

GENERAL INFORMATION

- Read the entire email notification about your Annual Public Financial Disclosure Report (OGE Form 278e)
- The report is due May 15, 2023. Send requests for extensions to standardsofconduct@hq.doe.gov NLT Friday, May 12, 2023. Late filing may carry a \$200 fee.
- If you started at DOE in 2022, your user ID is now your official email address, unless otherwise noted. The email from Integrity will tell you how to login with your new user ID. For technical issues, please contact 202-395-6860 or maxsupport@max.gov.
- Login to www.integrity.gov as soon as possible so GC can help address any issues.
- Use Google Chrome to access www.integrity.gov
- Email standardsofconduct@hq.doe.gov with questions about how to complete your report.
- If GC contacts you with questions about your report, please respond as soon as possible.

TOP TEN TIPS FOR YOUR PUBLIC FINANCIAL DISCLOSURE

1. If this is your first annual report, the time period for this report is calendar year 2022. Some information you previously reported should stay on the report, and you should not include information for 2023.	2. You are responsible for information for your spouse, dependents, and any accounts managed by others for you. Consider asking for end-of-year statements so you can complete the report.
3. Report your spouse's employer and how your spouse is paid (e.g., salary, commission, fees, etc.). Do not include dollar amounts.	4. Report your spouse's retirement assets, including any defined benefit plan.
5. Report the full name of each asset; a ticker symbol alone is insufficient.	6. Defined contribution plans (401(k)s, 403(b)s, 457s, IRAs, SEP IRAs, SIMPLE IRAs, and the Roth versions of these accounts) and defined benefit pension plans are reported in Part 2 (Employment Assets Income) and Part 3 (Employment Agreements and Arrangements).
7. For accounts that contain underlying assets (mutual funds, stocks, etc.), report each underlying asset held in the account separately that meets the reporting thresholds in the instructions. An entry named only "IRA account" or "Fidelity Brokerage" is not an appropriate entry.	8. Report purchases, sales, or exchanges of stocks, bonds, mutual funds, real property (except your personal residence, unless you are renting it out) and other securities greater than \$1,000 in Part 7 (Transactions). If you filed a 278-T for a transaction, you are not required to report it again.
9. DO NOT report the purchase or sale of underlying assets held within a mutual fund.	10. Report dividend reinvestments of more than \$1,000 as purchases.

HELPFUL HINTS

- Mutual fund transactions go on your annual report, even though they are not required on an OGE 278-T.
- You do not need to list your current position in the Federal Positions section of the report.
- Changing the investment options held in a brokerage or retirement account are not exchanges. In these cases, you are selling one fund or stock and buying another.
- You have to report sales transactions that resulted in losses. If the transaction exceeded the \$1,000 threshold, report the transaction.
- Check to make sure your appointment date and filer status is accurate in your report.