REVIEWING REPORTS

Foreign Funding Disclosure Portal

OVERVIEW

This guide outlines the "Review Reports" workflow in the foreign gift and reporting portal. It covers how analysts and managers can view, filter, compare, and act on draft and submitted reports, as well as how to track and manage report amendments.

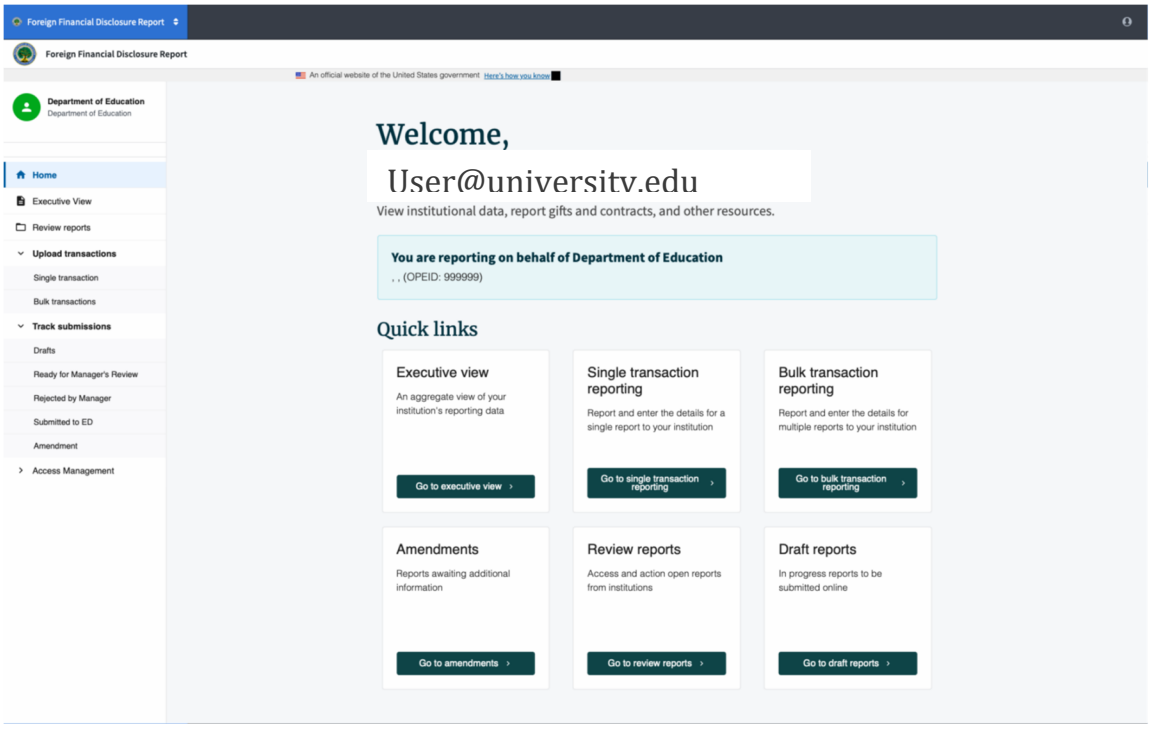


TABLE OF CONTENTS

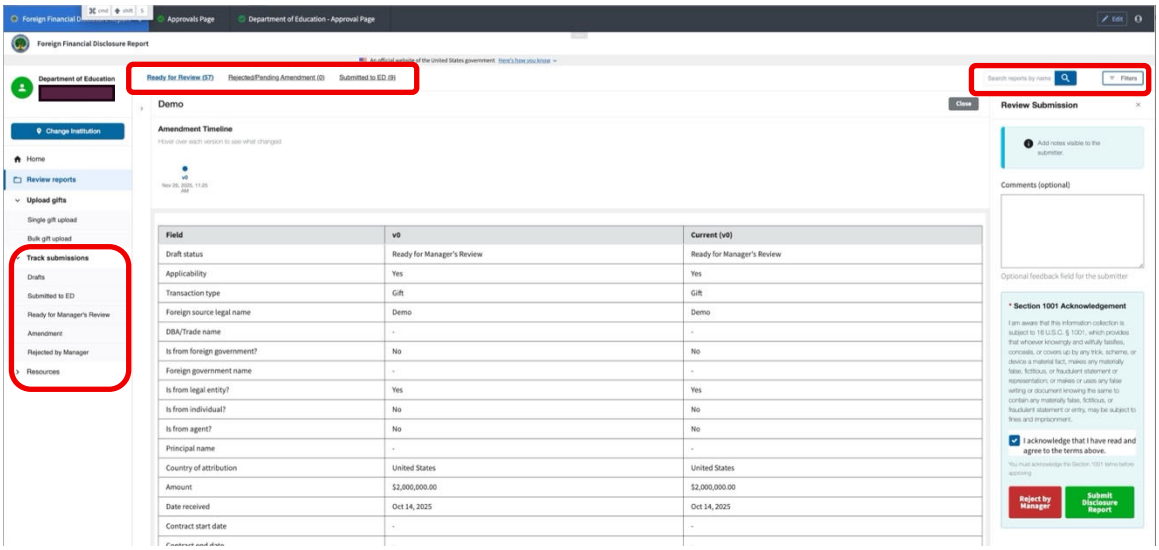
Accessing Review Reports

1. Navigate to `Review reports` in the sidebar.

2. You will see tabs across the top:
   - Ready for Review
   - Rejected/Pending Amendment
   - Submitted to ED

3. Tabs filter reports by status:
   - Ready for Review: Reports awaiting manager action.
   - Rejected/Pending Amendment: Reports sent back for revision or amendment.
   - Submitted to ED: Reports already submitted to the Department of Education.

4. Search reports by name and/or apply filters for precise results

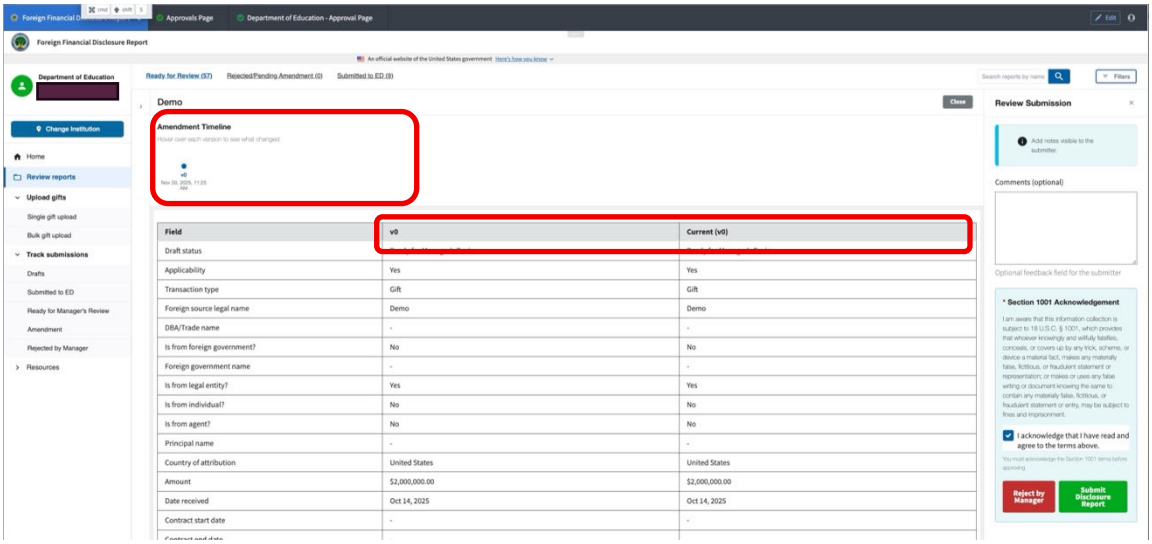


Selecting and Comparing a Report

1. Click a report in the left-hand pane to view details.

2. The main panel displays:
   - The Amendment Timeline, showing all versions/amendments.

- A comparison table: Each row lists a field; columns show previous and current values, highlighting changes.

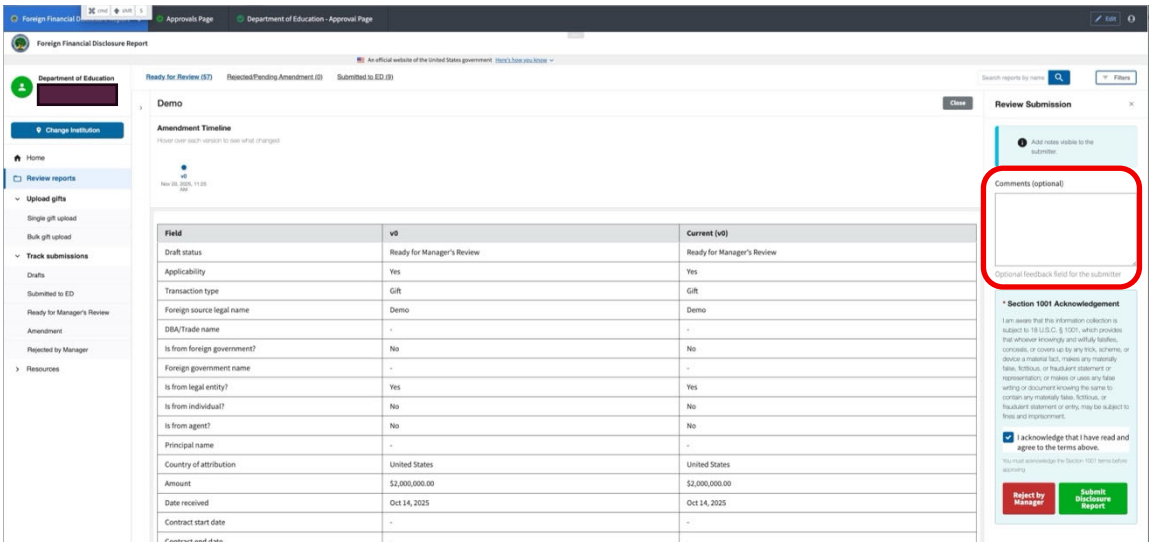


- Hover over timeline versions to see changed fields for each amendment.

Reviewing and Submitting a Report

1. Click “Review Submission” to the right of the details panel.

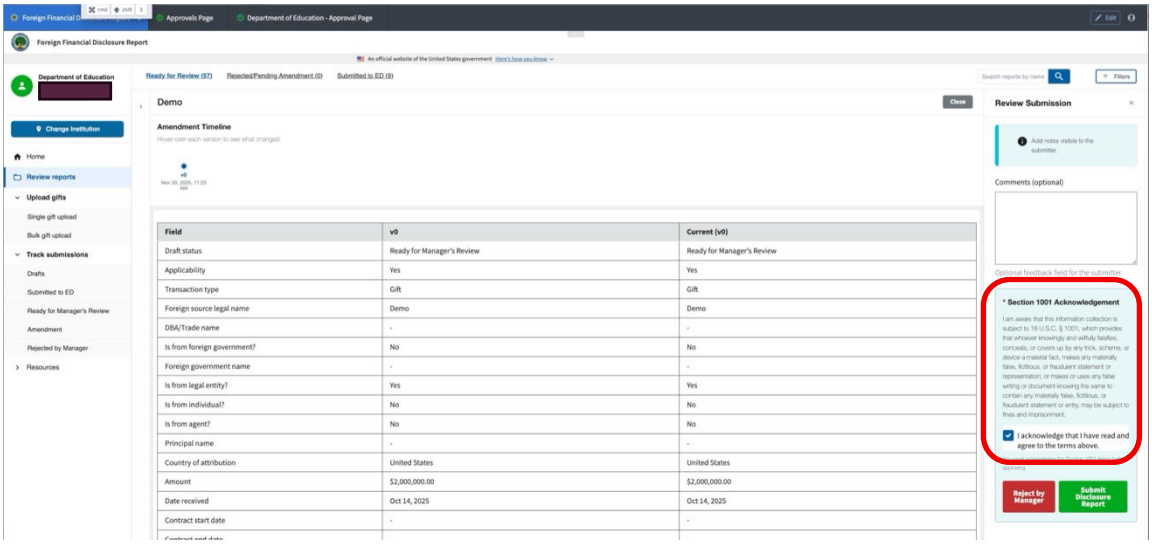
   - Add notes or comments. These will be visible to the submitter.



2. Section 1001 Acknowledgement

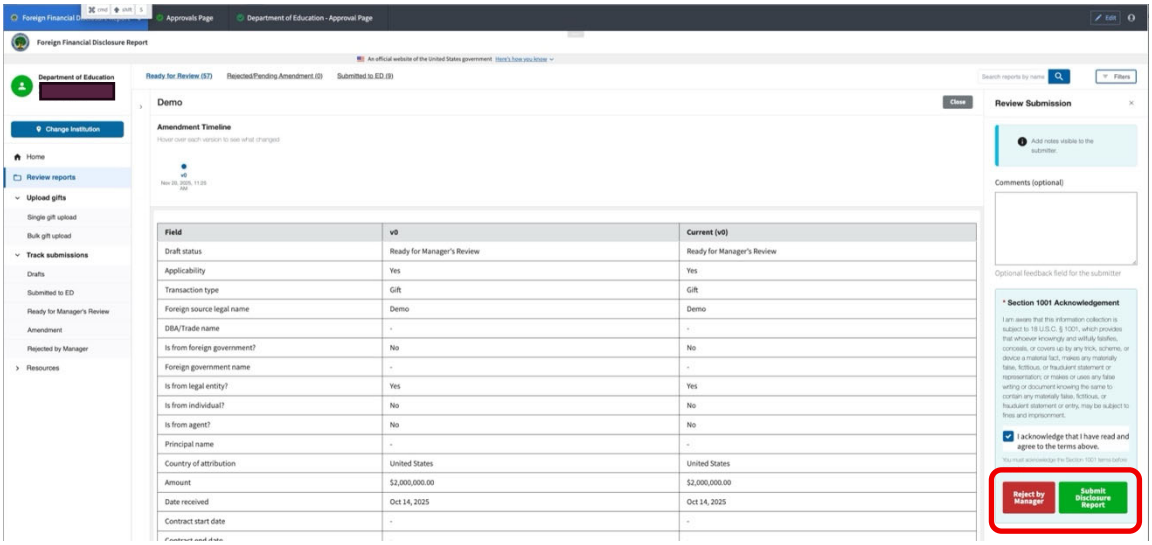
   - Before approving, read and acknowledge the Section 1001 warning.

- Check the box: "I acknowledge that I have read and agree to the terms above."



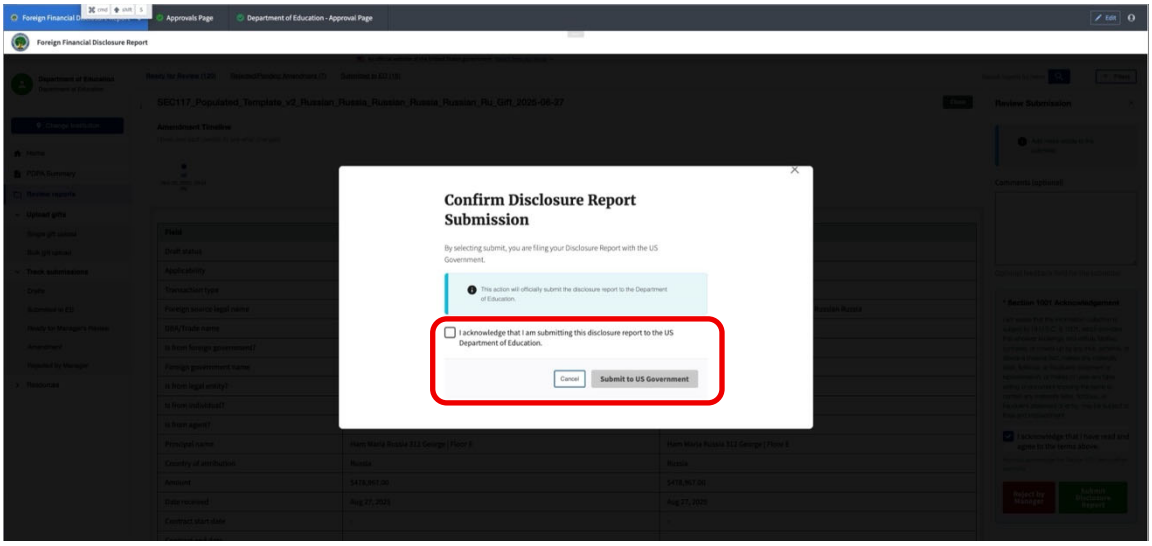
3. Submit Disclosure Report to U.S. Department of Education or reject for corrections

- Selecting “Submit Disclosure Report” will take the user to the confirmation screen
- Selecting “Reject by Manager” will send report back to Analyst for corrections



4. Acknowledge and Confirm Report Submission

- Selecting “Cancel” will return the user to the previous screen
- Selecting “Submit to US Government” will submit the report to the U.S. Department of Education



Request an Amendment

If you are in the “Review reports” section in the left-hand panel and determine that changes are required after submission:

1. Click “Request Amendment” (now available on submitted reports).
2. Select at least one field to amend (e.g., Amount, Date Received, Transaction Type, Foreign Source).
3. Optionally, enter comments for the submitter.
4. Click “Request Amendment”.

Viewing and Acting on Amendment Status

1. On the left-hand sidebar, click “Amendment” under the "Track submissions" section.
2. This will show you a list of reports that have pending amendments or require your review or action.

3. From this section, you can:

    - View outstanding amendment tasks
    - Respond to pending amendment requests

The Amendment Timeline in each report will also reflect outstanding amendments. Reports with amendments pending completion will be in their own tab.

Notice: At any stage, your actions (comments, rejection, requests for amendment, approval) are communicated to the submitter and logged in the track submission section.

Remember: Use the Amendment submission tracker tab in the left-hand sidebar to view and act on any required amendments, ensuring no pending actions are missed.