

24th Annual Government Financial Management Conference

The Budget Formulation and Execution Line of Business MAX.gov Capabilities

Practical Solutions You Can Use Now

August 11, 2014

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Justina Tong, BFELoB
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The Budget Line of Business: Ten Shared Services as Common Solutions

Analytical Tools

Collaboration

Data Collection & Tracking

Document Production

Knowledge Management

**Generally Applicable
Government-wide
Services via MAX.gov**

Agency Budgeting Tools

**Budget Execution and Financial
Management Integration**

Budget Performance Integration

Human Capital (Federal Budgeting Profession)

**Program Management
(Coordination, Standards, Architecture)**

**Budget Formulation
and Execution
Specific Services**

Collaboration, Content Management, Knowledge Management (1,000's)

- DOD - Air Force Health Futures Group, Futures Based Agile Thinking
- DOD - Navy BUMED Health and Medical KM, Operation TOMODACHI; Responder Safety
- DOJ - Congressional Reporting, Federal Knowledge Managers Community of Practice
- DHS FEMA - Hurricane Sandy, National Continuity Programs
- GSA – E-Gov Travel Service , FedRamp, Web Content Managers
- HHS – HAITI Health Facilities
- NASA – OCFO Collaboration and Knowledge Management
- OMB – President’s Budget authoring; Collaborations, Data Calls, Intranet; 2008 Presidential Transition
- OPM – Human Capital Community, Hiring Reform , Diversity & Inclusion, Chief Learning Officers
- USTR – Trans Pacific Partnership; US Trade Advisory Committee

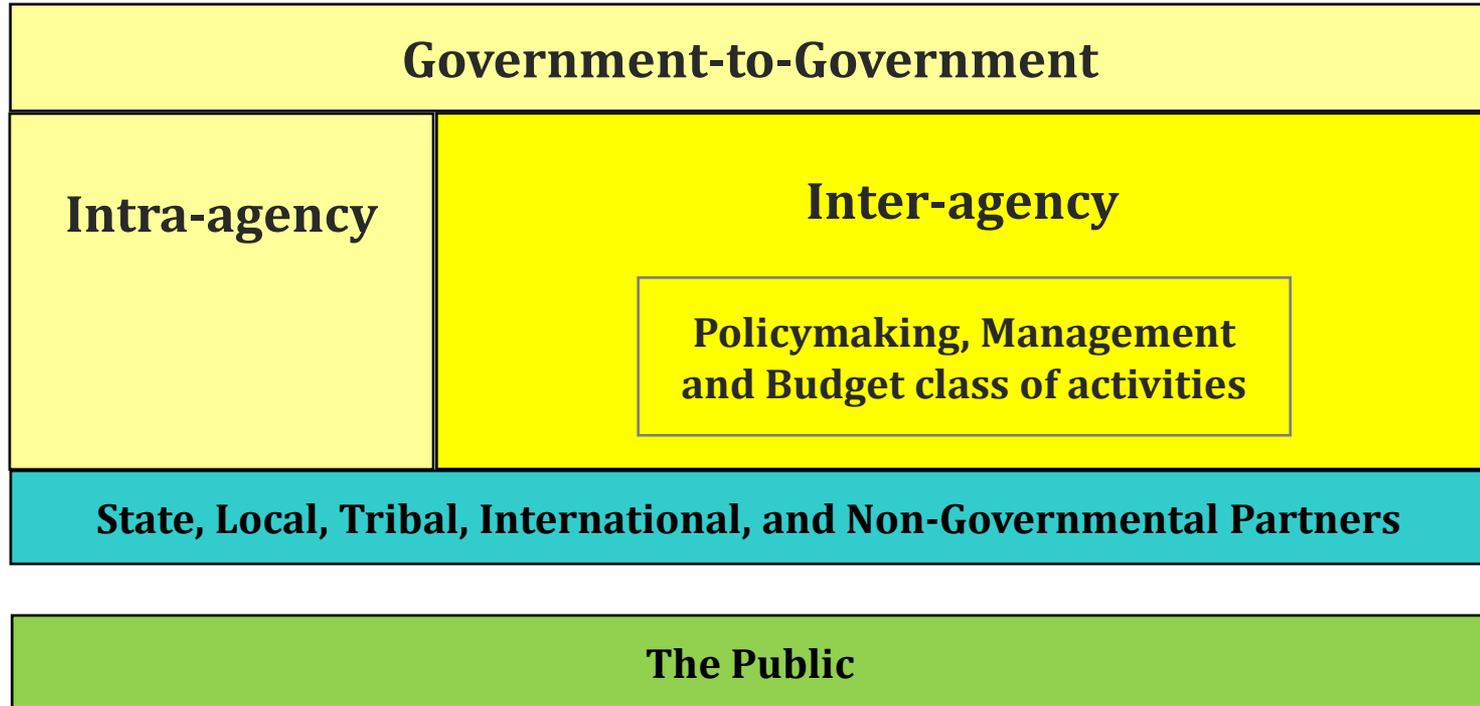
Data Collection, Tracking, BI Analytics, Publications (400+)

- CEQ - Green Sustainability (Executive Order 13514)
- DOD - Navy BUMED Force Health Protection Emergency Management, Contract Management & Budgeting
- DOJ - Congressional Questions for the Record; Performance Reporting
- DHS - Cyberscope authentication (HSPD-12 PIV/CAC)
- GSA - Federal Internet Domain Usage; Networx (FTS 2001) Implementation
- OGE - Stock Act Reporting
- OMB - President’s Budget Chapters, 150+ Data Calls incl. Qs&As, QFRs, Crosscuts, Sequestration
- ONDCP - Annual National Drug Control Strategy
- Treasury - ECIPC Shared Service

Websites (both Public Facing and Controlled Access)

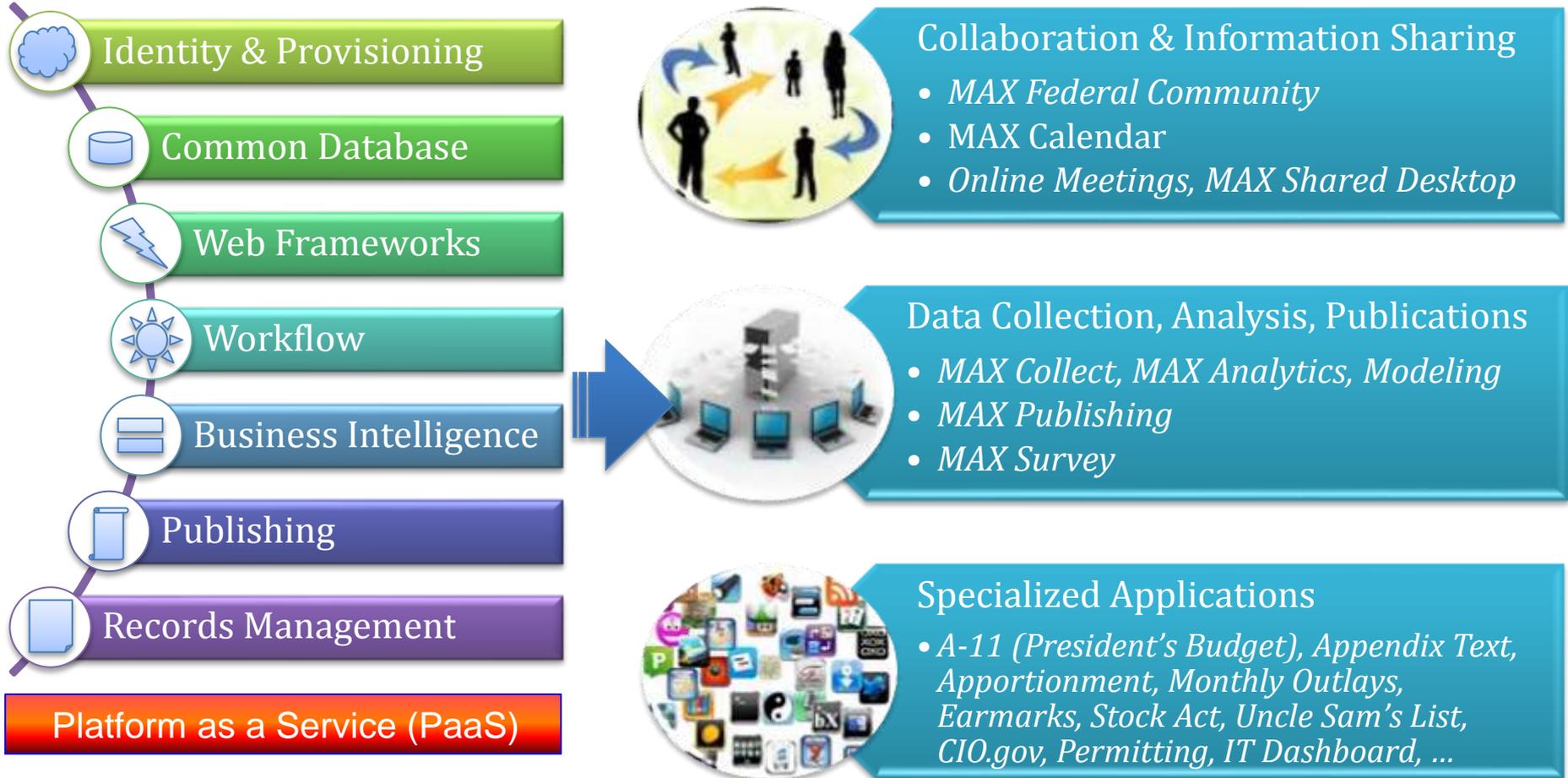
- E-Gov – CxO.gov websites, Federal Permitting, Uncle Sam’s List
- Earmarks.gov
- OPM - Shared List of People With Disabilities

Government-wide Scope (including Non-Federal Partners)



- Used for inter-agency, intra-agency, and government-wide activities
- Interactions with state, local, tribal, territorial, international, and non-governmental partners in secure *Enclaves*

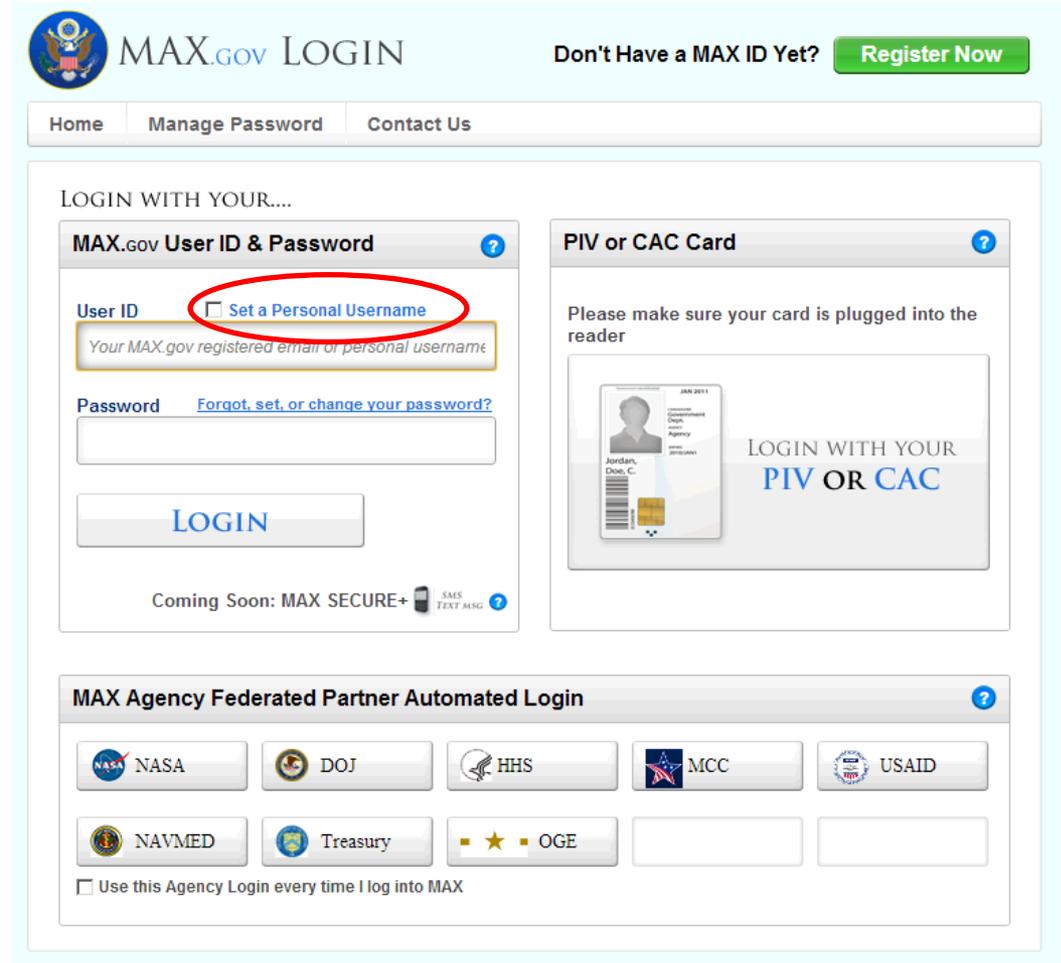
Agility and cost effectiveness through modular web services, open source, open standards, and web-oriented APIs.



Many more...

110,000+ Users, 180 Agencies, 23,000+ PIV/CAC Cards

- Automatic registration for federal users by email domain
- HSPD-12 PIV / DOD CAC cards and SMS 2-factor for sensitive activities
- Enterprise Federated Partner Automated Login (i.e. single sign-on) with agencies
- Usable by non-MAX.gov systems as a cost-effective service (e.g. Cyberscope, Data.gov, many others)



The screenshot shows the MAX.gov LOGIN interface. At the top, there is a navigation bar with "Home", "Manage Password", and "Contact Us" links. A "Register Now" button is located in the top right corner. The main content area is titled "LOGIN WITH YOUR..." and is divided into two columns. The left column is for "MAX.gov User ID & Password" and includes a "User ID" field with a checkbox labeled "Set a Personal Username" circled in red. Below this is a "Password" field and a "LOGIN" button. The right column is for "PIV or CAC Card" and includes a message: "Please make sure your card is plugged into the reader" and an image of a PIV/CAC card with the text "LOGIN WITH YOUR PIV OR CAC". At the bottom, there is a section for "MAX Agency Federated Partner Automated Login" with buttons for various agencies: NASA, DOJ, HHS, MCC, USAID, NAVMED, Treasury, and OGE. A checkbox at the bottom of this section reads "Use this Agency Login every time I log into MAX".

Wide Ranging Technology Stack

Open Source, GOTS, Low Cost COTS





MAX Federal Community

Government-wide Information Sharing, Collaboration, & Content Management – **NOW 110,000+ Users**



MAX FEDERAL COMMUNITY

Home

Search The MAX Community All

PERMISSIONS OPEN – EXECUTIVE BRANCH

MAX Federal Community Home (12)

(2) (0)

Edited By Justin Riordan (DWB, Ctr) on Sep 16, 2013 at 09:38 AM

Favorites Share Watchers (385)

Click on the Agency, Government-Wide Community, or Cross-Agency Collaboration you are interested in.

Agency Communities

- Access Board
- Army Corps of Engineers
- Broadcasting Board of Governors
- Commission on Civil Rights
- Consumer Financial Protection Bureau
- Consumer Products Safety Commission
- Corporation for National & Community Service
- Council on Environmental Quality
- Department of Agriculture
- Department of Commerce
- Department of Defense
- Department of Education
- Department of Energy
- Department of Health and Human Services
- Department of Homeland Security
- Department of Housing & Urban Development
- Department of the Interior
- Department of Justice
- Department of Labor
- Department of State
- Department of Transportation
- Department of the Treasury
- Department of Veterans Affairs

Government-Wide Communities

- | | | |
|----------------------|-------------------|-------------------|
| Acquisition | Human Capital | Recovery Act |
| Budget | IT Infrastructure | Small Agencies |
| E-Government | Management | Sustainability |
| Financial Management | Open Government | Web and New Media |
| Grants | Performance | |
| Homeland Security | Planning | |

Cross-Community Topics

Cross-Agency Collaborations

- Federal Credit Policy Council (FCPC) Home
- Federal Records Officers Network (FRON)
- Hurricane Sandy Rebuilding Task Force
- Information Collection Request, Review and Approval System (ICRAS)
- Infrastructure Projects - Permitting and Review
- Leading EDGE
- Partnership for Sustainable Communities
- Service First - Working Together...
- SFEB HR-Training Committee
- Trade Promotion Coordinating Committee (TPCC)
- Uncle Sam's List

About the MAX Federal Community



Each Agency Has Its Own Space with Its Own Logo, and both Internal & Interdepartmental Collaboration Areas



Home Find Help Contact Us Welcome Andrew Log Out

DEPT OF THE INTERIOR Home PERMISSIONS OPEN - EXECUTIVE BRANCH

Search The MAX Community All

Dept of the Interior Home (11)

Edited By Malissa Levesque(OMB) on Mar 05, 2013 at 01:49 PM Edit Add Favorites Share Watchers (16)

[Link to Interior Public Website](#)

Interdepartmental Collaborations

-
-
-

Interior-Only Collaborations

-
-
-

Rich Collaboration and Content Management Features

Flexible Access Restrictions

- Any combination of users and MAX Groups

“Find” feature to easily locate users and content in multiple ways

Extensive Help Section

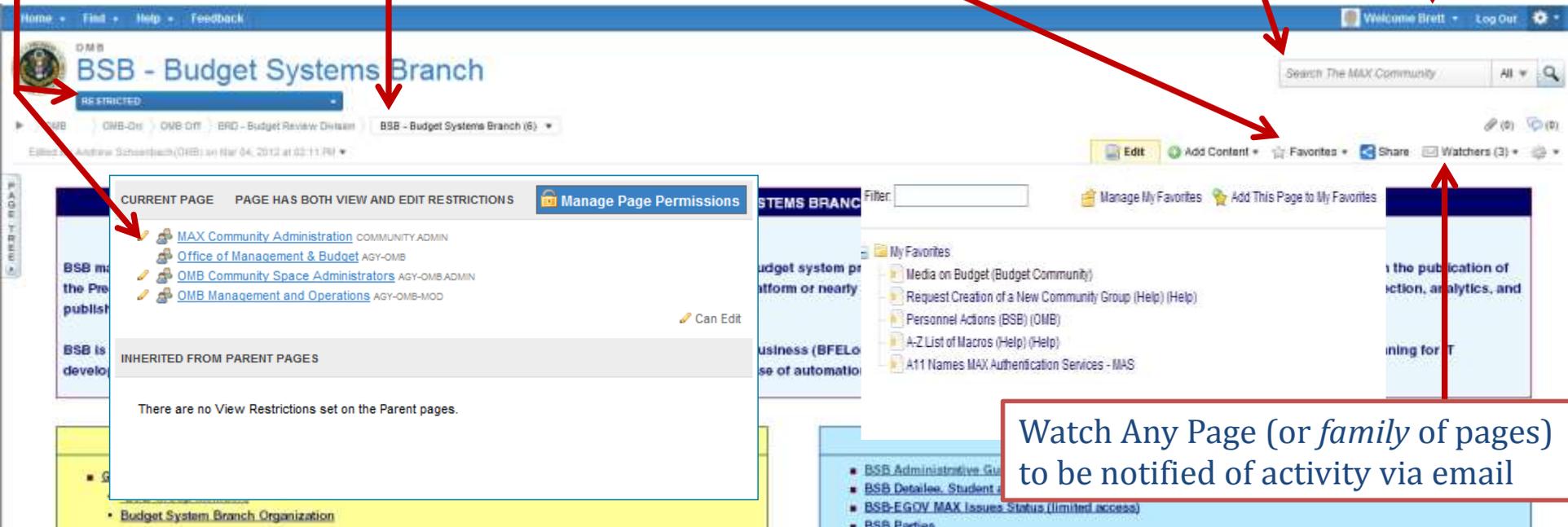
“Breadcrumb” trail to easily trace your steps

Favorites Pages

Recently viewed & updated pages

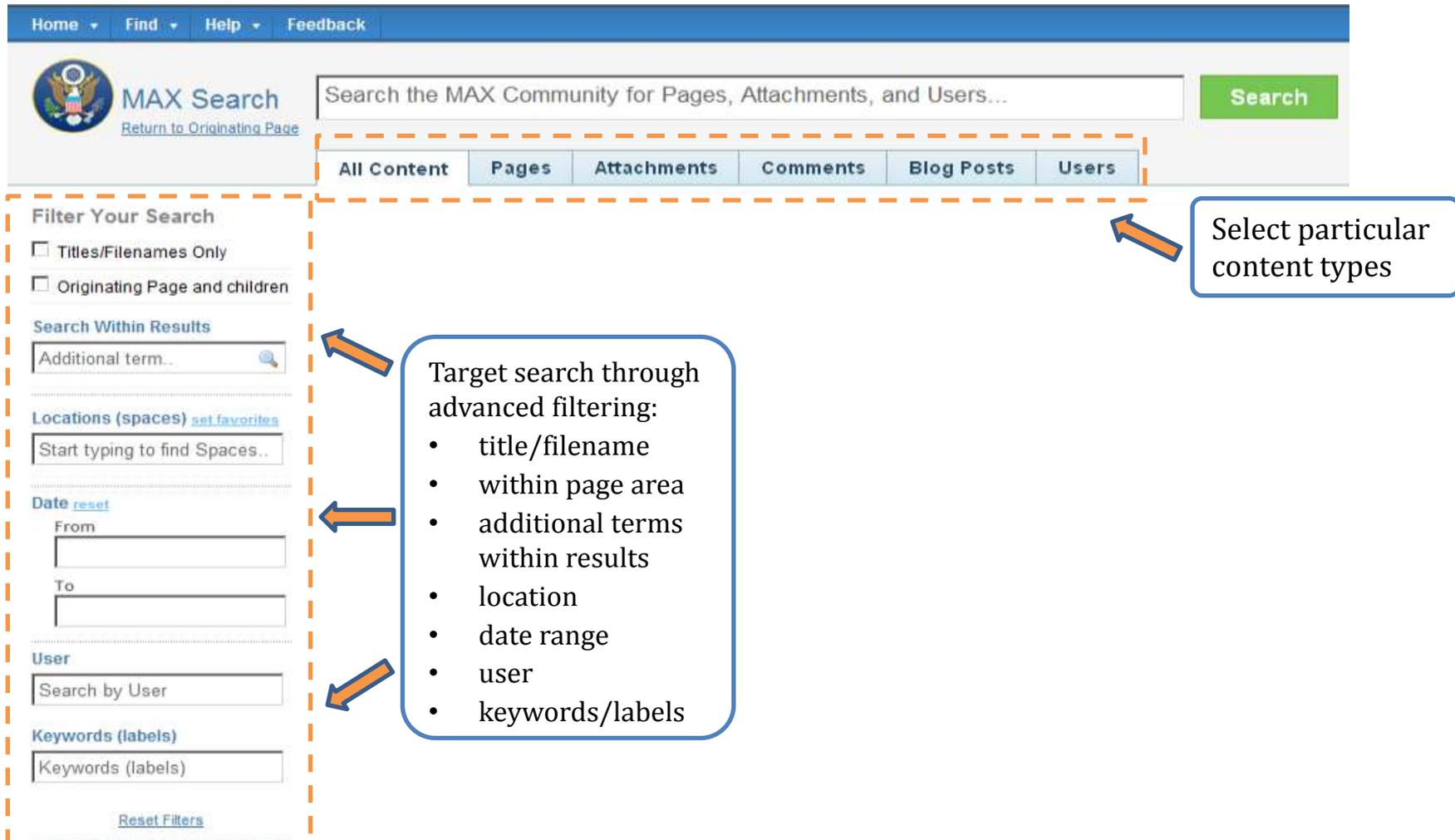
Fully-Indexed Search with advanced facets

Watch Any Page (or family of pages) to be notified of activity via email



The screenshot shows the website interface for the BSB - Budget Systems Branch. At the top, there is a navigation bar with 'Home', 'Find', 'Help', and 'Feedback'. Below this is a search bar labeled 'Search The MAX Community'. The main content area displays a list of items, including 'MAX Community Administration', 'Office of Management & Budget', 'OMB Community Space Administrators', and 'OMB Management and Operations'. A 'Manage Page Permissions' dialog box is open, showing a list of users and their roles. A 'My Favorites' section is visible on the right, listing various items like 'Media on Budget' and 'Request Creation of a New Community Group'. A 'Watchers' section is also present, showing a list of users who are watching the page. The interface is designed to be user-friendly and accessible, with clear navigation and search options.

Advanced Filtering To Locate Specific Content



The screenshot shows the MAX Search interface with several annotations:

- Search Bar:** A search input field with the placeholder text "Search the MAX Community for Pages, Attachments, and Users..." and a green "Search" button.
- Content Type Tabs:** A row of tabs labeled "All Content", "Pages", "Attachments", "Comments", "Blog Posts", and "Users". An arrow points to this row with the text "Select particular content types".
- Filter Your Search:** A section containing several filter options:
 - Titles/Filenames Only
 - Originating Page and children
 - Search Within Results:** A text input field with the placeholder "Additional term..".
 - Locations (spaces):** A text input field with the placeholder "Start typing to find Spaces..".
 - Date:** Two input fields labeled "From" and "To".
 - User:** A text input field with the placeholder "Search by User".
 - Keywords (labels):** A text input field with the placeholder "Keywords (labels)".
- Reset Filters:** A link at the bottom of the filter section.

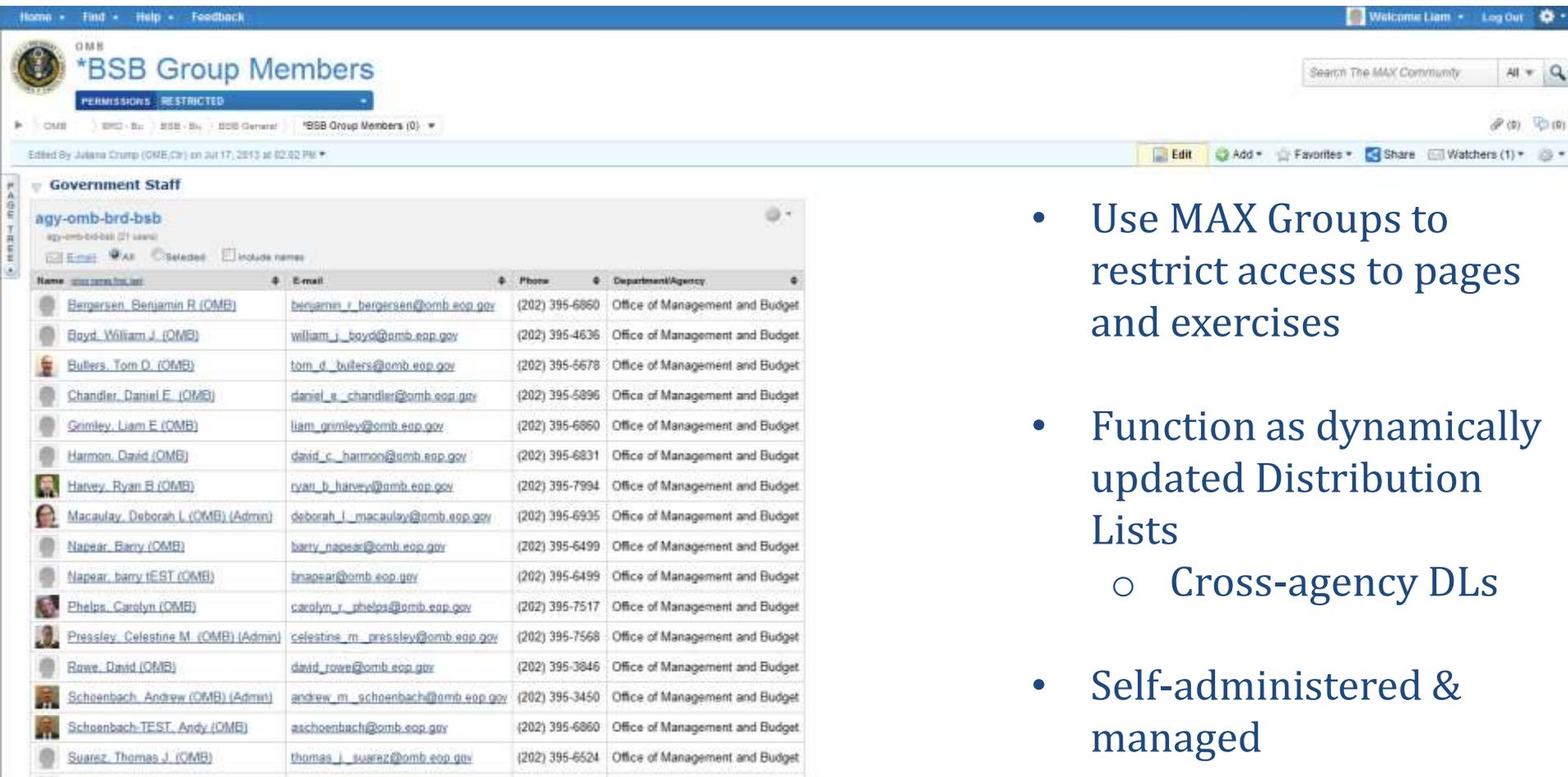
Annotations include orange arrows pointing from the filter section to a central text box and from the content type tabs to a separate text box.

Target search through advanced filtering:

- title/filename
- within page area
- additional terms within results
- location
- date range
- user
- keywords/labels

Select particular content types

Membership lists for Access Control, Email, more...



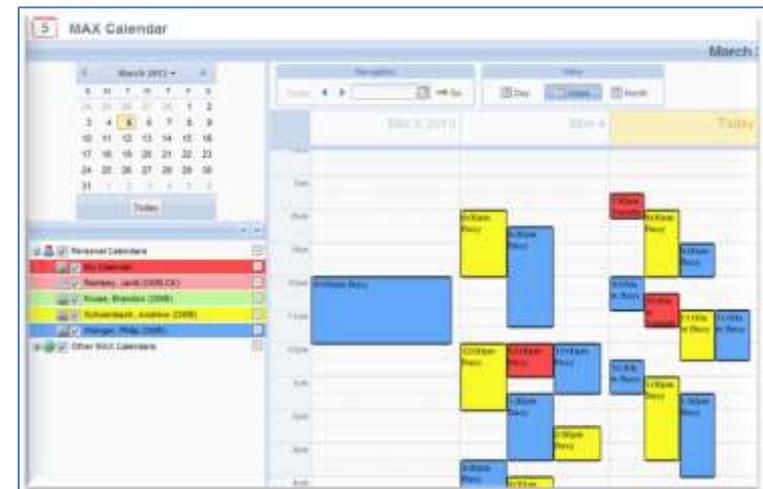
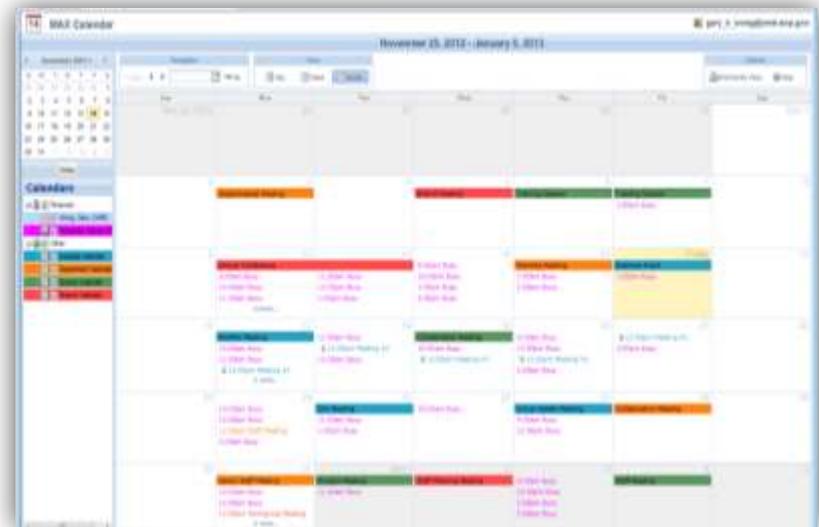
The screenshot shows a web interface for a MAX Group named '*BSB Group Members'. The page is titled 'Government Staff' and contains a table of members. The table has columns for Name, Email, Phone, and Department/Agency. The members listed are:

Name	Email	Phone	Department/Agency
Bergersen, Benjamin R (OMB)	benjamin_r_bergersen@omb.eop.gov	(202) 395-6860	Office of Management and Budget
Royd, William J. (OMB)	william_j_royd@omb.eop.gov	(202) 395-4636	Office of Management and Budget
Bullers, Tom D. (OMB)	tom_d_bullers@omb.eop.gov	(202) 395-6678	Office of Management and Budget
Chandler, Daniel E. (OMB)	daniel_e_chandler@omb.eop.gov	(202) 395-5896	Office of Management and Budget
Grimley, Liam E. (OMB)	liam_grimley@omb.eop.gov	(202) 395-6860	Office of Management and Budget
Harmon, David (OMB)	david_c_harmon@omb.eop.gov	(202) 395-6831	Office of Management and Budget
Harvey, Ryan B (OMB)	ryan_b_harvey@omb.eop.gov	(202) 395-7994	Office of Management and Budget
Macaulay, Deborah L. (OMB) (Admin)	deborah_l_macaulay@omb.eop.gov	(202) 395-6935	Office of Management and Budget
Napear, Barry (OMB)	barry_napear@omb.eop.gov	(202) 395-6499	Office of Management and Budget
Napear, barry (EST) (OMB)	bnapear@omb.eop.gov	(202) 395-6499	Office of Management and Budget
Phelps, Carolyn (OMB)	carolyn_r_phelps@omb.eop.gov	(202) 395-7517	Office of Management and Budget
Pressley, Celestine M. (OMB) (Admin)	celestine_m_pressley@omb.eop.gov	(202) 395-7568	Office of Management and Budget
Rowe, David (OMB)	david_rowe@omb.eop.gov	(202) 395-3846	Office of Management and Budget
Schoenbach, Andrew (OMB) (Admin)	andrew_m_schoenbach@omb.eop.gov	(202) 395-3450	Office of Management and Budget
Schoenbach-TEST, Andy (OMB)	aschoenbach@omb.eop.gov	(202) 395-6860	Office of Management and Budget
Suarez, Thomas J. (OMB)	thomas_j_suarez@omb.eop.gov	(202) 395-6524	Office of Management and Budget

- Use MAX Groups to restrict access to pages and exercises
- Function as dynamically updated Distribution Lists
 - Cross-agency DLs
- Self-administered & managed

Enhance and organize group activities
Simplify cross-agency meeting scheduling

- Robust group collaborative calendaring that spans organizational boundaries
 - Multiple calendars are presented in a color-coded display
 - “Subscribe” feature enables iCal notifications of events
- Synchronize your personal agency calendar with your MAX Calendar
 - Securely publish your 'free/busy' or “detail” information to MAX
 - Allow any combination of individuals and MAX groups to see your 'free/busy' information or calendar details
- Specialized Calendar-based data collections
 - Custom events-based data collections with scheduling, tracking, and analytics



Direct Editing of Documents in MS Office Applications

Direct View & Edit Files Viewable while Being Edited by Others

Type	Name	Size	Creator/Modifier
	COMMUNITY-PERFORMANCE-REPORTING.xlsx (Being edited by Eric Typaldas (OMB); click file name to view)	2.50 MB	Barry Napear(OMB)
	Community-Usage-Reports.mdb	1.18 MB	Barry Napear(OMB)
	COMMUNITY-PERFORMANCE-REPORTING-TODAY.xls	250 kB	Matthew Keeneth(OMB, Ctr)

VIEW-ONLY
EDIT

Child Pages (0) Add Child Page Attachments (3) Add Attachment(s) Sort

All File Versions Remain Available (with attribution & date)

Type	Name
	BFELoB Overview-Latest.ppt
	Version 40 (869 kB - ERIK PRINCE(OMB) (INACTIVE) - Mar 05, 2010 03:45 PM)
	Version 39 (654 kB - Andrew Schoenbach(OMB) - Feb 13, 2010 02:30 PM)
	Version 38 (653 kB - Andrew Schoenbach(OMB) - Feb 13, 2010 02:18 PM)
	Version 37 (652 kB - Lauren Hoshibata(ED) - Jan 15, 2010 01:21 PM)
	Version 36 (652 kB - Andrea Leung(OMB) - Jan 13, 2010 01:59 PM)
	Version 35 (653 kB - Melanie Mager(OMB) - Jan 12, 2010 05:31 PM)
	Version 34 (653 kB - Shawn Azman(OMB) (INACTIVE) - Sep 24, 2009 11:41 AM)
	Version 33 (653 kB - Shawn Azman(OMB) (INACTIVE) - Sep 24, 2009 11:35 AM)
	Version 32 (653 kB - Lauren Hoshibata(ED) - Aug 04, 2009 11:31 AM)
	Version 31 (652 kB - Mark Dronfield(ED) - Jul 01, 2009 03:55 PM) Updated 6-30-09
	Version 30 (617 kB - Andrew Schoenbach(OMB) - Apr 27, 2009 07:18 PM) Updated
	Version 29 (569 kB - Edward Borrego(OMB) (INACTIVE) - Mar 12, 2009 09:14 AM)
	Version 28 (524 kB - LAUREN HOSHIBATA(OMB) (INACTIVE) - Feb 11, 2009 06:34 PM)
	Version 27 (484 kB - LAUREN HOSHIBATA(OMB) (INACTIVE) - Feb 11, 2009 06:31 PM)

Compare Previous Versions

Sample - Attachment Version History Compare.docx (14 kB, v.5)

Andrew Schoenbach(OMB) on Aug 24, 2013 at 12:18 PM

Generated by MAX

View Edit Edit Comment Email Me Lock History (5) More ...

Compare Selected Versions Include Intermediate Versions Email result

Select Changes by Author Select Changes by Date Clear

Version	Select Changes by Author	Select Changes by Date	Clear
<input checked="" type="checkbox"/> 5	14 kB	Current - 12:18 PM on Aug 24, 2013 by Andrew Schoenbach(OMB)	
<input checked="" type="checkbox"/> 4	14 kB	12:17 PM on Aug 24, 2013 by Andrew Schoenbach(OMB)	
<input checked="" type="checkbox"/> 3	14 kB	12:15 PM on Aug 24, 2013 by Andrew Schoenbach(OMB)	
<input checked="" type="checkbox"/> 2	14 kB	11:56 AM on Aug 16, 2013 by Toinita Tolson(OMB, Ctr)	
<input type="checkbox"/> 1	14 kB	11:55 AM on Aug 16, 2013 by Toinita Tolson(OMB, Ctr)	

Document Assemble & Document Compare (Merge)

Document Assemble

- Enables assembling (i.e. combining) multiple Word, Excel, PDF, image, and PowerPoint into a single integrated Word document.
- Documents to be assembled can be located on the same or different Community pages

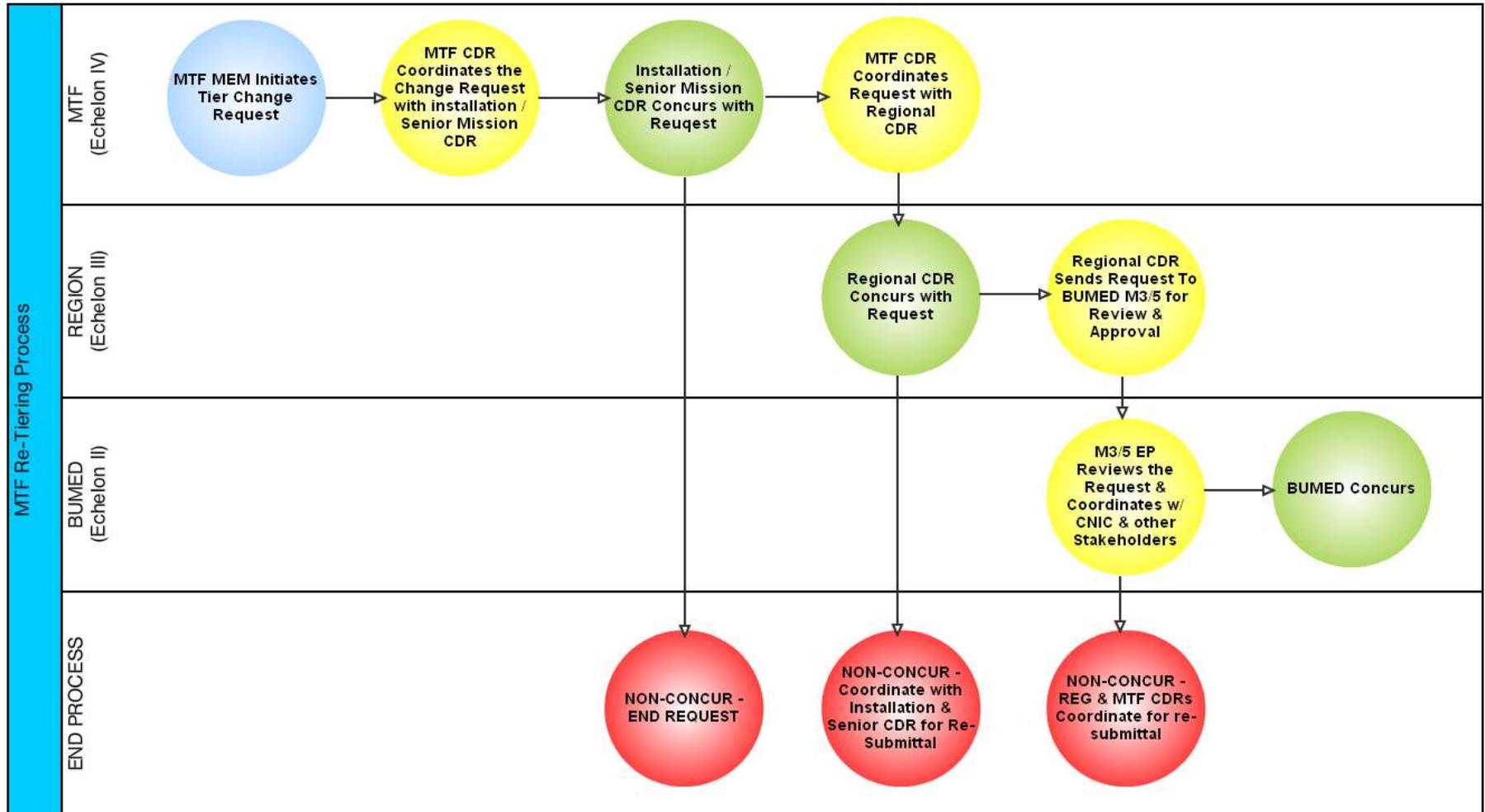


Document Compare (merge)

- Enables comparing (merging) multiple Word attachments against a starting document.
- Track changes (with attribution) will highlight all differences.



Any Page – Use to Navigate to Other Content



Tiering Decision Making Factors

Current Tiering Structure

Multi-stage Workflow Process For Reviewing and Tracking

Move Document Through Review Stages Using Simple Buttons

💡 Status: Author Draft

Status	View	Edit
<input type="button" value="Send for Branch Review"/>	Author, Branch Official	Branch Official
<input type="button" value="Send for Division Review"/>	Author, Branch Official, Division Official	Division Official
<input type="button" value="Send for Agency Review"/>	Author, Branch Official, Division Official, Agency Official	Agency Official
<input type="button" value="Approve"/>	Author, Branch Official, Division Official, Agency Official	Agency Official
<input type="button" value="Send for Author Re-Draft"/>	Author, Branch Official, Division Official, Agency Official	Author

Track Status of All Documents or Projects Automatically

Documents In Branch Review	Documents In Division Review	Documents In Agency Review	Documents Approved	Author Re-Draft
<ul style="list-style-type: none"> • Document A • Document F • Document N 	<ul style="list-style-type: none"> • Document C • Document R 	<ul style="list-style-type: none"> • Document B • Document N • Document Q • Document X 	<ul style="list-style-type: none"> • Document L • Document M • Document Y 	<ul style="list-style-type: none"> • Document O • Document Z

Use the forum template to set up a discussion area in Community

- Create new topic threads
- Dynamic discussion list dashboard

MAX Federal Community with NON-FEDERAL Partners

Home • Find • Help • Feedback

Welcome Juliana • Log Out

HELP
MAX Forum Example

PERMISSIONS OPEN - ALL MAX USERS

Search The MAX Community

MAX Forum Example (12)

Edited By Juliana Crump (OMB.Ctr) on Jul 17, 2013 at 03:45 PM

Edit Add Favorites Share Watchers (15)

Start a New Topic

Type your topic into the box and click "submit" Enter topic title here

Search this Discussion Forum

Recent Activities

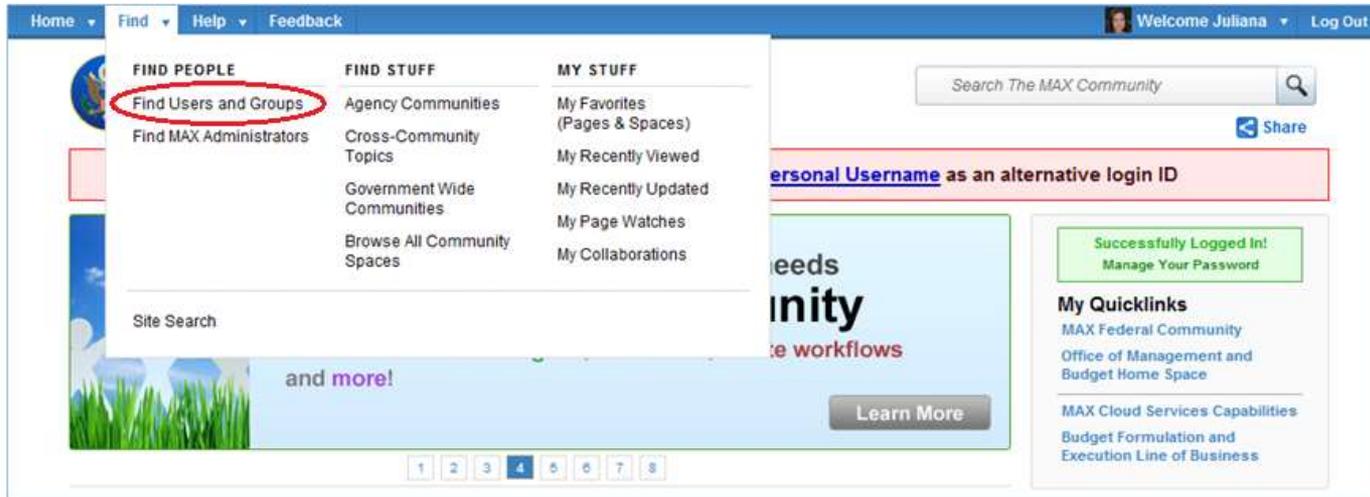
Testing Discussions	created by Jay Leask(VA)	Jun 27, 2013
New Topic here	commented by Cythia Bork(AG)	May 31, 2013
New Topic here	created by Andrea Schoenbach(OMB)	May 08, 2013
Is there an error on the add page form macro?	created by Justin Riordan (OMB.Ctr)	May 02, 2013
Reasons why I love sushi...	updated by Justin Riordan (OMB.Ctr)	Apr 16, 2013
Tools of the Trade	created by Brandon Kruse(OMB.Ctr) (INACTIVE)	Mar 27, 2013
Next Steps	created by Brandon Kruse(OMB.Ctr) (INACTIVE)	Mar 27, 2013
What do you think?	updated by Justin Riordan (OMB.Ctr)	Mar 26, 2013
Is this a new forum?	commented by Justin Riordan (OMB.Ctr)	Mar 26, 2013
Is this a new forum?	commented by Justin Riordan (OMB.Ctr)	Mar 26, 2013
Is this a new forum?	created by Justin Riordan (OMB.Ctr)	Mar 26, 2013
Example Topic - Gary Wong	created by Gary Wong(OMB) (INACTIVE)	Mar 26, 2013
What is the best way to contract MAX Support	updated by Justin Riordan (OMB.Ctr)	Mar 26, 2013
What is the best way to contract MAX Support	commented by Justin Riordan (OMB.Ctr)	Mar 26, 2013

New Topics

Testing Discussions	created by Jay Leask(VA)	Jun 27, 2013
MAX Forum Example	updated by Justin Riordan (OMB.Ctr)	May 09, 2013
New Topic here	created by Andrea Schoenbach(OMB)	May 08, 2013
Is there an error on the add page form macro?	created by Justin Riordan (OMB.Ctr)	May 02, 2013
Reasons why I love sushi...	updated by Justin Riordan (OMB.Ctr)	Apr 16, 2013
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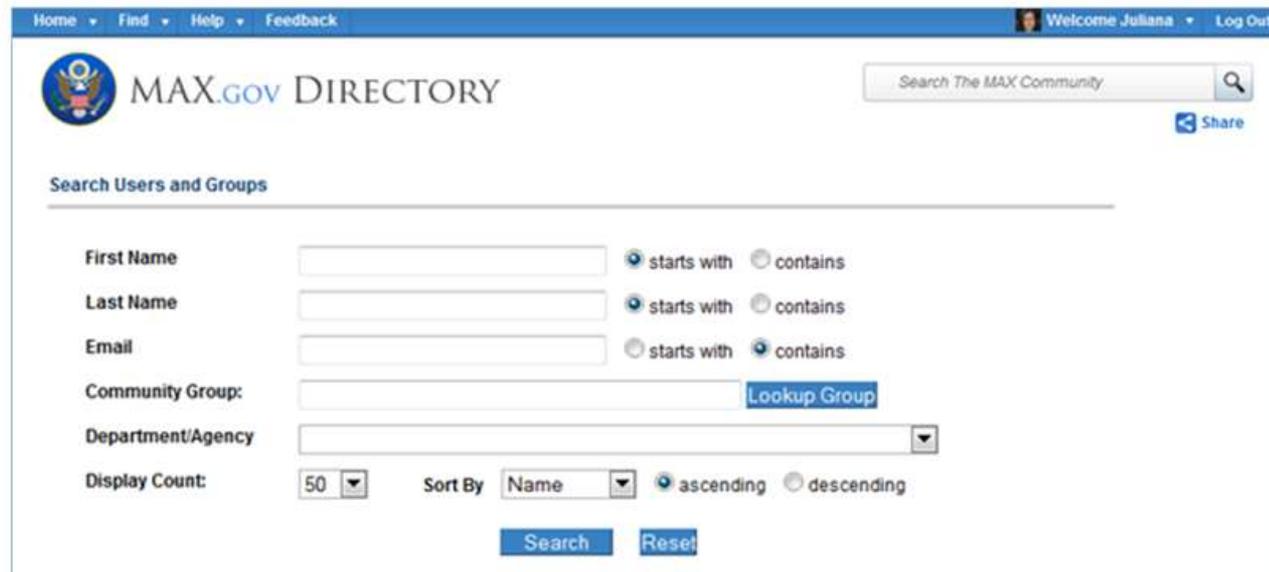
Government-wide Directory of all MAX Users with Quick Search

1.



The screenshot shows the MAX.gov homepage. The navigation menu includes Home, Find, Help, and Feedback. The 'Find' dropdown menu is open, showing three main categories: FIND PEOPLE, FIND STUFF, and MY STUFF. Under FIND PEOPLE, the option 'Find Users and Groups' is circled in red. Other options include 'Find MAX Administrators'. Under FIND STUFF, options include 'Agency Communities', 'Cross-Community Topics', 'Government Wide Communities', and 'Browse All Community Spaces'. Under MY STUFF, options include 'My Favorites (Pages & Spaces)', 'My Recently Viewed', 'My Recently Updated', 'My Page Watches', and 'My Collaborations'. The page also features a search bar, a 'Share' button, a 'Personal Username as an alternative login ID' message, a 'Successfully Logged In! Manage Your Password' notification, and a 'My Quicklinks' section with links to 'MAX Federal Community', 'Office of Management and Budget Home Space', and 'MAX Cloud Services Capabilities Budget Formulation and Execution Line of Business'. A 'Learn More' button is visible at the bottom of the main content area.

2.



The screenshot shows the MAX.gov Directory search page. The header includes the MAX.gov logo and the text 'MAX.gov DIRECTORY'. The search bar contains the text 'Search The MAX Community'. Below the search bar, the heading 'Search Users and Groups' is displayed. The search form includes fields for 'First Name', 'Last Name', and 'Email', each with a search type selector (radio buttons) for 'starts with' and 'contains'. The 'Community Group' field has a 'Lookup Group' button. The 'Department/Agency' field is a dropdown menu. The 'Display Count' is set to 50, and the 'Sort By' is set to 'Name' with 'ascending' order selected. 'Search' and 'Reset' buttons are at the bottom.

MAX Collect, MAX Analytics, MAX Publication, MAX Survey

**Integrated Government-wide data
collection, tracking, analytics,
publications, surveying**

Data Collection, Analysis, & Publication

The Challenge

- Data collection exercises can be large and complex
- Require quick turnaround, input from multiple organizations
- Workflow with multiple levels of review (stages and roles)
- Diverse Analysis and Publication requirements
- Integrate information from other exercises and sources

The Old Way

- E-mailed Word/Excel Templates
- Manual compilation
- Reediting to restore original format
- No workflow or tracking capability
- Version control is problematic
- Manual Table of Contents (or none)
- No index or search capability
- No analytical capability
- Revisions are a huge problem

The MAX Collect Way

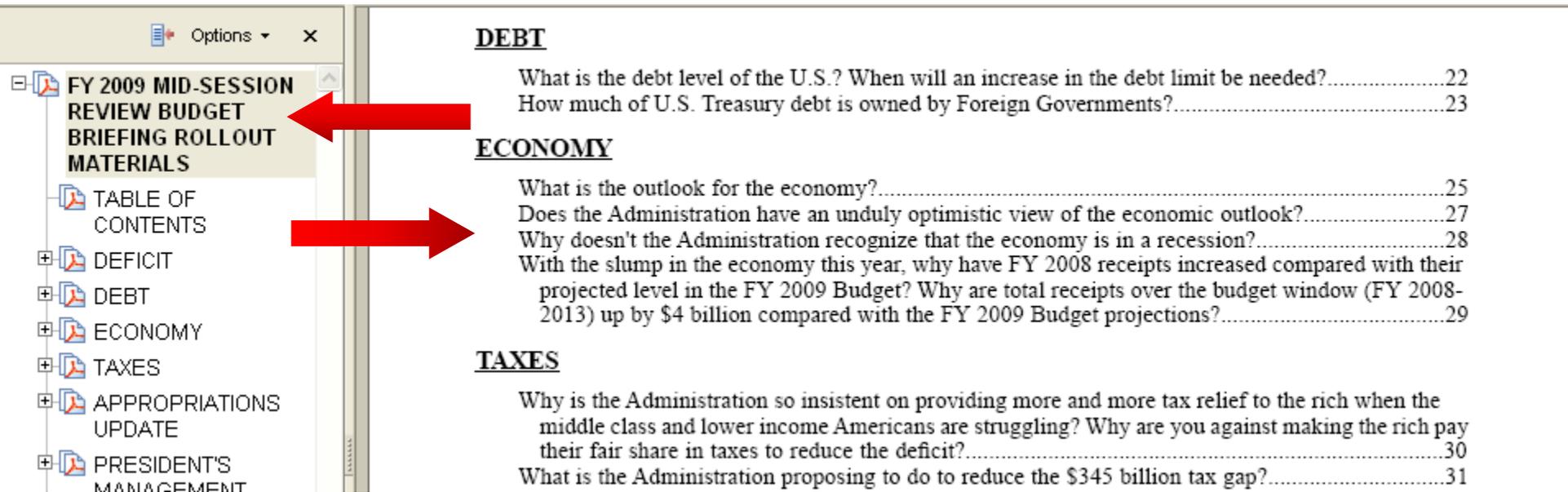
- Web-based distributed collection
- Automated compilation
- Instant publication: PDF, Word, Excel
- Multiple stage workflow
- Custom camera-ready formats
- Paginated table of contents
- Fully indexed and searchable
- Real-time analytics, dashboards, reports, faceted search, microsites
- Easy to re-use/repurpose content

Both Major Data Collections and Quick Data Calls

Examples

- OMB's Budget Briefing Book (over 500 questions, 1,000 pages, 160 enterers)
- [Aid to State & Local Governments](#) (President's Budget, FY 2013 Analytical Perspectives Ch.17)
- [Cuts, Consolidations, and Savings](#) (President's Budget FY 2013, 120 pages)
- FEA Enterprise Architecture Segment (20 data elements, 61,000 rows)
- Federal Internet Domain Usage (1,800 domains, 2,000 pages, 220 enterers)
- Green Sustainability Survey (80 questions from 86 organizations)

Example: Fully Paginated Table of Contents & Indexed Categorizations



FY 2009 MID-SESSION REVIEW BUDGET BRIEFING ROLLOUT MATERIALS

- TABLE OF CONTENTS
- DEFICIT
- DEBT
- ECONOMY
- TAXES
- APPROPRIATIONS UPDATE
- PRESIDENT'S MANAGEMENT

DEBT

- What is the debt level of the U.S.? When will an increase in the debt limit be needed?.....22
- How much of U.S. Treasury debt is owned by Foreign Governments?.....23

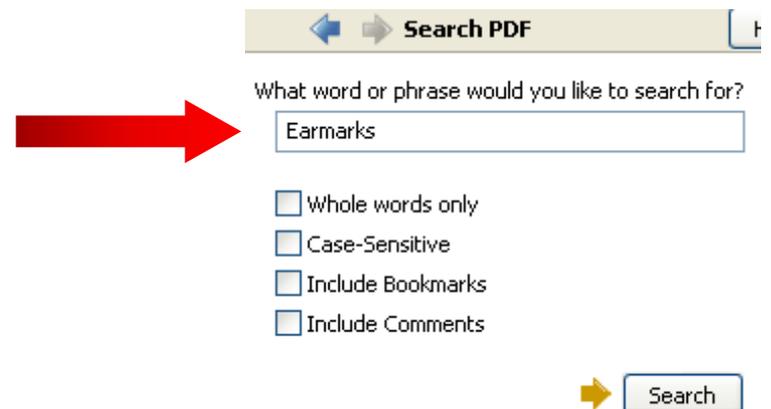
ECONOMY

- What is the outlook for the economy?.....25
- Does the Administration have an unduly optimistic view of the economic outlook?.....27
- Why doesn't the Administration recognize that the economy is in a recession?.....28
- With the slump in the economy this year, why have FY 2008 receipts increased compared with their projected level in the FY 2009 Budget? Why are total receipts over the budget window (FY 2008-2013) up by \$4 billion compared with the FY 2009 Budget projections?.....29

TAXES

- Why is the Administration so insistent on providing more and more tax relief to the rich when the middle class and lower income Americans are struggling? Why are you against making the rich pay their fair share in taxes to reduce the deficit?.....30
- What is the Administration proposing to do to reduce the \$345 billion tax gap?.....31

... and Full-Text Search



Search PDF

What word or phrase would you like to search for?

Earmarks

- Whole words only
- Case-Sensitive
- Include Bookmarks
- Include Comments

Search

Example: Briefing Book with Bulleted Talking Points, In-line Table and Chart

Bookmarks

- Qs & As
- DEFICIT
- TAX POLICY
- RECEIPT PROJECTIONS
- ECONOMY
- SPENDING/BUDGET PROCESS REFORM
- ENTITLEMENT REFORM
- ENERGY
- IRAQ/AFGHANISTAN/WAR ON TERROR
- INTELLIGENCE COMMUNITY
- CYBERSECURITY
- KATRINA
- GOVERNMENT-WIDE
- AGENCY
 - DEPARTMENT OF AGRICULTURE
 - DEPARTMENT OF COMMERCE
 - DEPARTMENT OF DEFENSE
 - DEPARTMENT OF EDUCATION
 - DEPARTMENT OF ENERGY

Signatures

Pages

Model Tree

Attachments

Comments

SPENDING/BUDGET PROCESS REFORM Discretionary Caps - Categories and Adjustments

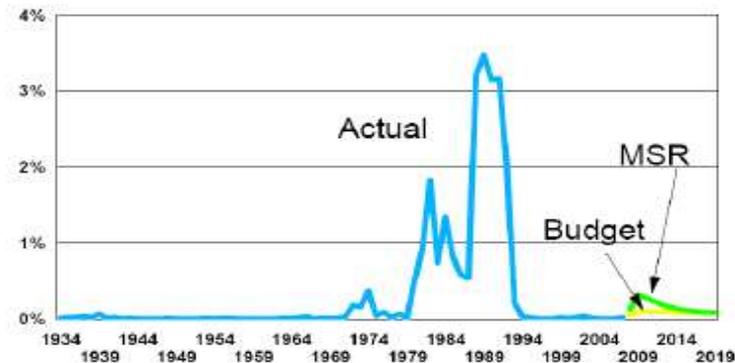
Question: What is the expected impact of the program integrity cap adjustments?

Talking Points:

- Cap adjustments provide an effective way to ensure that limited resources are allocated to activities with a proven track record of reducing payment errors and generating program savings.
- All of the activities that would be funded under the cap adjustments have a positive return on investment (ROI), in some cases as high as \$10 of savings for every \$1 invested.

(BA in millions)	2001 Actual	2008 Request	2008 Enacted	2009 Request	2009 Change from 2008 (+/- %)	2009 Change from 2001 (+/- %)
Program Integrity Cap Adjustments	0	876	0	968	10.5	0

Historic Bank Failure Rates (Failed Assets/Total Bank Assets)



Example: Published Tables in the President's Budget Analytical Perspectives

18. AID TO STATE AND LOCAL GOVERNMENTS

Table 18-2. TRENDS IN FEDERAL GRANTS TO STATE AND LOCAL GOVERNMENTS
(Outlays in billions of dollars)

	Actual											Estimate	
	1960	1965	1970	1975	1980	1985	1990	1995	2000	2005	2010	CR	2012
A. Distribution of grants by function:													
Natural resources and environment	0.1	0.2	0.4	2.4	5.4	4.1	3.7	4.0	4.6	5.9	9.1	9.1	7.8
Agriculture	0.2	0.5	0.6	0.4	0.6	2.4	1.3	0.8	0.7	0.9	0.8	1.0	1.0
Transportation	3.0	4.1	4.6	5.9	13.0	17.0	19.2	25.8	32.2	43.4	61.0	61.1	70.7
Community and regional development	0.1	0.6	1.8	2.8	6.5	5.2	5.0	7.2	8.7	20.2	18.8	18.6	14.8
Education, training, employment, and social services	0.5	1.1	6.4	12.1	21.9	17.1	21.8	30.9	36.7	57.2	97.6	101.5	70.1
Health	0.2	0.6	3.8	8.8	15.8	24.5	43.9	93.6	124.8	197.8	290.2	295.5	288.8
Income security	2.6	3.5	5.8	9.4	18.5	27.9	36.8	58.4	68.7	90.9	115.2	116.5	110.9
Administration of justice	0.0	0.7	0.5	0.1	0.6	1.2	5.3	4.8	5.1	5.6	5.7
General government	0.2	0.2	0.5	7.1	8.6	6.8	2.3	2.3	2.1	4.4	5.2	7.2	7.9
Other	0.0	0.1	0.1	0.2	0.7	0.8	0.8	0.8	2.1	2.6	5.4	9.2	6.6
Total	7.0	10.9	24.1	49.8	91.4	105.9	135.3	225.0	285.9	428.0	608.4	625.2	584.3
B. Distribution of grants by BEA category:													
Discretionary	N/A	2.9	10.2	21.0	53.3	55.5	63.3	94.0	116.7	181.7	207.7	206.6	159.4
Mandatory	N/A	8.0	13.9	28.8	38.1	50.4	72.0	131.0	169.2	246.3	400.7	418.6	424.9
Total	7.0	10.9	24.1	49.8	91.4	105.9	135.3	225.0	285.9	428.0	608.4	625.2	584.3
C. Composition:													
Current dollars:													
Payments for individuals ¹	2.5	3.7	8.7	16.8	32.6	50.1	77.3	144.4	182.6	273.9	384.5	392.5	385.4
Physical capital ¹	3.3	5.0	7.1	10.9	22.6	24.9	27.2	39.6	48.7	60.8	93.3	100.2	100.9
Other grants	1.2	2.2	8.3	22.2	36.2	30.9	30.9	41.0	54.6	93.3	130.6	132.5	98.0
Total	7.0	10.9	24.1	49.8	91.4	105.9	135.3	225.0	285.9	428.0	608.4	625.2	584.3
Percentage of total grants:													
Payments for individuals ¹	35.3%	34.1%	36.2%	33.6%	35.7%	47.3%	57.1%	64.2%	63.9%	64.0%	63.2%	62.8%	66.0%
Physical capital ¹	47.3%	45.7%	29.3%	21.9%	24.7%	23.5%	20.1%	17.6%	17.0%	14.2%	15.3%	16.0%	17.3%
Other grants	17.4%	20.2%	34.5%	44.5%	39.6%	29.2%	22.8%	18.2%	19.1%	21.8%	21.5%	21.2%	16.8%
Total	100.0%												

Example: Faceted Search Navigation

OPM Shared List of People with Disabilities

Results 1 - 100 of 533

[More options](#)

Filters
Click a term to filter your search.

Position

- [Contact Representative \(175\)](#)
- [IT \(143\)](#)
- [Misc. Clerical \(126\)](#)
- [Secretary \(114\)](#)
- [HR Specialist \(89\)](#)
- [HR Assistant \(68\)](#)
- [Finance \(58\)](#)
- [Contract Specialist \(51\)](#)
- [Budget Analyst \(39\)](#)
- [Training and Education \(35\)](#)
- [more...](#)

Location State

- [DC \(234\)](#)
- [PA \(111\)](#)
- [CA \(110\)](#)
- [GA \(98\)](#)
- [NY \(96\)](#)
- [FL \(95\)](#)
- [TX \(89\)](#)
- [VA \(85\)](#)
- [MD \(75\)](#)
- [IL \(70\)](#)
- [more...](#)

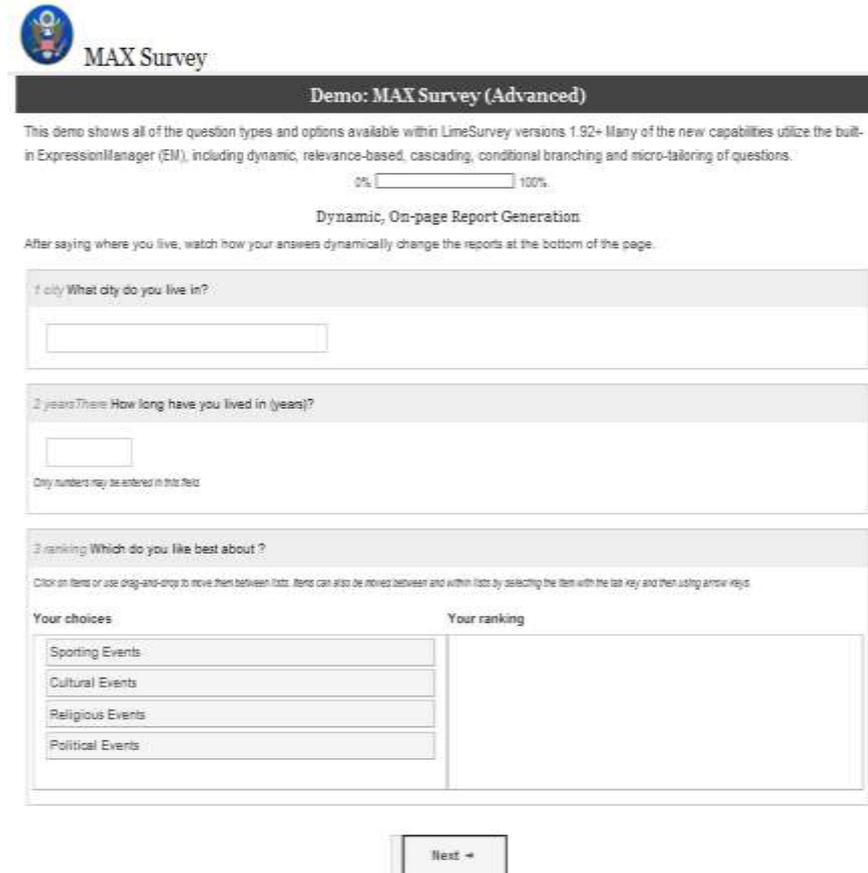
Location City

- [Washington \(220\)](#)
- [Pittsburgh \(49\)](#)
- [Atlanta \(41\)](#)
- [New York \(41\)](#)
- [Dallas \(34\)](#)
- [Chicago \(31\)](#)
- [Los Angeles \(23\)](#)
- [Philadelphia \(21\)](#)
- [San Francisco \(20\)](#)
- [Baltimore \(17\)](#)
- [more...](#)

<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> John Doe 15721 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): Secretary, Misc., Clerical, Secretary, Degree(s): Communication, Studies City(s): Washington State(s): DC, NC, Region(s): Specific, City/State Veteran Status: No Active Clearance: No Date Submitted: 01/01/2011 Address: 123 ExampleRoad</p>
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> Jane Doe 4882 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): IT Degree(s): Computer, Science, Computer, Science, City(s): Dallas, Miami, State(s): FL, TX, VA, Region(s): Specific, City/State Veteran Status: No Active Clearance: No Date Submitted: 01/01/2011 Address: 123 ExampleRoad</p>
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> John Doe 14519 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): HR, Specialist, Contact, Representative, HR, Assistant, HR, Specialist, Training, and, Education, Degree(s): Law, Liberal, Arts, City(s): Chicago, Pittsburgh, Seattle, Washington, State(s): AZ, CA, DC, IL, PA, WA, Region(s): Specific, City/State Veteran Status: No Active Clearance: No Date Submitted: 01/01/2011 Address: 123 ExampleRoad</p>
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> Jane Doe 9084 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): HR, Specialist, HR, Specialist, Degree(s): Business, Administration City(s): Atlanta, Chicago, Washington, State(s): DC, GA, IL, NC, Region(s): Specific, City/State Veteran Status: No Active Clearance: No Date Submitted: 01/01/2011 Address: 123 ExampleRoad</p>
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> John Doe 15376 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): IT Degree(s): Finance, Economics, City(s): Charlotte State(s): NC Region(s): Specific, City/State Veteran Status: No Active Clearance: No Date Submitted: 01/01/2011 Address: 123 ExampleRoad</p>
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> Jane Doe 11268 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Resume </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Example@email.com </div> </div>		<p>Position(s): Misc., Clerical, HR, Assistant, Misc., Clerical, Engineering, Environmental, Engineering, Project, Management, Degree(s): Mechanical, Engineering City(s): State(s): AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY,</p>

Easy-to-use web-based surveys with unique capabilities for government use

- Wide selection of survey question types including conditional sections and customized templates
- Capable of large scale and high-volume
- Wide variety of survey modes:
 - ✓ Anonymous links – either unrestricted or limited to specific groups
 - ✓ Individualized (“tokenized”) links:
 - Customized invitation emails, response tracking, and targeted follow-up
 - Results can be anonymous, fully attributed, or retain only meta-data
 - Can require user login for more security
- Results can be dynamically displayed in real time dashboards and integrated with other data sets using MAX Analytics
- FISMA and Section 508 compliant



The screenshot shows a web-based survey interface for "MAX Survey". At the top, there is a logo and the text "MAX Survey". Below that, a dark header bar contains the text "Demo: MAX Survey (Advanced)". The main content area includes a progress indicator showing "0%" and "100%", and a section titled "Dynamic, On-page Report Generation". Below this, there are three question sections:

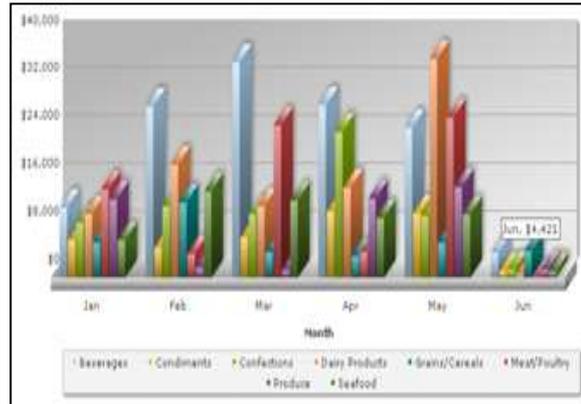
- 1 city** What city do you live in?
[Text input field]
- 2 years/there** How long have you lived in (years)?
[Text input field]
Only numbers may be entered in this field.
- 3 ranking** Which do you like best about?
Click an item or use drag-and-drop to move them between lists. Items can also be moved between and within lists by selecting the item with the tab key and then using arrow keys.

The ranking section is divided into two columns: "Your choices" and "Your ranking".

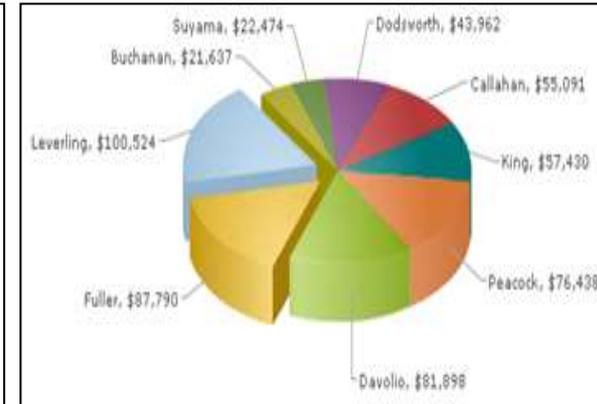
Your choices	Your ranking
Sporting Events	
Cultural Events	
Religious Events	
Political Events	

At the bottom right, there is a "Next >" button.

- Analyze and visualize data from MAX Collect and other data sources
- Easy-to-use interface for queries, reports, 3D Charts, and Graphs, GIS mapping
- Data Cube functionality allows users to “slice and dice” data for real time analysis and review
- Publish Output in multiple formats, including PDFs, spreadsheets, and HTML with dynamic drilldown
- Dynamically integrate into the Community and other web dashboards



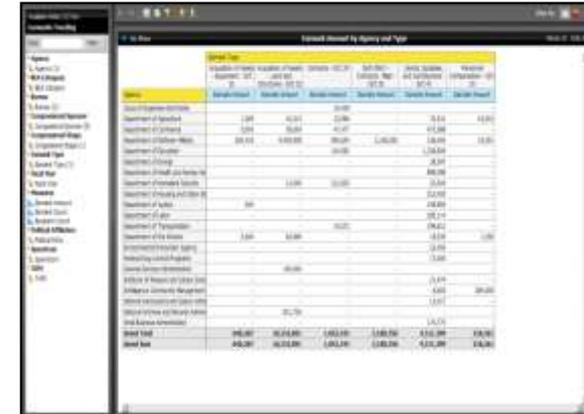
3D Bar Chart



3D Pie Chart



GIS Map



Data Cube

Knowledge Management : A Natural Extension of Using MAX

Knowledge Management is only effective when content is automatically maintained as part of the organization's normal daily activities.

- By using the MAX Community, MAX Collect, and MAX Analytics for information sharing, collaboration, data collection, analytical, & publishing activities, the knowledge content base automatically accumulates.
- The Community's powerful capabilities for organizing and multi-purposing content can then transform this content into organizational knowledge.

MAX Community

Pages
Documents (attachments)
Comments
Diagrams

MAX Collect, MAX Analytics

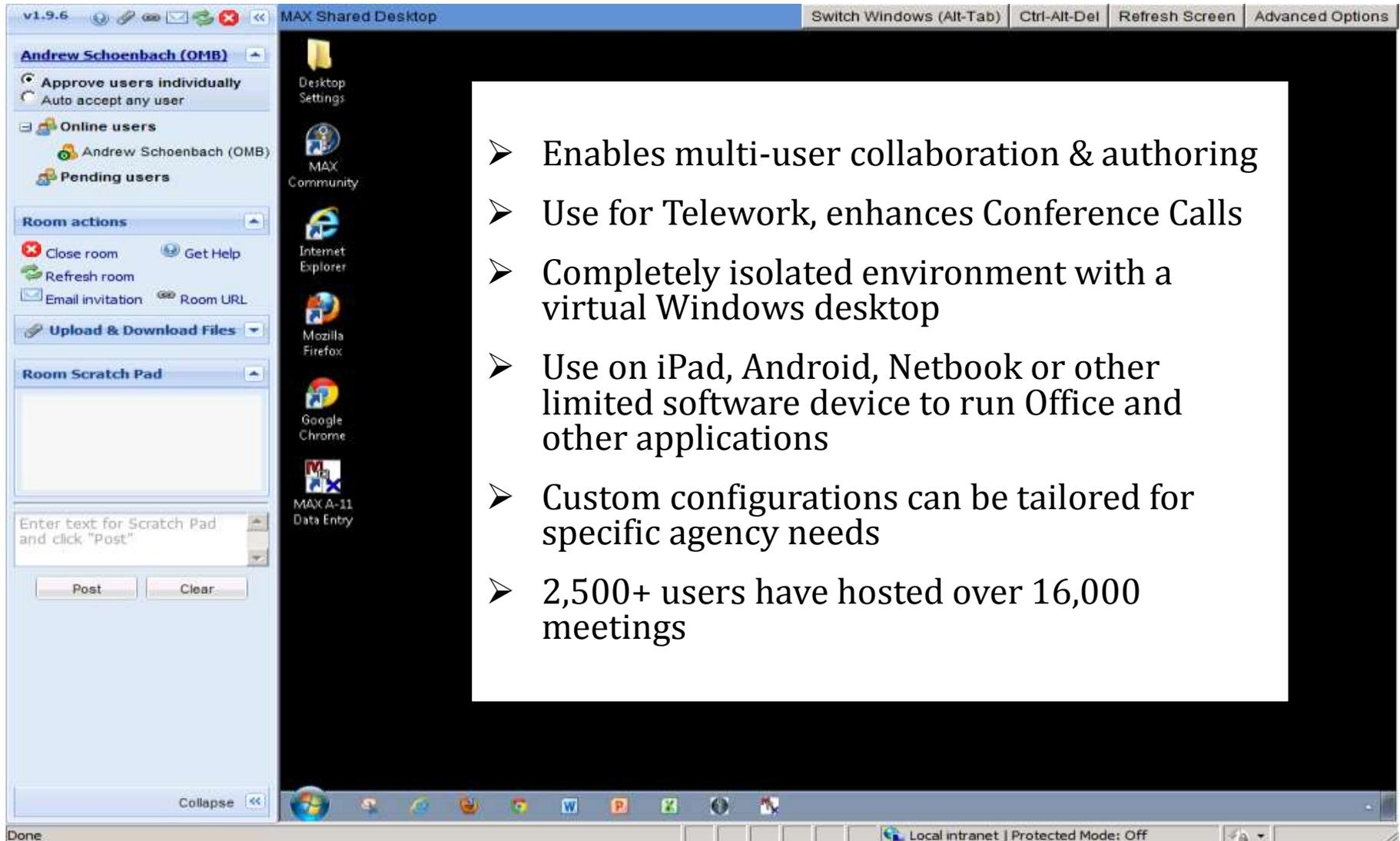
Data (textual & numeric)
Charts & Graphs
Faceted Search
Publications
Reports

Gardening

Organizing
Multi-purposing

Knowledge

MAX Shared Desktop: Advanced Collaboration & Virtual Desktop



The screenshot displays the MAX Shared Desktop interface. On the left is a control panel for 'Andrew Schoenbach (OMB)' with options like 'Approve users individually', 'Online users', 'Room actions', and 'Room Scratch Pad'. The main area shows a virtual desktop with icons for Desktop Settings, MAX Community, Internet Explorer, Mozilla Firefox, Google Chrome, and MAX A-11 Data Entry. A taskbar at the bottom contains icons for various applications. The status bar at the bottom indicates 'Local intranet | Protected Mode: Off'.

- Enables multi-user collaboration & authoring
- Use for Telework, enhances Conference Calls
- Completely isolated environment with a virtual Windows desktop
- Use on iPad, Android, Netbook or other limited software device to run Office and other applications
- Custom configurations can be tailored for specific agency needs
- 2,500+ users have hosted over 16,000 meetings

Budget Formulation Using MAX Collect



How the OCIO at the Department of Energy uses MAX Collect to manage its formulation process

Challenges – What Were the Problems?

Previous Processes, Tools, and Issues

- Manual, paper-based processes using MS Word, MS Excel, and e-mail
- Time-consuming
- Resource-intensive
- Lack of version control
- Prone to errors



Pain Points

- Information Collection
- Document Publication
- Lack of good analysis

Benefits of MAX Collect

STRUCTURED DATA

MAX Collect organizes your data in a centralized, web-based, folder structure. This allows the central coordinator to do many things, including:

- ❑ Organize data inputs by responsible people or offices,
- ❑ Secure permissions so only the correct people can view and edit, and
- ❑ Create multiple perspectives that allows him/her to organize by structures suitable for publication



MAX COLLECT
DOE-OCIO FY 2016 Budget Formulation
Status: Active

Edited by: Hawley, Alicia on Apr 03 2014 at 08:27 AM

Overview

Description of Work

Describe the work that your office is responsible for, providing connections to the JRM and DOE strategic plans

[Edit](#) [History](#)

Program Direction provides Federal staffing and associated costs for the overall management of activities carried out by the Department's program offices and 1

Program Direction funding provides resources needed to perform Departmental activities of the CIO, including the services: policy development, IT strategic planning, IT governance process support, enterprise architecture development, Enterprise-wide agreements, IT procurement, IT operations support, contingency planning, and inter-agency coordination.

The balance of the Department's IT portfolio funding is directly managed by the Department's program offices and 1

Program Milestones and Significant Accomplishments

Using a bullet format, list significant milestones and accomplishments.

[Edit](#) [History](#)

Human Capital
Increased staffing by 10, of which 5 occupy critical occupation (GS-2210) positions (FY13)

Benefits of MAX Collect

CONSISTENT INFORMATION COLLECTION

MAX Collect provides for the configuration of a consistent set of information to collect. In this case, OCIO uses it to document narratives regarding current budget scenarios, program descriptions, and new program requests for increases.

Turn off column sorting

Col	Header	Width	Type	Constraint
1	Line Item		Text ▾	- choose/remove constraint - ▾
2	Allocation within Target		Text ▾	- choose/remove constraint - ▾
3	Additional Funds Needed OT		Text ▾	- choose/remove constraint - ▾
4			Text ▾	- choose/remove constraint - ▾
5			Text ▾	- choose/remove constraint - ▾
6			Text ▾	- choose/remove constraint - ▾

Use comments?

Use footnotes?

Required?

Page break None for section ▾

Add to all items in this exercise that have this item template but don't have this section?

Update all items in this exercise that have this item template and already have this section?

Benefits of MAX Collect

VERSION CONTROL AND CHANGE HISTORY

Every entry maintains a change history with the value prior to the change, value after the change, who changed the value, and when the value was changed. You also have the option to restore to previous versions.

Overview

Description of Work

Describe the work that your office is responsible for, providing connections to the IRM and DOE strategic plans and goal areas.

Compare Two Selected Versions		Cancel			
	Version	Date	Changed By		Operations
<input type="checkbox"/>	CURRENT (v. 3)	Mar 20, 2014 10:55	Alicia Hawley Click to enter a comment		
<input type="checkbox"/>	v. 2	Mar 04, 2014 07:56	Alicia Hawley Click to enter a comment		Restore
<input type="checkbox"/>	v. 1	Feb 04, 2014 02:05	Alicia Hawley Click to enter a comment		Restore

Benefits of MAX Collect

CONSISTENT FORMATTING AND PUBLICATION

MAX Collect provides a publication function that generates report outputs using controlled and consistent formatting. Report outputs include MS Word, PDF, and Excel.

Program Direction Corporate Management (IM-10)

Overview

Description of Work

Program Direction provides Federal staffing and associated costs for the overall management of activities carried out by the Chief Information Officer (CIO). Program Direction funding provides resources needed to perform Departmental activities of the CIO, including the operation and delivery of Department-wide information technology and telecommunication infrastructure services; policy development; IT strategic planning; IT governance process support; enterprise architecture development; program and field oversight; reviews and assistance visits; records management oversight; Enterprise-wide agreements; IT procurement; IT operations support; contingency planning; and inter-agency coordination. The balance of the Department's IT portfolio funding is directly managed by the Department's program offices and their field sites and laboratories. The CIO exercises Clinger-Cohen related IT portfolio management responsibilities in reviewing IT business cases and portfolio requests of all Departmental program elements.

Program Milestones and Significant Accomplishments

- Human Capital
 - Increased staffing by 10; of which 5 occupy critical occupation (GS-2210) positions (FY13)
 - Increased staffing by 5; of which 4 occupy mission critical occupation (GS-2210) positions (FY14)
 - Submission of the IM reorganization package to the Under Secretary for Management & Performance and to the Chief Human Capital Officer
- Acquisitions
 - Utilized the Federal Strategic Sourcing Wireless Schedule and Initiative for DOE CIO wireless requirements contributing to overall DOE strategic sourcing accomplishments
 - Initiated Development of Acquisition Strategy and Source Process for follow-on IT Operations contract
 - Established follow-on Microsoft EWA contract
 - Established follow-on Oracle EWA contract
 - Established follow-on Red Hat EWA contract
 - All CORS received required training and maintained necessary certification level and qualifications to manage CIO contracts
 - Ensured all contract invoices were processed within required timeframes to meet Prompt Payment Act requirements and updated Small Business Prompt Pay requirements

Questions-for-the-Record Using MAX Collect



How the Department of Education
uses MAX Collect to manage the
QFR process

Challenges – What Were the Problems?

Previous Processes, Tools, and Issues

- Manual, paper-based processes using MS Word and e-mail
- Strict deadlines requiring a quick turnaround
- Resource-intensive
- Lack of version control
- Managing clearances



Pain Points

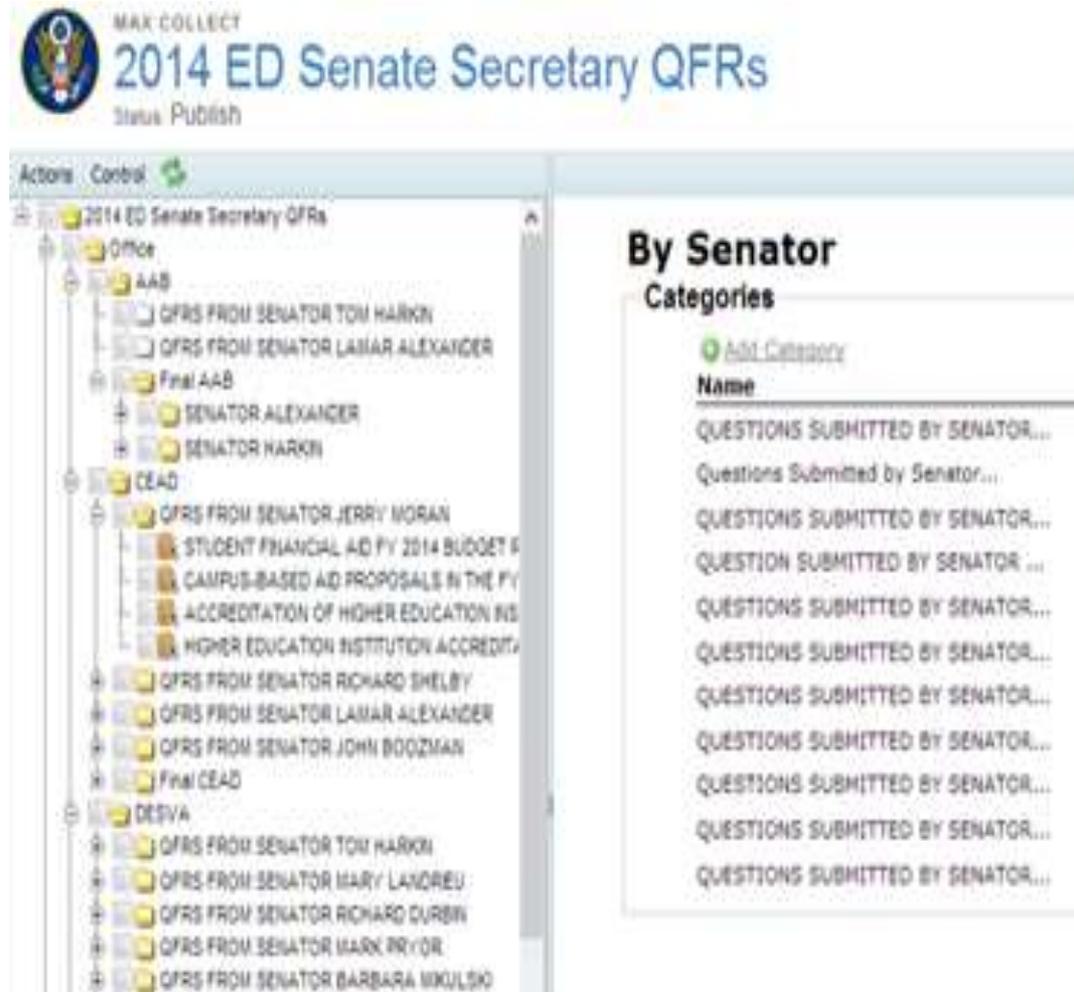
- Information Collection
- Workflow Management
- Document Publication

Benefits of MAX Collect

STRUCTURED DATA

MAX Collect organizes your data in a centralized, web-based, folder structure. This allows the central coordinator to do many things, including:

- ❑ Organize questions by responsible people or offices,
- ❑ Secure permissions so only the correct people can view and edit, and
- ❑ Create multiple perspectives that allows him/her to organize by Office, Questioner, and any other structure



The screenshot displays the MAX Collect web interface. The main heading is "2014 ED Senate Secretary QFRs" with a status of "Publish". The interface is divided into two main sections:

- Left Panel (Folder Structure):** A tree view showing a hierarchy of folders. The root is "2014 ED Senate Secretary QFRs", which contains an "Office" folder. Under "Office", there are "AAB" and "CEAD" folders. "AAB" contains sub-folders for "QFRS FROM SENATOR TOM HARKIN", "QFRS FROM SENATOR LAMAR ALEXANDER", "Final AAB", "SENATOR ALEXANDER", and "SENATOR HARKIN". "CEAD" contains sub-folders for "QFRS FROM SENATOR JERRY MORAN", "STUDENT FINANCIAL AID FY 2014 BUDGET F", "CAMPUS-BASED AID PROPOSALS IN THE FY", "ACCREDITATION OF HIGHER EDUCATION IN", "HIGHER EDUCATION INSTITUTION ACCREDITA", "QFRS FROM SENATOR RICHARD SHELBY", "QFRS FROM SENATOR LAMAR ALEXANDER", "QFRS FROM SENATOR JOHN BOOZMAN", and "Final CEAD". Below "CEAD" is a "DESVA" folder, which contains sub-folders for "QFRS FROM SENATOR TOM HARKIN", "QFRS FROM SENATOR MARY LANDREU", "QFRS FROM SENATOR RICHARD DURBIN", "QFRS FROM SENATOR MARK PRIOR", and "QFRS FROM SENATOR BARBARA MIKULSKI".
- Right Panel (By Senator Categories):** A section titled "By Senator" with a sub-heading "Categories". It includes an "Add Category" button and a list of categories, each starting with "QUESTIONS SUBMITTED BY SENATOR...".

Benefits of MAX Collect

CONSISTENT INFORMATION COLLECTION

MAX Collect provides for the configuration of a consistent set of information to collect. In this case, ED uses it to document the questions being asked by Congress and the responses being formulated by appropriate staff.



The screenshot displays the MAX Collect interface for a 2014 ED Senate Secretary QFR. The left sidebar shows a hierarchical tree structure with folders for 'Office', 'Final AAB', 'SENATOR ALEXANDER', 'SENATOR HARRIS', 'CEAD', and 'DPRS FROM SENATOR JERRY MORAN'. The 'DATA INTEGRITY SUPPORT IN STUDENT AID ADMINISTRATION' folder is selected. The main content area shows the title 'DATA INTEGRITY SUPPORT IN STUDENT AID ADMINISTRATION REQUEST' and a 'Question' section. The question text reads: 'In February 2011, the Department delayed the release of certain default rates (CDRs) to institutions of higher education without providing a reason for the delay. That delay led to a number of colleges and universities that question the accuracy of the Federal student debt data in the College Scorecard from the White House. In April 2011, the Department notified institutions that it had erroneously inflated CDRs for a number of institutions. This sporadic history of mismanagement of key metrics is troubling. How will the Department ensure that

Benefits of MAX Collect

WORKFLOW MANAGEMENT

A structured workflow, with unique naming conventions, can be applied to the exercise to manage the multiple stages of authorship and review that accompany a typical QFR process.

FY 2015 DOI Budget QFRs		Status: Setup
Item Workflow for this Exercise		
Name	Alias	Actions
Setup	Setup	Alias Deactivate
Authoring	Drafting Response	Alias Deactivate
Initial Review	POB Initial Review	Alias Deactivate
Review1	OMB Review	Alias Deactivate
Review2	Response to OMB Review	Alias Deactivate
Review3	POB Final Review/Clearance	Alias Deactivate
Review4	Review4	Alias Activate
Review5	Review5	Alias Activate
Collaboration	Collaboration	Alias Activate
Final Review	Final Review	Alias Activate
Publish	Publish	Alias Deactivate

Benefits of MAX Collect

CONSISTENT FORMATTING AND PUBLICATION

MAX Collect provides a publication function that generates report outputs using controlled and consistent formatting. Report outputs include MS Word, PDF, and Excel.



Other Examples...

- ❑ **Section 3003 Conference Reporting Exercise**
- ❑ **Contract Management and Budget Portal**

OPM Section 3003 Conference Reporting

BFELoB's MAX Collect Exercise for Conference Reporting

This page will host information on a Collect exercise built for the Section 3003 reporting process, first discussed at the [Spring 2013 Steering Committee](#) and at subsequent Task Force meetings throughout the summer. Original information is posted on the [Task Force Agency Topics](#) page. More information on which agencies are using Collect for QFRs can be found on the [MAX Collect Exercises for Budget Offices](#) page.

Access and View the Exercise



Request a Set-up

If you are interested in using the exercise for your agency's conference reporting needs, please add your name to the task list. We'll contact you shortly and help you get started right away!

Request a 3003 Exercise	
<input type="text"/>	<input type="button" value="Add"/>
<input type="checkbox"/>	Justina Tong (ED)- Need in two weeks
<input type="checkbox"/>	Corinne Phipps
<input type="checkbox"/>	Anthony Rainey (OPM)
Sort by: <input type="text" value="Custom"/>	

OPM Section 3003 Conference Reporting

- Broken down by programs offices and fiscal quarters
- Pre-formed tables for simple data entry
- Ability to upload supporting documentation

Actions Control 

- [-] OPM FY 2014 Section 3003 Conference Rep
 - [-] OPM-Sponsored Conferences
 - [-] Program Offices - Under \$100,000
 - [-] Office of the Director/Executive Sec
 - [-] Quarter 1
 - [-] Quarter 2
 - [-] Quarter 3
 - [-] Quarter 4
 - [-] Office of General Counsel
 - [-] Planning and Poli
 - [-] Communications
 - [-] Congressional Le
 - [-] Office of the Inspe
 - [-] Employee Service
 - [-] Retirement Servic
 - [-] Healthcare & Insu
 - [-] Merit System Acco
 - [-] Federal Investigati
 - [-] Human Resource
 - [-] Chief Financial Of
 - [-] Chief Information
 - [-] Facilities, Security
 - [-] Equal Employer
 - [-] Diversity and Inclu
 - [-] Program Offices - Abc
 - [-] Non-OPM-Sponsored Cc

FY 2014 Conferences

[Edit Table](#)

Conference Title	Purpose	Start Date	End Date	Location	Number of Attendees	Item	Itemized Cost	Reimbursement (from whom and how much)	Net Cost (if applicable)	Funding Source	Comments	Actions
						[Please Choose]						
						[Please Choose]						
						[Please Choose]						
						[Please Choose]						

[Export All to Excel](#)

(Hide comments for FY 2014 Conferences)

Comments for FY 2014 Conferences

[Edit Comments](#)

Comment	User	Viewable by	Date/Time	Action

Documentation

Please upload documentation to back up cost estimates, if necessary.

[Upload Files](#)

BUMED Contract Management and Budget Portal (CMBP)

DEPT OF DEFENSE **Contract Management and Budgeting Portal (CMBP) Informational Page (Previously PM-COR Tool)** Home Search The MAX Community All

PERMISSIONS OPEN - EXECUTIVE BRANCH

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Edited By James Hagan(DDO) on Mar 30, 2014 at 02:52 PM

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The CMBP Tool has had a major update within the attachment sections on Nov 19, 2013. The system now uploads all MS Office Files/PDFs, allows bulk uploads, and has a date stamp and user name feature.



Contract Management and Budgeting Portal (CMBP)



CMBP Analytics



CMBP Add New Contract Folder

1 General CMBP Attachments

- CMBP User Guide
- CMBP Tool Overview
- BUMED Memorandum - Implementation of CMBP

1 M9 WII Attachments

- Mandate Memo for WII Funded Programs
- WII M9 Project Close Out Report
- MAX Quarterly Report Tutorial
- M94 Template FY13 Project Quarterly Report

1 CMBP Assistance

For any additional assistance with the Contract Management and Budgeting Portal, please reach out to the following for help at your convenience:

- Mr. Jason Sawyer, jason.sawyer@med.navy.mil
- Mr. Colin Romoser, colin.romoser_ctr@med.navy.mil

CMBP Dashboards (Permission Required)

Click arrow to expand...

STARS Data Load

Authorized Users May Click [Here](#) to Upload STARS Data.

STARS Data as of 18MAR14.

Helpful Links:

MAX Training Links

- MAX Federal Community Hands-On Training
- MAX Collect Training
- MAX Analytics Training
- MAX Dashboard Training
- MAX JIRA Training Slides

Navy Medicine Links

- BUMED Financial Improvement Program
- Naval Medical Logistics Command

COR Instructions

- DDO COR Handbook
- NAVSUP INST 4205.3E
- FY14 NAVSUP Submission Dates

COR Nomination Process

- NAVSUP COR Nomination process is done through the [DDO COR](#).

Project Management

Interested in a project management system? MAX currently utilizes JIRA, a COTS system that offers a number of critical features, including project tracking and customized workflow. Questions, please email: Jason.Sawyer@med.navy.mil.

BUMED Contract Management and Budget Portal (CMBP)

MAX COLLECT

Navy Medicine Contracts Management and Budget Portal
 Status: **Active**

[CMBP Informational Page](#) Contact: [Jason Sawyer](#)

Actions Control Refresh Export Favorites Share

Navy Medicine
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Expenditure Rates
 Please populate all ACRNs and ensure Option Year is populated as well.

Edit Add Row Delete Row Paste Rows as Edit Paste Entire Table Refresh Export to Excel

CLIN	ACRN	Type	CLIN Value	Obligation	Disbursement	Call Number	Option Year
0001	AA	Labor	1,377,086.04	1377086.04	1377086.04		0
0002	AA	Travel	60,000.00	60000.0	28843.6		0
1001	AB	Labor	1,418,380.80	1418380.8	1300182.4		1
1002	AB	Travel	60,000.00	60000.0	25602.58		1
2001	AC	Labor	1,460,985.60	1460985.6	0.0		2
2002	AC	Travel	60,000.00	60000.0	0.0		2

(Show comments for Expenditure Rates)

BUMED Contract Management and Budget Portal (CMBP)

New Dashboard

M3 Contracts FY13 - 15

+ 3 Filters Rows: 70 Cols: 4 Actions

Contract Name	Contract Number	COR Name	CLIN Value	Obligation	Disbursement
	N0003910D0010	Dave Wade	\$48,495.44	\$48,495.44	\$37,118.08
	N0017805D4341	CAPT Lea Bielman	\$3,763,578.32	\$3,766,020.73	\$3,776,216.10
	N0018909C2115	Aletha Bullock	\$1,182,511.92	\$1,182,511.92	\$560,604.06
	N0018909PZ301	LT Heather Neumeyer	\$210,645.24	\$210,645.24	\$184,314.59
	N0018910C2015	Rebecca L Foster	\$1,318,558.00	\$1,318,558.00	\$1,196,304.78
	N0018910C2086	Carmen Birk	\$1,528,865.20	\$1,455,103.90	\$578,559.56
	N0018910PZ732	James Hagen	\$450,000.00	\$449,487.08	\$450,000.00
	N0018911DZ025	Sharon Newman	\$3,250,312.59	\$2,806,403.73	\$2,677,021.82
	N0018911DZ026	Sharon Newman	\$4,827,314.09	\$4,779,215.21	\$3,774,329.87

M3 Total Contract and Values

+ 2 Filters Rows: 6 Cols: 2 Actions

Fiscal Year	Count Contracts	CLIN Value
FY2012	19	\$18,699,762.84
FY2013	34	\$42,194,526.13
FY2014	22	\$16,770,454.19
FY2015	9	\$4,856,395.60
FY2016	5	\$1,215,340.80
FY2017	1	\$500,000.00

M3 Contract Deliverables

+ 2 Filters Rows: 53 Cols: 0 Actions

Contract Name	Deliverable	Due Date	Date Completed	Notes
	FY13 EM Plans Reviews 47	-	-	ongoing
	FY13 PI Plan reviews 41	-	-	ongoing
	FY13 PQAV and HVAs 37 reviews	-	-	Ongoing
	GIS Mapping to include Navy Weather	2013-12-24	-	Complete awaiting Na
	H200-Logistical Dashboard	2013-01-15	2013-12-20	Awaiting Analytics
	MAX-COOP Dashboard	2013-06-30	2013-06-30	Complete
	MAX-Contract Mangement System	2013-06-30	2013-11-20	99% Complete. Ther
	MAX-Contract Mangement System Us	2013-06-30	2013-08-15	Version 1.5 due 8/15
	MAX-EM PQAV/Review Dashboard	2014-01-31	-	Initial planning in progr
	MAY-H100 Logistics Dashboard	2013-08-15	2013-08-14	Reviewing data fields

FY13 Breakout of Costs

+ 3 Filters Actions

Category	Value	Percentage
Labor	\$23,367,131.77	55.4%
Service	\$16,023,563.76	38%
Equipment	\$974,322.48	2.3%
Travel	\$5,000.00	0%
Subscription	\$284,472.12	0.7%
Supply	\$996,525.50	2.4%
Training	\$514,594.32	1.2%
UNDEFINED	\$28,916.18	0.1%

MAX.gov Cloud Services Capabilities

Sponsored by The Budget Formulation and Execution Line of Business (BFELoB)

BFELoB Organization and Contacts:

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- Deputy Policy Lead:** Phil Wenger, OMB
- Program Management Office Lead:** Mark Dronfield, Education
- MAX Community Lead:** Steve Wynands, OMB
- MAX Collect /MAX PaaS Lead:** Ryan Harvey, OMB
- MAX Analytics, Survey, and Shared Desktop Lead:** Dan Chandler, OMB
- MAX Authentication Lead:** Barry Napear, OMB

Learn More:

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