

Introduction: Starting in January 2020, we will use *INTEGRITY*, <https://integrity.gov>, to collect and review the OGE 278e, Public Financial Disclosure Report, and the OGE Form 278-T, Periodic Transaction Report.

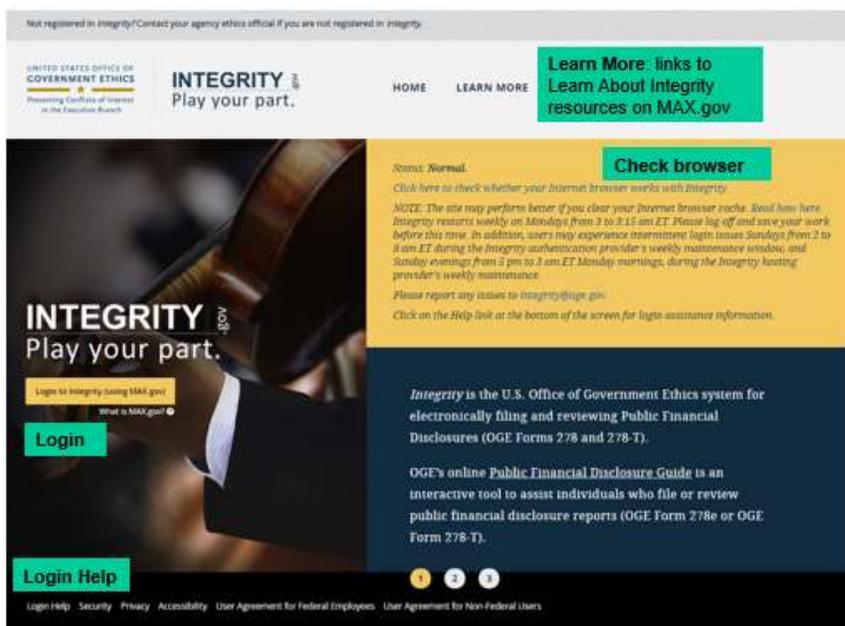
INTEGRITY is the online system the Office of Government Ethics (OGE) developed for the executive branch. It presents filers with on screen questions (a report wizard) to guide them.

Key *INTEGRITY* features for reviewers:

- Reviewer My Queue dashboard.
- Ability to edit filers' entries, including the ability to “move” an item between Parts 2, 5, or 6.
- Asset name auto-complete suggests possible matches for over 13,000 assets as the filer types either the asset name or ticker symbol.
- Public annotations to add notes on the face of the publicly releasable version of the filing.
- Comments: a reviewer may use this feature to instruct a filer to make corrections or supply additional information. *INTEGRITY* automatically deletes comments on certification.
- FDM data imported for migrating agency filers.
- Report compare: when a filer “pre-populates” the report with information from a previous report, *INTEGRITY*’s comparison tool will show items that changed in the later report.
- Default and automated notices and reminders (agency configurable).
- Return to filer to amend (if the report is pending your action). See the *INTEGRITY* User Guide (IUG), §6.4.7.
- Management status reports (see IUG, §7.8).

Getting Started:

- Browse the Learn about *INTEGRITY* site, <https://community.max.gov/display/OGEEExternal/About+Integrity>.
- Download the *INTEGRITY* User Guide (IUG) available at <https://community.max.gov/x/SYI-Lg>.
- Scan the IUG Table of Contents. **Focus on Section 6, Reviewer Actions.**
- Watch a narrated video or see job aids on the “**For Reviewers**” tab, <https://community.max.gov/display/OGEEExternal/Information+for+Reviewers>.
- Email OGE-Integrity-subscribe-request@listserv.gsa.gov to join the *INTEGRITY* listserv to receive notices of important changes and monthly Help Desk Webinars.
- Login and use the Admin | Find User tool to search for yourself and see what roles you have.
- Go on the Admin dashboard and select Management Reports to run a list of filers or reports in system (reports in Data Imported status to see which filers have FDM data imported).

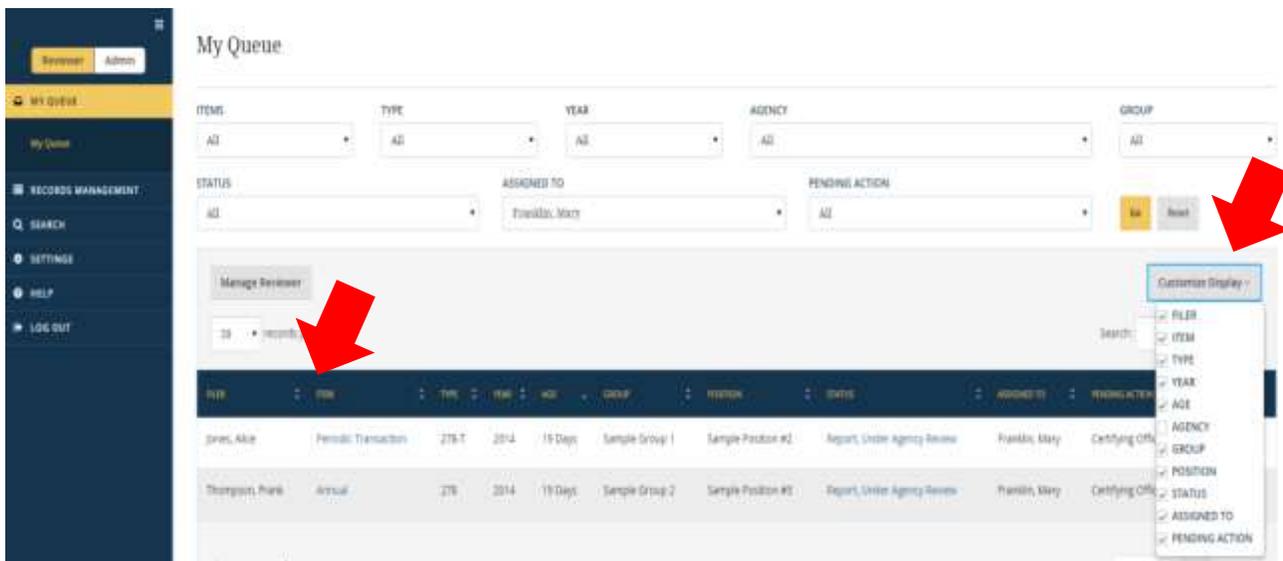


The **Reviewer My Queue** dashboard is your home workspace to see reports in groups where you have a staff role (e.g., ethics official, certifier). “**My Queue**” consists of two sections – a set of filter conditions and the results generated by the use of those filter conditions. The default setting is for reports pending your action. Change to see other filings. See IUG, §§ 1.5.3, 6.1.



To view a pending filing, click on the hyperlinked text in the “**Item**” column for that report.

If you do not see the “**Item**” column, check the “**Customize Display**” button (right side) to display it.



The report will open in a new, secondary window (new browser tab).

Review Report. There are several ways to review a report (see IUG, § 6.4):

1. Screen-by-screen - advance screen by screen by clicking the **Next** action button at the bottom right of a screen.
2. Left-side navigation is a table of contents or hyperlink to jump to that part of a filing (see left side of screen shot below).

3. **Report Data (Summary)** displays the complete report for scrolling: the cover page, any comments, public annotations and the grid data. You may find it easier to start with this page and go to the data entry grids only if you have to edit an entry or make a comment. Comments and public annotations are displayed in special sections at the top of the page. The Reviewer can jump to a part by using the **Edit** action button (right side) of any part.



Best practices/lessons learned: Some of the agencies that use *INTEGRITY* provided these best practices/lessons learned.

- **Helping filers:**
 - Review the **For Filers** tab on the Learn about *INTEGRITY* site, <https://community.max.gov/x/vQAplg>, and or, the Quick Start *INTEGRITY* for DoD Filers.
 - Filers may appoint a designee to start or draft a report. See IUG, §3.4.
 - Filers frequently asked how to report an underlying asset in *INTEGRITY*. See the job aid, [Reporting an Underlying Asset](#) (or IUG §4.3.5).
 - Reviewers can edit a report without returning it to the filer if agency policy permits. If you do return a report to a filer to amend: mention the specific item(s) and remind the filer to re-submit after (s)he amends or changes the returned filing. *INTEGRITY* will send reminder notices until the filer re-submits.
- **Reviewing:**
 - See IUG §6 for information on reviewing reports in *INTEGRITY*.
 - Watch narrated review tutorials or view the Reviewer Resources on the **For Reviewers** tab, <https://community.max.gov/x/vQAplg> (Learn about *INTEGRITY*).
 - *INTEGRITY* uses filer information on the General Information page to compile an agency's annual data extract for the OGE Annual Questionnaire. When reviewing, check the Filer Category, Spouse indicator, Report Year (see IUG §7.6.10), and End Initial Review date. Edit if corrections are needed.
 - Check the online Public Financial Disclosure Guide, [§4.04: When to Obtain Additional Information](#), Additional Considerations).
- **Printing:** see IUG §4.3.11.: *INTEGRITY* relies on your browser's print feature or if you exported the filing to PDF you can open and print PDFs as you normally do.

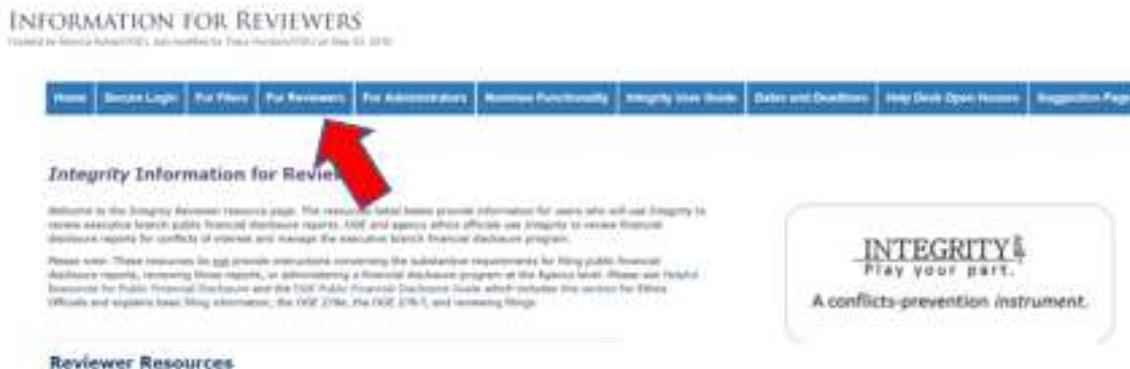
Want more information?

- Scan the IUG Table of Contents.
- View the **For Reviewers** tab <https://community.max.gov/x/vQAplg> (Learn about *INTEGRITY*).

Be sure to check for the latest **Reviewer Tasks** aid. It has a hyperlinked table of contents to help you jump to a particular topic.



Reviewer Tasks PDF



Login: The login differs from the FDM experience. Since you are already registered, you need to activate your account. Here is how. On the *INTEGRITY* home landing page, <https://integrity.gov>, click on “**Login to Integrity.**”

Note: If you cannot login, contact your ethics counsel chain of command or check the Login Help link in the footer on the Landing page. You may be registered using a different email address.

On the Sign in Using screen, most DoD users will use a CAC.* **Note:** you will need to associate it with your MAX.gov ID (email address registered in *INTEGRITY*). Here are the steps:

1. Close out of all of your browsers.
2. Insert your PIV/CAC in your reader.
3. Open your internet browser and go to <https://piv.max.gov/maxpivreg>
4. Enter your MAX ID (email address) then click “Send Validation Code”. (Depending on your agency firewall/network it may take 15-20 minutes to receive this email.)
5. MAX will email a token number/validation code to enter in the next screen.
6. Type the certificate validation code from the bottom of the Certificate Registration email into the space beneath your MAX ID. Then click the “Submit” button.

*Read about other login methods here: <https://community.max.gov/x/7QEjSQ>. Filers and filer designees who have no reviewer or administrative role may login using only ID (email address) and password.



INTEGRITY uses the MAX authentication login service so your agency doesn't have to manage user IDs and passwords.

Troubleshooting login: browse <https://extapps2.oge.gov/integrity/help.nsf/integrity+help+documents/Help?open>. Watch/listen to this short tutorial if you see an “Access Denied” message.



Troubleshooting Access Denied.mp4

Contact MAX Support for login assistance, e.g., CAC registration, password reset. Mention login to *INTEGRITY*. MAX Support: 202.395.6860, maxsupport@omb.eop.gov. Available weekdays 8:30 a.m. to 9:00 p.m. and weekends 9:00 a.m. to 6:00 p.m.