Thanks Evan,

Gotta say, this setup is so much more efficient than our offices trying to maintain 2 separate systems. Makes me happy as a taxpayer!

Mike

---

Evan Walker

Roger. Will make both pages consistent.

---

Good morning Evan/Jim,

Vince, our Press Liaison, got a call this morning about a page on the White House website: https://www.whitehouse.gov/public-forms/oge278. This appears to be old information from the last Administration.

The page we updated last week has the new information: https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures

If both pages are needed, humbly suggest you make them consistent pointing both to the collections available on OGE’s website.

Current page we worked on: https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures has:

---

Financial Disclosures

Click here to view Presidential Appointee & Nominee Records.

This page details the process for requesting OGE Form 278
Executive Branch Personnel Public Financial Disclosure reports as they become available.

The old page https://www.whitehouse.gov/public-forms/oge278 has:

**OGE Form 278 (Formerly SF 278)**

OGE Form 278 Executive Branch Personnel Public Financial Disclosure reports for White House officials are now available. Interested parties may request online those reports they would like to review. As we did for the first time ever last year, we have streamlined the distribution process, so that each report is available in pdf form for quick transmission via email.

By filling out this electronic form, you can access the reports of the officials you wish to review. Requested reports will be emailed as quickly as possible - please call the press office if you have any questions.

Respectfully,

Mike

Michael Hanson
(202) 482-9221
Office of Government Ethics

Visit us at www.oge.gov

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Dunno. They were here 8-years. I’ve only been here 3.

Did the previous administration initiate the old process for handling white house reports or did they inherit it?

Hey Dan,
Just spoke with Teresa and she “volunteered” to help out.

When we last spoke, Sandy had the electronic version of the former President’s report and PNB would handle the FDTS upload.

Sandy, if PNB is too busy over there Lori or I could upload it as well – just forward it to 278tracking@oge.gov and we’ll do the rest.

I don’t know the status of the former VP’s report. Once we get it, we’ll upload it right away.

Dan

Hey Dan,
Just a thought – former President and VP reports aren’t in FDTS at the moment. It will be hard to fill requests for these until they are.
From: Daniel L. Skalla  
Sent: Thursday, January 26, 2017 8:17 AM  
To: Michael Hanson; Lori Kelly  
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher  
Subject: RE: White House reports  

Thanks Mike!

From: Michael Hanson  
Sent: Thursday, January 26, 2017 8:17 AM  
To: Daniel L. Skalla; Lori Kelly  
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher  
Subject: FW: White House reports  

Hello Dan/Lori,  
Worked with the White House and as of this morning we (OGE) will now be releasing their reports.  
Give me a call if you have questions,  

Mike

From: Michael Hanson  
Sent: Thursday, January 26, 2017 8:13 AM  
To: 'Schultz, James D. EOP/WHO'  
Cc: David J. Apol  
Subject: RE: White House reports  

Hello Jim,  
Made the change and all reports can now be ordered through the OGE site. All that is needed is for the edit to the White House page (https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures) adding the link to our page https://www.oge.gov/web/oge.nsf/Presidential+Appointee++Nominee+Records  

One note – you may want to have 2 additional links on the page. There are actually 2 classes of Filers, see the Background below.  

Let me know if we can provide language or any other assistance.  

Mike

Background  
There are 2 classes of Filings – One for Executive Pay Levels I & II and one for all other covered employees.  

- Reports for people in or formerly occupying the 67 Pay Level I & II positions (Cabinet Level, etc.) can simply be downloaded. (https://extapps2.oge.gov/201/Pas201/Pas201%20Index?OpenView)
• Reports for all other covered positions must be requested and, under the Stock Act, the requestor must complete the OGE Form 201*. ([https://extapps2.oge.gov/201/Presiden.nsf/201+Request?OpenForm](https://extapps2.oge.gov/201/Presiden.nsf/201+Request?OpenForm))

* Filers in this group have the right to get a list of people who requested their reports from OGE. The 201 form is where we collect the information.

From: Schultz, James D. EOP/WHO [mailto:]
Sent: Wednesday, January 25, 2017 5:14 PM
To: Michael Hanson
Subject: RE: White House reports

Michael- We will are going to add your link to our page. Let’s discuss how to make this happen. Do I need to loop in our IT people?

JAMES D. SCHULTZ
Associate Counsel to the President, Ethics & Compliance
Office of the White House Counsel

From: Michael Hanson [mailto:mhanson@oge.gov]
Sent: Wednesday, January 25, 2017 2:18 PM
To: Schultz, James D. EOP/WHO; David J. Apol <djapol@oge.gov>
Subject: RE: White House reports

Hello Jim,
We are getting requests for White House reports which cannot be filled until the White House mechanism is built.

An option you may want to consider:

We do have 2 legal requirements – provide the reports to requestors, and, provide Filers with a list of people who requested their report.

Please let me know what you think. We can make the change in a few moments.

Thank you,

Mike
From: Schultz, James D. EOP/WHO [mailto:(b)(6)]
Sent: Monday, January 23, 2017 8:03 PM
To: Michael Hanson; David J. Apol
Subject: RE: White House reports

Mike – lets connect tomorrow. J

JAMES D. SCHULTZ
Associate Counsel to the President, Ethics & Compliance
Office of the White House Counsel

From: Michael Hanson [mailto:mhanson@oge.gov]
Sent: Monday, January 23, 2017 2:22 PM
To: David J. Apol <djapol@oge.gov>; Schultz, James D. EOP/WHO [mailto:(b)(6)]
Subject: RE: White House reports

Hello Jim,
I’ve set our 201 request form to display https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures for all White House staff reports. Currently the Office of the Vice President reports are treated as any other Executive Branch organization.

To see the difference:

  Use this link to our 201 Request Form
  (https://extapps2.oge.gov/201/Presiden.nsf/201+Request?OpenForm),
  Enter Obama, click Find Filer, select him and you’ll see the White House link and a Close button.

  Close that window, enter Biden and click Find Filer.
  Select him and you’ll be able to order reports specific reports.

Be glad to answer any questions you might have about our current process, give me a shout.

Thanks,

Mike

Michael Hanson
Jim,

Per your request, we will link to the White House site for request for White House reports. Please let Mike know as soon as that link is available to us. Currently request are going to your “coming soon” page.

Thanks

Dave
Good morning Jim,
Be happy to provide whatever process information I can. Doubtful the WH is using our technology (IBM/Domino) so we wouldn’t have ready-made tools you could use.
In any case, please feel free to point your developers in my direction if needed.

V/R,

Mike

Michael Hanson
(202) 482-9221
Office of Government Ethics

Visit us at www.oge.gov

While this works for Assistants to the President and Deputy Assistants, the Special Assistants’ 278s are housed in our office. We need to come up with a plan to make them available via electronic request. Please make some suggestions. Thank you.

JAMES D. SCHULTZ
Associate Counsel to the President, Ethics & Compliance
Office of the White House Counsel

From: Walker, Evan J. EOP/WHO
Sent: Wednesday, February 1, 2017 10:20 AM
To: Michael Hanson; Schultz, James D. EOP/WHO

Both pages are consistent now.
If we’d rather remove altogether, just let me know.

Evan Walker

Roger. Will make both pages consistent.

Evan Walker

Good morning Evan/Jim,
Vince, our Press Liaison, got a call this morning about a page on the White House website:
https://www.whitehouse.gov/public-forms/oge278 This appears to be old information from the last Administration.
The page we updated last week has the new information: https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures

If both pages are needed, humbly suggest you make them consistent pointing both to the collections available on OGE’s website.

Current page we worked on: https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures has:
This page details the process for requesting OGE Form 278 Executive Branch Personnel Public Financial Disclosure reports as they become available.

The old page https://www.whitehouse.gov/public-forms/oge278 has:

### OGE Form 278 (Formerly SF 278)

OGE Form 278 Executive Branch Personnel Public Financial Disclosure reports for White House officials are now available. Interested parties may request online those reports they would like to review. As we did for the first time ever last year, we have streamlined the distribution process, so that each report is available in pdf form for quick transmission via email.

By filling out this electronic form, you can access the reports of the officials you wish to review. Requested reports will be emailed as quickly as possible - please call the press office if you have any questions.

Respectfully,

Mike

Michael Hanson
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Office of Government Ethics

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of this email or its contents is strictly prohibited. If you have received this email in error, please notify the sender by responding to the email and then immediately delete the email.
James, does your team have the ability to handle this? ODS can get a form up on the page and we can edit to help meet your needs. Just let me know.

Thanks!

Evan Walker

Definitely is the form. Do you an internal tracking system or people in place to handle the requests once received? (the tricky part)

It looks like the previous administration had a form to fill out to make these requests. Do we want to go in this same direction?

http://obamawhitehouse.archives.gov/public-forms/oge278

While this works for Assistants to the President and Deputy Assistants, the Special Assistants’ 278s
are housed in our office. We need to come up with a plan to make them available via electronic request. Please make some suggestions. Thank you.

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Associate Counsel to the President, Ethics & Compliance
Office of the White House Counsel

From: Walker, Evan J. EOP/WHO
Sent: Wednesday, February 1, 2017 10:20 AM
To: Michael Hanson <mhanson@oge.gov>; Schultz, James D. EOP/WHO
Cc: David J. Apol <djapol@oge.gov>; Vincent Salamone <vjsalamo@oge.gov>
Subject: RE: Old info on WH website: where to get Financial Disclosure Reports

Both pages are consistent now.
If we’d rather remove altogether, just let me know.

Evan Walker

Roger. Will make both pages consistent.

Evan Walker

From: Michael Hanson [mailto:mhanson@oge.gov]
Sent: Wednesday, February 1, 2017 10:12 AM
To: Walker, Evan J. EOP/WHO; Schultz, James D. EOP/WHO
Cc: David J. Apol <djapol@oge.gov>; Vincent Salamone <vjsalamo@oge.gov>
Subject: Old info on WH website: where to get Financial Disclosure Reports

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By filling out this electronic form, you can access the reports of the officials you wish to review. Requested reports will be emailed as quickly as possible - please call the press office if you have any questions.

Respectfully,

Mike

Michael Hanson
Ok. I need to find the right person to accomplish this.

James D. Schultz
Associate Counsel to the President
Office of White House Counsel

On Jan 26, 2017, at 8:13 AM, Michael Hanson <mhanson@oge.gov> wrote:

Hello Jim,
Made the change and all reports can now be ordered through the OGE site. All that is needed is for the edit to the White House page (https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures) adding the link to our page https://www.oge.gov/web/oge.nsf/Presidential+Appointee+&+Nominee+Records

One note – you may want to have 2 additional links on the page. There are actually 2 classes of Filers, see the Background below.

Let me know if we can provide language or any other assistance.

Mike

Background
There are 2 classes of Filings – One for Executive Pay Levels I & II and one for all other covered employees.

- Reports for people in or formerly occupying the 67 Pay Level I & II positions (Cabinet Level, etc.) can simply be downloaded. (https://extapps2.oge.gov/201/Presiden.nsf/PAS%20Index?OpenView)

- Reports for all other covered positions must be requested and, under the Stock Act, the requestor must complete the OGE Form 201*. (https://extapps2.oge.gov/201/Presiden.nsf/201+Request?OpenForm)
  * Filers in this group have the right to get a list of people who requested their reports from OGE. The 201 form is where we collect the information.

Michael- We will are going to add your link to our page. Let’s discuss how to make this happen. Do I need to loop in our IT people?

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Office of the White House Counsel

From: Michael Hanson [mailto:mhanson@oge.gov]
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Thank you,
Mike

Michael Hanson
(202) 482-9221
Office of Government Ethics

Visit us at www.oge.gov
Mike – let’s connect tomorrow. J

JAMES D. SCHULTZ
Associate Counsel to the President, Ethics & Compliance
Office of the White House Counsel

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Enter Obama, click Find Filer, select him and you’ll see the White House link and a Close button.

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Select him and you’ll be able to order reports specific reports.

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Thanks,

Mike

Michael Hanson
(202) 482-9221
Office of Government Ethics
Jim,

Per your request, we will link to the White House site for request for White House reports. Please let Mike know as soon as that link is available to us. Currently request are going to your “coming soon” page.

Thanks

Dave
FOIA

From: Ty Cooper
Sent: Thursday, January 26, 2017 1:57 PM
To: Teresa L. Williamson; Daniel L. Skalla; Sandra S. Mabry
Cc: Vincent Salamone; Dale A. Christopher
Subject: RE: White House reports

Just curious... Did the previous administration initiate the old process for handling white house reports or did they inherit it?

From: Teresa L. Williamson
Sent: Thursday, January 26, 2017 12:28 PM
To: Michael Hanson; Daniel L. Skalla; Lori Kelly; Sandra S. Mabry
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher
Subject: RE: White House reports

President Obama and Vice President Biden reports have been uploaded to FDTS.

Thanks
Teresa

From: Michael Hanson
Sent: Thursday, January 26, 2017 8:47 AM
To: Daniel L. Skalla; Lori Kelly; Sandra S. Mabry; Teresa L. Williamson
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher
Subject: RE: White House reports

Hey Dan,
Just spoke with Teresa and she “volunteered” to help out.

From: Daniel L. Skalla
Sent: Thursday, January 26, 2017 8:44 AM
To: Michael Hanson; Lori Kelly; Sandra S. Mabry
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher
Subject: RE: White House reports

When we last spoke, Sandy had the electronic version of the former President’s report and PNB would handle the FDTS upload.

Sandy, if PNB is too busy over there Lori or I could upload it as well – just forward it to 278tracking@oge.gov and we’ll do the rest.
I don’t know the status of the former VP’s report. Once we get it, we’ll upload it right away.

Dan

From: Michael Hanson  
Sent: Thursday, January 26, 2017 8:26 AM  
To: Daniel L. Skalla; Lori Kelly  
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher  
Subject: RE: White House reports

Hey Dan,
Just a thought – former President and VP reports aren’t in FDTS at the moment. It will be hard to fill requests for these until they are.

From: Daniel L. Skalla  
Sent: Thursday, January 26, 2017 8:17 AM  
To: Michael Hanson; Lori Kelly  
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher  
Subject: RE: White House reports

Thanks Mike!

From: Michael Hanson  
Sent: Thursday, January 26, 2017 8:17 AM  
To: Daniel L. Skalla; Lori Kelly  
Cc: David J. Apol; Ty Cooper; Vincent Salamone; Dale A. Christopher  
Subject: FW: White House reports

Hello Dan/Lori,
Worked with the White House and as of this morning we (OGE) will now be releasing their reports. Give me a call if you have questions,

Mike

From: Michael Hanson  
Sent: Thursday, January 26, 2017 8:13 AM  
To: ‘Schultz, James D. EOP/WHO’  
Cc: David J. Apol  
Subject: RE: White House reports

Hello Jim,
Made the change and all reports can now be ordered through the OGE site. All that is needed is for the edit to the White House page (https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures) adding the link to our page https://www.oge.gov/web/oge.nsf/Presidential+Appointee+&+Nominee+Records

One note – you may want to have 2 additional links on the page. There are actually 2 classes of Filers, see the Background below.
Mike –
Here is the link we discussed:
https://www.whitehouse.gov/public-forms/oge278
Vince
Kathleen,

New entrant reports are due within 30 days of assuming a position. However, there are a number of variables that could impact how quickly we receive the reports. Agencies can provide extensions to the filing deadline of up to 90 days. Agencies then have up to 60 days to review and certify the reports, at which point they would be submitted to OGE for review and certification.

You would find those reports using OGE’s online 201 system (https://extapps2.oge.gov/201/Presiden.nsf/201+Request?OpenForm)

Sincerely,

Dan Skalla
Chief, Financial Disclosure Branch
Compliance Division
U.S. Office of Government Ethics
1201 New York Ave., NW, Suite 500
Washington, DC 20005-3917
Tel. 202.482.9222
Fax 202.482.9238

Visit OGE’s website: www.oge.gov
Follow OGE on Twitter: @OfficeGovEthics

Daniel,

I just wanted to follow up on our conversation about when new White House staffers had to file incumbent reports and OGE form 201.

I know that you stated that new White House staffers were required to file incumbent reports in 2018, yet I wanted to see when these covered staffers have to file their new entrant reports and where I can find the disclosures once they are filed.

Thanks for your assistance,
Kathleen

On Wed, Mar 8, 2017 at 3:05 PM, Daniel L. Skalla <dlskalla@oge.gov> wrote:

Hi Kathleen,

White House officials entering government service in 2017 will have their first incumbent reports due in May 2018 (the 2018 annual submission covers the 2017 calendar year).

Dan

---

From: Kathleen Casey [mailto: ]
Sent: Wednesday, March 08, 2017 1:58 PM
To: Daniel L. Skalla

Subject: Re: FAXED FOIA REQUEST

Daniel,

Thank you so much. Just to clarify, all financial disclosures for White House officials, who are mandated to file, are due by May 15th?

On Wed, Mar 8, 2017 at 1:53 PM, Daniel L. Skalla <dlskalla@oge.gov> wrote:

Hi Kathleen,

With the expansion of OGE’s online Form 201 system, OGE has discontinued that practice. Report can be searched for and requested at any time, at your convenience, using the online system.

Sincerely,

U.S. Office of Government Ethics
Compliance Division
1201 New York Ave., NW, Suite 500
Washington, DC  20005-3917
Visit OGE's website: www.oge.gov
Follow OGE on Twitter: @OfficeGovEthics

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From: Kathleen Casey [mailto: ]
Sent: Wednesday, March 08, 2017 1:29 PM
To: 201 Forms
Cc: Daniel L. Skalla
Subject: Re: FAXED FOIA REQUEST

To Whom it May Concern,

Thank you for your quick response. Last year when I filed this form for form 201 disclosures I was added to a list of people who would be alerted when the financial disclosures for the
individuals named on my request became publically available. Is this still something that your office does?

Thank you for your assistance,

Kathleen

On Fri, Mar 3, 2017 at 4:59 PM, 201 Forms <201forms@oge.gov> wrote:

Hi Kathleen,

The fax you submitted to OGE FOIA office on February 23, 2017 was forwarded to OGE Financial Disclosure Branch for action. The public financial disclosure reports you requested are either “Not Received by OGE” or “Not yet available under 5 CFR 2634.603(c).

We encourage you to use our Online OGE Form 201 when requesting public financial disclosure reports of filers that file with OGE but are not in Level I or Level II positions to retrieve 278 reports. If you don’t find the filer’s last name in the search box, the report is not yet available. Below is the link to the electronic 201 system:

Online OGE Form 201: https://extapps2.oge.gov/201/Presiden.nsf/f54fd322068f23a85257fc40006f88e?OpenForm

Best regards,

U.S. Office of Government Ethics
Compliance Division
1201 New York Ave., NW, Suite 500
Washington, DC 20005-3917

Visit OGE's website: www.oge.gov
Follow OGE on Twitter: @OfficeGovEthics

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--
Kathleen M. Casey

Looks like the White House will be posting their reports starting the end of next week.
Hello Dave,

I modified our 201 selection to provide a link to [https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures](https://www.whitehouse.gov/briefing-room/disclosures/financial-disclosures) for all former and current White House staff reports including the President.

(the old link -- [https://www.whitehouse.gov/the-press-office/financial-disclosure-reports-now-available](https://www.whitehouse.gov/the-press-office/financial-disclosure-reports-now-available) -- no longer exists)

Michael Hanson
(202) 482-9221
Office of Government Ethics

Visit us at www.oge.gov
Hello David,

The default link we’ve been using for White House reports is no longer valid as they’ve pulled and replaced all their content. Please let me know if I 

In the meantime, if I get contacted by anyone on the WH web team (normally likely) I’ll ask them 

Again, our current link is broken (text below), we need to either 

(2) Select Document(s), then click "Add to Cart"

Please visit the White House for these reports.

Here is a link https://www.whitehouse.gov/the-press-office/financial-disclosure-reports-now-available

Thanks,

Mike

Michael Hanson
(202) 482-9221
Office of Government Ethics

Visit us at www.oge.gov
FYI.


Looks like the White House will be posting their reports starting the end of next week.
Thanks

From: Teresa L. Williamson
Sent: Friday, March 24, 2017 12:10 PM
To: Vincent Salamone; Daniel L. Skalla; Lori Kelly
Subject: White House reports


Looks like the White House will be posting their reports starting the end of next week.
No. We referred 201 requests to the White House website for the former administration. Under the Trump administration, White House staff reports will be released by OGE rather than the WH.