, review the certification information regarding the DoD Joint Ethics Regulation requirement to acknowledge the annual post-employment certification and notification about post-Government Employment restrictions.
17. Select the reviewer(s) who will review your report and then click **eSign**. If the names of your legal advisor or Supervisor are incorrect, please contact your legal advisor before eSigning.

Note: Click **View this Report** to view and print your report prior to submission.



When you eSign, an e-mail message is sent to your selected reviewers indicating that your report is awaiting their review.

## VIEW/PRINT YOUR REPORT

At any time, you can view and print your financial disclosure report.

1. On the **My Reports | Reports List** page, select the appropriate report.
2. Click the **View/Print** tab and then click **View/Print** again. The disclosure report displays in a separate browser window.

### Printing a Report

3. Select **File | Print** and then click **Print**.

**SCHEDULE A**  
Reporting Individual's Name: 0001\_20, L X  
Page Number: 2 of 6

**BLOCK A: Assets and Income**  
BLOCK B: Valuation of Assets at close of reporting period  
BLOCK C: Income type and amount

Asset Description	Value	Income Type	Amount
1. 1011 Madison Ave. 10th Floor, New York, NY 10017	\$1,000,000	Rental Income	\$10,000
2. 1011 Madison Ave. 10th Floor, New York, NY 10017	\$1,000,000	Rental Income	\$10,000
3. 1011 Madison Ave. 10th Floor, New York, NY 10017	\$1,000,000	Rental Income	\$10,000
4. 1011 Madison Ave. 10th Floor, New York, NY 10017	\$1,000,000	Rental Income	\$10,000

## COMPARING REPORTS

You can easily compare changes/differences between last year's report and this year's on one page. The Compare feature is only available if the Filer pre-populated from a previous report.

1. Click **Compare**.
2. Review the report changes.
3. Click **Report Data** and then **eSign** to eSign your report.

**Disclosure Report Comparison**  
Compare-to Report: Complete 2007 Incumbent  
Comparison Date: March 03, 2008 14:46:27

Change Summary	Changed	Added	Deleted	Unchanged
Assets	2	1	2	2
Income	0	1	1	1
Liabilities	0	1	0	0
Agreements	0	0	0	1
Positions	0	1	0	1

## AMENDING A REPORT

Amending a report voids your last digital signature on the OGE 278 report. You must digitally sign the OGE 278 report again once your amendments are complete. FDM notifies all the reviewers who completed an initial review of your report prior to this amendment informing them that your OGE 278 report has changed since it was last submitted.

As with drafting or editing your OGE 278 report, you must go to eSign to complete the amendment process. You must Re-certify your changes and re-sign your report.

1. On the Reports List Page, click **Amend** beside the appropriate OGE 278 report.
2. Make the appropriate additions/corrections.
3. When complete, click **eSign**.
4. Submit and eSign your report.

**My SF 278 Reports**

Year	Reporting Status	Review Status	Last Updated	Amend
2007	Incumbent	Under Review	03/02/2007	View

Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC



## ADDING REPORT COMMENTS

Comments can be added to specific line items or to the OGE 278 report itself as substantive or non-substantive comments. Comments (and attachments) can also be added to a report after the report is complete (see next section).

### Adding a Line Item Comment

1. Click **Add a Comment** beside the appropriate line item you added. The Add Comment page is displayed
2. Type the appropriate information and click **Save**.

### Adding a Report Comment

1. Click **Comments** in the My Reports submenu. The Comments page displays.
2. Click **Add Report Comment**.
3. Type the appropriate information and click **Save**.

## Supplemental Report Comments and Attachments

At times, reviewers may request OGE 450 filers to provide additional report information even after the report review is complete (e.g. a disqualification, an ethics agreement.) Consult your ethics counselor for assistance before using this feature.

In FDM, Filers and their assistants can add this supplemental information through report comments and report attachments once the report is complete.

1. On the Reports List Page, click **View** beside the appropriate OGE 278 completed report.

You can add either additional report comments or attachments to your completed report.

### Supplemental Report Comments

2. Click the Comments sub-tab and then click **Add Report Comment**.
3. Type your comment and then click **Save**.

At this point you can edit the comment you just added or add any additional report comments. Report comments cannot be deleted.

### Supplemental Report Attachments

1. Click the **Attachments** sub-tab and then click **Add Attachment**.
2. Select the **Attachment Type** and then type a brief description of your file in the **Notes** field.
3. Click **Browse** to locate the file you wish to upload to your financial disclosure report.
4. Once you have found the file, click **Upload**.

At this point you can Replace and/or Delete any existing attachments or add a new attachment.

My Reports My Info Resources

Reports List

Report Data Attachments Comments Flags Audit Trail View/Print Review Status Compare

Draft - L X. Hamilton\_23, 2009 Incumbent SF 278 Report

Add Comment

Comment on Report (Limit 500 characters)

Date: 04/01/2009 Author: L X. Hamilton\_23

(500 Characters Remaining of 500)

Save Cancel

My Reports My Info Resources Log Out

Reports List

Report Data Attachments Comments Flags Audit Trail View/Print Review Status

Complete - L X. Hamilton\_23, 2008 Incumbent SF 278 Report

Comments

(listed in reverse chronological order)

Author	Author Role	Date	Comment On	Line Item	Category	Comment Text
Hamilton_23, L X.	Filer	04/01/2009	Report		Supplemental	Papsico was erroneously reported as a transaction. <a href="#">Edit Comment</a>
Frydey, Gladys X.	Reviewer	04/01/2009	Transaction	CG Capital Markets - GVT		Please update the transaction information. <a href="#">View Transaction</a>
Frydey, Gladys X.	Reviewer	04/01/2009	Asset	CG Capital Markets - GVT		Please be sure to include the owner of this asset. <a href="#">View Asset</a>

[Add Report Comment](#)

**Common Questions**

- Who is a DAEO (Designated Agency Ethics Official)?
- Who is an SLC (Senior Legal Counsel)?
- Who is an EC (Ethics Counselor)?
- What is the difference between a comment on a Report and a comment on a line item?
- What is the SF 278 of Record?
- Glossary

My Reports My Info Resources Log Out

Reports List

Report Data Attachments Comments Flags Audit Trail View/Print Review Status

Complete - L X. Hamilton\_23, 2008 Incumbent SF 278 Report

Attachments

Date Attached	Originator	Type	Name	Category	Notes
04/01/2009	Hamilton_23, L X.	Job Description	FDM_JOB_DESCRIPTION.doc		

[Add Attachment](#)