Introducing *INTEGRITY* to Filers and Designees

This job aid introduces *INTEGRITY* to Filers and Designees. It should help Filers and Designees with an overview of *INTEGRITY* and how to get started. It is not substantive or policy guidance. Please visit the OGE website or contact your Agency Ethics official for additional information. This version includes references to the *INTEGRITY* User Guide v.3.0 (October 2020).

Contents

BACKGROUND 2

FOR FILERS 2

- LOGIN TO *INTEGRITY* 2
- RESET PASSWORD 4
- REGISTER YOUR PIV/CAC CARD WITH MAX.GOV 4
- CONTACT INFORMATION 4
- UPDATE CONTACT INFORMATION 5
- START A 278e 5
- THE *INTEGRITY* WIZARD 6
- PRE-POPULATE A REPORT 7
- RESET A 278e REPORT 7
- ADD TRANSACTIONS TO THE 278e FROM THE 278-T 7
- IMPORT ENTRIES FROM A TEMPLATE SPREADSHEET TO THE 278e 8
- BASICS TO SUCCESSFULLY IMPORT A SPREADSHEET TO THE 278e/278-T 8
- Start a 278-T 9
- ASSIGN A DESIGNEE 10

FOR DESIGNEES 11

- WHAT DOES A FILER DESIGNEE DO? 11
- DESIGNEE APPOINTMENT EMAIL 11
- *INTEGRITY* LOGIN HELP: CLOAKED USERS 12

HELP RESOURCES 16

- CLEAR BROWSER CACHE 16
- INTEGRITY ICONS 17

BACKGROUND

The Executive Branch uses *INTEGRITY*, *INTEGRITY*.gov, to securely file the OGE 278e, Public Financial Disclosure Report, and the OGE Form 278-T, Periodic Transaction Report.

INTEGRITY is an Office of Government Ethics (OGE) developed web based filing system for the executive branch. Congress required electronic filing of Public Financial Disclosures in the "Stop Trading on Congressional Knowledge" (STOCK) Act of 2012. *INTEGRITY* presents filers with a combination of data-entry tables and context-dependent questions to help filers identify all of their reportable financial interests and to disclose those interests correctly.

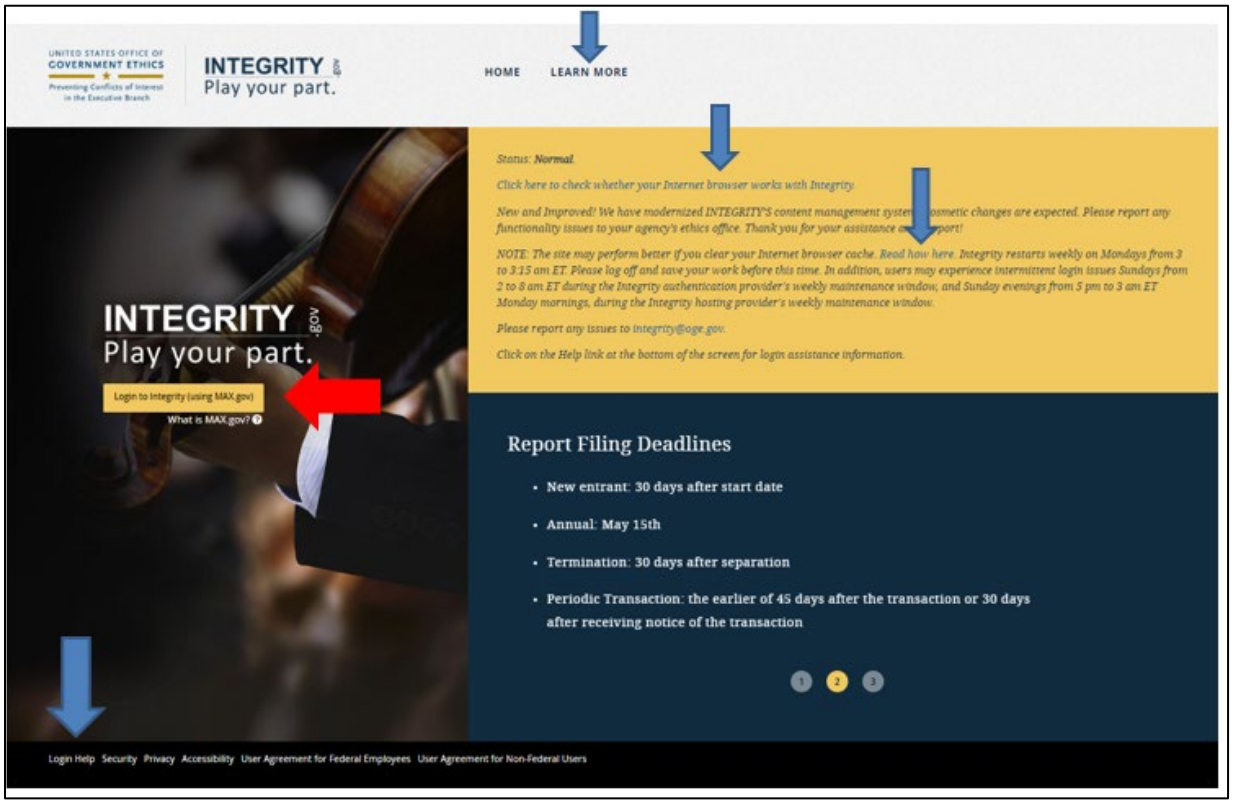
INTEGRITY has user-friendly inputs with brief on screen instructions and tool tips, available on demand (white question mark on blue background). ?

Consult with your agency ethics official and OGE's online Public Financial Disclosure Guide, for what to report. A complete list of agency ethics officials is available here Agency Ethics Program Contact Information.

FOR FILERS

LOGIN TO *INTEGRITY*

Go to *INTEGRITY*.gov. On the landing page click on "Login to *INTEGRITY*", see red arrow on the screenshot below.



Note: The *INTEGRITY* Landing page has a wealth of information on it, including the status of *INTEGRITY* and maintenance hours when users may experience intermittent login issues. Any alerts about *INTEGRITY* will be posted in the status section of the landing page. The page has various footer links such as the "Login Help" link that provides guidance on troubleshooting login problems. It also has links to check whether your Internet browser works with *INTEGRITY* and provides a link to read how to clear your Internet

browser cache. In addition, the Learn More link is a direct link to the Learn about *INTEGRITY* site, which includes print and video resources for all users.

On the next screen, MAX.gov Login, as shown in the screenshot below, choose the appropriate option:

1. Login with User ID and Password. The User ID is the email address that is registered in *INTEGRITY*. You and your designees may use this method if your only role is a Filer or Filer Designee. Most agencies encourage their Filers to use either an authenticator app or PIV/CAC card to login.

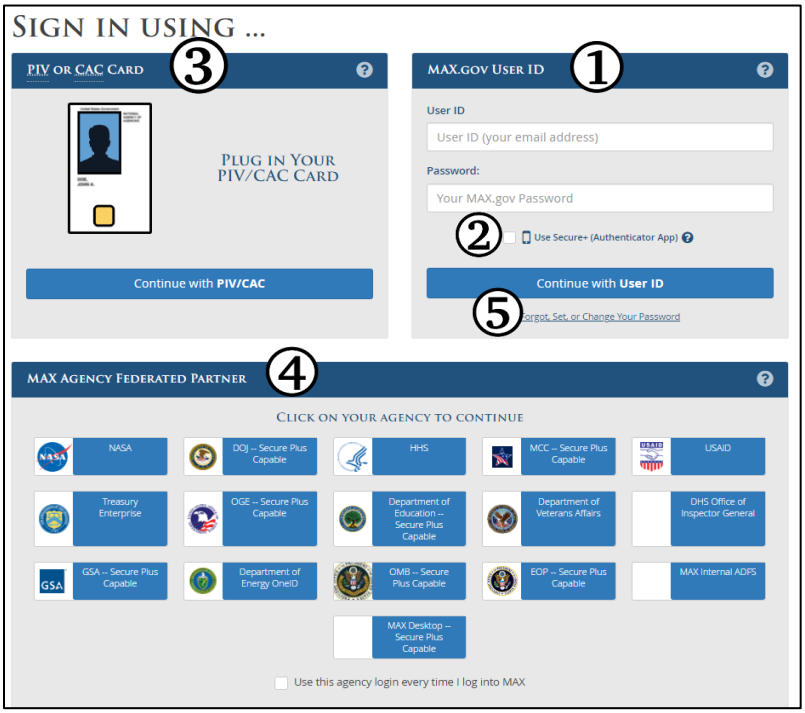
   Note: When you login for the first time, you have to set a password, click on the "Forgot, set, or change your password?" link and follow the on-screen prompts to create a password on MAX.gov. Watch your email for a password reset link from MAX Support. If you login with user ID and password, your password will expire every 90 days and you'll need to reset your password.

2. Login with an Authenticator App. Check the check box to "Use MAX Secure+ Authenticator App" (right side) and enter your User ID (email address registered in *INTEGRITY)* and password. Contact your agency *INTEGRITY* administrator if you need assistance.

3. Login with PIV/CAC. Login with your existing PIV/CAC card and pin. Recommended best practice.

   Note: You must register the PIV/CAC with MAX.gov every time your credentials are updated, e.g. you change agencies, your agency email address changes, etc.
   Note: Google Chrome and Microsoft Edge are the recommended browsers for PIV/CAC login.

4. Login using MAX Agency Federated Partner. If your agency is listed as a "MAX Agency Federated Partner," login by clicking on the icon button for your agency. MAX will route you through your agency authenticator. If you are already logged in at your agency, you will be connected directly to *INTEGRITY* without further prompt. Consider checking the "Use this Agency Login every time I log into MAX." If you exclusively use this feature for login, you no longer need to periodically update your MAX password.



RESET PASSWORD

To reset your password, go to *INTEGRITY*.gov, click "Login to *INTEGRITY*". On the next screen, MAX.gov Login, select the "Forgot, Set or Change Your Password" link marked with the five (5) above. After you have reset your password, go to *INTEGRITY*.gov to login. Follow the onscreen prompts. For issues related to passwords contact MAX.gov at maxsupport@max.gov.

REGISTER YOUR PIV/CAC CARD WITH MAX.GOV

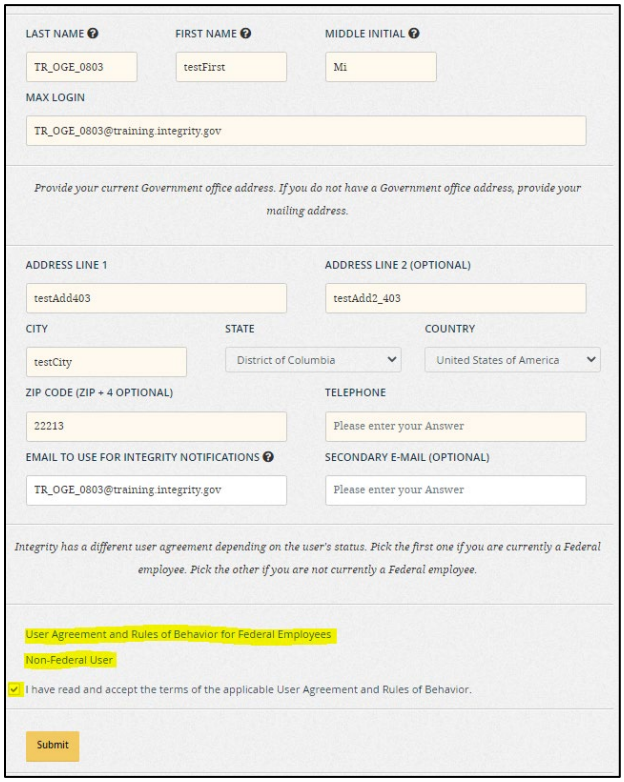
1. Close out all Internet browsers.
2. Insert the PIV/CAC card in the reader.
3. Open an Internet browser and go to https://piv.max.gov/maxpivreg.
4. Enter your MAX ID (email address) then click "Send Validation Code". *Depending on your firewall/network it may take 15-20 minutes to receive this email.
5. You will be sent a token number to enter in the next screen.
6. Type the PIV/CAC certificate validation code from the bottom of the PIV/CAC Certificate Registration email into the space below your MAX ID. Then click the "Submit" button.
7. After you register your PIV/CAC, login to *INTEGRITY* at https://*INTEGRITY*.gov.

Contact MAX Support in the event of problems with registering the PIV/CAC card: 202-395-6860, maxsupport@max.gov.

Note: Google Chrome and Microsoft Edge are the recommended browsers for PIV/CAC login.

CONTACT INFORMATION

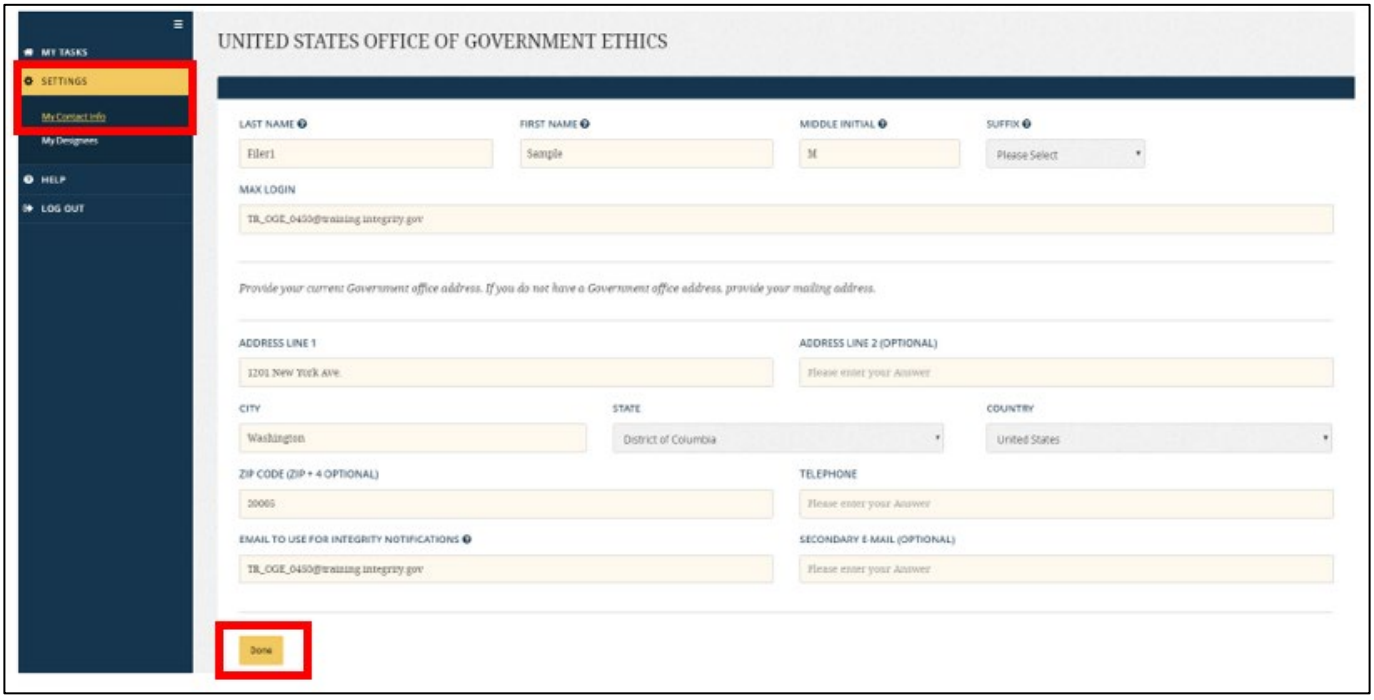
The first time you login to *INTEGRITY,* you'll see a partially completed "Contact Information" screen. Review and update the information, read the appropriate *User Agreement and Rules of Behavior*, check the box to acknowledge that you read and agree to it, then click Submit.



UPDATE CONTACT INFORMATION

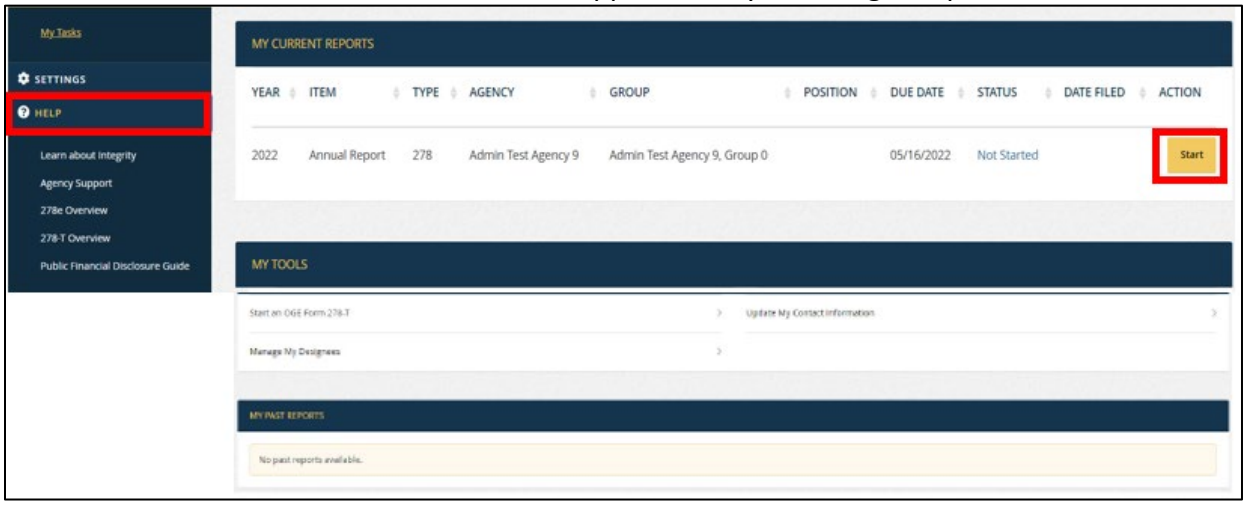
You can view and edit your contact information at any time by selecting, “Settings” and, then, “My Contact Info” from the left-side navigation menu on the primary window. You can change the office address and telephone number on the “My Contact Info” page. You should contact an Agency *INTEGRITY* Administrator or ethics official if the user needs to change the user’s name or MAX login (i.e., the email used when logging into MAX and *INTEGRITY*).

You cannot change your name or email address. If you need to change your name or email address contact your ethics official. Information on getting support is in the Help Resources.



START A 278e

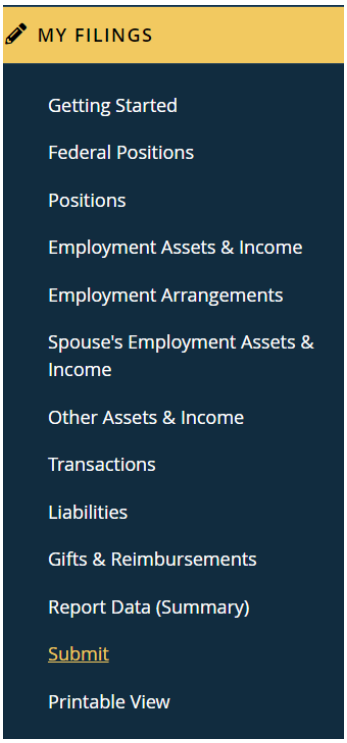
INTEGRITY displays the My Tasks dashboard. To start an assigned 278e, click on “Start” in the row to the right, see the red arrow below. Contact your agency ethics office if you do not see an assigned report. Help information is available within the *INTEGRITY* application by selecting “Help”.



THE *INTEGRITY* WIZARD

After you click "Start", if you are a first-time filer or meet a few other criteria, you may be routed through a series of questions that gather information to complete the filing.

As you enter your information, the wizard will build a report based on your answers. The left-side navigation will expand to show the different parts applicable to your situation based on your answers. As you finish a part of the report, that part's title will appear in the table of contents. At the left is a sample for a typical Annual report where the Filer has a spouse. It shows the Getting Started page, the nine parts of the report, the Report Data (Summary), Submit page, and a Printable View page.
Each of the parts listed to the left are hyperlinks and will take you to that section in the event you need to make edits.
You will not be able to jump forward in a report unless you select the "Next" button that appears with each section. Upon completing the report you will want to review all appropriate data for correctness. Your report is not complete until you click "Submit" filing your report. After you submit the report you can select "Printable View" to print a paper copy for your records. *INTEGRITY* will store a copy of your completed report for 6 years.



PRE-POPULATE A REPORT

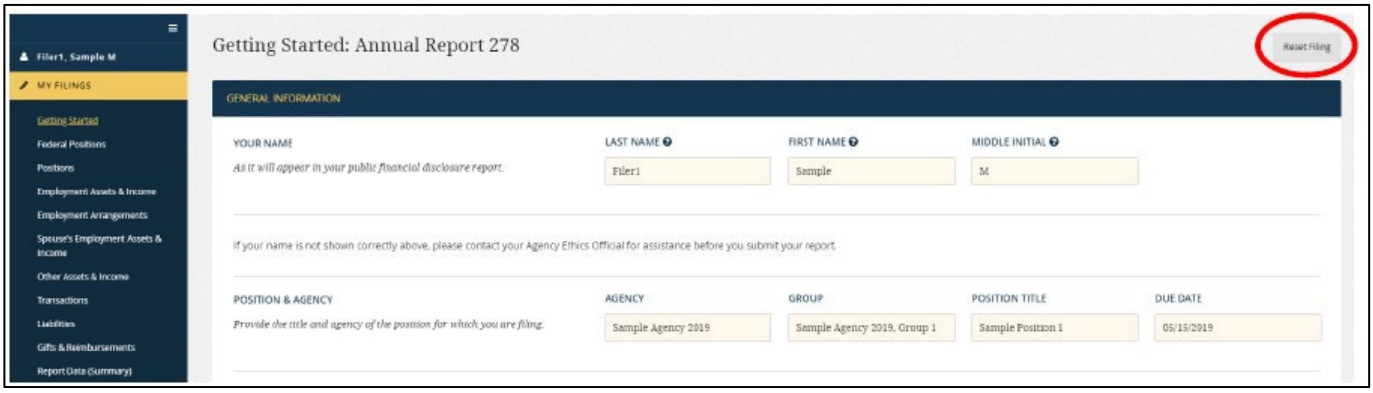
Either you or your designee may elect to prepopulate the report when starting a new report.

INTEGRITY will display a message that the report is being populated.

After the report is pre-populated, the Filer or designee needs to click "Next" through each section of the report until the vertical left-side navigation completely displays in order to see the pre-populated data. On Parts where no data prepopulated, you must either put a check mark in the "I don't have" box in the bottom left or click "add an item" in the top right. If data did pre-populate onto the report, you are required to review and verify each section before the submit button will display.

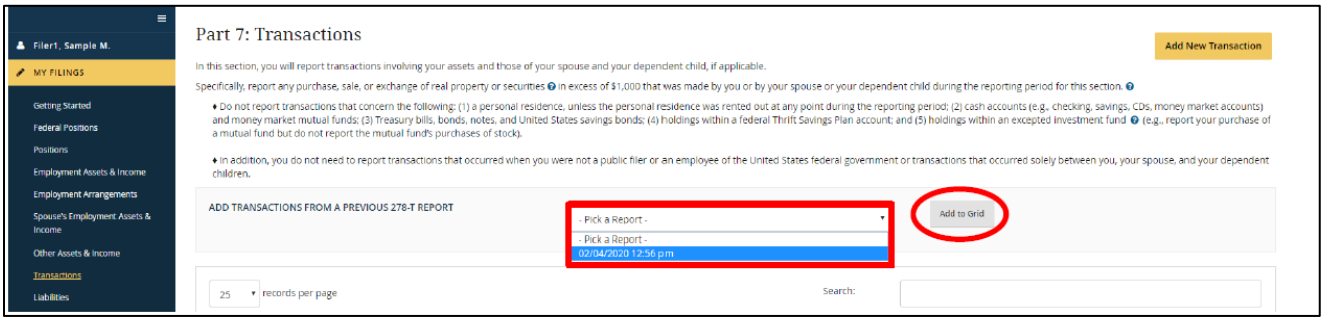
RESET A 278e REPORT

INTEGRITY permits you to reset or restart a report by clicking the "Reset Filing" action button on the Getting Started page. Note: You may reset a report at any point prior to filing. Resetting a report deletes all of the information you have entered and takes you back to the starting point of the filing process.



ADD TRANSACTIONS TO THE 278e FROM THE 278-T

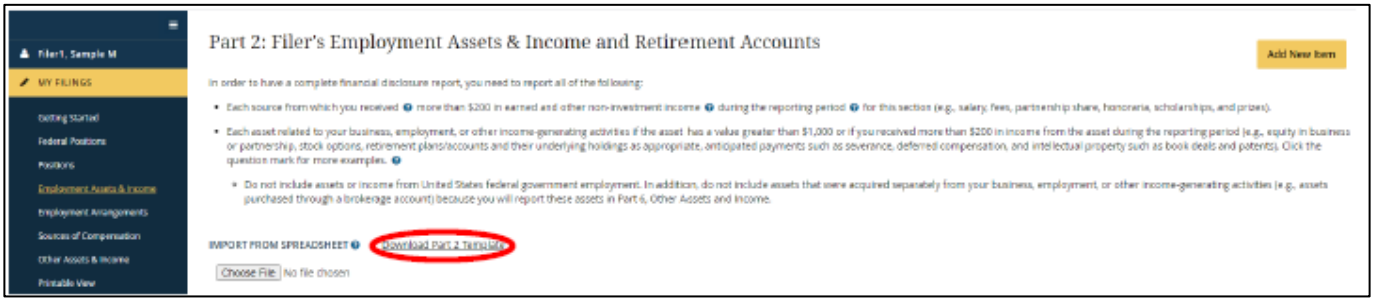
INTEGRITY includes a feature that allows you to import previously reported transactions (278-Ts) that were filed in *INTEGRITY,* into an Annual or Termination report on the Transactions part of the report. To import transactions, go to the "Transactions" grid and select a report from the "Add Transactions" drop-down field. Then, click the "Add to Grid" button.



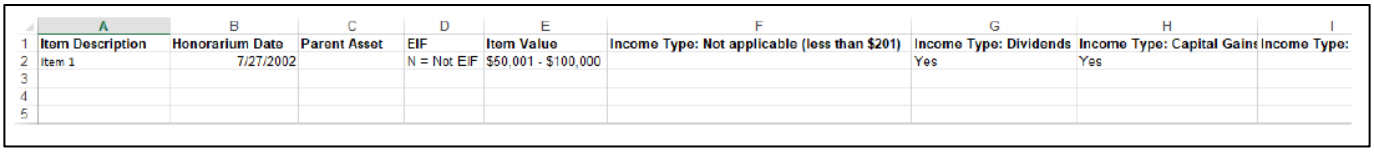
IMPORT ENTRIES FROM A TEMPLATE SPREADSHEET TO THE 278e

You can import up to 1000 entries at one time from a Microsoft Excel spreadsheet into Parts 2, 5, and 6.
Note: Each Part has its own template that cannot be used for other Parts of the report.

First, in the Part (2, 5, or 6) you need to add information, click the "Download Template" link above the data entry grid.

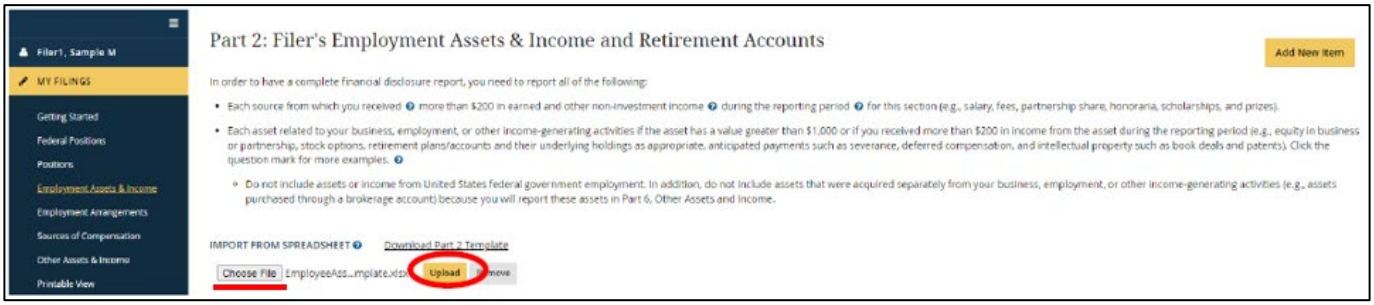


Second, save a copy of the template, open the template and begin adding information. The first row of the template has the header labels for each column, which correspond to fields on the data entry grid. The second row is a sample entry, which shows how to enter data into the template.



	A	B	C	D	E	F	G	H	I
1	Item Description	Honorarium Date	Parent Asset	EIF	Item Value	Income Type: Not applicable (less than $201)	Income Type: Dividends	Income Type: Capital Gains	Income Type:
2	Item 1	7/27/2002		N = Not EIF	$50,001 - $100,000		Yes	Yes	
3									
4									
5									

Save your edits, click the "Choose File" button and select the template from the location it was saved. Then, click the "Upload" button.



Note: Importing entries from a template spreadsheet to a transaction report, 278-T, is very similar to the steps provided above.

BASICS TO SUCCESSFULLY IMPORT A SPREADSHEET TO THE 278e/278-T

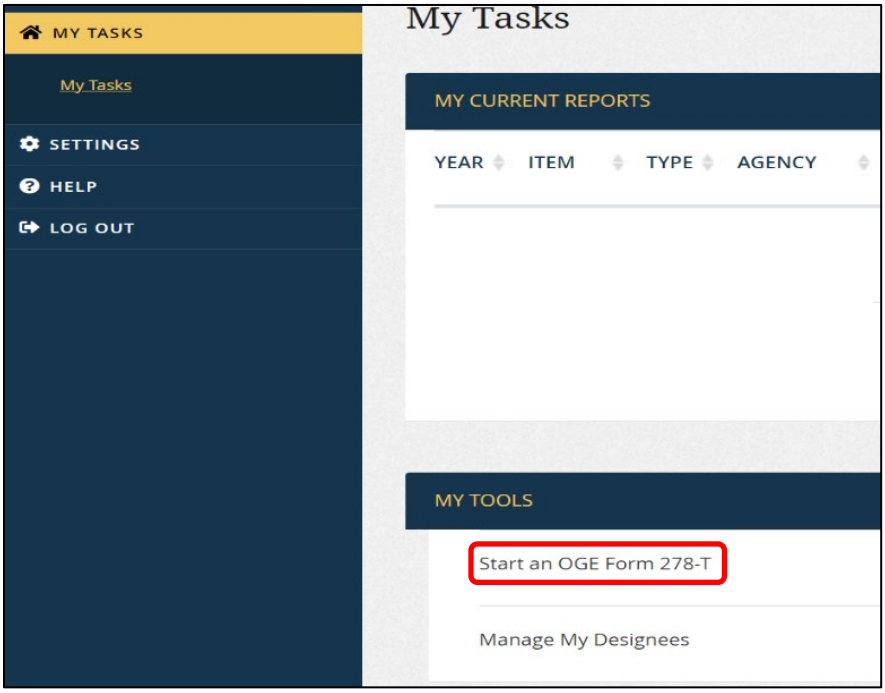
There are a few things to keep in mind to successfully import the 278e and 278-T template spreadsheets:

1. The 278-T template cannot be used for any part of the 278e.
2. Each Part of the 278e has its own template. Therefore, you can't use the Part 6 template for Part 5, etc. Using the wrong template will result in an error message.
3. The template format **cannot** be changed. Often Filers will delete columns that don't contain any information or add additional columns or information. Doing so will prevent the spreadsheet from uploading.
4. The templates include columns with drop-down menus, use the drop-drown menu to add information to that column.

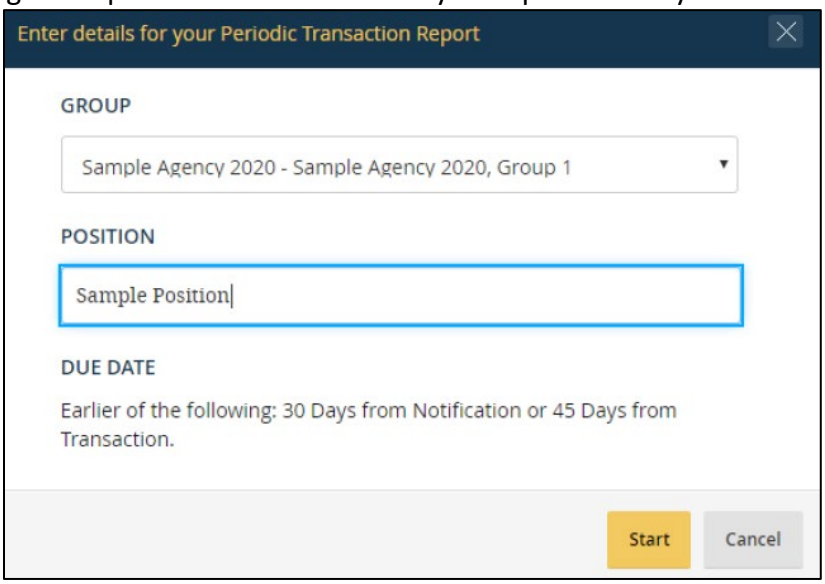
5. When you upload the template, *INTEGRITY* will reject the upload if there are any inconsistencies and provide you an error box with all inconsistencies. Correct the inconsistencies, save the spreadsheet and then upload again. Repeat process if spreadsheet is rejected and error message is provided.

Start a 278-T

You can self-assign an OGE 278-T within *INTEGRITY*. On the "My Tasks" dashboard, scroll down to the "My Tools" area and click on "Start an OGE Form 278-T".



A pop-up window will appear that asks you to specify the position and the Group in which the Filer is filing the report. You can choose only Groups in which you are a Filer.

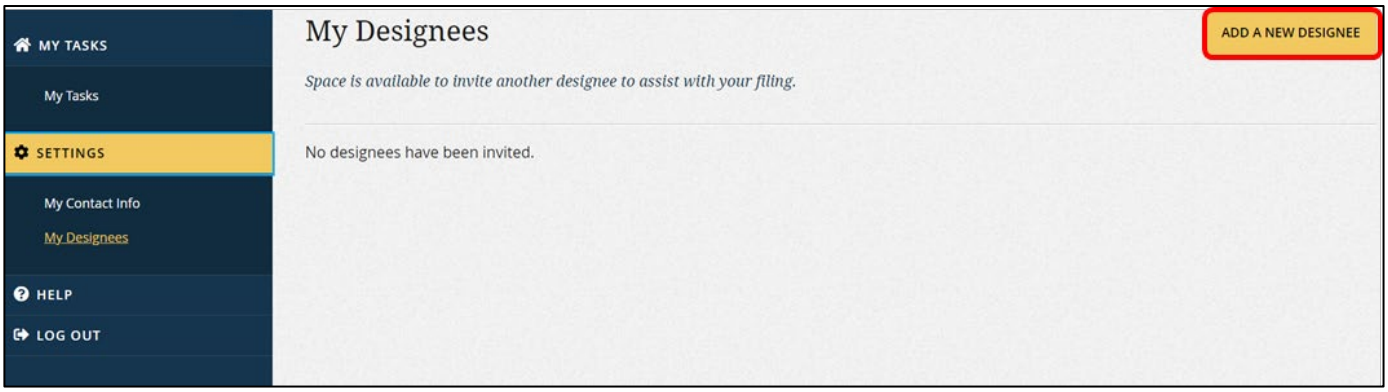


Clicking "Start" opens the report in a new, secondary window. Navigate through the report by clicking "Next" and completing the information on each page.

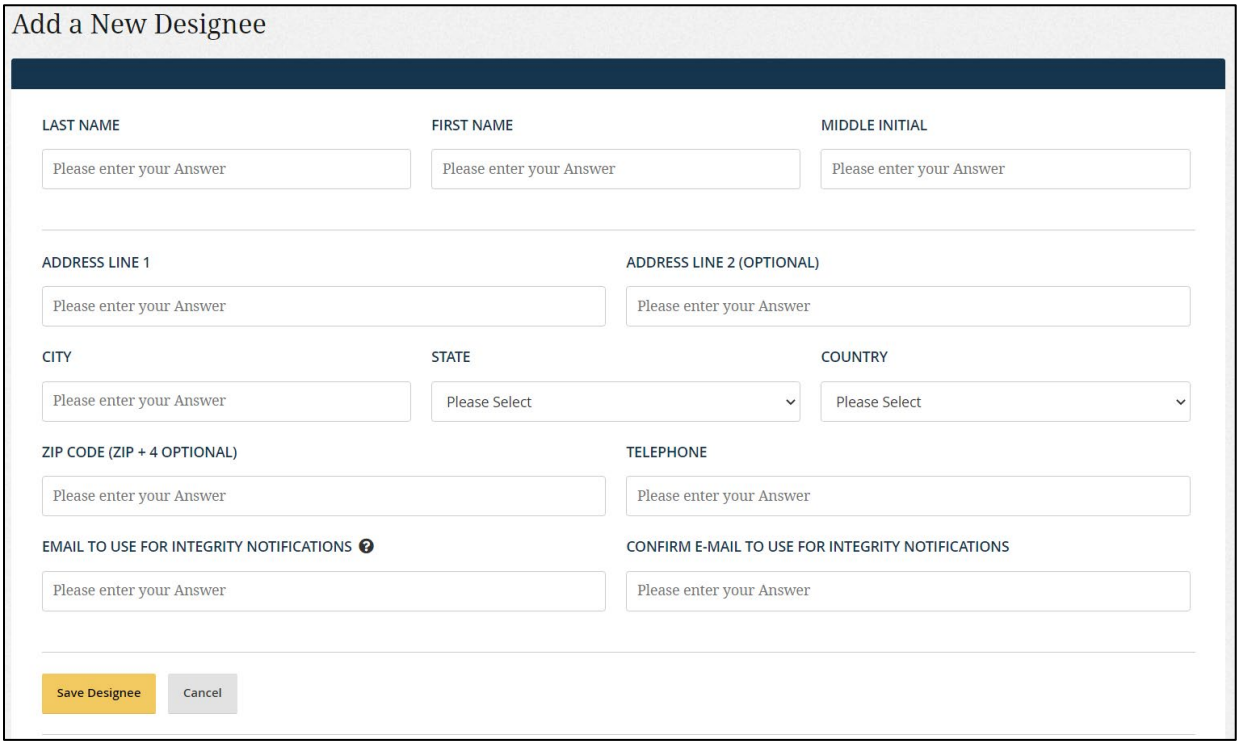
ASSIGN A DESIGNEE

You have an option to assign a designee to assist them with completing their 278e and 278-T. A Designee can login and view reports associated with your account, can edit report information and respond to Reviewer comments; however a Designee may not file the report. Only you may submit and officially file your report.

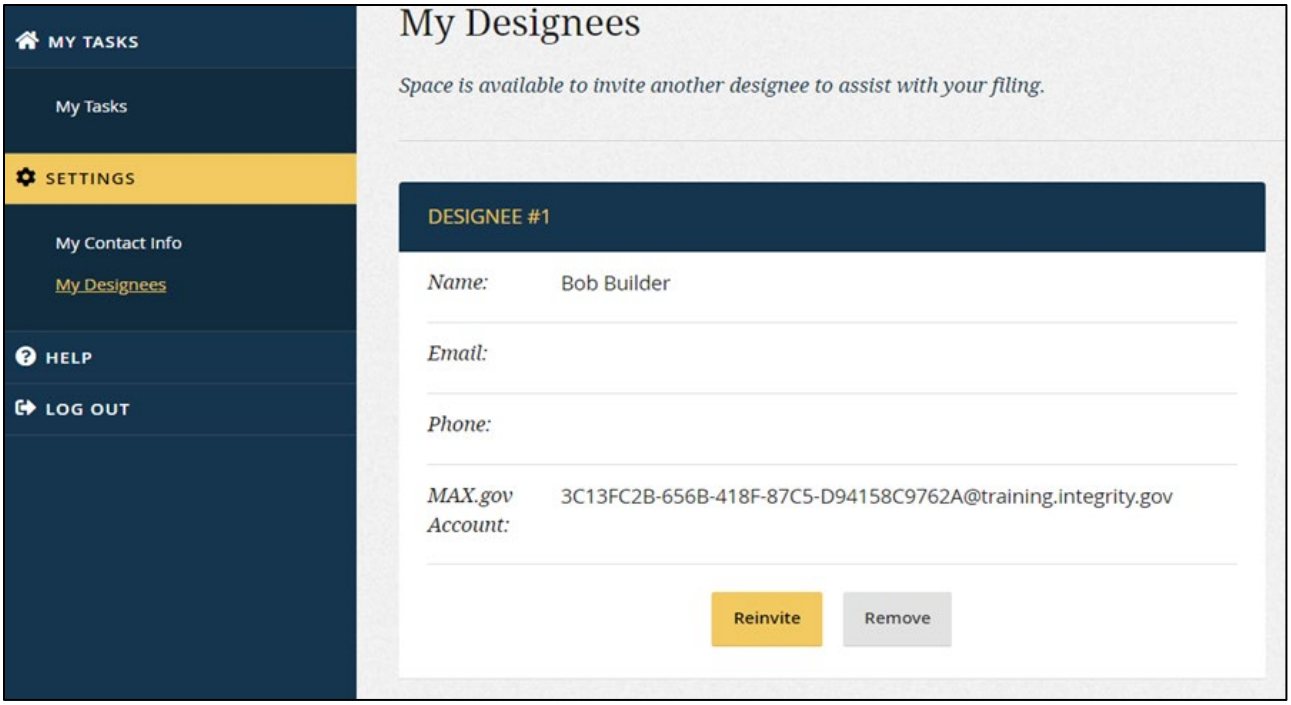
On the "My Task" dashboard, select "Settings" and click on "My Designees". Click on the "Add a New Designee" button displayed below.



The "Add a New Designee" screen will open, you will input the designee's information and click "Save Designee".



The designee info will display as shown below. You now have the option to "Re-invite" or "Remove" the designee. Selecting the Re-invite button will resend the invitation to the designee. Selecting the Remove button will remove the individual's role as your designee.



FOR DESIGNEES

WHAT DOES A FILER DESIGNEE DO?

The Filer Designee role permits a user to log in and view reports associated with a particular Filer. A Filer Designee can also edit information and respond to Reviewer comments; however, a Filer Designee may not file the report. Only a Filer may file his or her report.

Filer Designee roles are assigned by the Filer. Each Filer Designee for a Filer receives a unique "Cloaked" user ID that the Filer Designee must use when logging in to assist that Filer. Cloaked ID's protect the privacy of the Designee.

DESIGNEE APPOINTMENT EMAIL

When a Filer appoints you as their designee, *INTEGRITY* will send you an email with your designee (Cloaked) ID. It will have a special, long alpha-numeric ID similar to 123ABC-0000-1234-5678-123A012BC000@www.*integrity*.gov that is also known as a cloaked ID or cloaked account. That ID is associated with your Filer and their report. You **must** use the cloaked ID to set a password and login to *INTEGRITY* to see your Filer's report(s).

An example of the email is below:

You have been granted access as a DESIGNEE to "FILER'S NAME" within *INTEGRITY*, the system created by the U.S. Office of Government Ethics for electronically filing and reviewing public financial disclosure reports.

Your access as a DESIGNEE will occur through a special account that will be different from any other login rights to *INTEGRITY* that you might have. This special account limits the number of individuals who can see that you are a user within *INTEGRITY*.

- Account login ID: 123ABC-0000-1234-5678-123A 012BC000@www.*integrity*.gov

- Account password: Please use the following link to set up your password to this account.

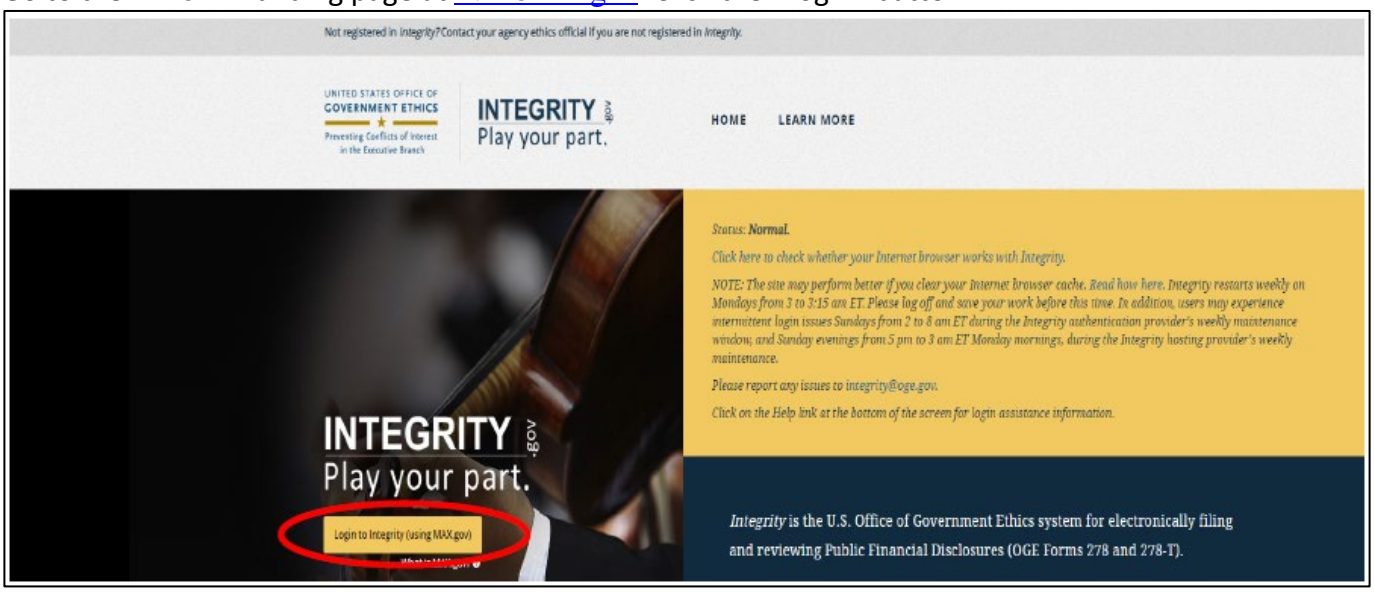
Forgot, Set, or Change your Password

After setting up your password, you can access *INTEGRITY* by going to *INTEGRITY*.gov.

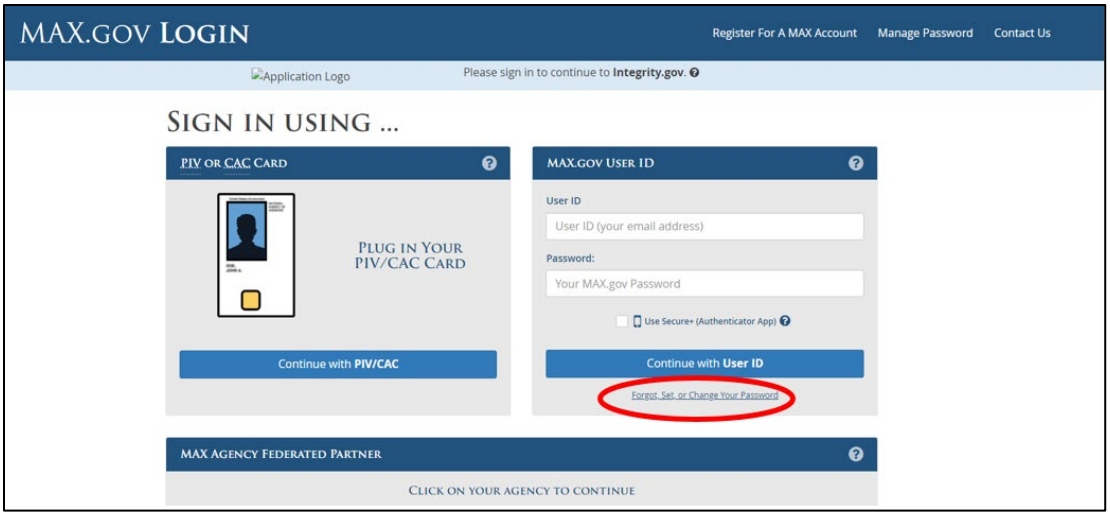
In the event you lose or forget your Cloaked ID contact the Filer who appointed you as their designee, they can re-invite you by initiating another email. Instructions for the Filer to re-invite a designee are listed above.

INTEGRITY LOGIN HELP: CLOAKED USERS

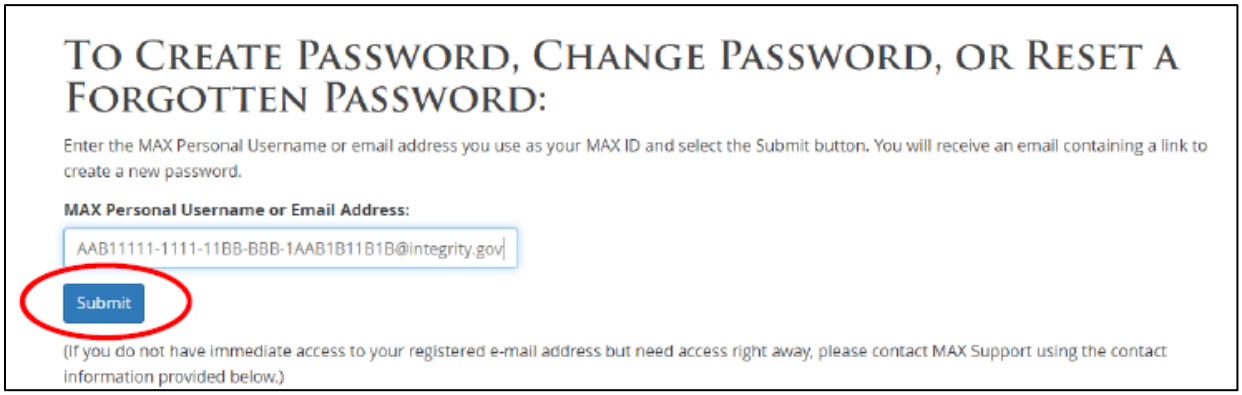
Go to the *INTEGRITY* landing page at *INTEGRITY*.gov. Click the "Login" button.



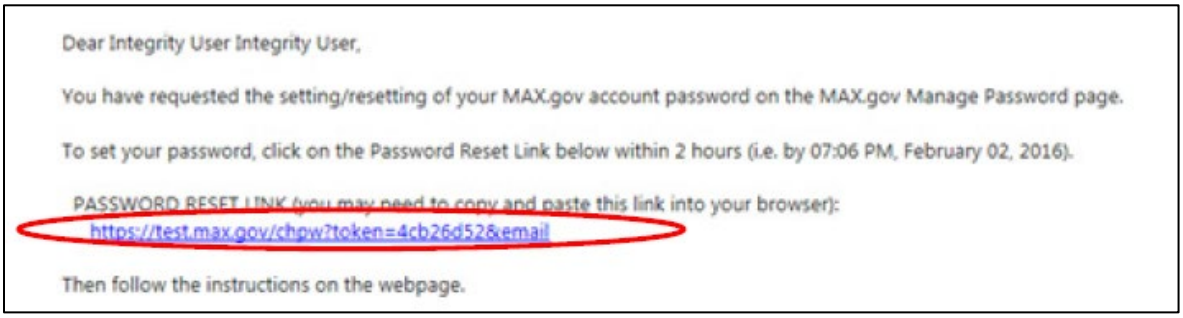
After you click the "Login" button, the login screen will appear. Next, click, the "Forgot, Set, or Change Your Password" link.



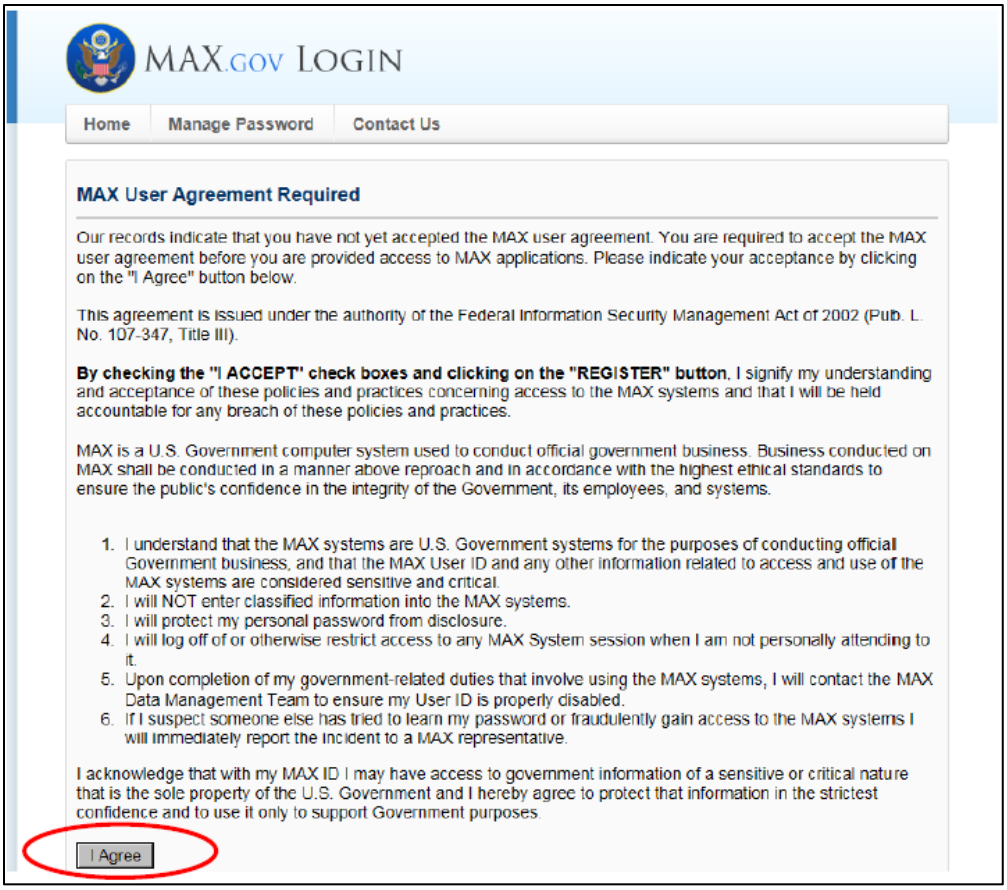
The MAX.gov Password Request page will appear. Enter your cloaked login ID and click the "Submit".



After clicking "Submit," you will receive an email from MAX.gov. Click the password reset link in that email.



A page will open that will ask you to agree to the MAX User Agreement. Read the agreement and click "I Agree" to continue.



MAX.gov LOGIN

Home | Manage Password | Contact Us

MAX User Agreement Required

Our records indicate that you have not yet accepted the MAX user agreement. You are required to accept the MAX user agreement before you are provided access to MAX applications. Please indicate your acceptance by clicking on the "I Agree" button below.

This agreement is issued under the authority of the Federal Information Security Management Act of 2002 (Pub. L. No. 107-347, Title III).

By checking the "I ACCEPT" check boxes and clicking on the "REGISTER" button, I signify my understanding and acceptance of these policies and practices concerning access to the MAX systems and that I will be held accountable for any breach of these policies and practices.

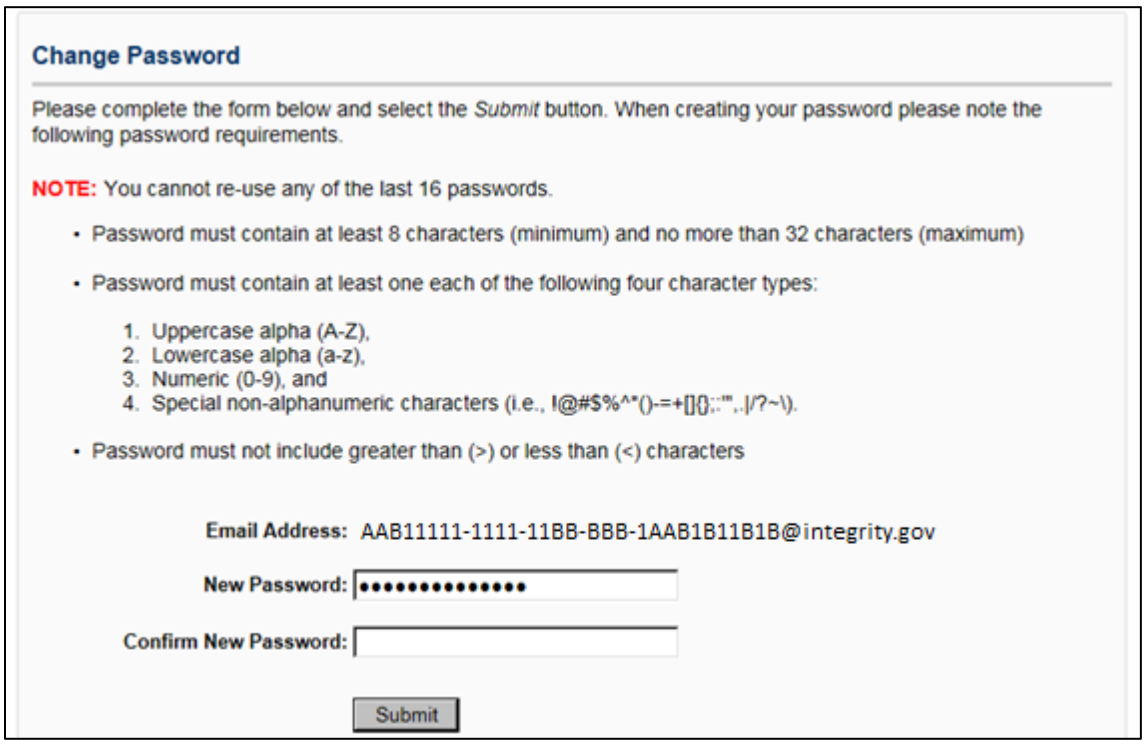
MAX is a U.S. Government computer system used to conduct official government business. Business conducted on MAX shall be conducted in a manner above reproach and in accordance with the highest ethical standards to ensure the public's confidence in the integrity of the Government, its employees, and systems.

1. I understand that the MAX systems are U.S. Government systems for the purposes of conducting official Government business, and that the MAX User ID and any other information related to access and use of the MAX systems are considered sensitive and critical.
2. I will NOT enter classified information into the MAX systems.
3. I will protect my personal password from disclosure.
4. I will log off of or otherwise restrict access to any MAX System session when I am not personally attending to it.
5. Upon completion of my government-related duties that involve using the MAX systems, I will contact the MAX Data Management Team to ensure my User ID is properly disabled.
6. If I suspect someone else has tried to learn my password or fraudulently gain access to the MAX systems I will immediately report the incident to a MAX representative.

I acknowledge that with my MAX ID I may have access to government information of a sensitive or critical nature that is the sole property of the U.S. Government and I hereby agree to protect that information in the strictest confidence and to use it only to support Government purposes.

I Agree

After you agree, you will be able to set a password.



Change Password

Please complete the form below and select the *Submit* button. When creating your password please note the following password requirements.

NOTE: You cannot re-use any of the last 16 passwords.

- Password must contain at least 8 characters (minimum) and no more than 32 characters (maximum)
- Password must contain at least one each of the following four character types:
  1. Uppercase alpha (A-Z),
  2. Lowercase alpha (a-z),
  3. Numeric (0-9), and
  4. Special non-alphanumeric characters (i.e., !@#$%^*()-=+[]{};:'",.|/?~\).
- Password must not include greater than (>) or less than (<) characters

Email Address: AAB11111-1111-11BB-BBB-1AAB1B11B1B@integrity.gov

New Password: ••••••••••••••

Confirm New Password:

Submit

After you have set your password, return to the *INTEGRITY* landing page (https://integrity.gov/login) and click the "Login" button and the login screen, shown below, will appear. Enter your User ID (cloaked ID) and password on the MAX.gov login screen.

Then, click the "Continue with User ID" button.

HELP RESOURCES

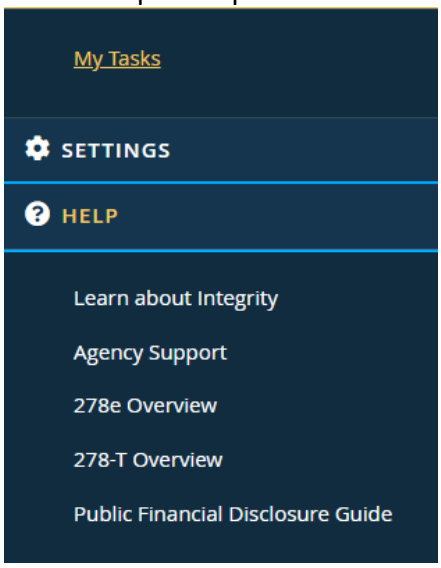
If you do not know the contact information for your agency Ethics Office, OGE maintains a list of Agency Ethics Program Contact Information which is regularly updated.

Some, but not all, Agencies provide Point of Contact information within *INTEGRITY*. Access the information by navigating to "Help" then selecting "Agency Support"

Additional Resources can also be found under the Help menu. Resources include a link to more training materials at "Learn about *INTEGRITY*", 278 overview documents and the Public Financial Disclosure Guide.

For technical issues within the *INTEGRITY* Application contact the *INTEGRITY* Help Desk: *INTEGRITY*@oge.gov. When emailing the Help Desk having screen shots of the issues you are experiencing is very helpful.

NOTE: Help Desk personnel DO NOT have access to individual records.



CLEAR BROWSER CACHE

Cached information can help websites load faster, but it can also prevent loading the most up-to-date version of a webpage; in some cases, it can also cause the webpage to load improperly or fail to load at all. Often necessary when a user changes ID/password that was stored (cached) in previous browser. Read how to clear Internet browser cache: http://www.wikihow.com/Clear-Your-Browser's-Cache. Read how to clear the Edge browser cache here.

INTEGRITY ICONS

INTEGRITY uses the following common set of icons throughout the application.

Icon	Name	Description
	Menu	Also known as the "Hamburger" icon (found in the left-side navigation menu, upper-right corner). Click to hide or display the left-side navigation menu.
	Tool Tip	Click the white question mark in a blue circle to see explanatory information on the topic.
	Down Arrow	Click the down-pointing arrow to display a drop-down list of choices.
	Pencil and Paper	Click to start or resume answering questions within the Filer wizards.
	Delete	Also known as the "Trash Can" icon. Select the checkbox to the left of the item and click the trash can icon (usually at the top of the column) to delete the item(s) you selected.
	Comments / Annotations	Also known as the "Caption" icon (found within filed reports). The icon heads the column used to indicate whether a comment or public annotation exists for a particular line entry.
	View / Add	Also known as the "Plus" icon (found within filed reports). Click to view or add comments and public annotations.