## Agency Custom Preferences

The table below lists the available agency configuration. It also contains recommendations on how to use these configurable items to the agency's best advantage.

<table>
<thead>
<tr>
<th>Item</th>
<th>Options</th>
<th>Description and Location In FDM</th>
<th>Selected Option</th>
</tr>
</thead>
</table>
| Error Notifications Email | Supply Agency E-mail address to receive error notifications *(RECOMMENDED)*  
Use the FDM Service Center's Email address | This option will post the agency’s email address on the Access Denied page for follow-up. An email notification is automatically triggered when an unregistered person attempts to login to FDM. | Default |
| Help Desk Phone Numbers | Use the FDM Service Center's phone number *(RECOMMENDED)*  
Use an agency technical call center phone number. | A listing of help desk phone numbers to be used to request help directly. FDM Website Help & Support tab. | Default |
| Help Desk Email | Use the FDM Service Center's Email Address *(RECOMMENDED)*  
Use an agency technical call center email address | An email link that allows users to request help directly. FDM Website Help & Support tab. | Default |
| Help Page URL | Use the FDM Default Help & Support page  
Supply an Agency’s FDM Support page URL | Your portal to help and support for FDM related issues. Contains links to Agency’s FDM Help center. Help link at bottom of FDM application page. | Default |
| Resources Page URL | Supply an Agency’s FDM support page URL *(RECOMMENDED)*  
Use the FDM default help page | The Agency’s FDM or Ethics Support page  
Separate tab within FDM Application. | Default |
| Senior Legal Counsels Record OGE 278 Extensions | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether all Senior Legal Counsels can record extensions for OGE 278 Reports within that Agency. | Yes |
| Send Supervisor/Filer Notification | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether Supervisor/Filers within an Org Unit receive e-mail notifications when the eSigning Supervisor is determined by FDM to be the next level up. | No |
| Send Submitted to DAEO Notification | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether the DAEO and their ECs receive e-mail notifications when a report has been Submitted to DAEO in FDM. | No |
| Auto Reminder Notices to 278 Filers | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether OGE 278 Filers receive e-mail notifications to ensure Filers submit reports on time. | No |
| Auto Reminder Notices to 450 Filers | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether OGE 450 Filers receive e-mail notifications to ensure Filers submit reports on time. | No |
| Auto Reminder Notices to SLCS | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether the Senior Legal Counsel and their ECs receive e-mail notifications when one or more reports await their review. | Yes |
| Auto Reminder Notices to 450 Certifiers | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether 450 Certifiers and their ECs receive e-mail notifications when one or more reports await their review. | Yes |
| Send 278 Intermediate Reviewer notifications | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables an Agency to specify whether OGE 278 Intermediate Reviewers (Senior Legal Counsel, Supervisor Senior Legal Counsel and their ECs) receive e-mail notifications when an intermediate review is complete. | No |
| Allow Filer to Add New Reports | Use the FDM default, Yes.  
Supply an Agency preference of False | Enables the Agency to specify whether OGE 450 and OGE 278 Filers can create/add unassigned reports in addition to the assigned ones. | No |
Agency Org Unit Set Up

The table below lists the Agency Org Unit roles and associated descriptions. Each Agency will need a person assigned as a DAEO (Designated Agency Ethics Official), Senior Legal Ethics Counselor (SLC), 450 Certifier, Supervisor and Agency Administrator (POC) to reside at the Agency level. One person can serve in all five roles at the Agency level. The FDM PMO System Administrator will update FDM with your Agency configuration choices.

**ACTION ITEM**

The Agency Action Officer should review the Agency Org Unit Roles and Descriptions listed below, note your selections in the tables below, and submit to FDM Project Team.

### Agency Org Unit Roles and Descriptions

<table>
<thead>
<tr>
<th>Item</th>
<th>Options</th>
<th>Description and Location In FDM</th>
<th>Selected Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Short Name</td>
<td>Supply an Agency Short Name</td>
<td>An abbreviated name of the agency (e.g., USARMY) used in drop down selection boxes etc</td>
<td>Dept of State</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Agency short must be approved by the FDM PMO to avoid duplication with another agency.</td>
<td></td>
</tr>
<tr>
<td>Agency Long Name/Description</td>
<td>Supply an Agency Long Name</td>
<td>A fully described name of the agency (e.g., “Department of Army”)</td>
<td>Department of State</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Although 100 characters are available, it is recommended that the Agency Long Name be kept as short as possible so that items such as output lines in management reports do not wrap or are truncated because of a long name.</td>
<td></td>
</tr>
<tr>
<td>Default DAEO</td>
<td>Supply an Agency Senior Legal Counsel Name</td>
<td>Your agency's top ethics official or senior legal official is responsible for the overall electronic filing process, just as he or she was for the paper filing process. This is the person will be the agency reviewer for at OGE 278 Public Financial Disclosure forms. The default or acting DAEO of any sub-org units for the Agency in FDM.</td>
<td>Katy Youel Page</td>
</tr>
<tr>
<td>Default 450 Certifier</td>
<td>Supply an Agency 450 Certifier</td>
<td>The default or acting 450 Certifier of any sub-org units for the Agency in FDM.</td>
<td>Katy Youel Page</td>
</tr>
<tr>
<td>Default Senior Legal Counsel</td>
<td>Supply an Agency Senior Legal Counsel Name</td>
<td>In FDM, your agency’s senior legal advisor or ethics official is called the Senior Legal Counsel (SLC). Most organizations will only have one SLC; however, it is permissible to have more than one SLC for an organization. The default or acting SLC of any sub-org units for the Agency in FDM.</td>
<td>MJ Alexander</td>
</tr>
<tr>
<td>Default Supervisor</td>
<td>Supply an Agency Supervisor Name</td>
<td>The default or acting Supervisor of any sub-org units for the Agency in FDM.</td>
<td>Sarah E taylor</td>
</tr>
<tr>
<td>Default Agency Admin/POC</td>
<td>Supply an Agency POC</td>
<td>The default or acting POC of any sub-org units for the Agency in FDM.</td>
<td>Sharon Andrews</td>
</tr>
</tbody>
</table>
Data Setup in FDM

1. Entering your Org Unit Data into FDM

Once you have familiarized your POCs with FDM, you will need them to begin entering in your Org Unit (Organization Unit) data into FDM. Your Org Units are simply an electronic version of your agency organization structure with required information regarding each organization – including a Supervisor, POC, SLC, and 450 Certifier.

The FDM team has developed a simple form for each organization POC to complete prior to entering in the data in FDM. The form collects the information the POC will be required to enter into FDM when the POC sets-up the Org Unit structure for your agency. Once the required data is collected, the POC (or ethics officials for those agencies without POCs) will create Org Units in FDM through the Org Unit tool. The POC can create sub-Org Units until a complete agency organizational structure has been established. The FDM team has several hand-outs and guides to assist the POC in using the Org Unit and accomplishing this task. 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.

2. Entering your Filers into FDM

Once the Org Unit structure has been entered into FDM, the POC will then begin to enter in the filers into each Org Unit. During your initial year, this task may take a significant period of time depending on the size of your agency. It is recommended that you begin informing, training, and executing these steps with your POC several months in advance of the filing season to ensure accuracy and completion of all tasks. A bulk registration tool is available that allows up to 25 OGE 450 filers to be entered at one time to a particular Org Unit. During subsequent years, the POC will simply need to maintain a current list of filers by adding and removing filers as appropriate.

Sample FDM Filer and Org Unit Registration Spreadsheet