

POC USER GUIDE



Financial Disclosure Management

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YOUR ROLE AS A POINT OF CONTACT (POC)

Many organizations have an established network of POCs who are responsible for managing OGE 450 financial disclosure filing activities. As a POC for an organization, command, or activity, you have very important responsibilities in FDM. Your duties in FDM are similar to how you manage Filers and reporting activities today, except now you can manage them online and in one place.

In FDM, POCs are responsible for a variety of tasks but primarily loading and managing OGE 450 Filers and Organizational data into FDM and keeping OGE 450 Filers and their Supervisors aware of the filing season and deadlines.

Task	In FDM
Identify Organizations and Supervisors	Add Org Unit and their respective Supervisors
Identify Filers who enter your organization who need to file	Register Filers in FDM
Identify and communicate the type of report that needs to be filed	Assign Filers a report to File in FDM
Track Filer Reporting Activities	Run management reports and send reminder notifications

Your local legal office will initially identify and establish the top level Org Units and POCs for your organization/ installation in FDM. The legal office will also assign the DAEO, Senior Legal Counsel (SLC) and 450 Certifier roles for your Org Units. Once you are added as a POC, you can begin managing Filers and their reporting activities in FDM.

POCs have the ability to add or delete subordinate organization units, add new Filers who enter the organization and remove Filers who leave the organization, assign and/or change Supervisors for your subordinate organization units, assign required activities (the requirement for Filers to complete a specific report), and generate management reports. POCs cannot assign DAEOs, SLCs or 450 Certifiers.

All FDM users must be assigned a specific role by an existing FDM user. Some FDM users can have overlapping responsibilities and multiple roles to help expedite the disclosure process. A user's location in the role hierarchy reflects the authority and responsibility they have in FDM.

ORGANIZE FILERS PRIOR TO DECEMBER 31

As the POC, it is your responsibility to make the necessary corrections to the Org Units and Filer lists in FDM. Supervisors should be able to help you identify employees who are required to file and OGE 450.

Automatic assignment of reports can create additional administrative work for POCs if your Filers are not organized properly before December 31. It is recommended POCs begin reviewing and updating their Filers in FDM no later than November 1. Everyone who is required to file an OGE 450 report and has been registered in FDM will be automatically assigned an Annual OGE 450 Report on December 31.

To ensure consistency, review the list of last year's Filers and update to reflect both employees no longer working for you, and new employees who fit the filing criteria. Having said that, Managers/Supervisors should review that list, and make the final determination regarding who of their employees meet the OGE criteria, and are required to file.

POC TIMELINE

When	Who	What	Description
October 1	Ethics Official	Identify POCs	Ethics Officials should contact their organizational POCs and request a positive response if they are still the financial disclosure form POC. If possible, a POC should provide an alternate name or replacement name when appropriate.
NLT October 15	Ethics Official	Inform and Train POCs	Ethics Officials should inform and train POCs on their new responsibilities within FDM. Note: During the initial year of FDM, the task of front-loading Filers and org units may be considerably time-consuming. It is recommended that POCs are notified and begin executing their FDM tasks several months in advance of the filing season
NLT October 31	POC	Review/Update Filer Spreadsheet	Gather Filer, Review Chain and Org List information and enter into the Filer Tracking Spreadsheet. Notify Filers and Supervisors that the FDM registration process has begun for upcoming filing season.
NLT November 18	POC	Update/Add Org Units & POCs/ Supervisors to FDM	Determine Filer-to-Org Unit-Groupings. Categorize Filers into organizations or departments based on their need to file a disclosure report and by their supervisor. Org Units are simply an electronic version of your agency organization structure. You can create sub-Org Units to complete the organizational structure. Large agencies should plan on this task consuming a significant amount of time during its initial year of FDM, as each Org Unit has to be manually entered into FDM. For each subsequent year, information for Org Units need only be modified as appropriate, as the information will already be stored in FDM's database.
NLT December 31	POC	Move/Add Filers	Once Filers are identified and grouped via the Filer spreadsheet and the Org Unit structure is established in FDM, begin adding Filers to FDM. You can add multiple OGE 450 Filers at the same time.
NLT December 31	POC	Record Ethics Training	Record Initial or Annual Ethics Training in FDM throughout the year, as it occurs, to ensure your records are kept up to date. NLT 30 December, print out the list of Trained and Not Trained Filers for future reference in preparing the SLC 220 report.
December 31	FDM	Auto Assign	FDM automatically assigns everyone who is required to file an OGE 450 report and has been registered in FDM an Annual OGE 450 Report on December 31.
NLT January 15	POC	Notify Filers to File	POCs should initially notify OGE 450 Annual Filers of their report assignment

Checking for Outstanding Reports

FDM Management Reports provide POCs with a tool for monitoring the filing and review progress of disclosure reports. Use the Management Reports in FDM to check if the Filer has any assigned or incomplete reports before you move or delete any of your Filers.

If a Filer has an incomplete report with a Draft or Under Review status, notify:

- ♦ the Filer's supervisor if he/she has not signed yet.
- ♦ the Filer's 450 Certifier to complete the report or delete the report if it was filed erroneously.

If the Filer has a Not Started report but the Filer's role has been removed from FDM, go to Admin | Filers and un-assign the report so it will no longer display on your management report.

PERIODIC REPORT TYPES

You can choose between five standard Management Reports in FDM:

Review Progress Summary

The Review Progress Summary Report tracks disclosure reports review progress.

Due Date Tracking

The Due Date Tracking Report tracks disclosure reports that are not currently submitted (i.e., eSigned) by the Filer as of today's date.

Daily Extension Tracking

The Daily Extension Tracking Report tracks disclosure reports that have extensions as of today's date.

Ethics Training Tracking

The Ethics Training Tracking Report tracks Ethics Training information recorded for Filers that were in your Org Units during the selected calendar year.

OGE AGENCY REPORT TYPES

Annual Ethics Training Report

Annual Ethics Training Report track Ethics Training information recorded for Filers that were in your Org Units during the selected calendar year.

Generating a Management Report

To access Management Reports:

1. Click on **Management Reports | Periodic, OGE Agency, or Admin Reports**.
2. Select the type of Management Report you wish to generate.
3. Select the appropriate report filter(s).

Including/Excluding additional Org Units in your View

You can opt to include or exclude specific Org Units from your Management report by selecting one of the “Set Report Filters” and select **SHOW MY** or **SHOW ALL**.

1. Click **Generate Report**.

After you have generated your management report, click **Export** then select **Export to Excel** or **Export to .csv**.

Working in Excel

1. Click **Open** to open the file in Excel.
2. Click the **Enable Editing** and then select the **DATA** tab to sort and filter the data.
Note: You can use any of Excel’s features/tools to sort and filter your data.

Filtering and Sorting Data in Excel

To filter data:

1. Click the arrow in the table header of the column you wish to filter.
2. In the list of text below the search bar, uncheck the **Select All** box at the top of the list, then check the boxes of the items that you wish to display in your table.
3. Click **OK**. The data will be filtered, temporarily hiding the content that does not match the selected criteria.

To sort data:

1. Select the column header drop-down arrow that you wish to sort on. The Filter menu displays.

Select **Sort A to Z** and then click **OK**. The data is sorted by the selected column.

PRINTING A REPORT

For Periodic and Agency Reports:

1. Generate a report and then **Export to Excel**.
2. Select **File** and then **Print Report**.

SAVING A REPORT

For Periodic and Agency Reports:

1. Generate a report and then **Export to Excel**.
2. Select **Save**.

Managing Filers

ADDING (REGISTERING) A FILER TO FDM

FDM automatically assigns every registered OGE 450 Filer in FDM an Annual Report on December 31. Automatic report assignment makes it important that POCs have their Org Units, Supervisors and Filers set up correctly in FDM before the end of the year.

If you used the Add Multi button and a Filer came back under the “will not be added” box, you can attempt to add the Filer using the “Add Filer” button. You can also use Add Filer when you only have one Filer to add to FDM instead of multiple Filers.

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** and then select the Org Unit in the Org Tree where the new Filer should be added.
3. Click the **Org Unit Filers** tab within the selected Org Unit.
4. Select either OGE 450 or OGE 278 Filers Panel. A list of Filers already associated with the selected Org Unit is displayed.
5. Click **Add Filer**. The search box on the right of your screen prompts you to search for a new Org Member.

The screenshot displays the FDM Admin Center interface. The top navigation bar includes tabs for Reports, My Info, My Reviews, My Expired Reports, Admin Center, Ethics Training, Management Reports, and Resources. The main content area is titled "Org Management" and shows a breadcrumb trail: "My Orgs » DLA » TOP LEVEL ORG » Confidential Filers » Central North »". Below this, there are tabs for Profile, Org Unit Members, Org Unit Filers, and History. The "Org Unit Filers" tab is active, showing a list of filers for the "Central North" org unit. A callout box points to the "Add Filer" button, stating "Click Add Filer to add the Filer to the selected Org Unit." Another callout box points to the "Central North" org unit in the Org Tree, stating "Locate and click on the Org Unit that you want to add the Filer to." The table of filers has columns for E-mail, Last Name, First Name, M I, Org Unit Name, Org Unit Description, and Supervisor. The table shows two entries for OGE 450 Filers.

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor
G.Fryday@FDM.Sandbox.com	Fryday	Gladys	X	Central North	Central North	Tuesday, Ruby
by_email	Sea	Stormy	X	Central North	Central North	Tuesday, Ruby

Searching For a Filer

The screenshot shows the 'Org Management' interface. At the top, there are navigation tabs: 'My Reviews', 'My Expired Reports', 'Admin Center', 'Ethics Training', 'Management Reports', and 'Resources'. Below these is a breadcrumb trail: 'My Orgs > DLA > TOP LEVEL ORG > Confidential Filers > Central North >'. The main content area is titled 'Central North' and contains two panels. The left panel, 'Current 450 Filers', shows a table with columns 'Name' and 'E-mail'. The right panel, 'Search For Filers', has a search form with fields for 'Agency Directory' (set to 'Army'), 'E-mail' (containing 'stanley.a.kupp@us.army.mil'), 'Last Name', 'First Name', and 'Middle Name'. A 'Search' button is at the bottom of the search form. Two callout bubbles provide instructions: one pointing to the 'Agency Directory' dropdown and another pointing to the 'E-mail' field.

6. Select the appropriate Agency Directory from the drop-down list.
Note: The best way to return a result for someone is to search by e-mail address. Searching by last, first, and middle name will return more results.
7. Type the new Filer's e-mail address in the e-mail field and then click **Search**.

The screenshot shows the 'Org Management' interface with search results. The breadcrumb trail is 'My Orgs > DLA > TOP LEVEL ORG > Confidential Filers > Central North >'. The main content area is titled 'Central North' and contains two panels. The left panel, 'Current 450 Filers', shows a table with columns 'Name' and 'E-mail'. The right panel, 'Search For Filers', has a search form with fields for 'Agency Directory' (set to 'Army'), 'E-mail' (containing 'stanley.a.kupp@us.army.mil'), 'Last Name', 'First Name', and 'Middle Name'. A 'Search' button is at the bottom of the search form. Below the search form is a table with columns 'In FDM?', 'E-mail', 'Last Name', 'First Name', 'Middle Name', and 'Phone'. A callout bubble points to the plus (+) sign next to the name 'Stanley Kupp' in the search results table.

8. In the search results list, select the individual whom you wish to add by clicking the **plus (+) sign** beside their name. The Filer list redisplay with the newly added Filer.
Note: Once a Filer is added, you can assign a report for them to file in FDM.

Filer Belongs to a Different Org Unit

If you are trying to add a Filer who is already a Filer in another Org Unit in FDM, you will see the Move Filer page. When this occurs, if the Filer is in an Org Unit that is assigned to you, you will have the option to select specific reports to move with the Filer to the new Org Unit if necessary.

1. Click **Return to Filers List** if you do not want to assign a report to the new Filer and you will return to the Filers page.
2. Click **Assign OGE 450 Filer Report** if you want to assign a report to the new Filer.

Note: This option is typically used for New Entrant Filers. It is also used if the System Administrator did not initially assign the Filer a current year's report.

REMOVING A FILER ROLE

Deleting Filers should be completed prior to the December 31 to prevent Filers from starting reports in the incorrect Org Unit for the next filing season. Only One Filer role can be removed at a time.

Note: You are not removing the person from the FDM system, but only the role that they hold in the Org Unit.

1. Go to **Admin Center | Org Management**.
2. Select an Org Unit from the Org Tree that contains the Filer who you want to remove.
3. Click on the **Org Unit Filers** tab.
4. Select the 450 Filers or 278 Filers panel. A list of Filers already associated with the selected Org Unit is displayed.

The screenshot shows the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and 'Add New Org' button. The main area shows the breadcrumb 'My Orgs » DLA » TOP LEVEL ORG » Confidential Filers » Central North »'. Below this are tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'Org Unit Filers' tab is active, showing a section for 'Central North' with a note: 'Click the appropriate box to view a list of current filers and access the ability to add filers.' There are two selection boxes: '450 Filers' (containing the number 2) and '278 Filers' (containing the number 0). The '450 Filers' panel is expanded, showing a table with the following data:

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor	Actions
G.Fryday@FDNSandbox.com	Fryday	Gladya	X	Central North	Central North	Tuesday, Ruby	[Add] [Edit] [X] [Trash] [User]
S.Sea@us.army.mil	Sea	Stormy	X	Central North	Central North	Tuesday, Ruby	[Add] [Edit] [X] [Trash] [User]

A callout box with a blue border and white background points to the 'X' icon in the actions column of the first row, with the text: 'Click the X to remove the Filer.'

5. Click on the **Remove 450/278 Filer (X)** button in the actions column beside the appropriate Filer.

Removing an Assigned Report

Org Management

My Orgs » DLA » TOP LEVEL ORG » Confidential Filers » Central North »

Central North

Are you sure you want to remove Gladys X Fryday as a 450 Filer from Central North?

Remove Reports option:
Also remove Not Started 450 Filer report assignments for Gladys X Fryday

Incomplete Reports for Gladys X Fryday

Remove Report?	Year	Reporting Status	Review Status	Assigning Org	Assigned
<input checked="" type="checkbox"/>	2018	OGE 450 New Entrant	Not Started	Central North	Yes
<input checked="" type="checkbox"/>	2018	OGE 450 Annual	Not Started	Central North	Yes
<input type="checkbox"/>	2016	OGE 450 Annual	Not Started	Central North	Yes
<input checked="" type="checkbox"/>	2015	OGE 450 Annual	Not Started	Central North	Yes

Ok Cancel

Leave the checkbox checked ("Yes") to remove any Not Started reports.

- Deleting a Filer's role does not delete any started reports (e.g. Draft, Under Review and Complete). The check box is checked by default to remove the assigned report.
- To remove a report with the Filer role, leave the checkbox selected beside a report and then click **OK**. If you want a report to stay with the review chain of the original Org Unit, deselect the check box and select **OK**.

Note: If you do not select the checkbox, the Filer role is removed and the report assignment is not removed.

Note: You may remove a Filer from your Org Unit even if they still need to create a report in FDM. If a Filer is deleted from an old Org Unit, but never added into a new Org Unit, the Filer will still be able to log into FDM but won't see the My Reports tab. The Filer should then contact the POC or their new Org Unit and ask to be added back in to FDM.

MOVING A FILER TO A DIFFERENT ORG UNIT

It is very important to move your Filers to their new Org Units before the FDM automatic assignments are generated on December 31. Only some Filers' reports are eligible to be moved to a different Org Unit.

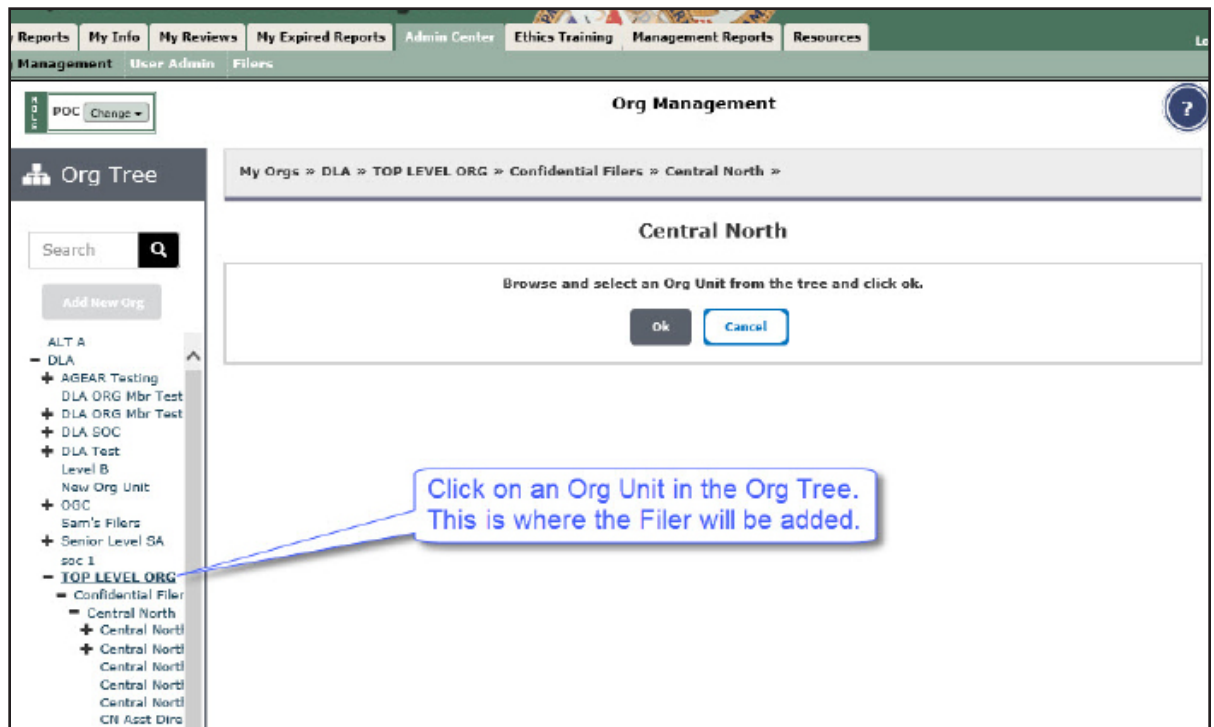
Moving a Filer with a Draft or Under Review Report

1. Go to **Admin Center | Org Management**.
2. Select an Org Unit from the Org Tree panel that contains the Filer that you plan to move to a different Org Unit.
3. Click the **Org Unit Filers** tab and then select either the OGE 450 or OGE 278 Filers Panel. A list of Filers already associated with the selected Org Unit is displayed.

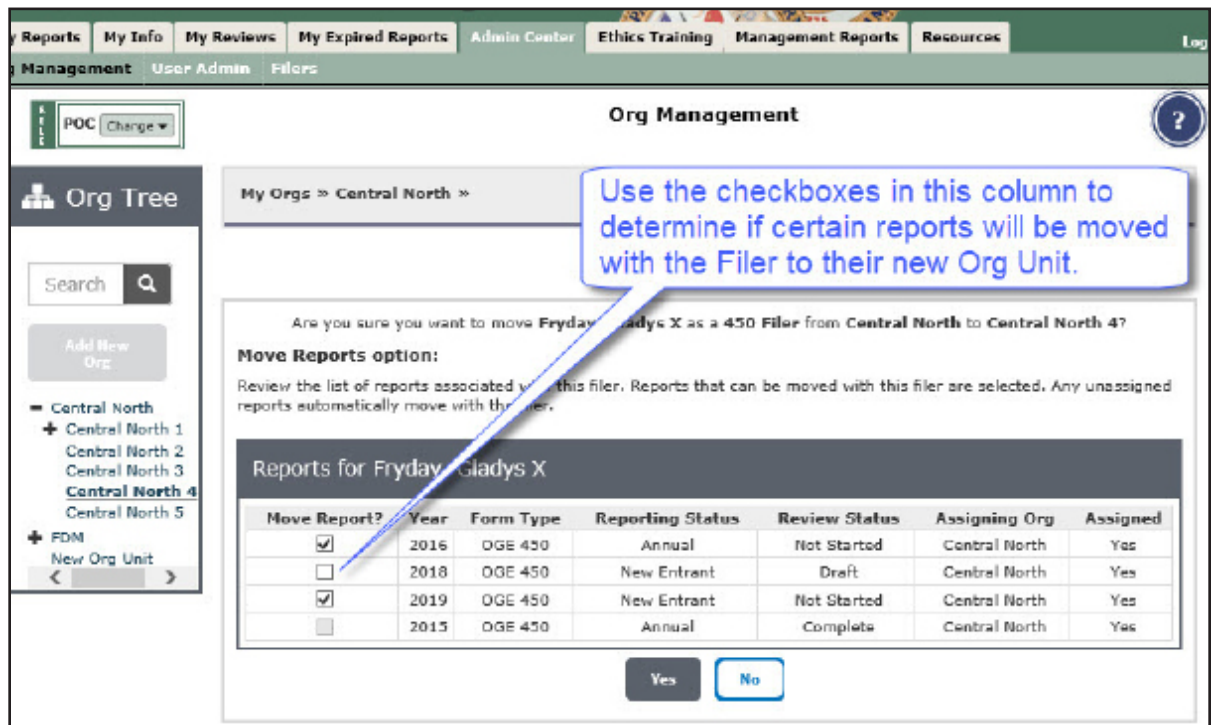
The screenshot shows the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and an 'Add New Org' button. The main content area is titled 'Org Management' and shows the breadcrumb 'My Orgs > DLA > TOP LEVEL ORG > Confidential Filers > Central North >'. Below this are tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'Org Unit Filers' tab is active, showing a section for 'Central North' with a 'Click the appropriate box to view a list of current filers and access the ability to add filers.' instruction. There are two boxes: '430 Filers' (containing a '2') and '278 Filers' (containing a '0'). The 'OGE 450 Filers - Central North' section has 'Add Filer' and 'Add Multi' buttons. Below is a table with columns: 'E-mail', 'Last Name', 'First Name', 'M I', 'Org Unit Name', 'Org Unit Description', 'Supervisor', and 'More'. Two filers are listed: G. Fryday and S. Sea. A callout box points to the 'Move' button in the 'More' column for the first filer, with the text 'Click Move to move a Filer to a different Org Unit.'

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor	More
G.Fryday@EDM@gsa.gov	Fryday	Gladys	X	Central North	Central North	Tuesday, Ruby	Move
S.Sea@us.army.mil	Sea	Stormy	X	Central North	Central North	Tuesday, Ruby	Move

4. Click on the **Move** button in the actions column beside the appropriate Filer.



5. Browse and select an Org Unit from the tree to locate the appropriate Org Unit where the Filer is to be added and then click **OK**.



6. If your Filer has past reports in FDM, the **Move Reports option** screen may display. To move a report with the Filer, leave the checkbox selected beside a report then click **OK**. If you want a report to stay with the review chain of the original Org Unit, deselect the checkbox before clicking **OK**.
7. Click **Yes**. The Filer and their selected reports are moved to the new Org Unit.

Moving Filers: Common Issues

Moving a Filer with a Completed Report or Unassigned reports

You can move a Filer with Completed or Unassigned reports to a different Org Unit. However, these types of reports will remain with the assigning Org Unit (despite the Filer moving). Completed or Unassigned reports will not move to the arriving Org Unit.

Filer's report was assigned in a different Org Unit (or, new Org Unit reviewers can't find report)

The most common issue for POCs during filing season is when a Filer is successfully added to a new Org Unit but their report assignment is with the previous Org Unit. This sometimes occurs when Filer's are added to an Org Unit after reports are automatically assigned for the upcoming filing season. To correct this problem:

1. Move the Filer back to old Org Unit. You may need to contact the POC for the previous Org Unit and request they add the Filer back.
2. Once the Filer is back in the original Org Unit, un-assign the report. Again, you may need to contact the POC for the previous Org Unit and request they do this.
3. Once the report assignment is removed, move or add the Filer to the new Org Unit and assign the report.

Filer's New Org Unit has Different Reviewers

If you are moving Filers to an Org Unit with different reviewers and the Filer has a disclosure report that is Under Review, notify the current reviewers as they may have already begun the review process.

Filer Changed Agencies

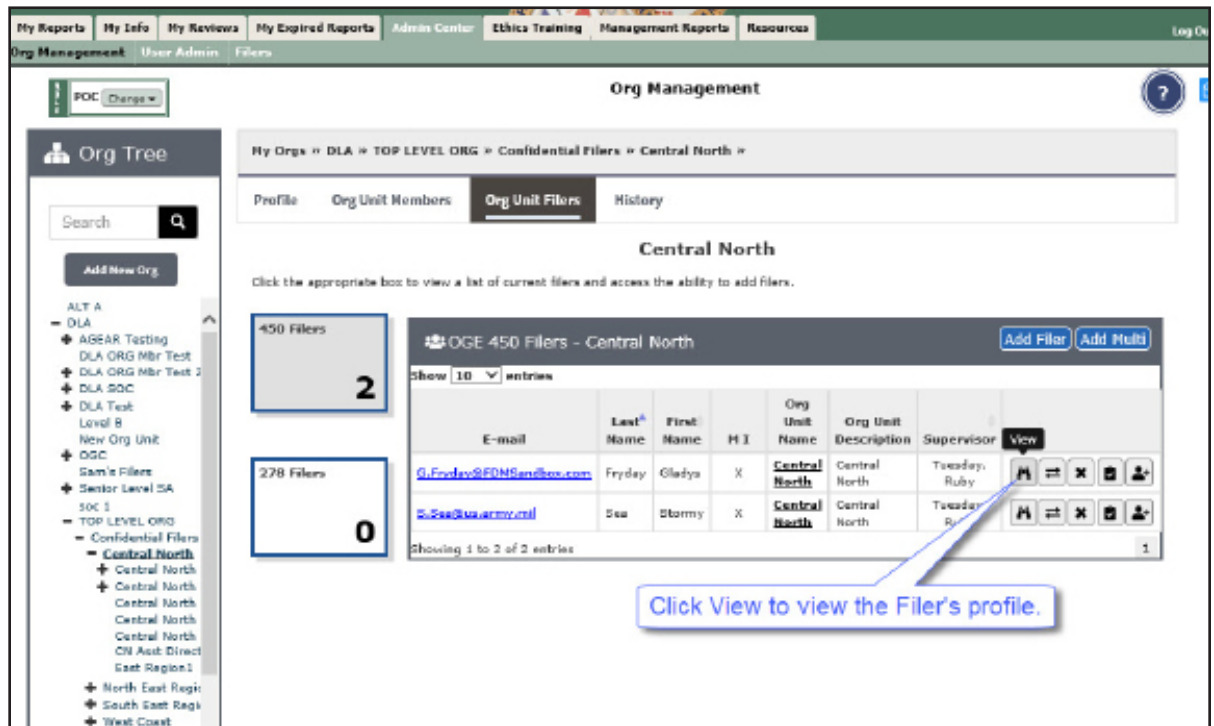
Filer reports cannot be moved across agencies. Contact FDM Customer Support before adding a Filer to your Agency if the Filer created reports in FDM under another agency. For example, if a Filer created reports in FDM while working in USARMY and now needs to create a report at VA, call FDM Customer Support and they will assist you with the move so the Filer will have access to all of their reports.

Filer files both 450 and 278 reports

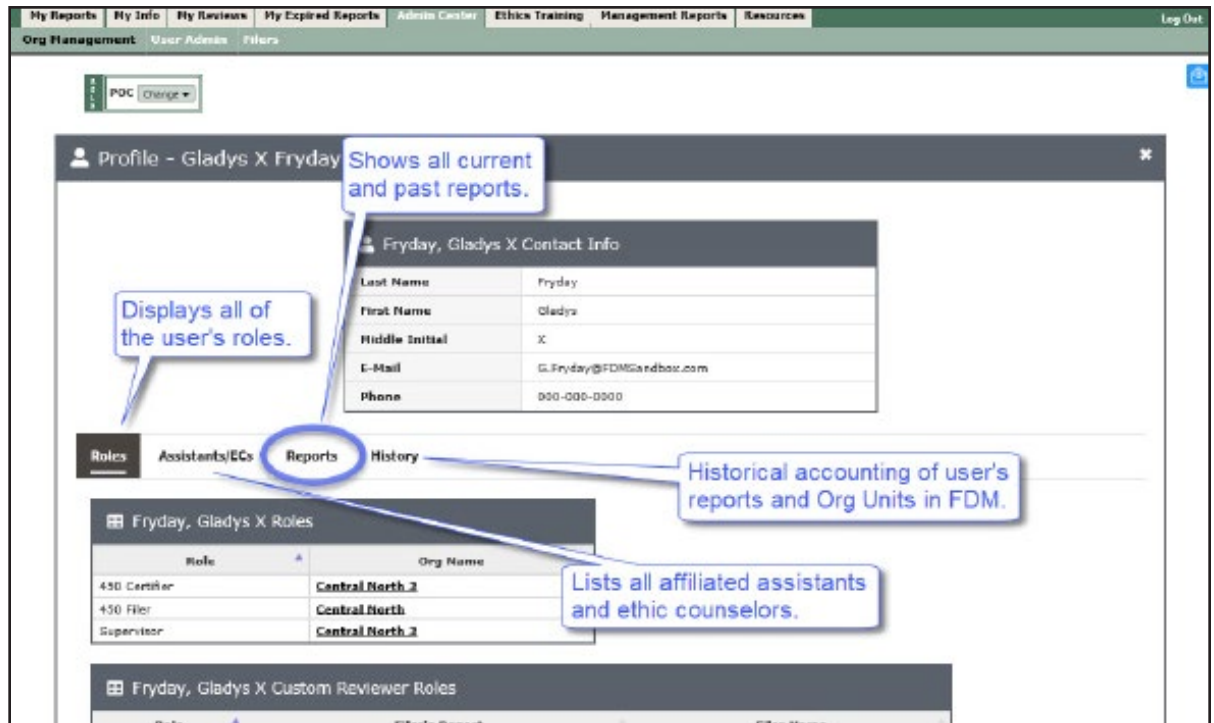
If you are trying to move a Filer who has both a 450 and 278 roles, you will not be able to move the Filer's OGe 278 reports as only DAEOs, DAEO ECs, SLCs and SLC Assistants have the authority to make this move.

VIEWING FILER(S) REPORT ASSIGNMENTS AND STATUS

Viewing Report Assignments



1. On the Org Unit Filers tab click **View** beside the Filer. The Filer profile displays.



2. Click the **Reports** tab in the Filer's profile.
Note: In the Assigned column, it will display 'Yes' if the report is Assigned.

POC Change

Profile - Gladys X Fryday

Fryday, Gladys X Contact Info

Last Name	Fryday
First Name	Gladys
Middle Initial	X
E-Mail	G.Fryday@FDMSandbox.com
Phone	000-000-0000

Roles Assistants/ECs **Reports** History

Click View to review the report from the Review Status page.

Fryday, Gladys X Reports

Report Year	Report Status	Review Status	Assigned	Current Due Date	Assigning Org Unit	
2015	OGE 450 Annual	Complete	Yes	02/17/2015	Central North	
2015	OGE 450 Annual	Not Started	Yes	02/16/2016	Central North	
2015	OGE 400 New Entrant	Draft	Yes	10/10/2016	Central North	

3. If the Filer's report has not been assigned, click on the **Assign** button beside the Filer's name.
4. To remove a report assignment on any Not Started report, click the **Remove Assignment** button.
5. To view a particular report, click on the **View** button beside a report. To do this you must have the correct role in FDM.

ADDING MULTIPLE 450 FILERS

FDM allows you to add Filers in groups of up to 100 at the at time in the same Org Unit with the same Supervisor. However, you will need the correct e-mail address for each Filer to add each Filer grouping to the selected Org Unit.

Adding Multiple OGE 450 Filers at a Time

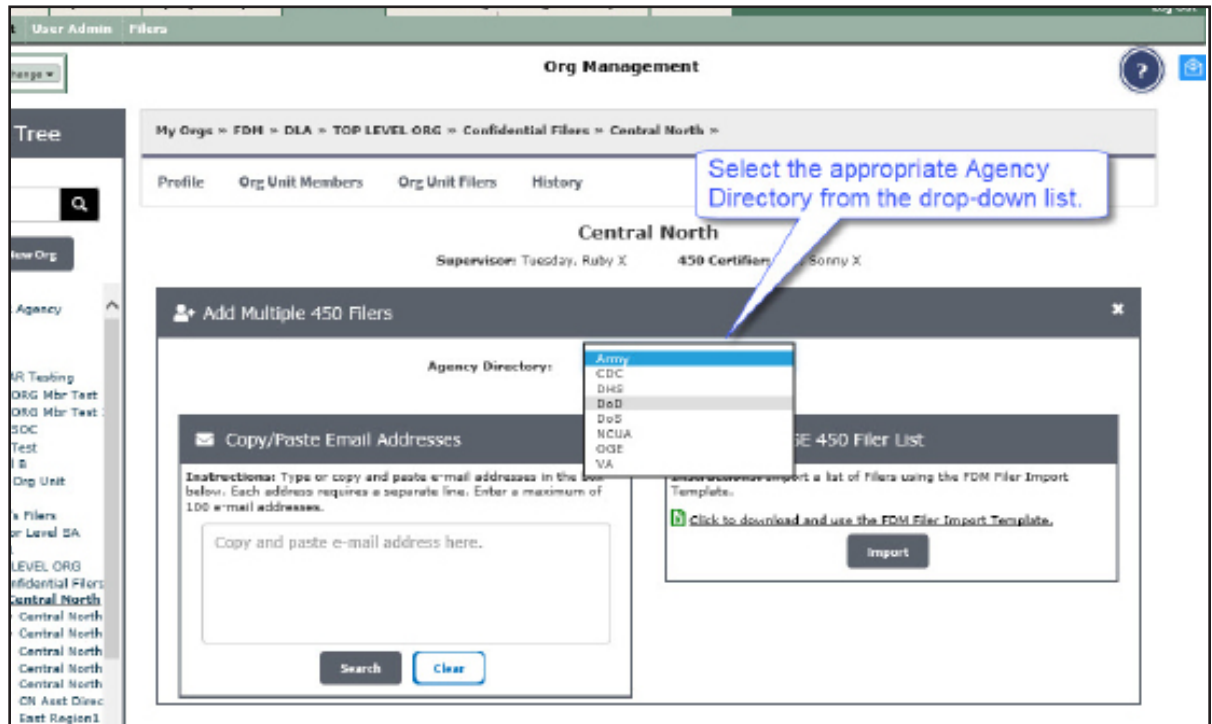
1. Go to **Admin Center | Org Management**.
2. Locate and select the appropriate Org Unit where the Filers will be added in the Org Tree panel.
3. Click the **Org Unit Filers** tab. Select the **450 Filers** panel. A list of Filers already associated with the selected Org Unit is displayed.

The screenshot shows the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and an 'Add New Org' button. The main area shows the breadcrumb 'My Orgs » FDM » DLA » TOP LEVEL ORG » Confidential Filers » Central North »'. Below this are tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'Org Unit Filers' tab is active, showing a 'Central North' section with a 'Click the appropriate box to view a list of current filers and access the ability to add filers.' instruction. There are two boxes: '450 Filers' (containing the number 2) and '278 Filers' (containing the number 0). The '450 Filers' box is selected. Below it is a table titled 'OGE 450 Filers - Central North' with columns: E-mail, Last Name, First Name, NI, Org Unit Name, Org Unit Description, and Supervisor. Two filers are listed: G.Fryday@FDMsandbox.com and S.See@us.army.mil. The 'Add Multi' button is highlighted with a callout box that says 'Click Add Multi to add multiple 450 Filers.'

E-mail	Last Name	First Name	NI	Org Unit Name	Org Unit Description	Supervisor
G.Fryday@FDMsandbox.com	Fryday	Gladys	X	Central North	Central North	Tuesday, Ruby
S.See@us.army.mil	See	Stormy	X	Central North	Central North	Tuesday, Ruby

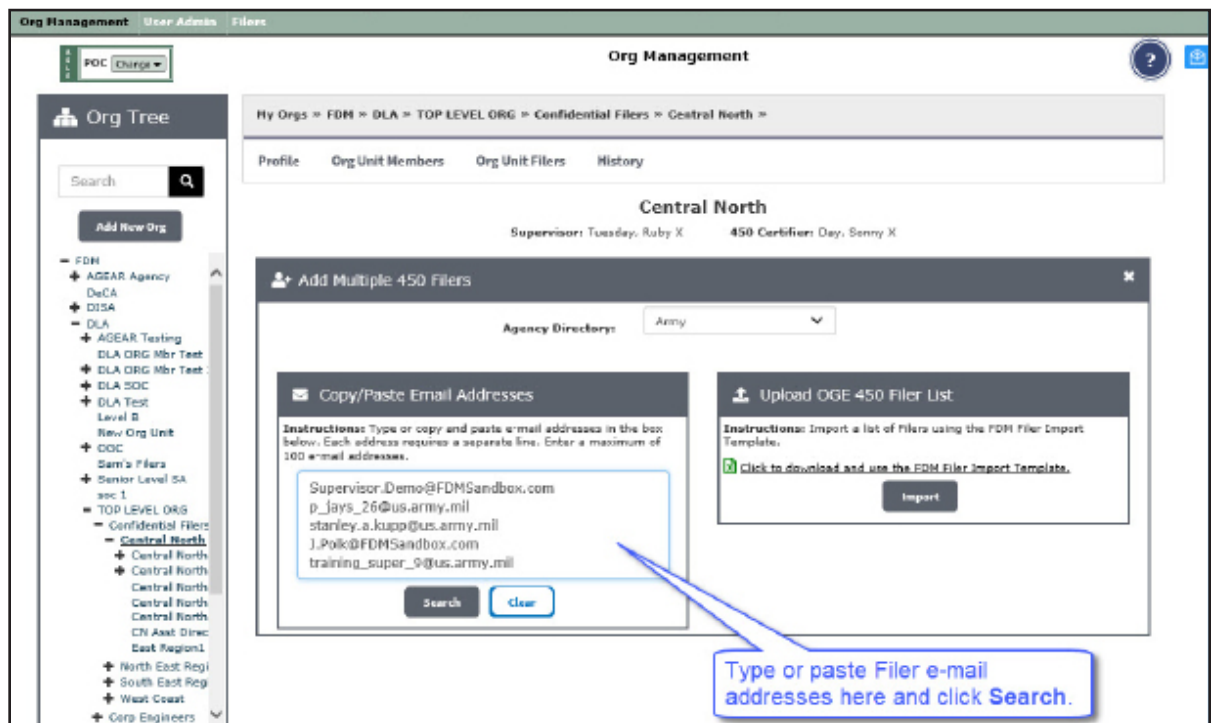
4. Click the **Add Multi** button. The Add Multiple Filers page is displayed.

You have two options for uploading multiple 450 Filers: you can type or paste e-mail addresses OR you can upload an FDM Excel template file.



1. Select the appropriate Agency Directory from the drop-down list. Please select DoD if your Agency is USAF, USN, USMC, ect.

Option 1: Importing/Adding Filers via Type/Paste of E-mail Addresses



1. Type or paste Filer e-mail addresses in the Copy/Paste E-mail Addresses box. You can enter up to 100 e-mail addresses at a time and only one e-mail address per line.

2. When complete, click **Search**. The Review and Confirm screen is displayed.

Review and Confirm

Instructions: Uncheck any individual you do not wish to add. Only selected individuals will be added to FDM.

Show 100 entries

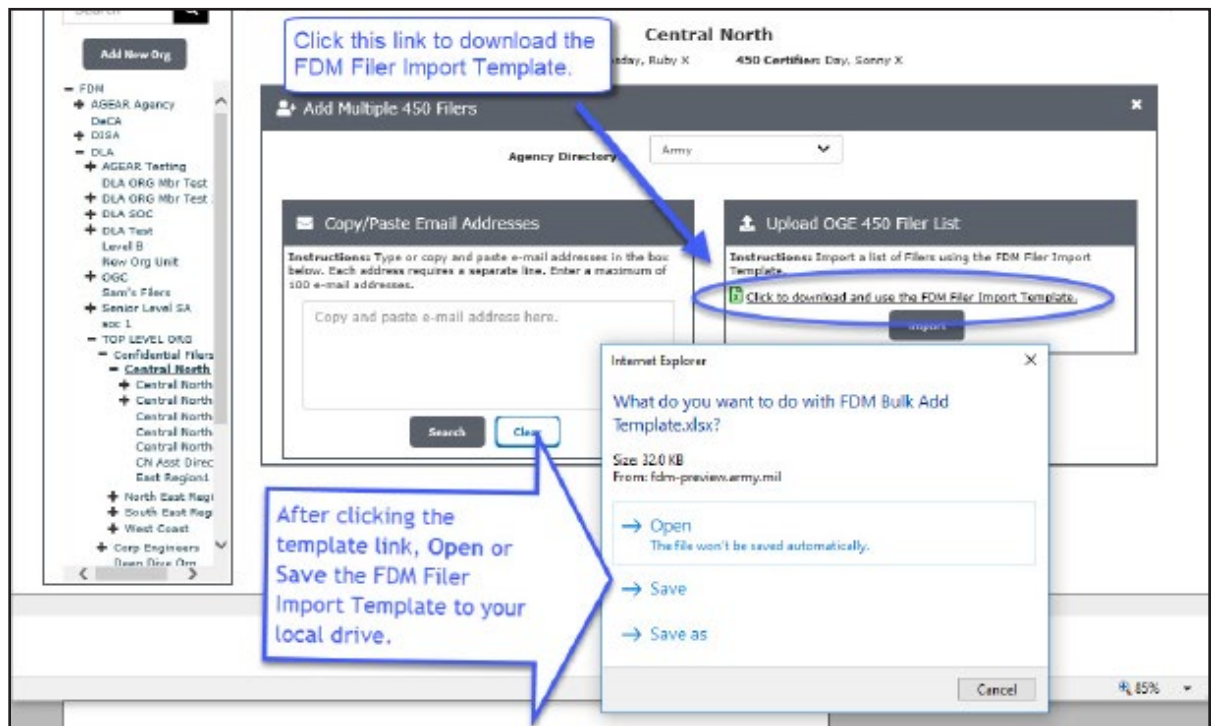
Add	In FDM?	E-mail	Last Name	First Name	Middle Name	Phone	FDM Role	Reason
<input checked="" type="checkbox"/>	Yes	Supervisor		Supervisor	X	000-000-0000	FDM User	
<input type="checkbox"/>	Yes	p_says_2001@army.mil	Frecco	Al	X	000-000-0000	Supervisor, FDM User	
<input checked="" type="checkbox"/>	Yes	stanley.a.kupp@us.army.mil	Kupp					
<input checked="" type="checkbox"/>	Yes	J.Polk@EDNSandbox.com	Polk					
<input checked="" type="checkbox"/>	Yes		aper_9	Training	X	000-000-0000	Other	
<input type="checkbox"/>	Yes	S.Sea@us.army.mil	Sea	Stormy	X	000-000-0000	450 Filer, 450 Certifier, Agear Ethics officers, FDM User	Already a filer in FDM

Confirm Cancel

3. Review the listing of Filers. To add a Filer, leave the checkbox selected beside the individual and click **Confirm**. Uncheck the checkbox beside any individual whom you do not wish to add. Only selected individuals will be added.

Note: If you were unable to add a Filer with Add Multi, verify that the e-mail address you entered is correct. If a Filer is **Already a Filer in FDM**, you will have to add them separately via **Add Filer**.

Option 2: Import a List of Filers (Excel file)



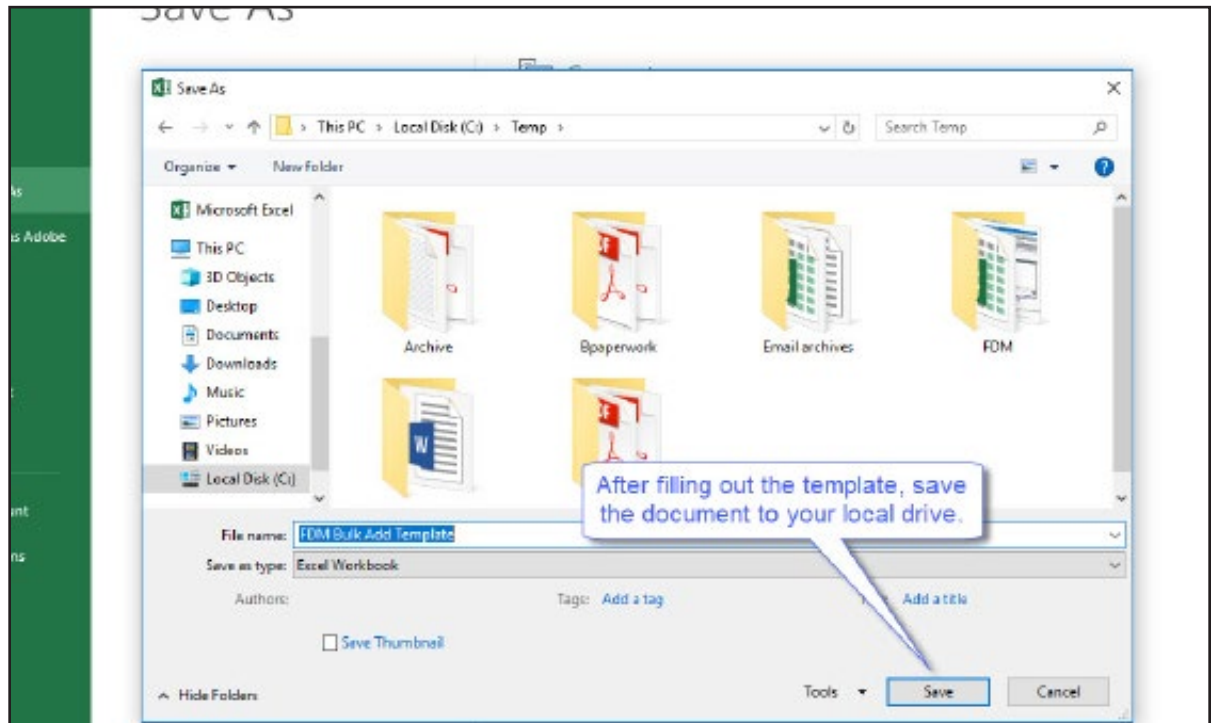
1. Click on the link that says **Click to Download and use the FDM Filer Import Template** in the Upload OGE 450 Filer List.

Note: Use only the FDM Filer Import Template during the upload process. The FDM template already maps the template fields to the appropriate FDM fields.

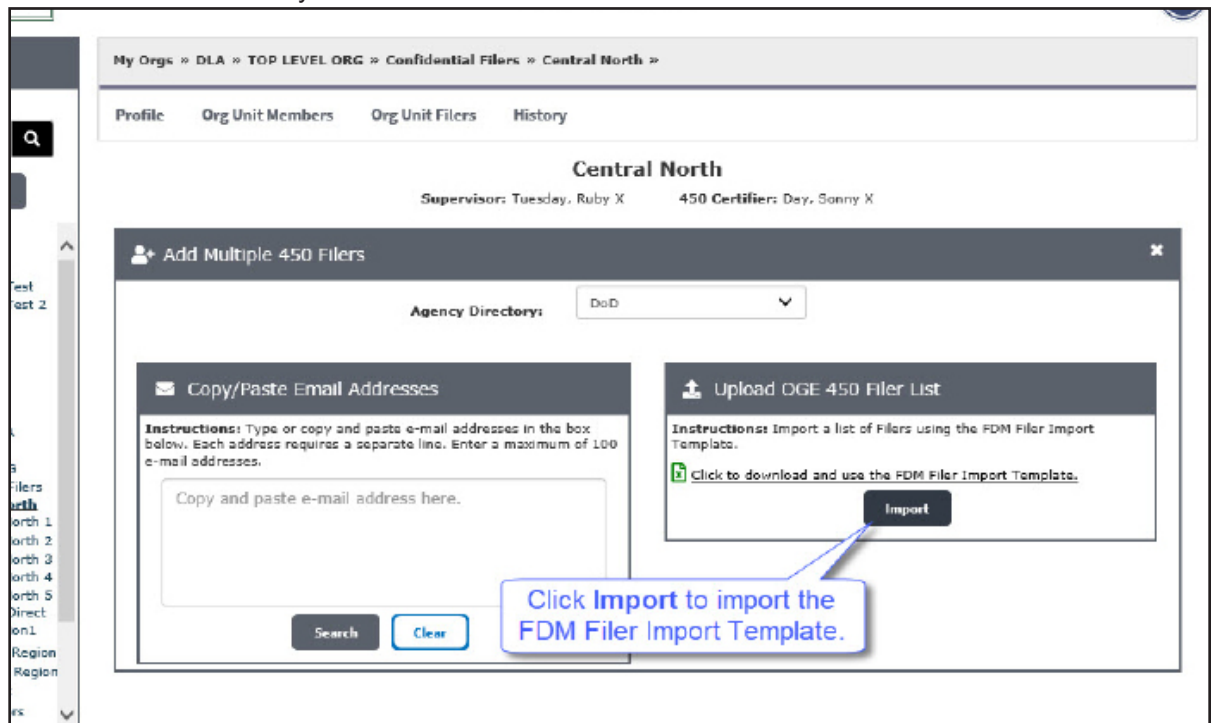
	A	B	C	D	E
1	First Name	Last Name	Middle Name (or Middle Initial)	Email Address	Email Valid?
2	Training	450_17	X	training_450_17@us.army.mil	TRUE
3	Training	450_18	X	training_450_18@us.army.mil	TRUE
4	Training	450_19	X	training_450_19@us.army.mil	TRUE
5	Training	450_20	X	training_450_20@us.army.mil	TRUE
6	Training	450_21	X	training_450_21@us.army.mil	TRUE
7	Training	450_22	X	training_450_22@us.army.mil	TRUE
8	Training	450_23	X	training_450_23@us.army.mil	TRUE
9	Training	450_24	X	training_450_24@us.army.mil	TRUE
10	Training	450_25	X	training_450_25@us.army.mil	TRUE
11	Training	450_26	X	training_450_26@us.army.mil	TRUE
12	Training	450_27	X	training_450_27@us.army.mil	TRUE
13	Training	450_28	X	training_450_28@us.army.mil	TRUE
14	Training			training_450_29@us.army.mil	TRUE
15	Training			training_450_30@us.army.mil	TRUE
16	Training			training_450_31@us.army.mil	TRUE
17	Training	450_32	X		TRUE
18	Training	450_33	X		TRUE
19	Training	450_34	X		TRUE
20					FALSE
21					FALSE
22					FALSE

2. Open the Excel template and fill out the required Filer information.

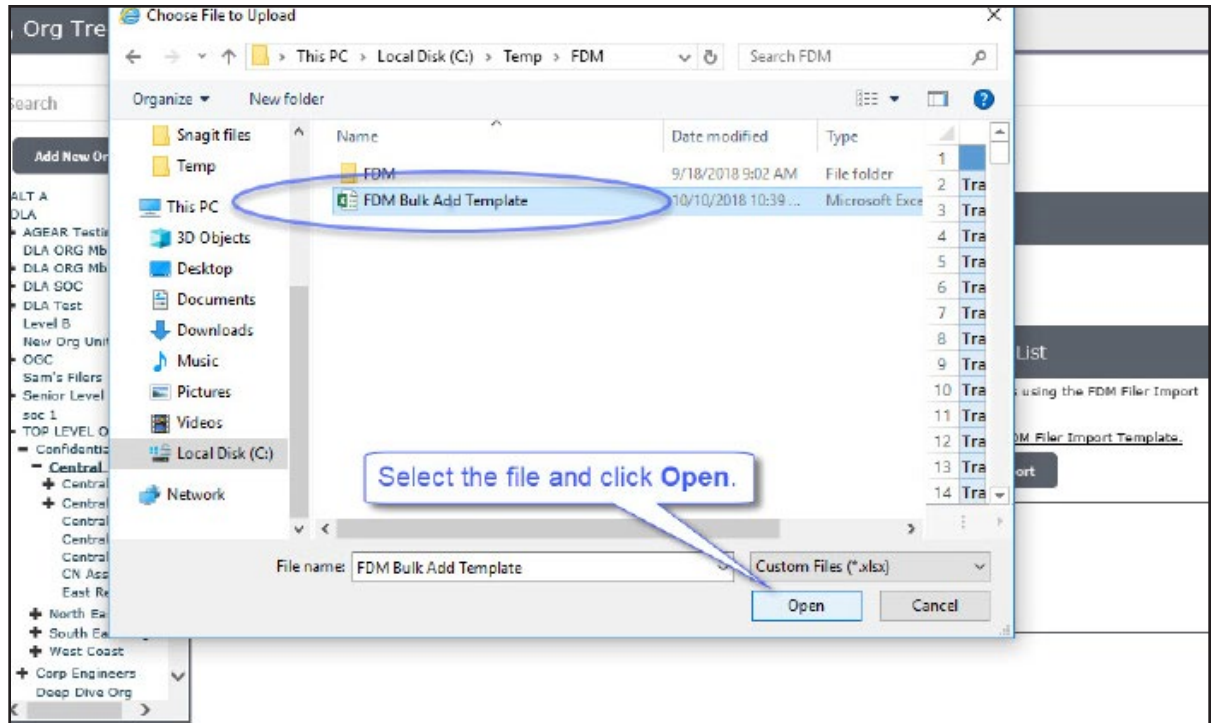
Note: DO NOT change the template. Otherwise, it will not upload properly.



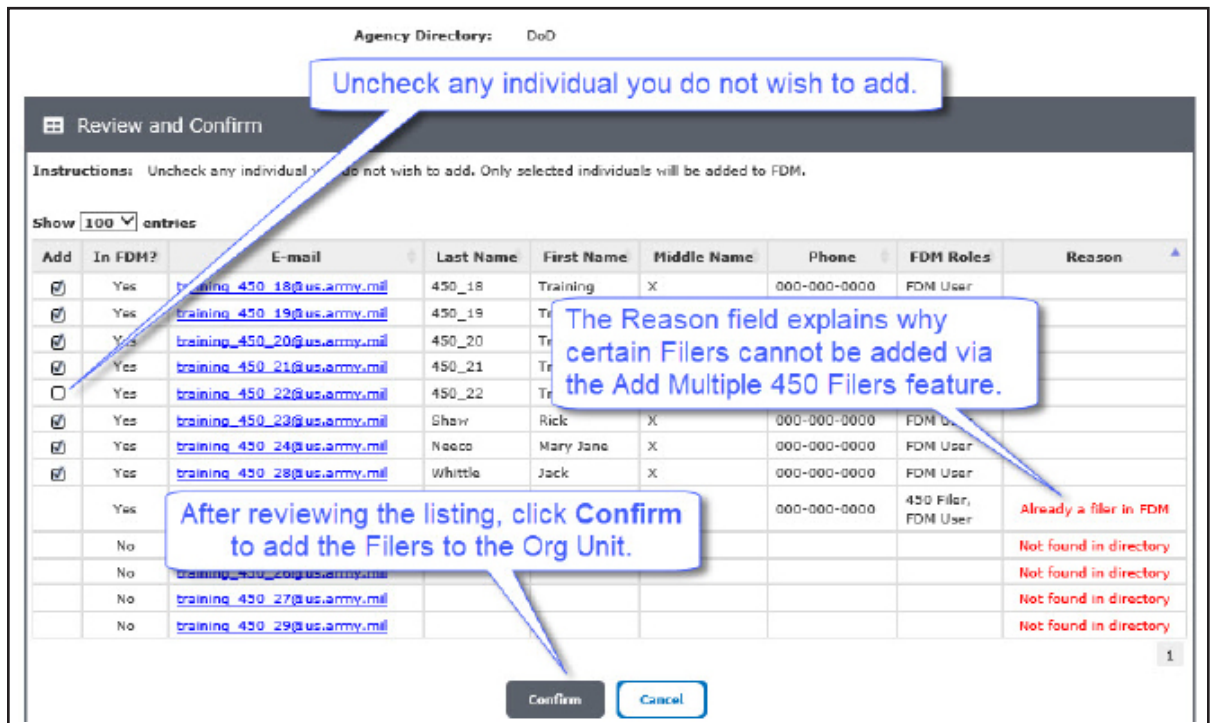
3. After entering the Filer information into the template, **Save** the document to your local drive.



4. In FDM, click **Import** and then navigate to the file in your local drive.



5. **Open** the appropriate file and then click **OK** in the Upload OGE 450 Filer List box. The Review and Confirm screen is displayed.



6. Review the listing of Filers and uncheck any individuals you do not wish to add. Click **Confirm**.
Note: Only selected individuals will be added.
Note: If you were unable to add a Filer with Add Multi, verify that the e-mail address you entered into the template is accurate. If a Filer is already in FDM, you will have to add them individually via Add Filer.

Assigning Reports

Annual Filers

Since a System Administrator assigns Annual reports, it is very important that POCs have their organization set up properly before December 31.

Everyone who is required to file a report will be assigned an Annual OGE 450 Report to file in FDM automatically. If a Filer has been added to your organization after the initial notification, the POC will have to assign a report to that Filer.

New Entrant Filers

When a new Filer is added to your organization and they have not previously filed an OGE 450 report, they should be assigned to file a New Entrant report in FDM. When assigning a New Entrant activity, you will need to know the Filer's start date or the date the Filer was informed they should file a report.

Assigning a Report to a Filer:

1. Go to **Admin Center | Org Management**.
2. Locate and select the Filer's Org Unit in the Org Tree.
3. Click the **Org Unit Filers** tab and then select either **OGE 450 Filers Panel**.

The screenshot displays the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and a list of organizational units. The main area shows the 'Central North' org unit selected, with the 'Org Unit Filers' tab active. A table titled 'OGE 450 Filers - Central North' lists filers with columns for E-mail, Last Name, First Name, M I, Org Unit Name, Org Unit Description, and Supervisor. Two filers are listed: G.Fryday@FDM Sandbox.com and S.Sea@us.army.mil. A callout box with a blue border and white background points to the 'Assign' button in the table's action column, containing the text: 'Click Assign to assign a report to a Filer.'

4. Click the **Assign** button beside the appropriate Filer. The Filer Assignment page is displayed.

Entering the Report Information

5. Select the Year and New Entrant and then click **OK.**
 ♦ The Due Date defaults to the statutory Due Date..

Org Tree

My Orgs » DLA » TOP LEVEL ORG » Confidential Filers » Central North »

Override Due Date – Use ONLY when necessary to record the legal due date (e.g., because the date automatically assigned by FDM is not the correct legal due date). Only Certifying Officials or their EC can override the statutory due date. A reason must be included when overriding a Due Date in FDM, which usually just consists of indicating the appointment or termination date of the filer.

Record Extension – Use this function to record an extension to the legal due date. Report extensions are recorded on the Review Status page of a report.

Note: ECs may need to override a due date and then still record an extension – (e.g., Filer appointed 6/1, report assigned 6/15, giving filer only 15 days to file – EC may override to record 6/30 due date but extend 15 days to provide filer 30 days to file).

450 Filer Assignment

Org Unit: Central North
 Filer: Gladys X Fryday

Assignment Type: Report

Year: 2018

Report Status: New Entrant

Due Date: 11/08/2018

Due Date Comments: Enter a reason for overriding the report's default due date.
 (256 Characters Remaining of 256)

Ok Cancel

The report year defaults to the current year.

Only a DAEO/450 Certifier or their EC can adjust the Due Date.

Notifying a Filer

Org Tree

My Orgs » DLA » TOP LEVEL ORG » Confidential Filers » Central North »

Override Due Date – Use ONLY when necessary to record the legal due date (e.g., because the date automatically assigned by FDM is not the correct legal due date). Only Certifying Officials or their EC can override the statutory due date. A reason must be included when overriding a Due Date in FDM, which usually just consists of indicating the appointment or termination date of the filer.

Record Extension – Use this function to record an extension to the legal due date. Report extensions are recorded on the Review Status page of a report.

Note: ECs may need to override a due date and then still record an extension – (e.g., Filer appointed 6/1, report assigned 6/15, giving filer only 15 days to file – EC may override to record 6/30 due date but extend 15 days to provide filer 30 days to file).

450 Filer Assignment

Org Unit: Central North
 Filers: Gladys X Fryday

Success: Filer Gladys X Fryday assigned 2018 OGE 450 Annual Report!

Report Assignment Notification

To: G.Fryday@FDMSandbox.com

Subject: Start Your Report due 02/15/2018 (Automatic Notice)

Message: You are registered as an OGE 450, Confidential Financial Disclosure Report Filer in Financial Disclosure Management (FDM). Your report is due 02/15/2018. Please consult your legal advisor or 450 Certifier Don 16 D Manella, thomas.a.berens.ctr@mail.mil, 732-555-5234, if you have questions about how to file a Financial Disclosure Report, or need an extension. Also, consult your legal advisor, supervisor or me if you do not think you should file such a report.

Click Send to notify the Filer via e-mail.

The e-mail message can be edited by typing over the default text.

Send Cancel

6. Click **Send** to notify the Filer of their requirement to file or **Cancel** to notify later.
Note: The e-mail message can be edited by typing over the default message..

Reminding Annual Filers

Once the System Administrator has assigned Annual OGe 450 Reports to all current Filers in FDM, the POC can then notify the Filers in their Org Units of their requirement to file.

SENDING AN E-MAIL REMINDER

1. Select **My Reviews | Remind Filers**.

Remind OGE 450 Filers

POC: [? How Do I...](#)

Find Filers

Org Unit: [-SELECT-Next Level Down]

Show Filer's Reports for My Orgs
 Show My Filers Include Filers for Org Units assigned to other 450 Certifiers

Find:

OGE 450 Annual Filers who need an Initial Notification to file
 All OGE 450 Filers who have not started their Report
 All OGE 450 Filers who have not submitted their Report
 All OGE 450 Filers who are late

1 to 2 of 2 Items per Page: 100 [Printer Friendly](#)

Uncheck any Filer who should not get an email	Filer	Filer's e-mail	Report Year	Reporting Status	Supervisor	Supervisor's e-mail
Organization: Test Org 1016						
<input checked="" type="checkbox"/>	Admin Closed, 450_157	ASD4.sec@us.army.mil	2018	New Entrant	Kupp, Stanley	stanley.a.kupp@us.army.mil
<input checked="" type="checkbox"/>	AmendInProgress, 450_156 R	ASD3.sec@us.army.mil	2018	New Entrant	Kupp, Stanley	stanley.a.kupp@us.army.mil

1 to 2 of 2 Items per page: 100

2. Select the Org Unit from the **Next Level Down** drop-down list, select **OGE 450 Annual Filers Who Need An Initial Notification To File** and click **Search**.
3. Review the list of Filers and then click **Notify**. The Confirm Reminder to OGE 450 Filers page is displayed.

Review E-Mail Message

The Confirm Reminder page is used to notify a Filer that he/she has been assigned a report to file in FDM and lists the type of report that should be filed along with the due date.

Confirm Reminder to All OGE 450 Filers who have Not Started their Reports

Send an e-mail to 2 Filers

From: kevin.m.deegan.ctr@mail.mil

Subject: FDM Reminder - Please start your [ReportYear] [Reporting Status] OGE 450 Report , due [Current Due Date]

Message: [Filer Firstname Middle Lastname] :

It is time to file your [Report Year][Reporting Status] OGE 450 Report in FDM.

1. Log in to FDM - URL: <https://fdm-preview.army.mil>.
(If this is the first time you are entering FDM, you will see a Contact Information screen to review, update, and complete. Click Save when finished.)
2. You should land on the My Reports / Reports Not Started page if a report has been assigned (otherwise as a Filer you will be on the My Reports | Report List page).
3. Click the Start this Report button beside the report. FDM will guide you in entering your information.
4. When your report is complete, click the e-Sign button to sign and submit your report.

Please consult your legal advisor if you have questions about this requirement to file a Financial Disclosure Report, or need an extension. Also, consult your legal advisor if you do not think you should file such a report.

For further assistance, contact the FDM Service Center at 443-861-8679 or DSN 848-8679. Additional information can be found on the Help & Support page at: <https://fdm-preview.army.mil/helpSupport/helpSupport.htm>. E-mail: <mailto:usarmy.APG.cecom.mbx.FDMSpt@mail.mil>

(Limit 2,500 characters)

Add your optional text here:

(2500 Characters Remaining of 2500)

Closing: Regards,
Kevin M. Deegan

Send a summarized e-mail to 1 POCs

From: kevin.m.deegan.ctr@mail.mil

Subject: FDM - Your Filers have been reminded to start their assigned OGE 450 Reports

Message: [POC Firstname Middle Lastname] :

Customize Message

4. Type any additional text to add to your message and then click **Send**. The Remind OGE 450 Filers page is displayed with a message summary.
Note: You can also send a copy of this message to any associated POCs and Supervisors from this page.

Adding Sub Org Units

Additional Org Units are necessary when you need different or separate groupings of Filers and review chain participants, such as a new Supervisor for a new Activity.

Note: A New Org Unit is not required when a successor Supervisor replaces an incumbent one. In that case, simply delete the departed Supervisor and assign a new one.

You can add a new Org Unit and any associated Org Unit Members to FDM in the Admin Center.

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** and then select the Org Unit in the Org Tree where the new Org Unit will be added.

The screenshot displays the 'Org Management' interface. On the left, the 'Org Tree' panel shows a hierarchy of Org Units. The 'Add New Org' button is highlighted with a blue circle. A callout box points to this button with the text: 'Click Add New Org to add a new Org Unit.'

The main content area shows the details for the 'Corp Engineers' Org Unit. It includes a 'Basic Details' section with the following information:

- Name:** Corp Engineers
- Description:** Org Unit Description
- Agency:** DLA

Below the details is an 'Actions' section with two buttons: 'Move' and 'Remove'.

At the bottom, there is an 'Org Unit Role Assignments' table:

Roles	Current Assignments
POC(s)	Not Assigned (BEACH, Sandy X acting); (Barr, Clark X acting)
Supervisor	Manella, Don_16 D
450 Certifier	Not Assigned (ADAMS, Ansel X acting)
Senior Legal Counsel	Not Assigned (FRYDEY, Gladys X acting)
DAEO	Not Assigned (BAUM, Adam X acting)

3. Click **Add New Org**, located above the Org Tree panel.

4. Type the appropriate Name and Description for the new Org Unit.

Org Unit Name and Description

- ◆ The Org Unit name must be unique: duplicate names are not permitted at the same level within the Org Unit. It is recommended that you keep the Org Unit name short and specific, e.g. use of abbreviation of the organization name to which the Filers and legal reviewers belong. FDM does not prohibit you from naming Org Units whatever you like, but it is advised that you follow a standardized Org Unit naming convention.
 - ◆ Use the description field to describe the Org Unit further. This way, you can easily distinguish the Org Unit from others that may have a similar name. The Org Unit description is limited to 100 alphanumeric characters.
5. When complete, click **Save** and then **OK** to confirm the addition of the new Org Unit.

Acting and Assigned Org Unit Roles

Each Org Unit inherits the review chain participants from the Agency Org Unit until a different legal reviewer is associated to the subordinate Org Unit. When an Org Unit does not have an assigned Review Chain Participant or POC, FDM automatically assigns the person as acting in that role from the superior Org Unit.

ASSIGNING SUPERVISORS

FDM automatically assigns the Org Unit role from the superior Org Unit as the acting Org Unit role until a different Org Unit role is assigned.

If the person is associated to all of the subordinate Org Units, there is no need to assign that person to each subordinate Org Unit. In fact, you may not need the subordinate Org Unit in that case.

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** then select an Org Unit in the Org Tree where the new Org Member will be added.
3. Click the **Org Unit Members** tab within the selected Org Unit.

The screenshot displays the FDM 'Org Management' interface. The top navigation bar includes tabs for 'My Reports', 'My Info', 'My Reviews', 'My Expired Reports', 'Admin Center', 'Ethics Training', 'Management Reports', and 'Resources'. The 'Admin Center' tab is active, and the 'Org Management' sub-tab is selected. The breadcrumb trail shows the path: 'My Orgs > FDM > DLA > TOP LEVEL ORG > Confidential Filers > Central North >'. The 'Org Unit Members' tab is active, showing the 'Central North' Org Unit. The interface is divided into three main sections: 'Point of Contact (POC)', 'Supervisor', and '450 Certifier'. Each section has a table with columns for 'Name' and 'Status'. The 'Supervisor' section has a 'Replace' button next to the 'Tuesday, Ruby X' entry. A callout box points to this button with the text: 'Click Replace or Assign to select a new Org Unit Member.'

4. Click the **+Assign** or **Replace** button in the Supervisor panel to assign or replace someone as a Supervisor. The search box displays on the right
5. Select the appropriate Agency Directory from the drop-down list.
6. Type the new Supervisor's e-mail address in the e-mail field then click **Search**.

My Orgs » Central North »

Profile **Org Unit Members** Org Unit Filters History

Central North

Search for Supervisor

Agency Directory: DoD

E-mail: stanley.a.kupp@us.army.mil

Last Name:

First Name:

Middle Name:

Search

Show 10 entries

In FDH?	E-mail	Last Name	First Name	Middle Name	Phone	
Yes	stanley.a.kupp@us.army.mil	Kupp	Stanley		733-555-4234	Selected (+)

Showing 1 to 1 of 1 entries

1

Click the plus (+) sign beside the Supervisor's name.

Instructions

Click Replace (R) to change the assigned Org Member.

Click Remove (X) to Remove the assigned Org Member

Point of Contact (POC) +Add

Name	Status	
Day, Manny X	Assigned	[R] [X]

Supervisor

Name	Status	
Tuesday, Ruby X	Assigned	[R] [X]

450 Certifier

Name	Status	
Day, Sonny X	Assigned	[R] [X]

+Assign

Senior Legal Counsel (SLC)

- In the search results list, select the individual whom you wish to add by clicking the plus (+) sign beside their name. Your newly added Supervisor is listed beside the selected role.

Note: The best way to return a result for someone is to search by e-mail address. Searching by last, first, and middle name will return more results.

ASSIGNING POCs

If you are a POC at the top level of your organization hierarchy and you have many Org Units and Filers, you can assign a POC to any of your sub Org Units in order to help you manage your Filers.

To add an additional POC to an Org Unit:

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** then select an Org Unit in the Org Tree where the new POC will be added.
3. Click the **Org Unit Members** tab within the selected Org Unit.

The screenshot shows the 'Org Management' interface with the 'Org Unit Members' tab selected for the 'Central North' org unit. The main panel displays instructions and a table of assigned POCs. Two callouts provide additional guidance:

- Callout 1: "Click +Add to add an additional POC." points to the '+Add' button in the 'Point of Contact (POC)' section.
- Callout 2: "Click the Replace button to replace an already Assigned POC." points to the 'Replace' button (represented by a square icon with a checkmark) next to the assigned POC 'Day, Manny X'.

Name	Status	Actions
Day, Manny X	Assigned	[Replace] [Remove]

Name	Status	Actions
Tuesday, Ruby X	Assigned	[Replace] [Remove]

Name	Status	Actions
Day, Gossy X	Assigned	[Replace] [Remove]

4. Click the **+Add** button in the Point of Contact (POC) panel.
Note: Two or more POCs can be added to the same org Unit.
5. Click the **Replace** button beside the assigned POC to replace a POC.
Note: You can add additional POCs to assist with the administration of this org unit.
6. Select the appropriate Agency Directory from the drop-down list.
7. Type the new POC's e-mail address in the e-mail field then click **Search**.

The screenshot displays the 'Org Management' interface for 'Central North'. The left sidebar shows an 'Org Tree' with 'Central North' selected. The main content area is divided into sections for 'Instructions', 'Point of Contact (POC)', 'Supervisor', '450 Certifier', and 'Senior Legal Counsel (SLC)'. A 'Search for POC' dialog is open, showing search criteria (Agency Directory: DoD, E-mail: stanley.a.kupp@us.army.mil) and a search results table. A callout box points to the 'Show Directory Details' button, and another callout points to the plus sign in the search results table.

Instructions
 Click Replace (R) to change the assigned Org Member.
 Click Remove (X) to Remove the assigned Org Member.

Point of Contact (POC) +Add

Name	Status
Day, Manny X	Assigned [R] [X]

Supervisor

Name	Status
Tuesday, Ruby X	Assigned [R] [X]

450 Certifier

Name	Status
Day, Senny X	Assigned [R] [X]

Senior Legal Counsel (SLC) +Assign

Search for POC

Agency Directory: DoD
 E-mail: stanley.a.kupp@us.army.mil
 Last Name:
 First Name:
 Middle Name:
 Search

Show 10 entries

In FDN?	E-mail	Last Name	First Name	Middle Name	Phone
Yes	stanley.a.kupp@us.army.mil	Kupp	Stanley		732-555-4234

Showing 1

Click the Show Directory Details button to display the individual's contact information, Filer Category and Agency.

Click the plus (+) sign to assign the Org Unit Member role.

8. In the search results list, select the individual whom you wish to add by clicking the **plus (+) sign** beside their name. Your newly added POC is listed beside the selected role.
9. If prompted, select **Yes** to allow this person to hold the same role for multiple Org Units then confirm the selection.

Editing an Org Unit

Org Units can be updated at any time in FDM. It is advised that you update an Org Unit while your Agency is undergoing a period of transition or reorganization. You may also find the need to edit your Org Unit's Org Members (Review Chain) right after creating an Org Unit so that you can tailor its proper Review Chain to the grouping of Filers.

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** and then select the Org Unit in the Org Tree that you wish to edit.

The screenshot displays the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and an 'Add New Org' button. The main area shows the 'Central North' Org Unit profile. The profile includes a 'Basic Details' section with fields for Name, Description, and Agency. An 'Edit' button with a pencil icon is located above the 'Basic Details' section. A callout box points to this button with the text: 'Click Edit to edit the Org Unit Name and Description.' To the right of the 'Basic Details' are 'Actions' (Move, Revoke) and 'Org Unit Role Assignments' table.

Role	Current Assignments
POC(s)	Day, Manny X
Supervisor	Tuesday, Ruby X
450 Certifier	Day, Sonny X
Senior Legal Counsel	Not Assigned (DAEO, Confidential X acting)
DAEO	Not Assigned (DAEO, Confidential X acting)

3. To update the Org Unit's Name and Description, click the **Edit button** in the Org Profile Basic Details on the right.

My Orgs » FDM » DLA » TOP LEVEL ORG » Confidential Filers » Central North »

Profile | Org Unit Members | Org Unit Filers | History

Org Management - Edit Org Unit

Instructions
 Org Unit name must be unique and no longer than 20 alphanumeric characters.
 Use the Description field to describe the Org Unit. Description is limited to 100 alphanumeric characters.

EDIT BASIC DETAILS

Name:
 Org Unit Name

Description:
 Org Unit Description X

ACTIONS
 Save Cancel

Org Unit Role Assignments

Roles	Current Assignments
POC(s)	Day, Manny X
Supervisor	Tuesday, Ruby X
450 Certifier	Day, Sonny X
Senior Legal Counsel	Not Assigned (DAEO, Confidential X acting)
DAEO	Not Assigned (DAEO, Confidential X acting)

4. Update the Org Unit Name and/or Description as needed.
5. Click **Save**.

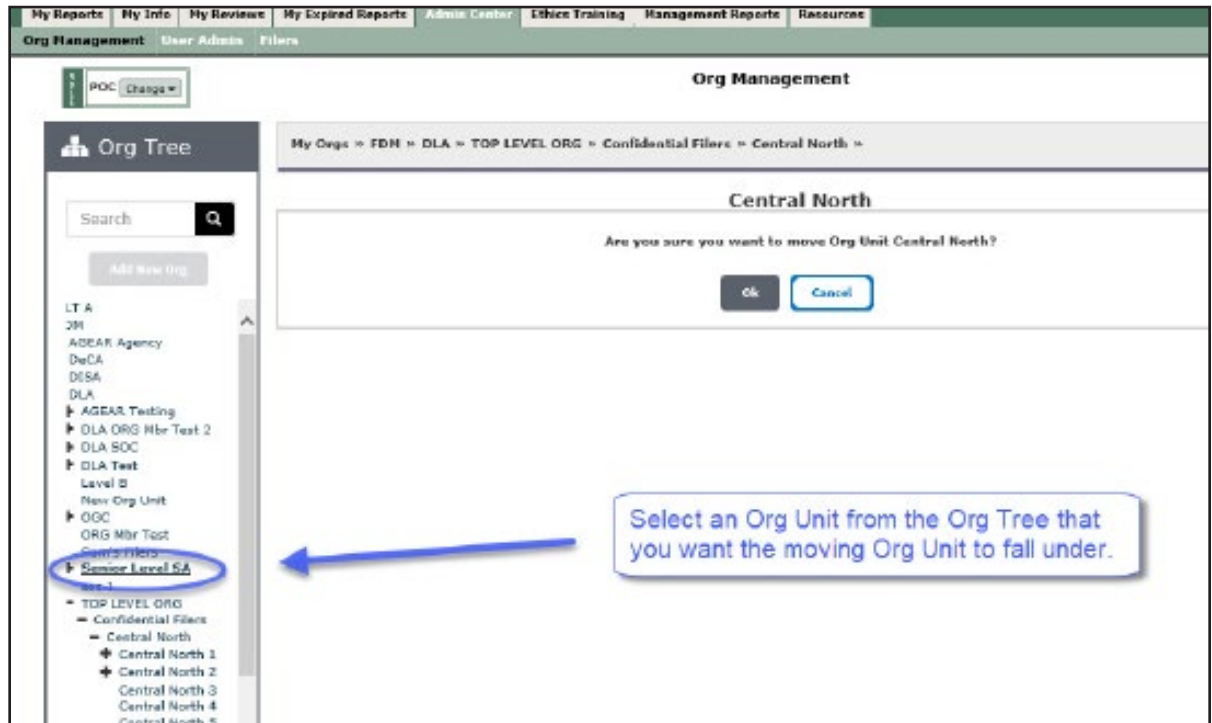
Moving Org Units

You can move an Org Unit to align the Filers and review chain participants appropriately after a transformation within your agency. Click **Move** on the Org Unit profile page to move the Org Unit and all Filers in that Org Unit simultaneously to a new location in FDM. Selected user roles may only move Org Units to another FDM location within their authority.

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** and then select the Org Unit in the Org Tree that you wish to move. The Org Unit Profile is displayed.

The screenshot displays the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and an 'Add New Org' button. The main area shows the 'Central North' Org Unit profile, including a breadcrumb trail: 'My Orgs > DLA > TOP LEVEL ORG > Confidential Filers > Central North'. Below the breadcrumb are tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'Org Unit Filers' tab is active, showing a list of filers for 'OGE 450 Filers - Central North'. The table has columns for 'E-mail', 'Last Name', 'First Name', 'MI', 'Org Unit Name', 'Org Unit Description', 'Supervisor', and 'Move'. Two filers are listed: G.Fryday@EDM@dlasoc.com and S.Sea@usarmy.mil. A callout box with a blue border and white background points to the 'Move' button in the Actions column of the first filer row, containing the text: 'Click Move to move a Filer to a different Org Unit.'

3. Click the **Move button** in the Actions column of the Org Unit profile.



4. Browse and select an Org Unit from the Org Tree that you want the moving Org Unit to fall under. The Org Unit that you select here will fall above the moving Org Unit.
Note: If a Filer in a moving Org Unit has assigned incomplete reports, those reports will remain with the Filer's departing Org Unit.
5. Click **OK** to confirm.

Removing Org Units

Important Information

Before you can delete an Org Unit, move any associated Filers to another Org Unit or remove the Filer's role if they are no longer Filers. See the Filers section for further information. If the Org Unit has subordinate Org Units, move or delete the sub-Org Units.

Removing an Org Unit:

1. From any point in FDM, click the **Admin Center** tab.
2. Click **Org Management** and then select the Org Unit in the Org Tree that you wish to move. The Org Unit Profile is displayed.

The screenshot displays the 'Org Management' interface. On the left is the 'Org Tree' with a search bar and an 'Add New Org' button. The main area shows the 'Central North' profile with tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'Basic Details' section shows the name 'Central North' and its agency 'DLA'. The 'Actions' section has 'Have' and 'Remove' buttons. Below is the 'Org Unit Role Assignments' table:

Roles	Current Assignments
POC(s)	Dwy, Harry X
Supervisor	Tuesday, Rub
ESB Certifier	Dwy, Sonny X
Senior Legal Council	Not Assigned
DAEO	Not Assigned

A callout box with a blue border and white background points to the 'Remove' button, containing the text: "Click Remove to remove the Org Unit."

3. Click on the button that says **Remove** in the Actions section of the Org Unit profile.
4. Click **Ok** to confirm.