

Group Filers into separate Org Units by Supervisor. Agencies that do not use Supervisory review assign a paralegal or legal clerk in the Supervisor role to perform a technical screening for a disclosure report's completeness.

1. From any point in FDM, click the **Admin Center** tab and then click **Org Management**
2. Select the Org Unit where the new Filer should be added and then click **Org Unit Filers** tab.
3. Select either **OGE 450** or **OGE 278 Filers Panel** and then click **Add Filer**.

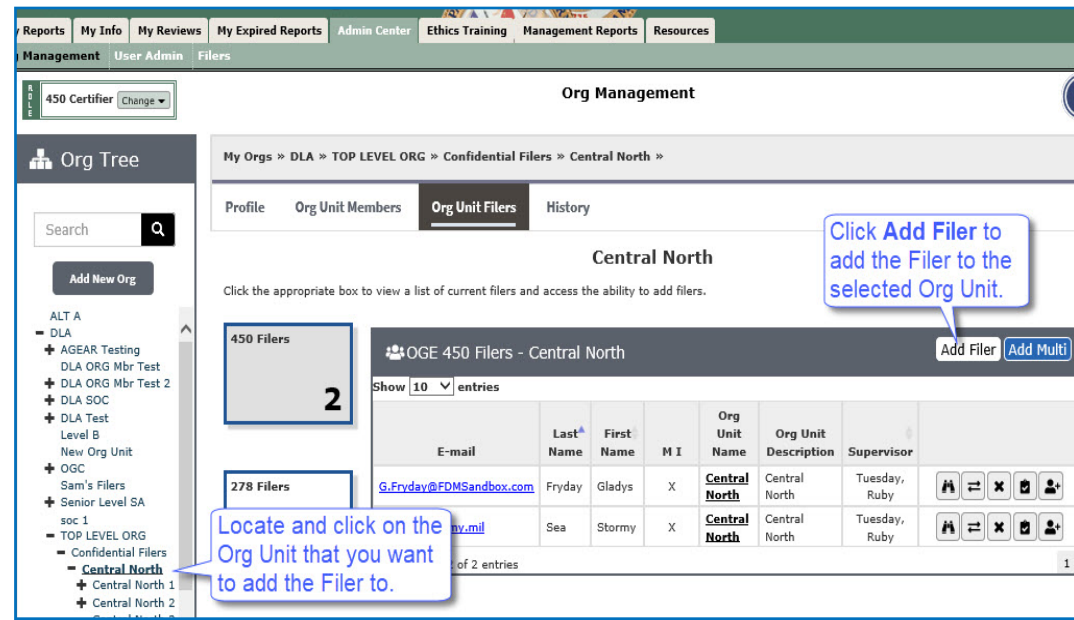
Searching for a Filer

4. Select the appropriate Agency Directory, type the new Filer's E-mail address in the E-mail field and then click **Search**.
5. In the search results list, select the individual whom you wish to add by clicking the **plus (+) sign** beside their name. The Current Filers list redisplay with the newly added Filer.

Note: Once a Filer is added, you can assign a report for them to file in FDM.

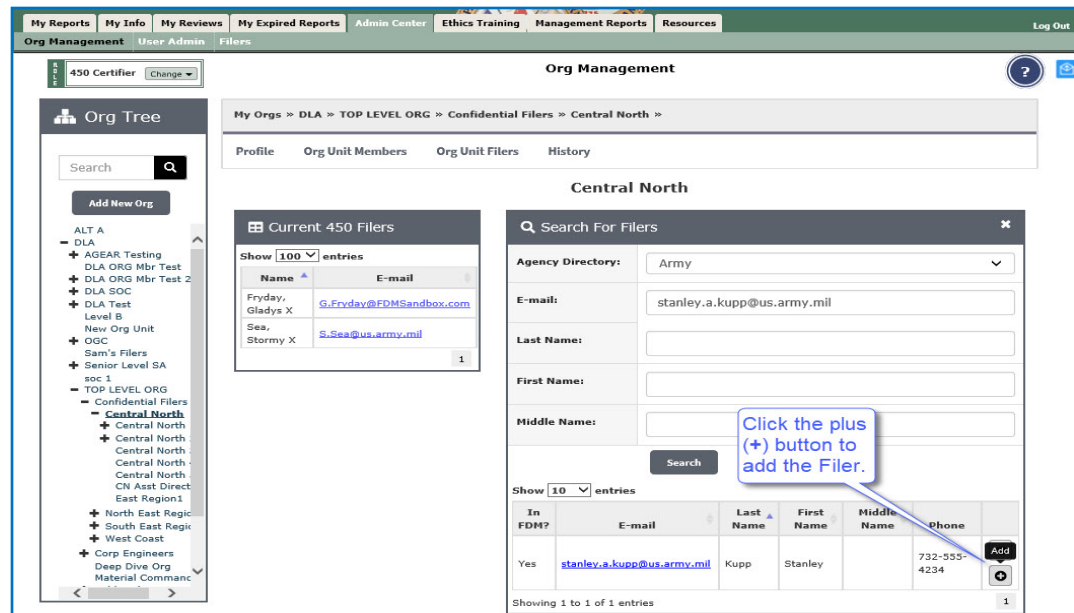
Filer Belongs to Different Org Unit

If the Filer you are adding is already a Filer in a different FDM Org Unit, you may have the option to select some or all of the Filer's incomplete reports and move the reports with the Filer to the new Org Unit. This may change the originally assigned review chain for those reports.



The screenshot shows the 'Org Management' interface with the 'Org Unit Filers' tab selected 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 points to the 'Central North' Org Unit in the tree, stating: "Locate and click on the Org Unit that you want to add the Filer to." The main area displays a table of current filers for 'OGE 450 Filers - Central North'.

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor	
G.Fryday@FDMSandbox.com	Fryday	Gladys	X	Central North	Central North	Tuesday, Ruby	[Icons]
my.mil	Sea	Stormy	X	Central North	Central North	Tuesday, Ruby	[Icons]



The screenshot shows the 'Org Management' interface with the 'Search For Filers' dialog box open. A callout box points to the plus (+) button next to a filer in the search results, stating: "Click the plus (+) button to add the Filer." The search results table shows the following filer:

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

Assigning a Report to a Filer:

1. On the **Org Unit Filers** page, select either **OGE 450** or **OGE 278 Filers Panel**. A list of Filers already associated with the selected Org Unit is displayed.
2. Click the **Assign** button beside the appropriate Filer. The Filer Assignment page is displayed.
3. Select the report criteria and click **OK**.

Notifying a Filer

The Report Assignment Notification page is used to notify a Filer that he/she has been registered. The notification includes report information and instructions on how to file the report in FDM.

4. Click **Send** to notify the Filer of their requirement to file or **Cancel** to notify later.

450 Filer Assignment

Org Unit: Kevin Sub Org
Filer: Robin Lastname

Assignment Type: Report

Year: 2020

Report Status: New Entrant

Duty to File:

- Filer is New to Org
- Filer Assigned new duties
- Filer is SGE

Appointment Date: 04/23/2020

Due Date: 05/23/2020

Ok Cancel

Removing a Filing Assignment

There may be times when some of your Filers are no longer required to file. In FDM, you can remove the report assignment for your Filers.

1. Locate the name of the Filer on the list and then click **View** beside the name.
2. Go to the Reports tab and click the **Unassign** button. A message displays confirming that you wish to remove the assignment from the Filer.
3. Click **OK**.

Profile - William King

King, William Contact Info

Last Name	King
First Name	William
Middle Initial	
E-Mail	W.King@FDMSandbox.com
Phone	000 000 0000

Roles Assistants/ECS **Reports** History

King, William Reports

Report Year	Report Status	Review Status	Assigned	Current Due Date	Assigning Org Unit
2015	OGE 278 Incumbent	Draft	Yes	05/15/2015	Director Dema
2016	OGE 278 Incumbent	Completed Without signatures	Yes	05/26/2016	Director Dema
2016	OGE 278 New Filers	Under Review - SEC Signoff	No	05/16/2016	CEO
2017	OGE 278 Incumbent	Draft	Yes	05/22/2017	CEO
2018	OGE 278 New Filers	Under Review - SEC Signoff	Yes	11/19/2018	Director Dema

Moving a Filer to a Different Org Unit

When you are updating your Filer list, some of your Filers may have made lateral transfers and therefore need to be moved to different Org Units within FDM. You can only move a Filer to Org Units that are located in your organizational view.

1. On the **Org Unit Filers** page, select either the **OGE 450** or **OGE 278 Filers Panel**.
2. Click on the **Move** button in the actions column beside the appropriate Filer.
3. Browse and select an Org Unit from the Org Tree to locate the appropriate Org Unit where the Filer is to be added and then click **OK**.

Note: If your Filer has past reports in FDM, the **Move Reports option** screen may display.

4. To move a report with the Filer, leave the check box 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 check box before clicking **OK**. Click **Yes**. The Filer and their selected reports are moved to the new Org Unit.

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

Removing a Filer's Role

Only one Filer role can be removed at a time. If a Filer has both OGE 450 and OGE 278 roles, you must select each Filer type and then click **Remove Filer Role**.

1. On the **Org Unit Filers**, select the **450 Filers** or **278 Filers** panel.
2. Click on the **Remove 450 Filer (X)** button in the actions column beside the appropriate Filer. The Remove Reports Option page displays.

Note: Deleting a Filer only removes their role in FDM. Deleting does not permanently remove the Filer from FDM

3. To remove a report with the Filer role, leave the check box 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 then click **OK**.

Note: You can remove a Draft report when removing a Filer role.

The screenshot shows the 'Org Management' interface. The breadcrumb trail is 'My Orgs > DLA > TOP LEVEL ORG > Confidential Filers > Central North >'. The 'Org Unit Filers' tab is active. On the left, the '450 Filers' panel is selected, showing a count of 2. Below it, the '278 Filers' panel shows a count of 0. The main area displays a table of filers for 'OGE 450 Filers - Central North'. The table has columns for E-mail, Last Name, First Name, M I, Org Unit Name, Org Unit Description, Supervisor, and actions. A callout points to the 'Remove 450 Filer' button (an X icon) in the actions column for the filer Gladys X Fryday.

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor	Actions
G.Fryday@FDMsandbox.com	Fryday	Gladys	X	Central North	Central North	Tuesday, Ruby	[Remove 450 Filer]
S.Sea@us.army.mil	Sea	Stormy	X	Central North	Central North	Tuesday, Ruby	[Remove 450 Filer]

Click the X to remove the Filer.

The screenshot shows the 'Remove Reports option' dialog box. The title is 'Are you sure you want to remove Gladys X Fryday as a 450 Filer from Central North?'. Below the title, it says 'Remove Reports option: Also remove Not Started 450 Filer report assignments for Gladys X Fryday'. The dialog contains a table of 'Incomplete Reports for Gladys X Fryday' with columns for 'Remove Report?', 'Year', 'Reporting Status', 'Review Status', 'Assigning Org', and 'Assigned'. A callout points to the 'Remove Report?' checkbox for the 2018 OGE 450 New Entrant report, which is checked.

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	Draft	Central North	Yes

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