

Financial Disclosure Management

8.0.2.2 Release Notes

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Introduction

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

Release 8.0.2.2 implements these enhancements:

8.0.2.2 Enhancements

Asset Name Sorting

Asset Name Sorting

Asset List page can now be sorted alphabetically by asset name. Underlying assets sort in alphabetical order directly under the parent asset

Figure 1. Asset Line Item Page – Sequence Sort (Default)

Assets							
Add Asset							
Reporting Period: Calendar Year 2016.							
1 to 13 of 13		Items per page: <input type="text" value="100"/>					1
<p>Instructions: For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income. Report personal savings and/or checking accounts in a single financial institution if they total more than \$5,000 (Note: This is a different requirement than for the OGE 450.)</p>							
Seq.#▲	Asset Name	EIF	Owner	Asset Value	Employment Related	Asset Income	
1	JP Morgan SmartRetirement Income Fund (JSRAX)	Y	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment
1.1	JPMORGAN Core Bond R6 JCBUX (underlying asset of 1)	N/A	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment
1.2	JPMORGAN Disciplined Equity R6 JDEUX (underlying asset of 1)	N/A	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment
1.3	JPMORGAN Corporate Bond R6 (underlying asset of 1)	N/A	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment
1.4	JPMorgan International Equity R6 (underlying asset of 1)	N/A	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment
2	Janus Venture Fund (JVTAX)	Y	Self	\$15,001-\$50,000	No	\$1,001-\$2,500	Edit Asset Delete Asset Add Underlying Asset Add Comment
2.1	Broadridge Financial Solutions Inc BR (underlying asset of 2)	N/A	Self	\$15,001-\$50,000	No	\$1,001-\$2,500	Edit Asset Delete Asset Add Underlying Asset Add Comment
2.2	Cadene Design Systems Inc. (underlying asset of 2)	N/A	Self	\$250,001-\$500,000	No	No Income (or less than \$201)	Edit Asset Delete Asset Add Underlying Asset Add Comment

Figure 2. Asset Line Item Page – Alphabetical Sort

Add Asset

Reporting Period: Calendar Year 2016.

1 to 13 of 13 **Items per page:** 100 1

Instructions: For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income. Report personal savings and/or checking accounts in a single financial institution if they total more than \$5,000 (Note: This is a different requirement than for the OGE 450.).

Seq.#	Asset Name ▲	EIF	Owner	Asset Value	Employment Related	Asset Income	
5	<u>AAPL: Apple Inc. (NASDAQ)</u>	N/A	Self	\$1,001-\$15,000	Yes	\$1,001-\$2,500	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
6	<u>Anheuser-Busch InBev</u>	N/A	Self	\$1,001-\$15,000	No	\$201-\$1,000	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
2	<u>Janus Venture Fund (JVTAX)</u>	Y	Self	\$15,001-\$50,000	No	\$1,001-\$2,500	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
2.1	<u>Broadride Financial Solutions Inc BR (underlying asset of 2)</u>	N/A	Self	\$15,001-\$50,000	No	\$1,001-\$2,500	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
2.2	<u>Cadene Design Systems Inc. (underlying asset of 2)</u>	N/A	Self	\$250,001-\$500,000	No	No Income (or less than \$201)	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
2.3	<u>ServiceMaster Global Holdings Inc. SERV (underlying asset of 2)</u>	N/A	Self	\$250,001-\$500,000	No	\$2,501-\$5,000	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
1	<u>JP Morgan SmartRetirement Income Fund (JSRAX)</u>	Y	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>
1.1	<u>JPMORGAN Core Bond R6 JCBUX (underlying asset of 1)</u>	N/A	Spouse	\$250,001-\$500,000	Yes	No Income (or less than \$201)	<input type="button" value="Edit Asset"/> <input type="button" value="Delete Asset"/> <input type="button" value="Add Underlying Asset"/> <input type="button" value="Add Comment"/>

Common Questions

- ◆ What are example reportable assets?
- ◆ Do I have to report personal savings checking account?
- ◆ Do I need to report that I have made another person (that my spouse or dependent child) to another person?
- ◆ Do I report my sp assets if we are separated?
- ◆ What is my Filing?
- ◆ Country Code Re
- ◆ OGE Form 278e C
- ◆ Glossary

Defects & Changes

FDM 1221 – The Expired Reports tab now displays the expired report list, allowing expired reports to be purged from FDM.

FDM 1486 – Allows the removal of 278-filer role for “Dual Hatted Filers”.

FDM 1446 – The Due Date Acknowledgement pop up no longer displays for Reviewers when reviewing a report.

FDM 1591- Removed an erroneous “Notified to File Date” error message when SGE is selected.

FDM 1706 –Updates the link to the OGE 278e Common Question link to a blank OGE Form, now points to the correct form.

AGEAR 73 – Expands text limits in the AGEAR text boxes to 1500 characters and adds a counter for the number of characters.

AGEAR 96 – Removes the extra text in the AGEAR Opinion Template.