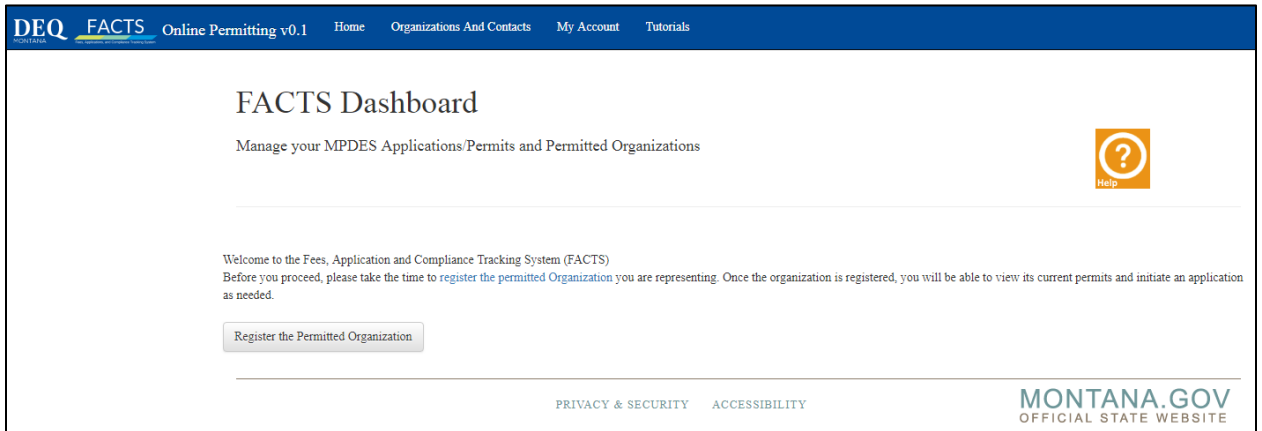


## Manage Organizations

### HOW TO ADD NEW ORGANIZATION

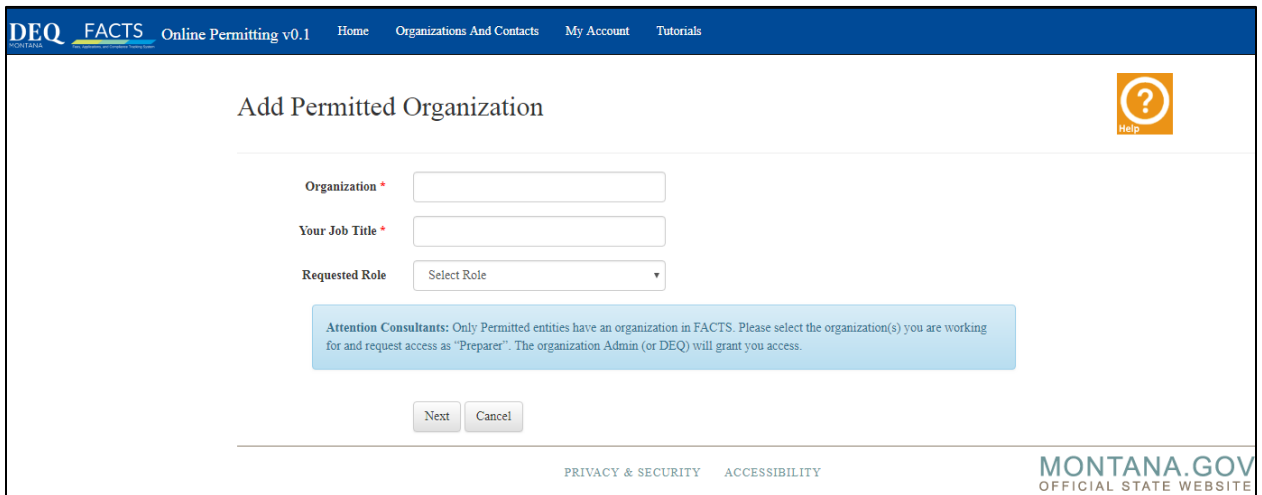
To add a new Organization to FACTS account, please follow the following steps:

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



The screenshot shows the FACTS Dashboard with a navigation bar at the top containing 'DEQ FACTS Online Permitting v0.1', 'Home', 'Organizations And Contacts', 'My Account', and 'Tutorials'. The main heading is 'FACTS Dashboard' with the subtext 'Manage your MPDES Applications/Permits and Permitted Organizations'. A 'Help' icon is visible in the top right. Below the heading, a welcome message states: 'Welcome to the Fees, Application and Compliance Tracking System (FACTS) Before you proceed, please take the time to register the permitted Organization you are representing. Once the organization is registered, you will be able to view its current permits and initiate an application as needed.' A button labeled 'Register the Permitted Organization' is centered below the text. At the bottom, there are links for 'PRIVACY & SECURITY' and 'ACCESSIBILITY', and the 'MONTANA.GOV OFFICIAL STATE WEBSITE' logo.

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



The screenshot shows the 'Add Permitted Organization' form. The navigation bar is identical to the dashboard. The main heading is 'Add Permitted Organization' with a 'Help' icon in the top right. The form contains three fields: 'Organization \*' (text input), 'Your Job Title \*' (text input), and 'Requested Role' (dropdown menu with 'Select Role' selected). Below the fields is a blue information box: 'Attention Consultants: 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.' At the bottom of the form are 'Next' and 'Cancel' buttons. The footer includes 'PRIVACY & SECURITY', 'ACCESSIBILITY', and the 'MONTANA.GOV OFFICIAL STATE WEBSITE' logo.

Please note that New Organization can be added or modified anytime in future by clicking “Organizations and Contacts”

## Manage Organizations

The screenshot shows the FACTS Dashboard with the following elements:

- Navigation bar: DEQ FACTS Online Permitting Test v0.1 Home **Organizations And Contacts** My Account Tutorials
- Header: FACTS Dashboard
- Sub-header: Manage your MPDES Applications/Permits and Permitted Organizations
- Help icon: A yellow square with a question mark and the word "Help" below it.
- Link: Click here for ID Proofing (required for electronic signature)
- Buttons: New Application
- Section: Applications (with a dropdown arrow)
- Search: Search Applications [input field]
- Table Headers: Facility, Permittee, Permit Type, Permit Status, Modify Date

- 3) To Leave an Organization, “Leave Organization” button could be clicked, To Add a new Organization, “Add Organization” button could be clicked.

The screenshot shows the 'Permitted Organizations and Contacts' page with the following elements:

- Navigation bar: DEQ FACTS Online Permitting Test v0.1 Home Organizations And Contacts My Account Tutorials Hello
- Section: Permitted Organizations and Contacts
- Buttons: **Add Organization** (highlighted in red), Start Application, Leave Organization (highlighted in red)
- Table:

Organization	Your Role	Mailing Address	City	State	Zip Code
Only Organization	Signatory Authority	1045 E. 6th Ave	Helena	MT	59601

- 4) Adding or searching an organization is a 3 step process:
- 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.**

## Manage Organizations

- 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.

Organization	Mailing Address	City	State	Zip Code	
Test Organization	1045 E 6th Ave	Helena	MT	59602	<a href="#">Edit Org</a>
Test Organization 1	1520 E 6th Ave	Helena	MT	59601	<a href="#">Request Access</a>
Test Organization	1045 E 6th Ave	Helena	MT	59601	<a href="#">Request Access</a>
AAB TEST	1010 DODGE	HELENA	MT	59601	<a href="#">Request Access</a>
THE KOEHLER ORGANIZATION	PO BOX 15	ABERDEEN	SD	57402	<a href="#">Request Access</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).

## Manage Organizations

The screenshot shows the 'Permitted Organization Information' form in the DEQ FACTS Online Application. The form includes the following fields and options:

- Organization \***: Text input field containing 'Test Organization'.
- Your Job Title \***: Dropdown menu with 'Administrative Associate' selected.
- Type \***: Dropdown menu with 'Please select'.
- Mailing Address \***: Text input field containing '1052 E 6'th Ave'.
- City \***: Text input field containing 'Helena'.
- State \***: Dropdown menu with 'Montana' selected.
- Zip Code \***: Text input field containing '59602'.

At the bottom of the form are 'Save' and 'Cancel' buttons.

**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.

The screenshot shows the 'Request Permitted Organization Access for OUTLOOK COUNTY SEWER AND WATER' page. The page includes the following elements:

- Header**: DEQ FACTS Online Application, Home, Organizations And Contacts, My Account, Hello JackW, Log Out.
- Title**: Request Permitted Organization Access for OUTLOOK COUNTY SEWER AND WATER.
- Message**: Please enter a request for Applicant Privileges for the FACTS Organization Administrator.
- Text Area**: A text input field containing the request: 'Please add me to your FACTS Organization. As an Organization Admin.'
- Buttons**: 'Back' and 'Submit Request' buttons.