Key Features - Reviewers

This guide will give you a brief overview of some of the main features and components of the Financial Disclosure Management (FDM) system. Separate Quick Reference Cards will give you a more in depth, step-by-step look at the various processes contained within FDM.

The functions of the FDM System are personalized to your FDM role giving you instant access to relevant data. All FDM functions are organized into separate tab categories. Each tab contains one or more associated function. FDM has five main tabs.

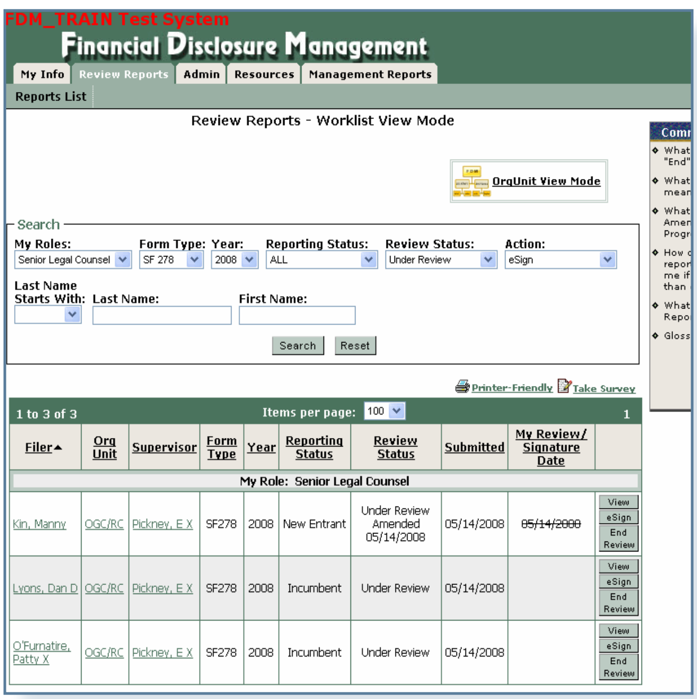
My Reports - Main work area for Filers where they can create and manage their disclosure reports.

My Info - You can manage your contact preferences, specify Ethics Counselors and Assistants (not available to Supervisors), manage Filers and their activities.

Review Reports - The main FDM Reviewer work area featuring the Reports list.

Admin - Where you can set up Filer organizations and their associated review chain participants.

Management Reports - Provides administrative and legal FDM users tools for monitoring the filing and reviewing progress of disclosure reports.



Review Reports

The default page for reviewers is the Review Reports | Reports List page. FDM has two Report's List views: Worklist and Org Unit.

Report's Worklist

Use the Worklist as a reminder of the reviewing activities you need to complete. You can filter your Worklist in combination with sorting the column headings to organize your disclosure review quickly and efficiently.

Report's Org Unit View

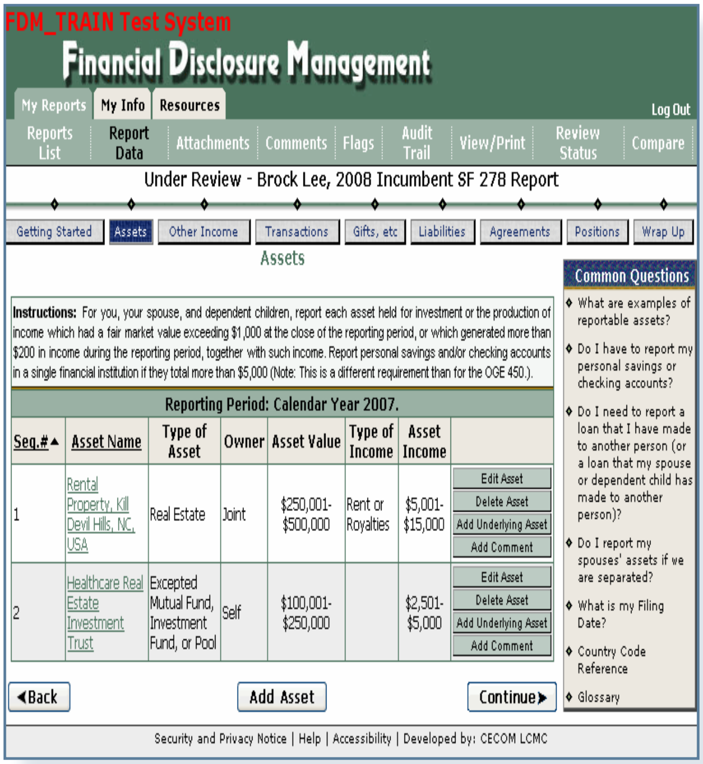
Use the Org Unit view to list reports by Filer Org Unit.

List Disclosures that you need to eSign

1. In the Search area on the Report's Worklist page, select the following and click **Search.**
   - ROLE - Supervisor, 450 Certifier, Senior Legal Counsel or DAEO
   - FORM TYPE - OGE 450 or SF 278
   - YEAR - The current year
   - REPORTING STATUS- All
   - REVIEW STATUS - Under Review
   - ACTION - eSign

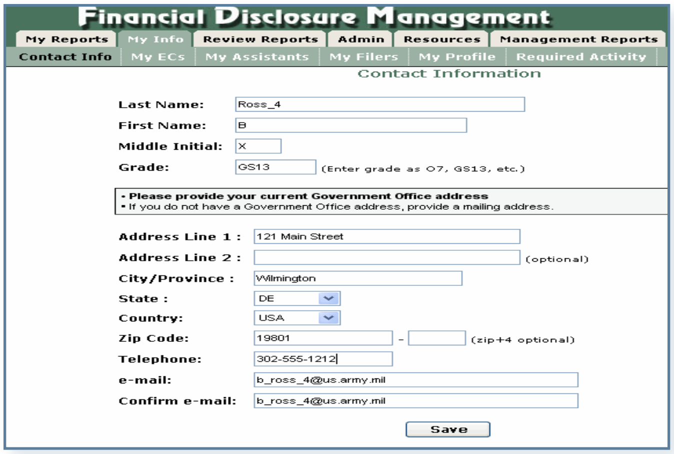
Report Data

Report Data is the main area used for preparing and reviewing a financial disclosure report. Reviewers and their Assistants or Ethics Counselors can access Report Data by clicking **View** beside a financial disclosure report on the Reports List page.



Other useful Report pages are:

Attachments	Within Attachments, a Filer can add, replace or delete attachments and Reviewers can view any associated attachments.
Comments	Within Comments, Filers and Reviewers can record their comments on a financial disclosure report. Filers can edit comments if the financial disclosure report has a draft status. Once a financial disclosure report has been submitted, comments can only be amended.
Flags	Within Flags, Filers and Reviewers can review any financial disclosure report flags, to note any missing or invalid information.
Audit Trail	The Audit Trail tracks and time stamps all changes made to the report.
View/Print	Within View/Print, a Filer or Reviewer can view and print a financial disclosure report, flags, comments, job description.
Review Status	Review Status page shows the progress of a financial disclosure report, which includes signing status, a list of assigned reviewers and their role as well as their review and signature date.
Compare	Reviewers can easily compare changes/ differences between last year's report and this year's on one page if the Filer pre-populated from a previous report.
Previous Reports	FDM reviewers (i.e., supplemental or additional) can request a copy of a Filer's previous report for comparison. E-mail requests are automatically sent to the Filer's current organizational legal reviewers. Note: You can also view a Filer's previous reports by clicking Reports List. Select all in the Search Filter and then click Search.

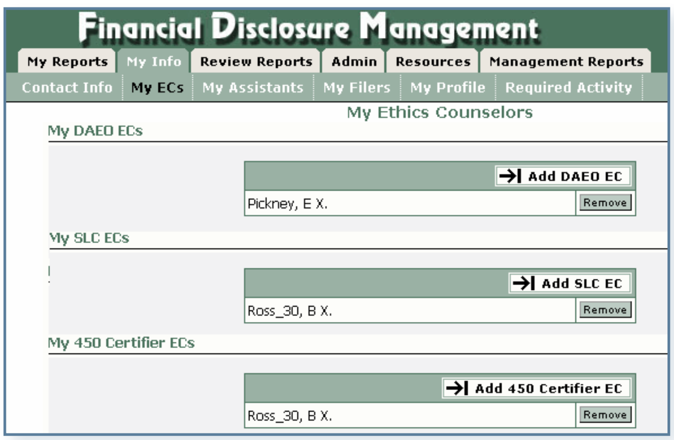


My Info

The My Info tab provides you access to manage your contact preferences, specify Ethics Counselors and Assistants (not available to Supervisors), manage Filers and their activities, and view your FDM roles and related org units.

Contact Information

The Contact Information page contains your personal contact information, such as e-mail address, phone and mailing address. Information on this page can be updated and saved at any time. This page displays the first time a FDM user logs into the system for editing and/or verification.



My ECs

Use the my ECs page to appoint an Ethics Counselor(s) to assist you in reviewing and/or eSigning disclosure reports in FDM. You may appoint one or more ECs in FDM depending on your legal office workflow. Ethics Counselor's can perform the same functions as the FDM reviewer they assist.

Note: This tab is not available to Supervisors.

My Assistants

Use the My Assistants page to appoint an assistant to help monitor disclosure reports in FDM. FDM reviewer Assistants are generally paralegals appointed by a Senior Legal Counsel in the system. Reviewer assistants can perform the same functions as the FDM reviewer they assist with the exception of eSigning a report.

Note: This tab is not available to Supervisors.