

Office of Government Ethics Guidance on Financial Disclosure Filing Extensions for Schedule Policy/Career Employees

(March 2026, updated June 2026)



On February 6, 2026, the Office of Personnel Management issued a final rule creating Schedule Policy/Career in the excepted service (91 FR 5580). This rulemaking implements Executive Order No. 14171 (Restoring Accountability to Policy-Influencing Positions Within the Federal Workforce, signed January 20, 2025), and creates a new schedule for excepted service positions that are of a confidential, policy-determining, policy-making, or policy-advocating character. The final rule will take effect on March 9, 2026.

Section 13103(f)(5) of title 5 of the U.S. Code normally requires financial disclosure reports to be filed by employees who are “in a position in the executive branch which is excepted from the competitive service by reason of being of a confidential or policymaking character.” Pursuant to this section, the employees whose positions are moved into Schedule Policy/Career and who are not already public financial disclosure filers would typically become public financial disclosure filers upon the move. As a result, these employees would be required to file a New Entrant Public Financial Disclosure Report (New Entrant Report) within 30 days of the move, and to file Periodic Transaction Reports (PTRs) for any reportable transaction on or after the date of the move.

Section 13103(f)(5), however, permits the Director of the Office of Government Ethics (OGE) to issue a regulation to exclude a group of individuals from filing “in cases in which the Director determines such exclusion would not affect adversely the integrity of the Government or the public’s confidence in the integrity of the Government.” OGE is working to publish an interim final regulation excluding Schedule Policy/Career employees who are not otherwise public financial disclosure filers from this filing obligation.

OGE has previously determined that if a filer receives an extension but the legal basis for the filing ends before the extension ends, then the filer does not have to make the filing. Because the forthcoming regulation addressing the filing requirements of Schedule Policy/Career employees may affect the legal basis for the filing of New Entrant Reports and PTRs, OGE recommends that agency Designated Agency Ethics Officials (DAEOs) issue a 45-day extension for all employees placed in Schedule Policy/Career pursuant to 5 CFR § 2634.201(g). This extension should apply to both New Entrant Reports and PTRs. It should exclude from the group anyone who currently files pursuant to another provision of section 13103.

If OGE has not issued the exclusion regulation by August 2026, DAEOs should ask the employees in Schedule Policy/Career to seek a further 45-day extension in writing. This additional extension should cover the New Entrant Report and any transactions that have happened since the date the employee’s position was transferred to Schedule Policy/Career. The “good cause” for the extension is the anticipated regulation that will exclude the employee from filing. Agency ethics officials must approve this extension in writing. Additionally, if the employee continues to have reportable transactions after sending in the request for an additional 45-day extension, they will need to request extensions for reporting those transactions.

OGE is working diligently to publish the interim final rule excluding Schedule Policy/Career employees who are not otherwise public filers from this financial disclosure requirement and expects the rule will be published prior to the expiration of these recommended extensions.