

Financial Disclosure Management

7.0.2.6 Release Notes

May 2016

Introduction

Previous Release Notes are posted on the FDM website at the following link:
<https://www.fdm.army.mil/helpSupport/releaseNotes.htm>.

Release 7.0.2.6 implements these enhancements:

- [Liabilities Instructions & Common Questions Updates](#)
- [Add/Edit Other Earned Income instruction updates](#)

Liabilities

Liabilities Instruction Update

The following instructions have been added to the Liabilities page to match the OGE instructions:

“Additional Requirement for General/Flag Officers and Presidentially Appointed, Senate Confirmed (PAS) Officials: You must report a mortgage or home equity loan secured by your personal residence as you would a mortgage on any other property.”

Figure 1. Liabilities

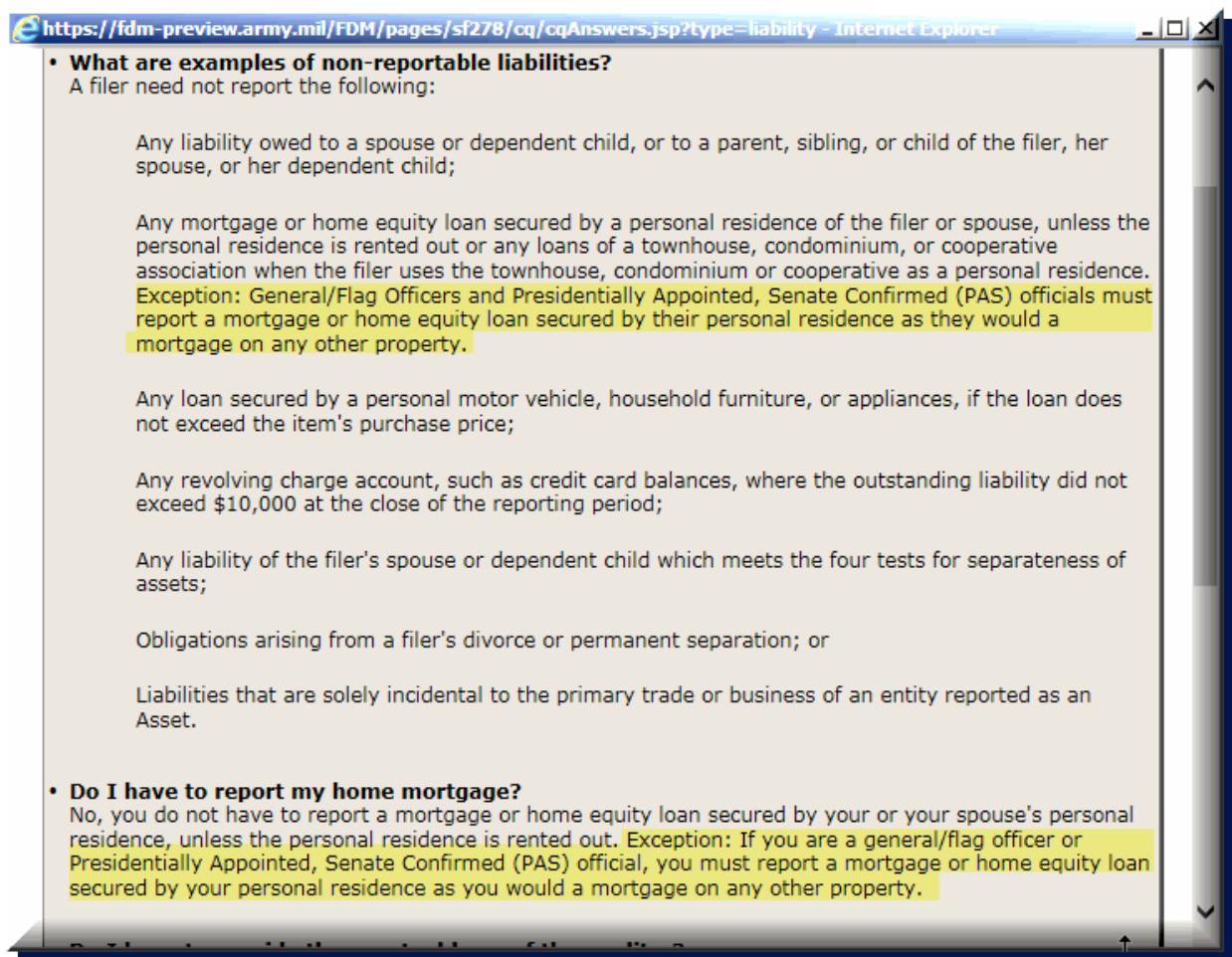
The screenshot displays the 'Liabilities' section of the FDM application. At the top, there is a navigation bar with tabs for 'My Reports', 'My Info', and 'Resources'. Below this is a sub-navigation bar with 'Reports Not Started' and 'Reports List'. A main navigation bar contains buttons for 'Report Data', 'Attachments', 'Comments', 'Flags', 'Audit Trail', 'View/Print', and 'Review Status'. The current page title is 'Draft - Phil Harmonic, 2016 Incumbent OGE 278 Report'. A progress bar shows steps: 'Getting Started', 'Assets', 'Income', 'Transactions', 'Gifts, etc', 'Liabilities' (highlighted), 'Agreements', 'Positions', and 'eSign'. The main content area is titled 'Liabilities' and contains an instruction box with the following text: 'Instruction: For you, your spouse or dependent children, report any liability over \$10,000 owed to any one creditor at any time during the reporting period. Exclude: the mortgage on your personal residence unless it is rented out; loans secured by automobiles, household furniture or appliances; and liabilities owed to certain relatives. Additional Requirement for General/Flag Officers and Presidentially Appointed, Senate Confirmed (PAS) Officials: You must report a mortgage or home equity loan secured by your personal residence as you would a mortgage on any other property. See Common Questions for information on revolving charge accounts and liabilities owed to certain relatives.' Below the instruction is a green box stating 'Reporting Period: Calendar Year 2015.' The main question is: 'During the reporting period, did you, your spouse, or dependent children have any reportable liabilities?' with radio buttons for 'Yes' and 'No'. At the bottom left is a '< Back' button and at the bottom right is a 'Continue >' button. On the right side, there is a 'Common Questions' sidebar with a list of questions: 'What are examples of reportable liabilities?', 'What liabilities are not reportable?', 'Do I need to report a loan that I have made to another person (or a loan that my spouse or dependent child has made to another person)?', 'Do I have to report credit card debt/revolving charge accounts?', 'What is my Filing Date?', 'Country Code Reference', 'OGE Form 278e Guide', and 'Glossary'.

Liabilities Common Questions Update

The following Common Questions have been added to the Add/Edit Liabilities page to match the OGE instructions:

- **What are examples of non-reportable liabilities?** “*Exception: General/Flag Officers and Presidentially Appointed, Senate Confirmed (PAS) officials must report a mortgage or home equity loan secured by their personal residence as they would a mortgage on any other property.*”
- **Do I have to report my home mortgage?** “*Exception: If you are a general/flag officer or Presidentially Appointed, Senate Confirmed (PAS) official, you must report a mortgage or home equity loan secured by your personal residence as you would a mortgage on any other property.*”

Figure 2. Add/Edit Liabilities Common Questions



Other Earned Non-Investment Income

The instructions on the Add/Edit Other Earned Non-Investment Income page have been updated to:

“The filer will only check “Yes” if the earned or non-investment income of the filer is more than \$200. For the filer’s spouse, only report if the earned or non-investment income of the filer is more than \$1000, except if the filer’s spouse received honoraria from a single source aggregating to more than \$200 during the reporting period. The income amount is not required for the filer’s spouse. Do NOT report assets or income related to US Government employment, such as Federal salary, military retirement, or the Thrift Saving Plan (TSP).”

Figure 3. Add/Edit Other Earned or Non-Investment Income

The screenshot shows the 'Draft - Phil Harmonic, 2016 Incumbent OGE 278 Report' interface. The 'Income' tab is selected in the navigation bar. The main content area is titled 'Add Other Earned or Non-Investment Income'. It includes a yellow instruction box with the text: 'Instructions: The filer will only check "Yes" if the earned or non-investment income of the filer is more than \$200. For the filer's spouse, only report if the earned or non-investment income of the filer is more than \$1000, except if the filer's spouse received honoraria from a single source aggregating to more than \$200 during the reporting period. The income amount is not required for the filer's spouse. Do NOT report assets or income related to US Government employment, such as Federal salary, military retirement, or the Thrift Savings Plan (TSP).'. Below this, the 'Reporting Period: Calendar Year 2015.' is displayed. The form contains several sections: 'Income Name:' with a text input field; 'Is This Income Employment Related?' with radio buttons for 'Yes' (selected) and 'No'; 'Income Owner:' with radio buttons for 'Self' and 'Spouse'; 'Type of Income:' with radio buttons for 'Salary (other than Federal Government)', 'Fees', 'Commissions', and 'Income from personal services'; and 'Amount of Income:' with a text input field for 'Actual Amount: \$' and a '(Ex: 2500)' label. A 'Common Questions' sidebar is visible on the right side of the form.

Defects & Changes

The following updates were made in the 7.0.2.6 release of FDM.

SCR 1027 – The wording “not principal residence unless rented” has been removed from the Mortgage Type selection area

SCR 1026 - The View or Print your report link on the OGE 278 Submit Confirm page now displays the correct 278e report format.