

Annual Reporting: Report Activity

- 2015 Annual Reports
- Review Summary - Annual Reporting
 - View Reports
- Reports - Submitted
- Have Not Submitted
- New Employees
- Download to Excel

2015 Annual Reports

The video will demonstrate how to view annual reports that have been submitted; reports that have been approved; how to view a list of Outstanding Reports (reports not submitted) and other views available to departments and divisions.

[Click here for the video.](#)

Review Summary - Annual Reporting

An overview of your department activity is provided on the Dashboard, within **Review Summary**. There are two columns of detail available, the left column, **Received / Under Review**, displaying categories of reports submitted and currently under review by the COI office. To the right, **Approved**, displaying reports that have been approved with the category they fall under.

As a reminder, these reports provide a retrospective accounting of an individual's outside activities in 2015. Because these activities have already taken place, should a department require an individual to make changes to their outside activities, any adjustments should be for future activities.

The screenshot shows the 'Review Summary' dashboard. At the top, there are three tabs: 'Annual Reports' (3/49), 'Disclosures' (3/3), and 'Prior Approval Requests' (2/4). Below the tabs, there are two main sections: 'Received / Under Review' and 'Approved / Finalized'. Under 'Received / Under Review', there are two rows: 'With disclosures' (3) and 'Without disclosures' (0). Under 'Approved / Finalized', there are two rows: 'With disclosures' (0) and 'Without disclosures' (49).

View Reports

To view any category within Review Summary, select an available hyperlink. You will be directed to the reports which fall within the category selected.

Reports - Submitted

The next screen will direct you to the list of reports from the category you selected in Review Summary. To view a report, select the look-up

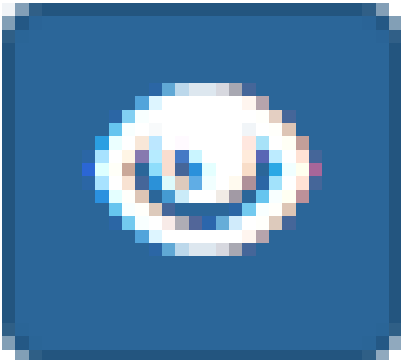


icon for the individual.

Available radio buttons to toggle between are: **Employees**, **Outstanding Reports** and **Approved**.

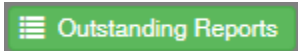
The screenshot shows the 'Reports - Submitted' dashboard. At the top, there are three tabs: 'Employees' (selected), 'Outstanding Reports', and 'Approved'. Below the tabs, there is a table with the following columns: Status, Name, Work, Vaca., #, \$ Total, Dept ID, and Actions. The table is currently empty.

Column	Icon	Description
Work	-	Total number of work days entered in a report. This is the sum of all work days entered.

Vaca.	-	Total number of vacation days entered in a report. This is the sum of all vacation days entered for a report.
#	-	Indicates the total number of disclosures entered in a report.
\$ Total	-	The sum of all disclosures.
Actions		Indicates a report (i.e., at least 1 disclosure was entered). If a report is submitted with 0 disclosures, a view icon will not be displayed.

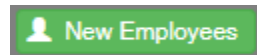
Have Not Submitted

The most common report requested, Outstanding Reports, provides a list of employees that have **not** submitted.



New Employees

A view of all individuals who began employment on or after the 1st of the current year and are required to submit an annual report can be viewed by clicking the **New Employees** button. The button is available from the Existing Employees view.



Download to Excel

To download the current page, or all pages, into excel, scroll to the bottom of the page, select an option and click

