

# Government Provided Service for Automating the Financial Disclosure Process

Federal Information Experts

*Bridging the gap between Government information  
and those who put it to work*



- Paperless Process
  - Automates dissemination, collection and tracking of OGE 450/450A & SF-278 (and other forms if needed)
- Increased Accuracy
  - Interview approach walks filer through data entry
  - Structured validation to ensure all required data is provided
- Automated Review, Analysis and Reporting
  - Promotes thoroughness and accuracy

## Purpose and Need

- Concept and initial software design and development in partnership with FAA
- Continuous upgrades to support expanded capabilities and to meet regulations
- Secure government hosting added to complete Software as a Service (SaaS) delivery capability

## Background

- Filer Module
  - Provides a simple to use interface to ensure a complete, accurate and timely form completion
- Administrator Module
  - Simplifies the notification and tracking of the entire process – initial invitation emails and scheduled reminders to filers that have not completed activity
- Reviewer Module
  - Streamlines the prohibited screening review and divesture notification process

## Application Modules

- Simple to use (zero training requirement for filer – minimal for admin.)
- Secure (has been thoroughly tested to meet government requirements)
- Provides a structure around existing OGE guidelines for fulfilling this mandate (simple to modify if rules change – wording and instructions are directly from form) Filer reviews final completed official OGE form.
- Web-based, no special requirements on users PC (Adobe® Reader®). Works across all browsers.
- Section 508 tested

## Application Design Principals

- Scalable (capable of handling large volumes of filers from a single installation)
- Partitioning of data to support multi-agency installations from a single instance of the software
- Self-registration feature allows agencies to setup and configure their own instance and configure wording of automated notifications
- Hosted and maintained from existing secure servers at NTIS
- Supports multi-year annual and year-round filings. Can present filers prior year information

## Application Design Principals

- Administrator bulk uploads filers to be notified of requirement, formats email template and schedules emails to be sent.
- Filer email notification and interface for completion of required financial disclosure form by filer.
- Administrator tracking of filers and Authorized Ethics review of completed filings.

## **Features Presented in Demonstration Screens**



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## Administration

User ID:

Password:

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Log-in as  
System  
Administrator  
to begin  
annual filing  
process





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## Main Menu

What do you want to do?

- [Status.](#)
- [Create, edit, or delete Filers.](#)
- [Upload Filers.](#)
- [Review Users.](#)
- [Work with Emails.](#)
- [Create, edit, or delete users, groups, and roles.](#)
- [Create, edit, or delete side properties.](#)
- [Create, edit, or delete E...](#)
- [Log out.](#)

Select Upload Filers

Current user: admin  
Current entity: root

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## Upload Filers

[Main Menu](#)

Current user: admin

Current entity: root

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Format is .cvs or  
Spreadsheet.  
Template will be provided.  
Other formats or integration to  
existing systems can be reviewed  
and considered



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## Main Menu

What do you want to do?

- [Status.](#)
- [Create, edit, or delete Filers.](#)
- [Upload Filers.](#)
- [Review Users.](#)
- [Work with Emails.](#)
- [Create, edit, or delete users, groups, and roles.](#)
- [Create, edit, or delete site wide properties.](#)
- [Create, edit, or delete Entities.](#)
- [Log out.](#)

Current user: admin  
Current entity: root

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Select work  
with Emails



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## Letters Menu

What types of letters would you like to send?

- [Send Reviewer Letters](#)
- [Send General Letters](#)
- [Edit Reviewer Templates](#)
- [Edit General Templates](#)

[Main Menu](#)

Current user: admin  
Current entity: root

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Select Edit  
General  
Templates



## Templates

5 records found.

First Prev 1 Next Last

Template	
<input type="radio"/>	Final Reminder
<input type="radio"/>	First Reminder
<input type="radio"/>	Notification to Filer
<input type="radio"/>	Notification to Manager Regarding Non-Compliance
<input type="radio"/>	Second Reminder

New Edit selected Delete selected Search Clear Search

[Letters Mail](#)

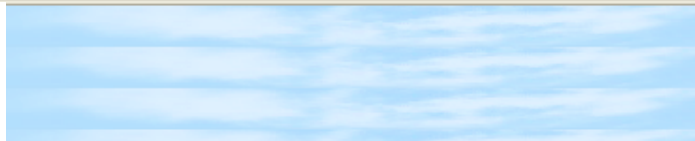
Current user: admin  
Current entity: root

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Select  
Notification to  
Filer



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## Edit Template

Template Name:

From:

To:

Cc:

Bcc:

Subject:

Set up Email Template language and insert merge fields

### Valid Merge Fields

- [M\\_FILER\\_EMAIL](#)
- [M\\_FILER\\_NAME](#)
- [M\\_INVITATION\\_LINK](#)
- [M\\_DUE\\_DATE](#)
- [M\\_MANAGER\\_NAME](#)
- [M\\_MANAGER\\_EMAIL](#)
- [M\\_EPC\\_NAME](#)
- [M\\_EPC\\_EMAIL](#)
- [M\\_LATE\\_FILER\\_NAMES](#)

Dear M\_FILER\_NAME, <BR> <BR>

You are required to complete a financial disclosure OGE Form 450 or 450A statement by February 15, 2010. To access the automated financial disclosure application, please click the link below and follow all instructions:

M\_INVITATION\_LINK  
<BR> <BR>

Once you have completed the form, the system will validate all entries to help ensure that the form has been completed properly. Once the system determines that you have completed all required fields, you will be allowed to submit the form electronically.

Remember, the due date for completing this activity is February 15, 2010.

Template: If you have any questions you can contact your EPC, M\_EPC\_NAME at M\_EPC\_EMAIL



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## Search

Template:

Save

Cancel

Current user: admin  
Current entity: root

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Select send notification, then select appropriate notification template



Subject	Sender	Date
* Oracle vs. open source: 8 reasons to make the switch	Web Buyer's Guide White Paper Spotlight	11:38 AM
Invitation Letter for FDonline	fdonlineDemo@hrworx.com	11:53 AM
		11:54 AM
		11:55 AM

**Subject:** Invitation Letter for FDonline  
**From:** fdonlineDemo@hrworx.com  
**Date:** 11:53 AM  
**To:** filer @agency.gov

Dear Patricia Gresham

You are required to complete a financial disclosure OGE Form 450 or 450A statement by February 15, 2010. To access the automated financial disclosure application, please click the link below and follow all instructions: [Filer Website](#)

Once you have completed the form, the system will validate all entries to help ensure that the form has been completed properly. Once the system determines that you have completed all required fields, you will be allowed to submit the form electronically. Remember, the due date for completing this activity is February 15, 2010. If you have any questions you can contact your EPC, epc\_name at noplace@hrworx.com

Filer select embedded link in email





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## Registration Page

Welcome to the Electronic OGE 450/450A Program. This web-based tool will guide you through the process of completing your annual financial disclosure requirement.

Access to the system is based on your government email address (e.g. John.Doe@.gov) and a unique password that you create. Please enter the password your would like to use for this account, below. The password is case sensitive and will need to be entered, upon re-entry, exactly as it was created.

User Id:

Password:

Retype password:

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First step is to  
create secure  
password  
(configurable to agency  
security requirements)



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## Choose Filing Period

Please choose your filing period.

Choose an existing filing:

OR

Create a new filing for the year

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Select prior  
filing or create  
new filing.  
(Can pull prior year data to  
current year filing)

## What To Expect

The Electronic OGE Form 450 system will automatically walk you through filling out your Financial Disclosure Form (OGE 450) or, if you are eligible, OGE Optional Form 450A.

The system will let you know what you are to report and what is not necessary to report. After all the necessary questions are answered, you will electronically submit the form. You will also print the completed form and return it in a sealed envelope to your Designated Ethics Counselor. For Regions and Centers, the Designated Ethics Counselor is your Regional/Center Counsel. For Headquarters, the Designated Ethics Counselor is AGC-400. You will also be able to save the form for your own records. You are strongly urged to retain a copy for your own records.

Save & Exit

Go Back

Continue

### Help

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[OGE 450 Form](#)

[OGE 450A Form](#)

[Penalties](#)

[Public Burden Information](#)

[Why Must I File?](#)

[When Must I File?](#)

[What is the Reporting Period?](#)

[What if I have Questions?](#)

### My OGE Form

[Change Password](#)

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[View Data](#)

Simple to follow instructions, help and navigation buttons

## Getting Around

### How It Works

This application is set up as a series of step by step screens which will guide you through the process of completing the OGE Form 450/450A. Each screen follows the format of the OGE Form 450/450A, e.g. Part I is for Assets and Income. As you navigate through the application, you will have easy access to OGE instructions by selecting the appropriate OGE instructions link on the right hand side of each page.

On the bottom of the screen there are navigation buttons to help direct you through the application. Once you have entered all of your information, you will have an opportunity to view your completed OGE 450/450A Form before you submit it. In order to view your completed form, you will need to have Adobe Acrobat Viewer installed and operating. [Click Here](#) to test if Adobe Acrobat is installed and working on your computer. If not, you can click on the Adobe icon below for a free download.



### Saving Information

At any time you can select "save and exit" and your data will be saved. When you return, you will be able to start from where you left off or start from the beginning to review your previously entered data. Each time you move from screen to screen your data will be saved. So if you lose your connection for some reason, don't worry, your data that you entered up to that screen will be saved.

### Reviewing Information

When you have entered all of your data, you can view, print and save the OGE Form 450/450A document. Once you submit your final form, you will not be able to go back into your account without proper authorization from your agency.

#### Help

- [OGE Instructions](#)
- [OGE 450 Form](#)
- [OGE 450A Form](#)
- [Penalties](#)
- [Public Burden Information](#)
- [Why Must I File?](#)
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#### My OGE Form

- [Change Password](#)

You can test Adobe Reader before getting started

Save & Exit

Go Back

Continue

## Personal Information

Fields marked "\*" are required.

Please provide your full name as it appears on your Government ID.

First Name: \*

Middle Initial:

Last Name: \*

**Progress**

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[OGE Frequently Asked Questions](#)  
[OGE - Completing the OGE Form 450](#)

**My OGE Form**  
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[View Data](#)

Complete fields as instructed. Some fields are marked required.

## Work Information

Fields marked "\*" are required.

E-Mail Address: \* PGresham@ntis.gov

Position/Title: \* Sr. Program Manager

Grade/Pay Band: \* GS-10

Agency: \* NTIS

Branch/Unit/Routing Symbol: \* AE-1503

Work Address: \* 1500 Port Royal Street

City, ST, Zip: \* Alexandria  
22312

Country: \* United States

Work Telephone # (include area code): \* 703-605-6123

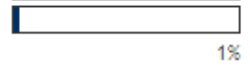
Save & Exit

Go Back

Continue

Help follows filer through each page.

### Progress



### Help

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- [OGE - Completing the OGE Form 450](#)

### My OGE Form

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## Reporting Status

Fields marked " \* " are required.

Is this a: \*

New entrant report  Annual report

Save & Exit

Go Back

Continue

**Progress**

3%

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- [OGE Ethics Training](#)
- [What is the Reporting Period?](#)

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Filer can save work and exit at any point in the process

## Special Government Employee

Fields marked " \* " are required.

Are you a [Special Government Employee \(SGE\)](#)? \*

Yes  No

An SGE is an executive branch officer or employee who is retained, designated, appointed, or employed to perform temporary duties either on a full-time or intermittent basis, with or without compensation, for a period not to exceed 130 days during any consecutive 365-day period.

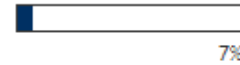
Save & Exit

Go Back

Continue

us/gov/oge/oge450\_2007/oge450\_sge\_choice

Progress



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Embedded logic determines what additional information is required of filer based on how they answer questions presented throughout the process.



## OGE 450 or 450-A (Short Form)?

Fields marked " \* " are required.

If you have a previous OGE Form 450 on file with your agency and can certify to all of the following statements, your agency may permit you to use the OGE Optional Form 450-A instead of filing an OGE Form 450. If you cannot certify to all of the following statements or otherwise do not wish to use this OGE Optional Form 450-A, you must complete a new OGE Form 450 as your report. Consult your agency ethics office for more information.

After examining a copy of my last confidential financial disclosure report (OGE Form 450), I certify to the following: \*

- A. **No New Interests.** Since filing my last OGE Form 450:
  1. I have no new reportable assets or sources of income, for myself, my spouse, or my dependent children;
  2. I have no new reportable liabilities (debts), for myself, my spouse, or my dependent children;
  3. I have no new reportable outside positions for myself;
  4. I have no new reportable agreements or arrangements concerning future, current, or past non-Government employment for myself;
  5. I have no new reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.

(For a description of what interests are reportable, see OGE Form accompanying instructions, and/or other agency guidance.)

- B. **No Change in Position/Duties.** Since filing my last OGE Form 450, I have not changed jobs at my agency. (The term "changed jobs" includes a new position description or other significant change in duties.)

- I can answer yes to all of the questions above and wish to use the OGE Form 450-A
- I cannot answer yes to all of the questions above or do not wish to use the OGE Form 450-A

Save & Exit

Go Back

Continue

Progress



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Common Questions

[Privacy Act Statement](#)

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My OGE Form

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If a 450A year, question determines eligibility to complete 450A

## Part I - Assets and Income

Fields marked " \* " are required.

Did you, your spouse, or [dependent child](#) hold any [asset](#) with a fair market value of more than \$1,000 *at the close of the reporting period* or that produced income over \$200 *during the reporting period*? \*

Yes  No

Save & Exit

Go Back

Continue

Report for Yourself, Spouse, and Dependent Child Do Not Report

- Assets held for investment with a value greater than \$1,000 at the end of the reporting period OR assets held for investment which produced more than \$200 in income during the reporting period, including but not limited to
  - Assets such as stocks, bonds, annuities, trust holdings, partnership interest, life insurance, investment real estate, or a privately-held trade or business
  - Sector mutual funds: those funds invested in a particular industry, business, or location such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the general family fund name)
  - Holding of retirement plans, such as 401(k)s or IRAs (list each holding except diversified mutual funds)
  - Holding of investment life insurance
- Federal Government retirement benefits
- Your personal residence, unless you rent it out
- Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund
- U.S. Government Treasury bonds, bills, notes, and

If yes, next step requires at least entry of at least one asset. If no, proceed to Part II

Progress

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- [Dependent Child](#)

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## Part I - Assets Which Must Be Reported

- A. Check all [assets](#) held by you, your spouse or [dependent child](#) worth more than \$1,000 at the end of the [reporting period](#) or that produced more than \$200 in income during the [reporting period](#).
- B. Check all [assets](#) no longer held by you, your spouse, or [dependent child](#) that produced more than \$200 in income during the [reporting period](#).

	No Longer			No Longer	
	Held	Held		Held	Held
Stocks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Commodity Futures	<input type="checkbox"/>	<input type="checkbox"/>
401(k)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sector Mutual Funds	<input type="checkbox"/>	<input type="checkbox"/>
Defined Benefit Pensions	<input type="checkbox"/>	<input type="checkbox"/>	IRAs	<input type="checkbox"/>	<input type="checkbox"/>
Bonds	<input type="checkbox"/>	<input type="checkbox"/>	Annuities	<input type="checkbox"/>	<input type="checkbox"/>
Investment Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	Trust Holdings	<input type="checkbox"/>	<input type="checkbox"/>
Investment Real Estate	<input type="checkbox"/>	<input type="checkbox"/>	Private Business		
Partnership Interests	<input type="checkbox"/>	<input type="checkbox"/>	Other		

Save & Exit

Select as appropriate. Will take you through each selected section

**Progress**

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## Stocks Held Worth More Than \$1,000 at the End of the Reporting Period or that Produced Income Greater Than \$200 During the Reporting Period

Fields marked " \* " are required.

Enter a specific stock. Indicate the full name of each stock.

Stock Name: \*  [\(lookup\)](#)

Held by:  Self only  Joint  
*Optional.*  Spouse only  Dependent child

STOCK Summary

Since Stock were selected, must enter at least one. Stock look up feature adds convenience

**Progress**  
17%

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## Stocks Held Worth More Than \$1,000 at the End of the Reporting Period or that Produced Income Greater Than \$200 During the Reporting Period

Fields marked "\*" are required.

Enter a specific stock. Indicate the full name of each stock.

Stock Name: \*  [\(lookup\)](#)

Held by:  Self only  Joint  
*Optional.*  Spouse only  Dependent child

STOCK Summary

Search beings back correct stock and symbol. Select held by and enter stock

us/gov/oge/oge450\_2007/oge450\_asset\_stock\_held

Progress

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## Stocks Held Worth More Than \$1,000 at the End of the Reporting Period or that Produced Income Greater Than \$200 During the Reporting Period

Fields marked "\*" are required.

Enter a specific stock. Indicate the full name of each stock.

Stock Name: \*

Held by:  Self only  Joint  
*Optional.*  Spouse only  Dependent child

### STOCK Summary

Search beings back correct stock and symbol. Select held by and enter stock

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## Stocks Held Worth More Than \$1,000 at the End of the Reporting Period or that Produced Income Greater Than \$200 During the Reporting Period

Fields marked " \* " are required.

Enter a specific stock. Indicate the full name of each stock.

Stock Name: \*  [\(lookup\)](#)

Held by:  Self only  Joint  
*Optional.*  Spouse only  Dependent child

### STOCK Summary

Stock-(Self)-BBY-Best Buy Co. Inc  
Stock-(Spouse Only)-NFLX-NETFLIX Inc  
Stock-(Joint)-FPB-Fountain Powerboat Indus Inc  
Stock-(Self)-F-Ford Motor Co  
Stock-(Joint)-MOT-Motorola Inc

us/gov/oge/oge450\_2007/oge450\_asset\_stock\_held

Progress

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E Form

word

Create unlimited listing of stocks

## 401(k)s Held Worth More Than \$1,000 at the End of the Reporting Period or that Produced Income Greater Than \$200 During the Reporting Period

Fields marked "\*" are required.

Bank or Institution that holds the 401(k):

How is the 401(k) invested?  
List each holding except diversified mutual funds. For each stock or mutual fund held, enter the specific name.

- \*  Stock  [\(lookup\)](#)
- Sector Mutual Fund  [\(lookup\)](#)
- Bonds
- Cash
- Other

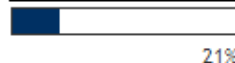
Held by:   
*Optional.*

- Self only
- Spouse only
- Joint
- Dependent child

### 401(k) Summary

401(k)-(Joint)-Provident Bank-Stock,LM-Legg Mason Inc

Progress



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OGE Form

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401K works same way. Also includes look up feature



# For More Information Contact

Patricia Gresham  
Office of Federal Services  
[pgresham@ntis.gov](mailto:pgresham@ntis.gov)  
703-605-6800

