



The following management reports are available in FDM:

Periodic Management Reports

- ◆ Review Progress Summary
- ◆ Due Date Tracking
- ◆ Daily Extension Tracking
- ◆ Ethics Training Tracking
- ◆ Reports Ready to be Purged

OGE Agency Management Reports

- ◆ Timely Filing & Certification Metrics
- ◆ Annual Extension Tracking
- ◆ Annual Ethics Training Report

Legacy Management Reports

- ◆ Registered Filers Summary
- ◆ Disclosure Report Detail
- ◆ Filers with No Disclosure Reports
- ◆ Supervisors' Org Units
- ◆ Currently Overdue OGE 450 Annual Reports
- ◆ Success Score for 450 Certifier
- ◆ Ethics Training Reports

Each standard report can be run by selecting filter options and then clicking 'Generate Report.'

Generating a Management Report

To generate a Management Report:

1. Click **Management Reports** and then select one of the Management Report tabs.
2. Select the appropriate report filter(s).
3. Click **Generate Report**.
4. After generating a report, click **Export** then select **Export to Excel** or **Export to .csv**.

The screenshot shows the 'Review Progress Summary' report interface. At the top, it displays '450 Certifier' with a 'Change' button. Below this is a description: 'Track disclosure reports review progress. To view detailed filer information (name, email, org unit), click Export, then "With Chart(s) (Excel)" or "Data Only (CSV)".' The interface includes a navigation path: 'My Orgs » DLA » TOP LEVEL ORG' with a dropdown menu. A 'Set Report Filter' section has radio buttons for 'Show MY Filers' reports' and 'Show ALL Filers' reports', a 'Form Type' dropdown set to 'OGE 450', and a 'Year' dropdown set to '2018'. A 'Generate Summary' button is present. Below the filters is a bar chart titled 'Assigned OGE 450 Review Progress' with a subtitle 'Total 2018 Assigned - 16'. The chart shows three categories: 'Not Started' (10), 'Draft' (1), and 'Under Review - Amendment in Progress' (2). An 'Export' button is located above the chart, and a callout points to it with the text 'Export to Excel'. Other callouts include 'Navigate to the appropriate Org Unit' pointing to the navigation path and 'Select report filers and then Generate Summary' pointing to the 'Generate Summary' button.

Category	Count
Not Started	10
Draft	1
Under Review - Amendment in Progress	2

MANAGEMENT REPORT DESCRIPTIONS

Report Name	Report Description
Periodic Reports	
Review Progress Summary	The Review Progress Summary consolidates and combines information from the current Registered Filer Summary and Disclosure Detail Report. It provides a single report that displays submission and review status metrics for reports in FDM. Use this report to track how many reports for the selected year have or have not been submitted, along with their review progress.
Due Date Tracking	The Due Date Tracking report consolidates Filers with No Disclosures and Currently Overdue reports. Use this report to track reports as they near the due date or are simply overdue
Daily Extension Tracking	This report tracks the number of reports that have extensions. Some reports may have more than one extension granted to them.
Ethics Training Tracking	This report counts the specific Ethics Training Types (Annual or Initial) recorded for Filers that are currently in the Org Units you administer during the selected calendar year.
Reports Ready to be Purged	This report tracks reports that are ready to be purged (have passed or are about to pass their required retention period,)
OGE Agency Reports	
Timely Filing & Certification Metrics	This report updates the <i>450 Certifier Success Score</i> report. Use this report to determine the count of reports that were filed and certified in a timely manner in accordance with OGE requirements. Timely filing is defined as the Filer eSigning prior to or on the due date, plus any extension. Timely certification occurs when the report is certified on or before 60 days after the Filer's last signature.
Annual Extension Tracking	This report tracks the total number of extensions provided for OGE 450 and OGE 278 reports in FDM over the past six years in FDM.
Annual Ethics Training Report	This report tracks ethics training recorded for Filers that were in your Org Units during the selected calendar year. The Excel export of this report ties the Filer's ethics training record to a report in FDM.

Legacy Reports

Registered Filers Summary	The Registered Filer Summary provides a summary of your current Filer's submission status by Form Type and Year. Use this report to track how many Filers for the current year have or have not submitted reports in FDM.
Disclosure Detail Report	The Disclosure Detail Report provides reporting and reviewing status detail by org unit, form type and year. Use this report to track review progress of Filers' reports.
Filers with No Disclosure Reports	Filers with No Disclosure Report lists any registered Filers who have not started a report, assigned or not assigned, by the specified year and report type. This report facilitates the annual data cleanup process prior to the upcoming filing season. Use this report to track delinquent filers and manage Filer-org unit associations.
Supervisor's Org Units	<p>The Supervisor's Org Unit report provides a listing of Supervisors and the org units they are assigned to in FDM. This report facilitates the annual data cleanup process prior to the upcoming filing season. Use this report to manage Supervisor to org unit associations. You should consider deleting an org unit if a Supervisor is listed for an org unit that has no Filers.</p> <p>When deleting org units from FDM, check the Subordinate Org Units for Assigned Org Unit column first. If the assigned org unit has sub org units listed, then you must first delete or move the sub org units before deleting the Supervisor's Org Unit.</p>
Currently Overdue OGE 450 Annual Reports	The Currently Overdue OGE 450 Annual Reports can be used by DAEOs, SLCs and 450 Certifiers to view data about late annual reports for the current year. A report will display if it was assigned, has a Review Status of Not Started or Draft, or the reporting due date has already passed.
Success Score for 450 Certifier	This report shows 450 Certifiers their review progress with regards to the Office of Government Ethics' 60-day review rule. FDM displays for 450 Certifiers a summary table and a Success Score. The Review Progress Summary is available under Management Reports Review Metrics .
Ethics Training Reports	The Ethics Training Report allows you to view current and prior years' Ethics Training information for Filers who were recorded in your org units during the selected calendar year.