Financial Disclosure Management

Release 8.4.1.4

November 20, 2019

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Introduction

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

8.4.1.4 ENHANCEMENTS

Defects and Changes

Enhancements

NOTIFICATIONS

Notifications replace the Remind Filers and Remind Supervisors feature. Use the Notification tool to identify, monitor and send notifications to users who have not completed a filing or reviewing action. You can also now send bulk notifications to a group of FDM users at the same time.

Reminder Notifications

Use the Remind Filter to identify filers, supervisors and SLCs who have not completed a filing or reviewing process and send them reminder to complete the action.

The following reminder options are available:

Filers

- Initial Notification Initial notification is only for those Filers who have been assigned a current year report. Use this option to locate Filers who are assigned an Annual Report and send a notification to remind them of their annual requirement to file.
- Not Started Use this option to locate Filers who have not started their report.
- Not Submitted Use this option to locate Filers who have not eSigned their report.
- Late Use this option to locate Filers who are delinquent in eSigning their report.

Supervisor or SLC

- Not eSigned Use this option to locate Supervisors or SLCs who have not eSigned a submitted report.
- **Note**: When sending reminder notifications, you can opt to send a summary email to any associated POCs and Supervisors.

Bulk Notifications

You can also send a group of users with the same role a notification.

Filtering and sorting

Filtering and sorting allows you to quickly view and group the information you are viewing by specific criteria. The Notifications Search filters have been redesigned to improve search results and make it easier to find what you are looking for.

Set your filters to specify the users you wish to display.

You can sort the Notifications list by E-mail, Name, Org Unit, Report Status, Review Status and Supervisor.

Filter Name	Filter Options	Description
Mode (REQUIRED)	Show AllShow My	Show My limits your search result to information for which you are responsible.
		Show All allows you to view all of the relevant information for the org units assigned to you and other FDM uses with the same role.
Form Type (REQUIRED)	• OGE 450 • OGE 278	Limits your list of results to either OGE 278 of OGE 450 reports.
Add Filter: Reminder (OPTIONAL)	 Initial Notification Not Started Not Submitted Late Not eSigned 	Limits your list of results to users who have not completed the selected Remind filter action.

Sending Notifications

1. Go to the **Notifications** tab and select the specific group of the users whom you wish to notify.

Figure 1: Notifications Filters

450 Certifi	er Change 🗸	Notifications	?
击 Org Tre	e M	y Orgs » Confidential Filers »	
Search	Q Fi	ilers Supervisors POCs 450 Certifiers	
+ Confident	ial Filers Fil	Iter(s): Mode: Show All Form Type: OGE 450 Reminder: Initial Notification X Not Started Security and Privacy Notice Help Accessibility ow Late	Apply Filters

2. Select the appropriate filters and click **Apply Filters**.

Figure 2: Notifications List

450 Certifier Change -			N	otifications			
🔒 Org Tree	Му	Orgs » Confidential Filers »	Central North »				
Search Q - Confidential Filers	File	rs Supervisors POCs 450	Certifiers				Export +
Control North Central North 1 Central North 2		er(s): Mode: Show All Form	Type: OGE 450 Remine	ler: Not Submitted	×		Notify Selecter
Central North 3 Central North 4	ব		Name	Assigning Org	Report Status	Review Status	
Central North 5	3	thomas.a.berens.ctr@mail.mil	FilerAsst, 450 1444 G	Central North	2015 Annual OGE 450	Draft	Tuesday, Ruby
 North East Region North East 1 	ভ	G.Fryday@FDMSandbox.com	Fryday, Gladys X	Central North	2018 New Entrant OGE 450	Draft	Tuesday, Ruby
North East 2	ভ	W.Knight@FDMSandbox.com	Knight, Wednesday X	Central North	2015 Annual OGE 450	Draft	Tuesday, Ruby
North East 3	ভ	stanley.a.kupp@us.army.mil	Kupp, Stanley	Central North	2019 New Entrant OGE 450	Draft	Tuesday, Ruby
North East 4 North East 5	ব	S.Sea@us.army.mil	Sea, Stormy X	Central North	2018 New Entrant OGE 450	Draft	Tuesday, Ruby
- South East Region	J	S.Sea@us.army.mil	Sea, Stormy X	Central North	2015 Annual OGE 450	Draft	Tuesday, Ruby
 Florida Only South East 1 	Show	ving 1 to 6 of 6 entries 6 rows s	elected				1
South East 2 South East 3 South East 4 South East 5							Notify Selecte
 West Coast West Coast 1 West Coast 2 West Coast 3 West Coast 4 West Coast 5 							

Note: You can deselect any of the users listed whom you do not wish to send a notification.

3. Review your list to be sure you have the appropriate users are selected and then click **Notify Selected**.

Figure 3: Notification Message

y Reviews My Expired Reports	dmin Ce	enter Ethics Tr	(*) Remind
tifications Remind Filers Rem	ind Sup	pervisors	۲	Remind 58 Filer(s) ^
Review the sample r and add any addition # DLA 1 # DLA 2 Filt	er(s):	ge ±450 ext. Poo Mode: Show All		FDM Reminder - Please start your OGE 450. due [Current Due Date] [Filer Firstname Middle Lastname] : It is time to file your OGE 278 in FDM. 1. Go to FDM - URL: https://158.9.48.172 and click on "Log In". Choose to log in with your PIV/CAC or with Username/Password. 2. You should land on the My Reports / Report SNOt Started page if a report has been assigned (otherwise as a Filer you will be on the My Reports Report List page). 3. Click the Start this Report button beside the report. FDM's report wizard will guide you in entering your information. 4. When your report is complete, click the e-Sign button to sign and submit your report. Please consult your legal advisor if you have questions about this requirement to file a Financial Disclosure Report, or need an extension. Also, consult your legal advisor if you do not think you should file such a report.
	10w 20	• • entries		Please do not send replies to this address as it is unmonitored. If you have questions please email
S	\$	E-mail		mailto:usarmy.APG.cecom.mbx.FDMSpt@mail.mil or you may also call us at 443-861-8679 or DSN 848- 8679
ଔ	0 <u>ha</u>	ans.e.downe@us		Additional information can be found on the Help & Support page at: https://158.9.48.172/helpSupport/helpSupport.htm
Ś	0 <u>ha</u>	ans.e.downe@us		Optional Text
ଔ	0 <u>ha</u>	ans.e.downe@us		
ď	0 <u>ha</u>	ans.e.downe@us		
ଔ	0 jo	e.palrang@us.ar		(2500 Characters Remaining of 2500)
3	0 jo	e.palrang@us.ar		Regards, 450C 11 DLA
ď	0 jo	e.palrang@us.ar		asdm.sec@us.army.mil 732-555-0023
đ	0 jo	e.palrang@us.ar		
đ	0 <u>a</u>	dam.b.baum@us	۲	Send Summarized Reminder to 3 Poc(s)
3	0 <u>a</u>	dam.b.baum@us		Sand Summarized Dominder to 0 Supervisor(s)
3		dam.b.baum@us		Send Summarized Reminder to 8 Supervisor(s) *
9				SEND

4. If you elected to send a reminder notification, add any additional text to the templated message. If you elected to send a Bulk message, enter your text into the appropriate field and then click **Send**.

FDM Notification History

You can now see which notifications you received and which notifications you sent in your Profile History.

Figure 4: Notification History

CD Confidential X DAEO Member since 2016	Notifications Sent
Profile	
Assistants	
ECs	
Roles	
Notifications	
	Track notifications sent through FDM
	Notifications Received

BLANK REPORTS – REPORTS THAT DO NOT CONTAIN ANY LINE ITEMS

On the My Reviews | Review Reports page in Worklist View, users can now filter the Worklist to list only reports which do not contain any report line items.

Figure 5: Worklist with Blank Reports

				Rev	iew Report	ts - Worklist Viev	w Mode			Unit View Mode	Common Question
My Roles: 450 Certifier Last Name Starts With: V		orm Type: DGE 450 V	Year:		ne:	arch Reset		Action: ALL	🔽 🗹 Blank Rep	vort(s)	mean? • What does "Amendme in Progress" mean? • How do I see the repo assigned to me if I ha more than one role in FDM? • What does "Complete" report status mean?
											 OGE Form 450e Guide Glossary
L to 2 of 2					Items	5 per page: 100 V			4	Printer-Friendly	
l to 2 of 2 <u>Filer</u>	<u>Org Unit</u>	Supervisor	<u>Form</u> <u>Туре</u>	Year	Items <u>Reporting</u> <u>Status</u>	; per page: 100 ∨ <u>Review Status</u>	<u>Days In</u> <u>Review</u>	Initial Review Days▼	<u>My Review/</u> Signature Date		
<u>Filer</u>		Supervisor		Year	Reporting				My Review/		
<u>Filer</u> 1y Role: 450 C		Supervisor	Туре		Reporting				My Review/		
	Confidential Filers		Type OGE 450	2018	Reporting <u>Status</u>	Review Status	Review	<u>Days</u> ▼	<u>My Review/</u> Signature Date	1 View Remove Assignment eSign &	

To view a list of reports which do not contain any line items:

- 1. Go to My Reviews | Review Reports.
- 2. Select the appropriate criteria and click the check box that says **Blank Reports**.
- 3. Click **Search**. A list of reports which do not contain any report line items is displayed.

Note: The Blank Reports filter option is available in Worklist View Mode only.

DELETE DRAFT REPORTS WHEN FILER ROLE REMOVED

Draft reports are now eligible for deletion when removing a filer role.

Figure 6: Worklist with Blank Reports

ly Reviews	My Expired Reports	Admin Center Et	thics Training	Management Reports Notif	ications		
g Managen	ient User Admin	Filers					
450 Ce	rtifier Change -			Filers			C
🏦 Org	Tree	My Orgs » Confide	ential Filers »				
Searc			Are you s	ure you want to remove Barb	ara X Bush as a 450 Filer from We	st Coast 2?	
+ Cen + Nor + Sou	dential Filers	Remove Reports Also remove Not Sta Incomplete Re	option: arted 450 Filer	report assigments for Barbar		st Coast 2?	
- <u>Confi</u> + Cen + Nort + Sou	dential Filers tral North th East Region th East Region	Also remove Not Sta Incomplete Re Remove Repo	s option: arted 450 Filer eports for Ba ort? Year	report assigments for Barbar arbara X Bush Reporting Status	a X Bush Review Status	Assigning Org	Assigned
- <u>Confi</u> + Cen + Nort + Sou	dential Filers tral North th East Region th East Region	Also remove Not Sta	eports for Bandred Year	report assigments for Barbar arbara X Bush Reporting Status OGE 450 New Entrant	a X Bush Review Status Not Started	Assigning Org West Coast 2	Yes
- <u>Confi</u> + Cen + Nort + Sou	dential Filers tral North th East Region th East Region	Also remove Not Sta Incomplete Re Remove Repo	eports for Bandrick Stress Str	report assigments for Barbar arbara X Bush Reporting Status OGE 450 New Entrant OGE 450 New Entrant	a X Bush Review Status Not Started Draft	Assigning Org West Coast 2 West Coast 2	Yes Yes
- <u>Confi</u> + Cen + Nort + Sou	dential Filers tral North th East Region th East Region	Also remove Not Sta	eports for Bandred Year	report assigments for Barbar arbara X Bush Reporting Status OGE 450 New Entrant	a X Bush Review Status Not Started	Assigning Org West Coast 2	Yes

Defects and Changes

FDM- 253 – Notifications sent from FDM_donotreply@conus.army.mil now explicitly state that the email address is unmonitored.

FDM- 268 – The mailbox notification button was removed from the My Reviews | Review Status screen.

FDM- 1156 – Report assignment notifications are now formatted so they are easier to read in plain text view.

FDM- 1453 – FDM notifications no longer include directions to use AKO username/password to log in to FDM.

FDM- 1780 – All FDM notifications now include a link to the FDM site.

FDM-2841 – All users can now use the criteria "Starts With", "Ends With", and "Equals" when searching for new users to add from the agency directory.

FDM- 3054 – An e-mail reminder to review outstanding reports will now be sent to report certifiers on a weekly basis between March 1 and December 31.

FDM-3456 – EC and Assistant roles can now search for Org Units in the Org Tree search bar.

FDM-3602 – The Resources tab was removed from the application.

FDM-3616 – Reminder to Purge notifications are no longer sent to ECs who are not authorized purge reports.

FDM-3640 – Creation of 278 Transaction life assurance assets no longer result in an application error.