

Annual Reporting: Report Activity

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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 a 'Review Summary' dashboard with the following data:

Category	Count
Annual Reports	3 / 49
Disclosures	3 / 3
Prior Approval Requests	2 / 4

Received / Under Review	Approved / Finalized
With disclosures: 3	With disclosures: 0
Without disclosures: 0	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



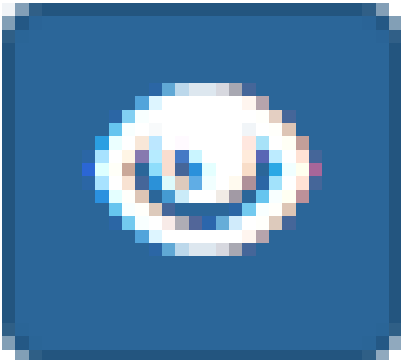
icon for the individual.

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

The screenshot shows a 'Reports - Submitted' dashboard with the following table structure:

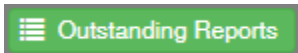
Status	Name	Work	Vaca.	#	\$ Total	Dept ID	Actions
[Dropdown]	[Input]	[Input]	[Input]	[Input]	[Input]	[Input]	[Input]

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.

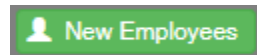
Have Not Submitted

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.



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