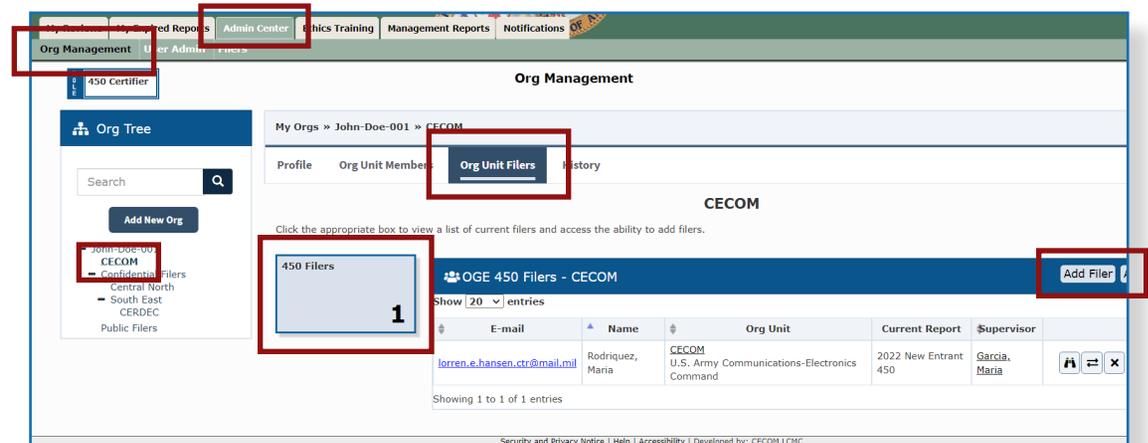


Group Filers into separate Org Units by Supervisor. Agencies that do not use Supervisory review assign a paralegal or legal clerk in the Supervisor role to perform a technical screening for a disclosure report's completeness.

1. Select **Admin Center | Org Management**.
2. Select the Org Unit where the new Filer is to be added.
3. Click the **Org Unit Filers** tab.
4. Click the **450 Filers** panel.
5. Click **Add Filer** button.



Locate and Add Filer

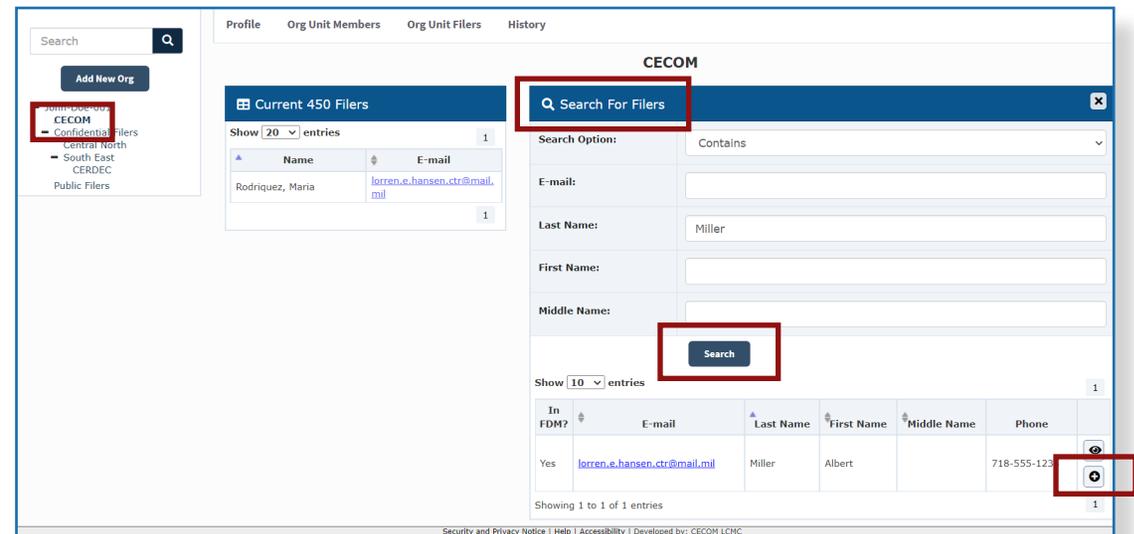
## Searching for a Filer

1. Select the appropriate Org Unit, type the Filer's e-mail address or name in the Search for Filers column, and click **Search**.
2. Click the **plus (+) sign** beside the Filer's name. The Current Filers list displays 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 new Filer 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 them with the Filer. This may change the originally assigned review chain for those reports.



Searching for a Filer

## Assigning a Report to a Filer

1. A list of Org Unit Filers is displayed on the **Org Unit Filers** page.
2. Click the **Assign** button beside the Filer. The **450 Filer Assignment** page is displayed.
3. Select the report criteria and click **OK**.

### Notifying a Filer

The Report Assignment Notification informs a Filer they have been registered. The notification includes report information and instructions for filing the report.

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

Assigning Report Criteria to a Filer

## Removing a Filing Assignment

Filers who are no longer required to file a report can have the assignment removed.

1. Locate the name of the Filer on the **Org Unit Filers** page and click the **View** icon beside the name.
2. Select the **Reports** tab and click the **View** icon beside the targeted report. The **Review Status** page is displayed.
3. Click the **Assigned** icon in the Report Progress panel. A prompt states "Remove Assignment" and a message asks if the intent is to remove the assignment. Click **OK** to confirm.
4. Click **OK** when prompted to finalize removal.

| Reviewer Role                             | Currently Assigned Reviewer  | Reviewer Type | Intermediate Review Dates | Required Signatures | Explanation |
|---|--|---------------|---------------------------|---------------------|-------------|
| Supervisor                                | Maria Garcia   | Organization  |                           |                     |             |
| Supervisor SLC Ethics Counselor Assistant | SLC_14_OGE<br>450Filer_1010_A_TestAuto<br>450Filer_1010_A_TestAuto | Organization  |                           |                     |             |
| 450 Certifier Ethics Counselor Assistant  | James Taylor<br>Michael Smith<br>Robert Brown                      | Organization  |                           |                     |             |

Removing a Filing Assignment

## Moving a Filer to a Different Org Unit

Move Filers to a different Org Unit after a lateral transfer. Filers can only be moved to Org Units within an Org Unit Member's organizational view.

1. Select **Admin Center | Org Management**.
2. Select the Org Unit where the Filer is located.
3. Click the **Org Unit Filers** tab.
4. Click the **450 Filers** panel.
5. Click the **Move** icon.
6. Select the **Org Unit** from the Org Tree where the Filer is to be added and click **OK**.

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

7. Leave the check box under the **"Move Report?"** heading selected to move a report with the Filer, and click **Yes**.
8. Deselect the **check box** to keep a report in the review chain of the original Org Unit, and click **Yes**.

The screenshot shows the 'Org Management' interface. The 'Admin Center | Org Management' menu is highlighted. The 'Org Unit Filers' tab is selected. The '450 Filers' panel is highlighted with a red box and a '1' label. The 'Move' icon in the top right of the filer list is also highlighted with a red box.

Click Move Icon

The screenshot shows the 'Org Unit selection' dialog. The 'Org Tree' on the left shows 'Central North' selected with a red box. The main area displays 'Browse and select an Org Unit from the tree and click ok.' with 'Ok' and 'Cancel' buttons. The 'Ok' button is highlighted with a red box.

Click Org Unit Destination

The screenshot shows the 'Move Reports' dialog. A table lists reports for 'Rodriguez, Maria' with 'Move Report?' checkboxes. The 'Yes' checkbox for the 2018 report is highlighted with a red box. The 'Yes' button at the bottom is also highlighted with a red box.

| Move Report?                        | Year | Form Type | 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"/> | 2019 | OGE 450   | Annual           | Not Started                          | CECOM         | Yes      |
| <input checked="" type="checkbox"/> | 2021 | OGE 450   | Annual           | Draft                                | CECOM         | Yes      |
| <input checked="" type="checkbox"/> | 2021 | OGE 450   | New Entrant      | Under Review - Amendment in Progress | CECOM         | Yes      |
| <input checked="" type="checkbox"/> | 2022 | OGE 450   | Annual           | Under Review - Amendment in Progress | CECOM         | Yes      |
| <input checked="" type="checkbox"/> | 2022 | OGE 450   | New Entrant      | Draft                                | CECOM         | Yes      |

Check Boxes to Retain or Relinquish Report

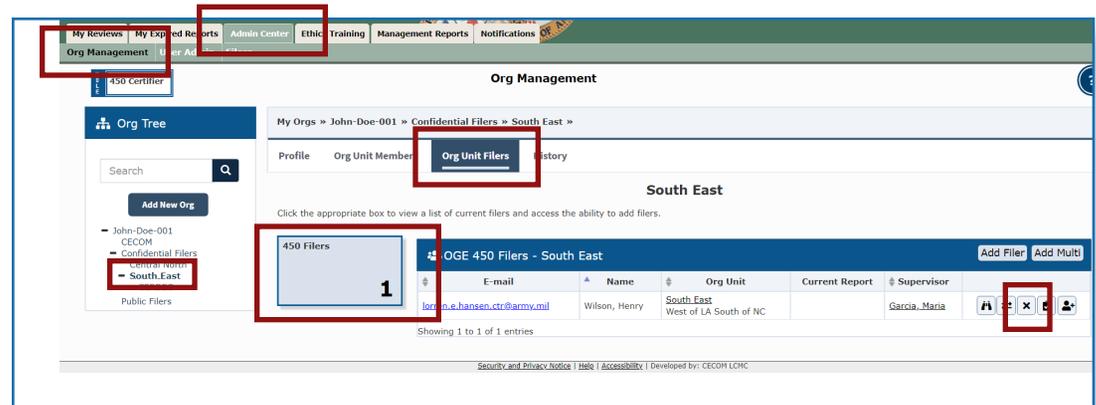
## Removing a Filer's Role

Only one Filer role can be removed at a time.

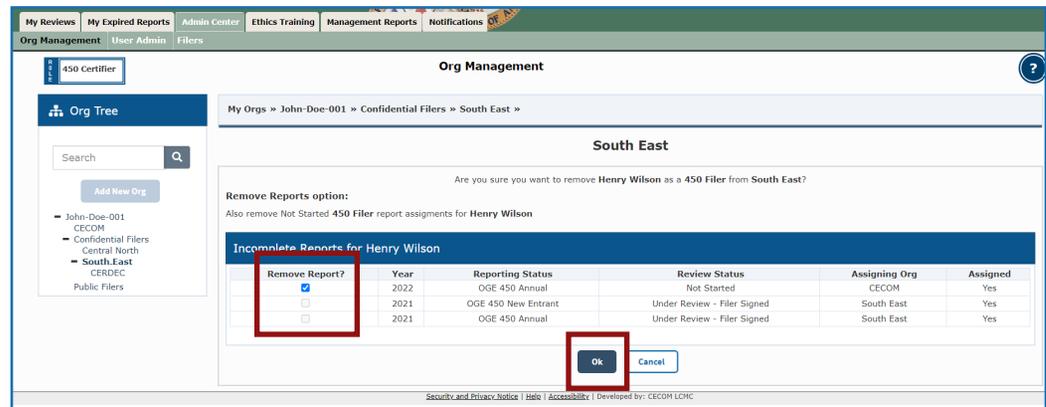
1. Select **Admin Center | Org Management**.
2. Select the Org Unit where the Filer is located.
3. Click the **Org Unit Filers** tab.
4. Click the **450 Filers** panel.
5. Click the **Remove 450 Filer** icon.

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

6. Leave the check box under the "**Remove Reports**" heading selected to remove a report with the Filer's role and click **OK**.
7. Deselect the **check box** and click **OK** to keep the report in the review chain of the original Org Unit.



Click Remove 450 Filer



Check Boxes to Retain or Remove Filer's Role