

From: [News and Info for Ethics Officials](#) on behalf of [Ethics Mailing List](#)
To: OGE-ETHICSINFO@LISTSERV.GSA.GOV
Subject: [External] Use OGE Public Financial Disclosure Resources this Filing Season
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Attachments: [Use OGE Public Financial Disclosure Resources this Filing Season.pdf](#)

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Public financial disclosure season is here. The deadline to file annual public financial disclosure reports (OGE Form 278s) is Friday, May 15, but you may already have some awaiting your review. We are pleased to offer live training opportunities this filing season and remind you of other OGE resources that can assist you in your work. See below.

Live Training Opportunities Coming Soon:

OGE will provide live training opportunities this filing season, including:

- *Integrity* Webinar: May 13, 2026, 12:00-1:00 Registration link. <https://events.gcc.teams.microsoft.com/event/adcfb452-2d84-4c74-bb4c-86e305be4428@c0abca44-0182-40a9-8010-01ec94254f77>
- Live Web Broadcast: Getting Started with Public Financial Disclosure Review, May 11, 2006, 2:00-2:30 Watch Here: <https://extapps2.oge.gov/Training/OGETTraining.nsf/0/F11BD6E53BF137A785258DEA004BA40C>

On-Demand Courses and Training Materials:

The courses and training materials linked to below, as well as numerous others on various ethics topics, can be found in [the IEG's course library](#).

New

[18 U.S.C. 208\(a\) Elements: Introductory Training to the 18 U.S.C.](#)

[208\(a\) Job Aid and How-To Session](#)

This training provides an overview of 18 U.S.C. 208(a) and its elements and how they are used to conduct analyses of 208(a) questions. The training also introduces the [18 U.S.C. 208\(a\) Job Aid \(PDF\)](#), which was created to assist ethics officials with their analyses, and leads a separate session on how to use it.

[Quick Start Guide: Confidential to Public Financial Disclosure Review](#)

After watching this video, you will be able to:

- Explain the two purposes of the public financial disclosure system.
- Find the two pieces of information you need to review an OGE Form 278.
- Identify entries and concepts unique to public financial disclosure review.
- Take action when you identify a potential conflict of interest.
- Continue your professional development as an OGE Form 278 reviewer.

Existing

[\(Updated\) Quick Start Guide: Public Financial Disclosure](#)

After watching this video, you will be able to:

- Identify who should file public financial disclosure reports (OGE Form 278s), when they should file them, and why they file.
- Explain the two purposes of the public financial disclosure system.
- Find the two pieces of information you need to review an OGE Form 278.
- Use the *Public Financial Disclosure Guide* to ensure an entry is properly reported.
- Use the *Resolving Potential Conflicts of Interest Collection* to perform a conflicts of interest analysis on an entry.
- Take action when you identify a potential conflict of interest.
- Continue your professional development as an OGE Form 278 reviewer.

New for 2026: Discussion questions to help you and your colleagues in the ethics office share practices for effective reviews.

(Updated) Public Financial Disclosure Review Course of Study

This Course of Study includes videos to learn about and practice public financial disclosure review. Its [“Resources for Conducting Substantive Legal Review of 278e” document \(Word\)](#), listed under the course materials, provides other resources for conducting substantive legal reviews of OGE Form 278s (e.g., web guides, job aids, training videos). These are organized by what filers are required to report: assets and income, liabilities, outside positions, agreements or arrangements, and gifts and travel reimbursements.

New for 2026: Discussion questions to help your agency’s ethics team prepare for public financial disclosure review season together.

[Navigating to OGE’s 278 Resources](#)

This demonstration shows participants how to navigate the OGE website and locate its resources related to public financial disclosure, including resources to support technical reviews of annual reports and analyzing for potential conflicts of interest, resources to share with annual filers, legal advisories, and training resources.

[How to Research Financial Instruments for Public Financial Disclosure Reviewers](#)

This short video introduces novice public financial disclosure reviewers to processes for researching and analyzing assets reported on these reports.

[Public Financial Disclosure Review: Reconciling Ethics Agreements with Annual Reporting](#)

One of the primary purposes of financial disclosure is to prevent conflicts of interest. When filers enter into ethics agreements, they make a commitment to remediate any actual or potential conflicts that have been identified. Those commitments may include everything from divestitures and resignations to forfeitures of assets and recusals from

matters. It is imperative that agency reviewers of annual reports ensure not only that these commitments are honored, but that any new conflicts are identified and remediated.

In this training, instructors review a hypothetical ethics agreement and identify those commitments that should be reconciled with annual public financial disclosure reporting. They also discuss how reviewers should continue to monitor and advise on newly identified actual and potential conflicts and other ethics concerns.

Public Financial Disclosure Review Resources:

[Public Financial Disclosure Guide](#)

This Guide is an interactive tool to assist in the administration and review of OGE Form 278s. It offers helpful instructions, illustrations of sample language, definitions of terms, and plain language answers to frequently asked questions. View the [“For Ethics Official” section](#) for comprehensive guidance geared toward ethics officials including review timelines, review steps, and certification standards.

[Analyzing Potential Conflicts of Interest](#)

This series of guidance documents provides conflicts analyses for various types of employment interests, investment interests, and liabilities.

[2026 Calendar of Important Ethics Dates \(PDF\)](#)

This calendar identifies key deadlines for executive branch ethics programs and is especially helpful for reminders related to the 2026 public financial disclosure season.

[Resources for Financial Disclosure Filers](#)

This webpage contains helpful resources for filers, including filer aids that explain certain reporting requirements and the [What to Gather Before You Start Your Public Financial Disclosure Report \(2024\) \(PDF\)](#)

one-pager, which provides a list of documents and information that filers need to collect before completing an OGE Form 278.

[18 U.S.C. 208: Particular Matters of General Applicability Job Aid](#)

This job aid helps agency ethics officials determine which agency activities qualify as particular matters for purposes of 18 U.S.C. 208.

***INTEGRITY* (Electronic Filing System) Resources:**

[Login Help \(March 2026\) \(PDF\)](#)

INTEGRITY recently completed its transition to a new authentication provider. This document is available to assist those who have questions.

[Integrity Reviewer's Guide](#)

This job aid explains the most frequent reviewer tasks in *INTEGRITY*. It should help new *INTEGRITY* reviewers and also serve as a quick refresher for experienced, but infrequent *INTEGRITY* reviewers.

[INTEGRITY News](#)

This news page provides information *INTEGRITY* users need to know, such as recent system updates and links to helpful tools and resources. These resources include opportunities to attend upcoming *INTEGRITY* training events and access to training materials (e.g., slide decks).

INTEGRITY Listserv Information

To stay informed, all agency ethics staff with a role in *INTEGRITY* are invited to join its listserv. Send a blank email to OGE-Integrity-subscribe-request@listserv.gsa.gov to self-subscribe.

Help Desk Information*

Email: INTEGRITY@oge.gov

Hours: Monday through Friday from 8am to 4:30pm EDT

*Please note that this Help Desk supports administrators and agency ethics officials.

Legal Advisories:

These are some of our most recent legal advisories (LAs) touching on the topic of public financial disclosure. They can be found, along with numerous others that may be relevant to your review of OGE Form 278s, in OGE's [Legal Research Search Collection](#).

[LA-24-10: Determining Whether a “Thematic” Fund is a Sector or Diversified Fund for Purposes of the Regulatory Exemptions Applicable to Mutual Funds \(PDF\)](#)

This LA provides guidance on when “thematic” mutual funds are “sector funds” for purposes of the regulatory exemptions to 18 U.S.C. § 208.

[LA-24-04: Conflicts of Interest Considerations and Financial Disclosure Reporting Requirements for Managed Investment Accounts \(PDF\)](#)

This LA highlights the potential conflict of interest risks and financial disclosure reporting challenges for employees who invest in managed accounts, including those managed by roboadvisors.

[LA-24-02: Bitcoin Exchange-Traded Products \(PDF\)](#)

This LA discusses the application of certain ethics rules to several Bitcoin exchange-traded products (“Bitcoin ETPs”). As described in the LA, these Bitcoin ETPs do not qualify for regulatory exemptions to the criminal conflict of interest law, 18 U.S.C. § 208. The Bitcoin ETPs do qualify as excepted investment funds for purposes of financial disclosure reporting.

[LA-23-12: Identifying and Preventing Violations of 18 U.S.C. § 208 Arising from Digital Asset Ownership \(PDF\)](#)

This LA provides guidance on when an employee may have a disqualifying financial interest under 18 U.S.C. § 208 arising from ownership of digital assets.

[LA-25-02: Limitations on Outside Compensation and Affiliation Applicable to Presidential Appointees and Covered Noncareer Employees](#)

This LA serves to remind agency ethics officials about the various limitations on outside earned income and affiliations that apply to PA, PAS, and CNC employees

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