

| ID | Task Name | Approx Duration | Resource Names | Notes |
|----|---|-----------------|-----------------------|-------|
| 1 | AGENCY PLANNING AND PREPARATION | 708 days | | |
| 2 | Step 1 - Letter of Intent | 5 days | | |
| 3 | Prepare and Send LOI | 5 days | FDM | |
| 4 | Review and Sign LOI | 5 days | Agency | |
| 5 | LOI Returned | 0 days | | |
| 6 | Step 2 MOA | 10 days | | |
| 7 | Prepare MOA and Cost Estimate | 10 days | FDM | |
| 8 | Send MOA and Cost Estimate for review | 1 day | FDM | |
| 9 | Schedule Conf call if necessary for Q/A session | 0.5 days | FDM | |
| 10 | Respond to any e-mail questions | 0.5 days | FDM | |
| 11 | Review & Sign | 5 days | Agency | |
| 12 | MOA Returned | 0 days | | |
| 13 | Step 3 - Funding | 5 days | | |
| 14 | Send funding request (MIPR) | 5 days | FDM | |
| 15 | Agency review MIPR | 5 days | Agency | |
| 16 | Funds received (July) | 0 days | FDM | |
| 17 | Step 4 - MOU/ISA | 24 days | | |
| 18 | Prepare MOU/ISA | 5 days | FDM | |
| 19 | Identify MOU and ISA Reqts with Agency | 10 days | FDM | |
| 20 | Send MOU and ISA for review | 1 day | FDM | |
| 21 | Schedule Conf call if necessary for Q/A session | 0.5 days | FDM | |
| 22 | Respond to any e-mail questions | 0.5 days | FDM | |
| 23 | Review & Sign | 5 days | Agency Action Officer | |
| 24 | MOU/ISA Returned | 0 days | Agency Action Officer | |
| 25 | Agency Planning and Preparation Complete | 0 days | | |
| 26 | Deployment/Transition Process Begin | 731 days | | |

| ID | Task Name | Approx Duration | Resource Names | Notes |
|----|--|------------------|-----------------------------|--|
| 27 | Agency Kickoff | 1 day | | |
| 28 | Introduce Deployment Planning & Preparation Guide | 1 day | FDM | |
| 29 | AGENCY DEPLOYMENT TEAM PLANNING AND PREPARATION | 731 days | | |
| 30 | ORGANIZE - Resource Planning | 709 days | | |
| 31 | Identify Core Agency Deployment Team | 5 days | Agency Action Officer | Provide Agency Action Officer with Appendix B of the FDM Deployment Planning and Preparation Guide |
| 32 | Review FDM Deployment Planning and Preparation Guide | 5 days | Agency Core Deployment Team | |
| 33 | Review Agency's Current SOPs | 5 days | FDM | |
| 34 | Conduct Demo to Core Agency Deployment Leads | 1 day | FDM | |
| 35 | CONFIGURATION - FDM Agency/LDAP Set Up | 709 days | | |
| 36 | Review FDM Minimum System Requirements | 1 day | Agency IT POC | Provide Agency IT POC with Minimum System Requirements checklist from FDM Website |
| 37 | Update Pilot Users PCs to meet Minimum System Requirements | 20 days | Agency IT POC | |
| 38 | LDAP Configuration | 15.5 days | | |
| 39 | Set up meeting with Agency IT resource | 0.5 days | FDM | |
| 40 | Send LDAP MOU/ISA and Specification | 0.5 days | FDM | Provide Agency IT POC with MOU ISA and LDAP Specification |
| 41 | Review LDAP MOU/ISA and Specification | 1 day | FDM, Agency IT POC | |
| 42 | Provide LDAP Configuration For testing | 1 day | Agency IT POC | |
| 43 | Connection Testing | 4 days | | |
| 44 | Conduct Connection Trial Meeting | 0.5 days | FDM, Agency IT POC | |
| 45 | Conduct LDAP Bind Test | 1 day | FDM, Agency IT POC | |
| 46 | Confirm Connection | 0.5 days | FDM, Agency IT POC | |
| 47 | Test Agency Connection in Pre-production FDM Instance | 0.5 days | FDM | |
| 48 | Configure Agency LDAP on Website | 0.5 days | FDM | |
| 49 | Test Agency LDAP Configuration on Website | 0.5 days | FDM | |
| 50 | Confirm Agency Configuration in Production | 0.5 days | FDM | |
| 51 | Agency Configuration | 709 days | | |
| 52 | Review Appendix F in Deployment Planning & Preparation Guide | 0.5 days | Agency Core Deployment Team | Provide Agency with Appendix F Agency Customization and Org Unit Set Up Lists |

| ID | Task Name | Approx Duration | Resource Names | Notes |
|----|---|------------------|------------------------------------|--|
| 53 | Agency Customizations | 701 days | | |
| 54 | Identify Agency Preferences Customization Setup | 0.25 days | FDM, Agency IT POC | |
| 55 | Review/Confirm Agency Preferences Customization Selections | 0.5 days | FDM, Agency Core Deployment Team | |
| 56 | Update/Test Website with Agency Customizations | 0.5 days | FDM | |
| 57 | Agency Org Unit Information | 0.5 days | | |
| 58 | Identify Agency Org Unit Members | 0.5 days | Agency Core Deployment Team | |
| 59 | Update/Test Website with Agency Org Unit selections | 0.5 days | FDM | |
| 60 | Post Agency Configuration Info on VSS | 0.5 days | FDM | |
| 61 | Configuration Information Complete | 0 days | | |
| 62 | INFORM | 709 days | | |
| 63 | Change Management & Communications | 709 days | | |
| 64 | Send Deployment Activity Checklist of Activities to Agency Deployment Team | 0.5 days | FDM | Provide Agency with Appendices C, G and I |
| 65 | Review Deployment Activity Checklist | 2 days | Agency Core Deployment Team | |
| 66 | Compare Activities to Agency's Current Disclosure SOPs | 3 days | Agency Core Deployment Team | |
| 67 | Update Current Financial Disclosure SOPs - Include FDM | 10 days | Agency Core Deployment Team | Should include Definition and Process set up for Org Units, Review Chain and POCs... |
| 68 | Modify Checklist to include Additional steps, if any, from SOPs | 2 days | FDM | Checklist document to be created from FDM Deployment Activity Checklist |
| 69 | Communication Activities | 0.25 days | | |
| 70 | Introduce FDM | 0.25 days | Agency Core Deployment Team | |
| 71 | Communication - FDM Announcement | 0.25 days | | Within Appendix H |
| 72 | Introduce FDM to Legal personnel | 0.25 days | Agency Core Deployment Team | |
| 73 | Communication - updated SOP and Initial SLC and 450 Certifier announcement | 0.25 days | | Within Appendix H |
| 74 | Identify POCs who are responsible for filing process | 0.25 days | Agency Core Deployment Team | |
| 75 | Communication - Request for Info to POCs & Supervisors | 0.25 days | | Within Appendix H |
| 76 | TRANSFORM/LEARN | 731 days | | |
| 77 | Data Planning | 731 days | | |
| 78 | Provide POCs/Supervisors with FDM Announcement and Introductory Materials and | 0.5 days | Agency Core Deployment Team | Provide Agency with Appendix I |

| ID | Task Name | Approx Duration | Resource Names | Notes |
|-----|---|------------------|------------------------------------|---|
| 79 | Follow up with Agency Deployment Teams to review spreadsheets and activity checklist | 0.5 days | FDM | The goal of this meeting/phone call is to help the POCs make the connection between their current process of data collection and how it will be done using |
| 80 | POCS Update Filer & Org Unit Registration Spreadsheet | 716 days | | |
| 81 | Gather and record Filer, Review Chain and Org Unit lists Review Chain/Org List (Oct?) | 5 days | Agency POCs | |
| 82 | Record high Level POCs (& Supervisors) and Org Units | 2 days | Agency POCs | |
| 83 | Determine Filer to Org Unit Groupings | 5 days | Agency POCs | |
| 84 | Review and Confirm POC, Review Chain and Filer Lists | 2 days | Agency Legal Offices, Agency | |
| 85 | TRAIN/DEMO FDM | 716 days | | |
| 86 | Identify Local Legal Personnel who can facilitate Train the trainer session for local | 3 days | Agency Core Deployment Team | |
| 87 | Schedule DEMO with Facilitators | 0.5 days | Agency Core Deployment Team | |
| 88 | Send Links to the Local Agency Project Leader Web Based Training and QRC's | 0.5 days | FDM | FDM Learning Center Link https://www.fdm.army.mil/learningCenter/learningCenter.htm |
| 89 | Confirm POC an Administrators have reviewed the Known Issues document | 0.5 days | Agency Core Deployment Team | |
| 90 | Data Setup Begin | 5 days | | |
| 91 | High Level Org Set Up | 1 day | | |
| 92 | Add High Level POCs(Supervisors) and Org Units to FDM | 1 day | FDM, Agency Core Deployment Team | |
| 93 | Update SLC and 450 Certifier Listings in FDM | 1 day | Agency Core Deployment Team | |
| 94 | Communication Activities | 0.25 days | Agency Core Deployment Team | |
| 95 | Communication - Begin Data Set up | 0.25 days | | |
| 96 | Communication - Local Help Desk Head's Up | 0.25 days | | |
| 97 | Communication - Filer Registration Awareness | 0.25 days | | |
| 98 | Communication - EC Set Up in FDM | 0.25 days | | |
| 99 | OGE 450 Filer Registration | 5 days | | |
| 100 | Register POCs, Supervisors and Org Units in FDM | 5 days | Agency POCs | |
| 101 | Register 450 Filers in FDM | 5 days | Agency POCs | |
| 102 | Conduct Local Training Where necessary | 1 day | Agency Core Deployment Team | |
| 103 | OGE 450 Filing Begin in FDM | 0 days | | |
| 104 | Monitor Management Reports and Requirement to File Status | 1 day | Agency POCs | |

| ID | Task Name | Approx Duration | Resource Names | Notes |
|-----|---|------------------|------------------------------------|-------|
| 105 | Communication Activities | 0.25 days | Agency Core Deployment Team | |
| 106 | Communication - OGE 450 Launch E-mail | 0.25 days | | |
| 107 | Communication - OGE 450 Delinquent Filer Reminder | 0.25 days | | |
| 108 | Communication - Supervisory Review Reminder | 0.25 days | | |
| 109 | SF 278 Filer Registration | 5 days | | |
| 110 | Register SF 278 Filers in FDM | 5 days | Agency POCs | |
| 111 | Conduct Local Training where necessary | 2 days | Agency Core Deployment Team | |
| 112 | SF 278 Filing Begin in FDM | 0 days | | |
| 113 | Monitor Management Reports and Requirement to File Status | 1 day | Agency POCs | |
| 114 | Communication Activities | 0.25 days | Agency Core Deployment Team | |
| 115 | Communication - SF 278 Launch e-mail | 0.25 days | | |
| 116 | Communication - Establish Filer Assistant Instructions | 0.25 days | | |

- 31 Identify Core Agency Deployment Team**
Provide Agency Action Officer with Appendix B of the FDM Deployment Planning and Preparation Guide
- 36 Review FDM Minimum System Requirements**
Provide Agency IT POC with Minimum System Requirements checklist from FDM Website
- 40 Send LDAP MOU/ISA and Specification**
Provide Agency IT POC with MOU ISA and LDAP Specification
- 52 Review Appendix F in Deployment Planning & Preparation Guide**
Provide Agency with Appendix F Agency Customization and Org Unit Set Up Lists
- 64 Send Deployment Activity Checklist of Activities to Agency Deployment Team**
Provide Agency with Appendices C, G and I
- 67 Update Current Financial Disclosure SOPs - Include FDM**
Should include Definition and Process set up for Org Units, Review Chain and POCs as well as Definition and Process set up for Filers and Required Activity
- 68 Modify Checklist to include Additional steps, if any, from SOPs**
Checklist document to be created from FDM Deployment Activity Checklist
- 71 Communication - FDM Announcement**
Within Appendix H
- 73 Communication - updated SOP and Initial SLC and 450 Certifier announcement**
Within Appendix H
- 75 Communication - Request for Info to POCs & Supervisors**
Within Appendix H
- 78 Provide POCs/Supervisors with FDM Announcement and Introductory Materials and Data Spreadsheets**
Provide Agency with Appendix I
- 79 Follow up with Agency Deployment Teams to review spreadsheets and activity checklist**
The goal of this meeting/phone call is to help the POCs make the connection between their current process of data collection and how it will be done using FDM.
- 88 Send Links to the Local Agency Project Leader Web Based Training and QRC's**
FDM Learning Center Link <https://www.fdm.army.mil/learningCenter/learningCenter.htm>