

USING FINANCIAL DISCLOSURE MANAGEMENT (FDM)

Purposes:

- Describe how DoD ethics officials use the Army's secure, online Financial Disclosure Management (FDM) system to electronically manage and review the OGE 278, Public Financial Disclosure Report, and the OGE 450, Confidential Financial Disclosure Report.
- Cover select topics on FDM use including: migration to online eFiling/eReviewing, and filing season preparations.

I. INTRODUCTION

II. REFERENCES

- A. Office of Government Ethics (OGE) Report: *Elements of a Successful Financial Disclosure Program*,
http://www.usoge.gov/ethics_docs/office_agency_prog/prdrptfocused_0309.pdf
- B. OGE DAEOgram DO-07-014, subject: Guidance on Electronic Filing of Public and Confidential Financial Disclosure Reports,
http://www.usoge.gov/ethics_guidance/daeograms/dgr_files/2007/do07014.txt
- C. FDM: <https://www.fdm.army.mil>
 1. FDM User Guides
 - a. FDM 278 SLC User Guide
 - b. FDM 450 Certifier User Guide
 - c. POC User Guide

2. Standing Operating Procedure (SOP) Templates
 - a. FDM 278 SOP
 - b. FDM 450 SOP
3. Quick Starts
 - a. FDM 278 SLC Quick Start
 - b. FDM 450 Certifier Quick Start
 - c. POC Quick Start
4. Frequent Tasks How To Guides
 - a. DAEOs:
https://www.fdm.army.mil/PM_Reference_Docs/DAEOFDMTasks.doc
 - b. SLCs:
https://www.fdm.army.mil/PM_Reference_Docs/SLCFDMTasks.doc

III. CURRENT STATUS

IV. FDM WEB SITE

- A. Help & Support - <https://www.fdm.army.mil/helpSupport/helpSupport.htm>
- B. Resources - <https://www.fdm.army.mil/helpSupport/resources.htm>

- C. Learning Center -
<https://www.fdm.army.mil/learningCenter/learningCenter.htm>
- 1. Video tutorials -
<https://www.fdm.army.mil/learningCenter/tutorials.htm>
- 2. Quick Reference Cards -
<https://www.fdm.army.mil/learningCenter/documentation.htm>

V. USING FDM

- A. FDM Terminology
- B. Navigating FDM
- C. Migration to eFiling
 - 1. Agency leadership
 - 2. Coordination with agency CIO/IT
 - 3. Getting Started – SOPs; Spreadsheet tool
 - 4. Organization Points of Contact (POCs)
- D. Set Up/Initialization
- E. Annual User Maintenance
- F. Management Reports

VI. FDM 450

- A. Remind Filers
- B. Extensions
- C. Review Reports – Mechanics+

VII. FDM 278

- A. Remind Filers
- B. Extensions
- C. Review Reports – Mechanics+

VIII. MANAGING ETHICS TRAINING IN FDM

IX. ANNUAL ETHICS REPORT

X. CONCLUSION

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