Manage Organizations

**HOW TO ADD NEW ORGANIZATION**

To add a new Organization to FACTS account, please follow the following steps:

1) If this is the first time you are logging to FACTS, you will see a button to “Register the Permitted Organization”

![Register the Permitted Organization](image)

2) Register the Permitted Organization can be clicked and should lead you to following screen:

![Add Permitted Organization](image)

Please note that New Organization can be added or modified anytime in future by clicking “Organizations and Contacts”
3) To Leave an Organization, “Leave Organization” button could be clicked, To Add a new Organization, “Add Organization” button could be clicked.

4) Adding or searching an organization is a 3 step process:
   a. Supply the permitted Organization’s name and your job title. **Make sure you enter the name of the organization to be permitted.**

   Note: - Attention Consultants Regarding Organizations:
   Only Permitted entities have an organization in FACTS. Please select the organization(s) you are working for and request access as “Preparer”. The organization Admin (or DEQ) will grant you access.
b. Review existing organizations within FACTS that match the name entered in step (1).
   I. If none are found, the system will jump straight to step 3.a.
   II. If possible matches are found but none of them correspond to your organization, scroll down to the bottom and click “Next” to create a new organization.
   III. If one of the organizations listed matches your organization, you may Request Access to it by using the corresponding link on that line.
   Note: - Please include the appropriate role you are requesting in the email.

c. Depending on the outcome of step 2, you will be presented with a screen to:
   I. Capture additional information about the new organization (type and address) before finalizing its creation. Upon creating a brand new organization, you become its administrator but can re-assign or share that responsibility by editing other's role(s).
Request access to the organization selected in step 2.c. This request will go to the current organization administrator if one exists, else it will go to DEQ, for review and approval. You will need to wait for that review to be completed before performing any tasks in FACTS for this organization.