



**Office of Federal Financial Management
Office of Management and Budget**

Attachment to Circular A-136: *A User Guide for Financial Management Reporting via MAX Federal Community*

Starting in the 3rd Quarter, Fiscal Year 2008, financial management reporting will no longer be submitted to the Office of Management and Budget (OMB) through the Statements Inbox (via statements@omb.eop.gov). The agency submission process will be enhanced by using the MAX Federal Community's *Financial Management Community* page. The MAX Federal Community is a "Wiki" tool created and maintained by OMB. Like Wikipedia, this tool is an interactive, real-time website dedicated to sharing information and ideas across various audiences. The financial reporting submissions will be between the agencies and OMB; however, interaction can occur between agencies or within a specific agency using the MAX Federal Community.

The MAX Federal Community was originally created with "Wiki" software as a collaborative environment for the Budget community. It soon became apparent that other communities, such as the Financial Management Community, could benefit from the same information sharing tools.

This User Guide will help agency financial managers understand the new financial reporting submission process and the benefits of the MAX Federal Community website.

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I. How to Get Started in the MAX Federal Community

The MAX Federal Community is a government-only “Wiki” tool used to share information in a real-time, web-based environment. “MAX” refers to OMB-wide databases and the “Wiki” concept allows any user of the community to edit or share information (the website [Wikipedia](#) is a popular example of this). The MAX Federal Community website itself is a series of “spaces,” or pages through which various communities can collaborate. These communities can be agency only, government-wide (e.g. financial management) or cross-cutting (e.g. guidance documents). Any single user can be involved in more than one community. Please note that while most pages are open to the entire community, some pages may have restricted access if they carry sensitive information. The following steps explain how to get started.

a. Getting a user ID

User IDs are open to any Federal government employee (or contractor supporting a government organization) wishing to use the MAX Federal Community. Please note that access is currently only granted to Executive branch agencies.

To acquire an ID follow these steps:

1. Go to the [MAX Registration Form](#).
2. Fill out all required information. Access to the MAX Federal Community is granted automatically.
3. Submit the form. If your email is from a recognized domain, you will automatically be granted access.
4. When access is granted, you will receive an email to set your password. NOTE: The password must be 8 characters and contain at least one upper-case character, one lower-case character, one numeric character and one special character.

b. Basics of navigating the Community

Bread Crumbs

At the top of every page is a sequence of words that starts with the word "Dashboard", followed by the name of the *Space* you are in, followed by the hierarchy of pages that lead to the page you are currently on. (These are called *bread crumbs* because they enable you to trace back to the starting point).

How to upload a document

1. Go to the page you wish to add an attachment.
2. Click on the “Add” drop-down menu located on the top right of the screen.
3. Browse to find the file to be attached and add a comment.
4. Hit the Attach File(s) button when you are ready.

How to watch a page

1. To watch a page, click the icon in the upper-right corner of the page.
2. To stop watching a page, click the icon in the upper-right corner of the page.
3. When a page is being watched, you will be notified via E-Mail of changes made to that page.

How to comment on a page

1. Go to the page you wish to comment about.
2. Click on the Add Comment link located at the bottom of the page.
3. Select the Rich Text tab (which is the default).
4. Hit the Post button when you are done typing.
If you are responding to a previous comment, then use the "Reply To This" button on that comment. This will create what is known as a "Comment Thread"


Email Links

1. When sending a link to a Community page, it is recommended that you use the email link that is displayed at the upper right of every page like so: **EMAIL LINK:** <https://max.omb.gov/community/x/NwBnAQ>. Do not use the "address URL" that shows at the top of the browser window as this address will change whenever the page name is changed or the page is moved - thus breaking the link. Using the "Email Link" provides a stable link to the page.
2. Go to the page where you want to copy the link.
3. Highlight the "Email Link" at the upper right of the page.
4. Copy the "Email Link" link from this section into your e-mail.

Setting Preferences

1. At the top right of the screen, under the search box, put your mouse over your name.
2. Choose preferences from the drop-down menu to edit profile information such as a preferred community and time zone, email preferences for updates and actions, and see unsaved drafts of previously edited documents.

c. How to get more help

Help is available to the top right of the screen labeled  [HELPFUL TIPS](#). The pages within this link provide additional help from how to use the Community to editing to signing up for OMB offered training sessions.

Help is also available from OMB Systems staff at (202) 395-6860 or MAXgeneral@omb.eop.gov between 8:30 AM – 6:00 PM EST.

II. MAX Financial Management Community for Financial Reporting

The spring 2008 update to OMB Circular A-136 requires the agencies to use the MAX Federal Community for all financial reporting submissions to OMB. This includes:

- Year-end financial reporting (i.e. Performance and Accountability Reports (PARs) or Agency Financial Reports (AFRs))
- Citizens’ reports
- Management Representation Letters
- Interim statements and fluctuation analyses
- Statement of Budgetary Resources (SBR) analyses

While navigating the Financial Management Community it is useful to note that other program areas of the Office of Federal Financial Management (OFFM) use the site for collaborations. Some areas include grants management, charge cards and improper payments.

a. Benefits of using the Community for collaboration

The Federal Financial Management Community page streamlines the current financial reporting process. While there are several benefits to using the Community, time savings is key. The previous process required the agencies to email OMB their reporting packages, and then once OMB received the packages (whether it was year-end reporting, quarterly reporting or management representation letters) the agency waited for a confirmation of receipt.

The New Feature...	Thus Eliminates...
<ul style="list-style-type: none"> • Submit financial reports and receiving visual confirmation in real-time. 	<ul style="list-style-type: none"> • Time spent waiting for OMB confirmation of receipt.
<ul style="list-style-type: none"> • Uses Direct Editing, the function which allows multiple reviewers to either simultaneously edit or “check out” a document (which locks the file and prevents only one user’s edits at a time). 	<ul style="list-style-type: none"> • Work flow confusion
<ul style="list-style-type: none"> • Allows financial managers at each level to directly access information. 	<ul style="list-style-type: none"> • Time spent waiting for guidance or other information to circulate from the Department-level CFO office.
<ul style="list-style-type: none"> • Acts as a forum for interagency working groups to share best practices, a public calendar, media, performance measures, etc. 	<ul style="list-style-type: none"> • Difficulties in reaching counterparts at the various agencies.

b. Advantages of changing the current reporting process

In addition to the benefits of using the Federal Financial Management Community for collaborative purposes, there are technical reasons to changing the reporting process from email to a “Wiki” tool. There have been reported issues with file size limitations; as well, there is the need to make these records permanent. The new process addresses these issues, and as financial reporting improves and changes, the Community can also grow and evolve.

Prior to using the Federal Community	With using the Federal Community
<ul style="list-style-type: none">• The Statements Inbox (statements@omb.eop.gov) has a limited attachment size which makes it difficult to send large files.	<ul style="list-style-type: none">• The Community page has a maximum file size limit of 100 MB. For reference, the largest FY 2007 PAR was 30.2MB.
<ul style="list-style-type: none">• Unable to use Direct Editing, the function which allows multiple reviewers to either simultaneously edit or “check out” a document (which locks the file and prevents only one user’s edits at a time).	<ul style="list-style-type: none">• There will be better version control management.

c. File Naming Convention

In the Community there are two types of pages, limited access and public access. On a limited access page, only specific users can see these pages. In the A-136 Collaboration page, this is done by limiting agency users to its individual pages for draft documents. On these pages the file naming convention is not imperative, as only the agency users and OMB users will see these documents.

Final Document pages are more sensitive. To serve as a quick reference tool, all MAX Community users will be able to view to these "unrestricted access" pages. In order to view the documents alphabetically, the following naming convention is suggested: **Agency Name_Report Name_Fiscal Year (e.g. NASA_AFR_FY08)**. Attachments not labeled with the full agency name will not show in alphabetical order.

III. Instructions for submitting financial reports

a. CFO Act Agencies (Those 24 agencies on the CFO Council as listed in the CFO Act of 1990)

1. Open the MAX Federal [Financial Management Community](#) page. Click “Collaborations.”

The screenshot shows the MAX Federal Financial Management Community website. The browser address bar indicates the URL is <https://max.omb.gov/community/x/EQ4>. The page features a navigation menu with the following items: [My Favorites](#), [My Homepage](#), [Directory](#), [Page Link: https://max.omb.gov/community/x/EQ4](#), [Help](#), and a search bar. Below the navigation menu, there is a "Home" section with a logo and the text "Added by heather.l.mercadante@omb.eop.gov, last edited by [LAUREN BLOOM](#) on Oct 09, 2008 ([view change](#))". A blue banner reads "Welcome to the Financial Management Community!".

On the left side, there is a "Calendar of Events" section with the following links: [CFO Council](#), [Charge Cards](#), [Collaborations](#) (circled in red), [Data Calls and Exercises](#), [Documents & Guidance](#), [FMLoB](#), [Human Capital](#), [Media on Financial Management](#), [Performance Measures](#), and [Shared Information](#).

On the right side, there is a "Recently Updated" section with the following items:

- [20081021 DoD 3rd qtr notes OMB Comments.pdf](#) by [AUDREY DUCHESNE](#) (an hour ago)
- [DoD Interim Statements Comment Sheet.doc](#) by [AUDREY DUCHESNE](#) (an hour ago)
- [Cover Sheets \(Templates\)](#) by [DEANNA DEMOTT](#) (11 hours ago)
- [Government Corporations and Accountability of Tax Dollars...](#) by [DEANNA DEMOTT](#) (12 hours ago)
- [Management Representation Letter \(Limited Access\)](#) by [DEANNA DEMOTT](#) (12 hours ago)
- [Final PARs and AFRs](#) by [DEANNA DEMOTT](#) (12 hours ago)
- [Final Citizens' Report and APR](#) by [DEANNA DEMOTT](#) (12 hours ago)
- [Draft Citizens' Report and APR](#) by [DEANNA DEMOTT](#) (13 hours ago)
- [Draft PARs and AFRs](#) by [DEANNA DEMOTT](#) (13 hours ago)
- [CFO Act Agencies](#) by [DEANNA DEMOTT](#) (14 hours ago)

At the bottom left, there is a "Financial Management Community-Highlights" box with the following content:

Financial Management Community-Highlights

- [IMPORTANT ANNOUNCEMENT FY 2008 Year-End Memo \(10.09.08\)](#)
- [IMPORTANT ANNOUNCEMENT Snapshot Guidance \(10.09.09\)](#)
- [IMPORTANT ANNOUNCEMENT FY 2008 Reporting Guidance\(8.29.08\)](#)
- [Click here to include your success story at CFOjobs.gov](#)
- [DMB M-08-18, Preventing Waste, Fraud, & Abuse in Use of Govt Charge Cards](#)
- [Financial Mgmt News from FSIO](#)

(Click [here](#) to *Watch* the Financial Management Community Highlights page to get notified of significant activities.)

Other Community Highlights

[Acquisition Community](#)

[Budget Community](#)

2. To submit financial reports click “A-136 Financial Reporting Collaboration.”

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/104> Help Search

Dashboard > Financial Management Community > Home > Collaborations Browse RANDY CARL

Collaborations

Added by heather.l.mercadante@omb.eop.gov, last edited by [DEANNA DEMOTT](#) on Oct 21, 2008 ([view change](#)) OPEN (0) ☆

Choose one of the following OMB/Agency collaborations

Financial Management Systems
[A-127 Update](#)

Financial Reporting Requirements
[A-136 Financial Reporting Collaboration](#)

[Show page tree](#) →

[Add Labels](#)

Children (2) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

 [A-127 Update](#)
 [A-136 Financial Reporting Collaboration](#)

[Add Comment](#)

Powered by [Atlassian Confluence](#) 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)

Note: Depending on your settings, your page may by default show the “Page Tree” as a sidebar on the left, as in the image below. To collapse the page tree, simply select “Hide page tree.”

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/1Q4> Help Search

Dashboard > Financial Management Community > Home > Collaborations Browse RANDY CARUSO

Collaborations

Added by heather.l.mercadante@omb.eop.gov, last edited by [DEANNA DEMOTT](#) on Oct 21, 2008 (view change) OPEN (0)

Page Tree Hide

Choose one of the following OMB/Agency collaborations

- Financial Management Systems
 - [A-127 Update](#)
- Financial Reporting Requirements
 - [A-136 Financial Reporting Collaboration](#)

[Calendar of Events](#)

[CFO Council](#)

[Charge Cards](#)

Collaborations

[Data Calls and Exercises](#)

[Documents and Guidance](#)

[Financial Management Community - Highlights](#)

[Financial Management Line of Business](#)

[FMLoB Performance Measures \(under construction\)](#)

[Human Capital](#)

[Performance Measures](#)

[Shared Information](#)

[TreeNavigation](#)

[Hide page tree](#)

[Add Labels](#)

Children (2) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [A-127 Update](#)
- [A-136 Financial Reporting Collaboration](#)

[Add Comment](#)

3. Click the current fiscal year for which the agency is reporting.

The screenshot shows a web browser window displaying the "A-136 Financial Reporting Collaboration" page. The browser's address bar shows the URL: <https://max.omb.gov/community/x/MoBkBg>. The page title is "A-136 Financial Reporting Collaboration". Below the title, it says "Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change)".

The main content of the page includes a heading: "This page is dedicated to the OMB/Agency collaborations regarding [Circular A-136: Financial Reporting Requirements](#)." Below this, a note states: "You can 'watch a page' to receive email alerts of any changes made by clicking on the envelope icon in the upper right. It is suggested that you watch your agency's individual pages." The link "2008 Reporting Submissions" is circled in red. Below this link, it says: "All agencies use this area to submit the 2008 financial reporting to OMB." A bulleted list follows:

- Q3 Interim Reporting (Due 8/21/08)
- Draft Year-end Report for OMB Review (Due 11/3/08)
- FINAL Year-end Report to OMB (Due 11/17/08)

A note below the list reads: "Note: Uploading in the Financial Management Community meets the OMB submission requirements only. GAO, Treasury and Department of Justice submission processes still apply. See Circular A-136 for n details." Below the list is a link for "A-136 Subcommittee".

At the bottom of the page, it says "Powered by [Atlassian Confluence](#) 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)".

4. Choose the “CFO Act Agencies” link.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/LYA-C> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions Browse RANDY CARUS

FY 2008 Submissions

Added by DEANNA DEMOTT, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change) OPEN (0) ☆

CFO Act Agencies Submit Here

Subject to the Chief Financial Officers Act of 1990: DHS, DOC, DOD, DOE, DOI, DOJ, DOL, DOT, Ed, EPA, GSA, HHS, HUD, NASA, NRC, NSF, OPM, SBA, SSA, State, Treasury, USAID, USDA, VA

ATDA Agencies and Government Corporations Submit Here

Subject to the Accountability of Tax Dollars Act of 2002: all other Executive agencies (31 USC 3515) listed on page 35 here: [OMB Bulletin 07-04: Audit Requirements for Federal Financial Statements](#)

[Show page tree](#) →

[Add Labels](#)

Children (3) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [CFO Act Agencies](#)
- [Cover Sheets \(Templates\)](#)
- [Government Corporations and Accountability of Tax Dollars Act Agencies \(a.k.a. "Small Agencies"\)](#)

[Add Comment](#)

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- Click the type of report to submit, for example Draft **PARs/AFRs**. Note: There are “limited access” pages that generally include either sensitive information or agency draft versions of documents. **Only the agency will have access to its own documents and information.**

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/kABuC

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies

Help Search

Browse RANDY CARUSO

Edit Add (0) Toc

OPEN (0) ☆

CFO Act Agencies

Added by DEANNA DEMOTT, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change)

Click one of the links below to upload or review your agency's documents.

FY 2008 Year-End Reporting

PAR or AFR (Non-Pilot): [Draft](#) [Final](#)

APR/Citizens' Report: [Draft](#) [Final](#)

[Management Representation Letters](#)

[SBR Reconciliation](#)

Year-End Reporting Deadlines	Agencies Upload Drafts into MAX	OMB Upload Comments in MAX	Final Document Released
Agency Financial Report (AFR) or Performance and Accountability Report (PAR)	Monday November 3, 2008	NLT 6:00pm Tuesday November 7, 2008	Monday November 17, 2008
Budget, Performance and Financial Snapshot	Monday December 1, 2008	Friday December 5, 2008	Monday December 15, 2008
Annual Performance Report (APR)/ Citizens' Report	Friday January 2, 2009	Friday January 9, 2009	Thursday January 15, 2009

Interim Reporting

(Q3 2008)

[Show page tree](#) →

[Add Labels](#)

Children (7) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [Draft Citizens' Report and APR](#)
- [Draft PARs and AFRs](#)
- [Final Citizens' Report and APR](#)
- [Final PARs and AFRs](#)
- [Interim Reporting](#)
- [Management Representation Letter \(Limited Access\)](#)
- [SBR Reconciliation](#)

[Add Comment](#)



6. Select your agency from the list, and proceed to the next step...

[Note: Because the following example was done on an account with OMB-Access, it will display all agencies' pages.]

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/QoA-C> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Draft PARs and AFRs > Browse > RANDY CARUSO

Draft PARs and AFRs

Added by [DEANNA DEMOTT](#), last edited by [DEANNA DEMOTT](#) on Oct 21, 2008 ([view change](#))

OPEN (0) ☆ 📄 🗑️

Find the link to your agency's page by 1 of the following methods:

- (1) Scroll all the way down to the bottom of your browser window (e.g. Internet Explorer, etc.)
- (2) Collapse the Page Tree to the left by clicking "Hide"
- (3) Expand the highlighted "Draft PARs and AFRs" in the Page Tree by clicking on the "+" symbol

Locate and click on the link to your agency's limited access draft PAR/AFR page. "Limited Access" means that only your agency and OMB can see the attachments on that page. Upload your document to this page only.

If you do *not* see a link with your agency's name, please contact your OFFM analyst immediately.

[Show page tree](#) →

[Add Labels](#)

Children (24) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [DHS Draft AFR \(limited access\)](#)
- [DOC Draft PAR \(limited access\)](#)
- [DOD Draft AFR \(limited access\)](#)
- [DOE Draft AFR \(limited access\)](#)
- [DOI Draft PAR \(limited access\)](#)
- [DOJ Draft PAR \(limited access\)](#)
- [DOL Draft PAR \(limited access\)](#)
- [DOT Draft PAR \(limited access\)](#)
- [Ed Draft PAR \(limited access\)](#)
- [EPA Draft PAR \(limited access\)](#)
- [GSA Draft PAR \(limited access\)](#)
- [HHS Draft AFR \(limited access\)](#)
- [HUD Draft PAR \(limited access\)](#)
- [NASA Draft AFR \(limited access\)](#)
- [NRC Draft PAR \(limited access\)](#)
- [NSF Draft AFR \(limited access\)](#)
- [OPM Draft PAR \(limited access\)](#)
- [SBA Draft AFR \(limited access\)](#)
- [SSA Draft PAR \(limited access\)](#)
- [State Draft AFR \(limited access\)](#)
- [Treasury Draft PAR \(limited access\)](#)
- [USAID Draft AFR \(limited access\)](#)
- [USDA Draft PAR \(limited access\)](#)
- [VA Draft PAR \(limited access\)](#)

[Add Comment](#)

Done Local intranet

7. Once this link is clicked, notice the restrictions set on this page by hovering the mouse over the orange “restrictions” link.

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/igA0Bw | Help | Search

Dashboard > Financial Management Community > ... > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Draft PARs > Browse > RANDY CARU... and AFRs > DHS Draft AFR (limited access)

DHS Draft AFR (limited access)

Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Jun 16, 2008 (view change)

Show page tree →

Add Labels

Add Comment

RESTRICTED (3)

View restrictions on this page:
AGY-DHS
AGY-OMB
AGY-TREAS-FMS-REPORTING

Click here for more info.

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8. Place your mouse over the + Add ▾ button and select Attachment from the drop down menu. Follow the on screen dialog to “Browse...” for and “Attach...” your document.

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/igA0Bw | Help | Search

Dashboard > Financial Management Community > ... > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Draft PARs > Browse > RANDY CARU... and AFRs > DHS Draft AFR (limited access)

DHS Draft AFR (limited access)

Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Jun 16, 2008 (view change)

Show page tree →

Add Labels

Add Comment

RESTRICTED (3)

Edit + Add ▾ (0) Settings

- Page
- Bookmark
- Diagram
- Comment
- Attachment

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9. Revisit the CFO Act Agencies page to submit any other reports. For example, **Interim Reporting** generally follows the same path.

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/kABuC


Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies

Help Search

Browse RANDY CARUSO

Edit Add (0) Toc

OPEN (0) ☆



CFO Act Agencies

Added by DEANNA DEMOTT, last edited by RANDY CARUSO on Oct 22, 2008 (view change)

Click one of the links below to upload or review your agency's documents.

FY 2008 Year-End Reporting

PAR or AFR: [Draft](#) [Final](#)

APR/Citizens' Report: [Draft](#) [Final](#)

[Management Representation Letters](#)

[SBR Reconciliation](#)

Year-End Reporting Deadlines	Agencies Upload Drafts into MAX	OMB Upload Comments in MAX	Final Document Released
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Budget, Performance and Financial Snapshot	Monday December 1, 2008	Friday December 5, 2008	Monday December 15, 2008
Annual Performance Report (APR)/ Citizens' Report	Friday January 2, 2009	Friday January 9, 2009	Thursday January 15, 2009

Interim Reporting

[\(Q3 2008\)](#)

[Show page tree](#) →

[Add Labels](#)

Children (7) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [Draft Citizens' Report and APR](#)
- [Draft PARs and AFRs](#)
- [Final Citizens' Report and APR](#)
- [Final PARs and AFRs](#)
- [Interim Reporting](#)

9. Click on the appropriate fiscal year and quarter.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/NYA-C> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Interim Reporting Browse RANDY CARUS


Interim Reporting

Added by [DEANNA DEMOTT](#), last edited by [REGINA KEARNEY](#) on Aug 13, 2008 ([view change](#))

[Show page tree](#) →

[Add Labels](#)

Children (1) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

-  [FY 2008 Quarter 3](#)

[Add Comment](#)

OPEN (0) ☆

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10. Again, because this is a “limited access” area, an agency can only see its own link. Please select your agency and continue... [Note: Because the following example was done on an account with OMB-Access, it will display all agencies’ pages.]

The screenshot shows a web browser window with a navigation bar at the top. The page title is "FY 2008 Quarter 3". Below the title, there is a message: "Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Jun 19, 2008 (view change)". A red warning message states: "You should see one link with your Agency Name below. Do NOT attach documents to this page." Below this, there are links for "Show page tree" and "Add Labels". A section titled "Children (24)" is highlighted with a red box, containing a list of 24 agency links, each followed by "(Limited access)". The agencies listed are: DHS, DOC, DOD, DOE, DOI, DOJ, DOL, DOT, Ed, EPA, GSA, HHS, HUD, NASA, NRC, NSF, OPM, SBA, SSA, State, Treasury, USAID, USDA, and VA. At the bottom of the page, there is a link for "Add Comment".

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/GqBuC | Help | Search

Dashboard > Financial Management Community > ... > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Interim Reporting > FY 2008 Quarter 3

FY 2008 Quarter 3 Edit + Add (0) Settings

Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Jun 19, 2008 (view change) OPEN (0) ☆

You should see one link with your Agency Name below. Do NOT attach documents to this page.

[Show page tree](#) →

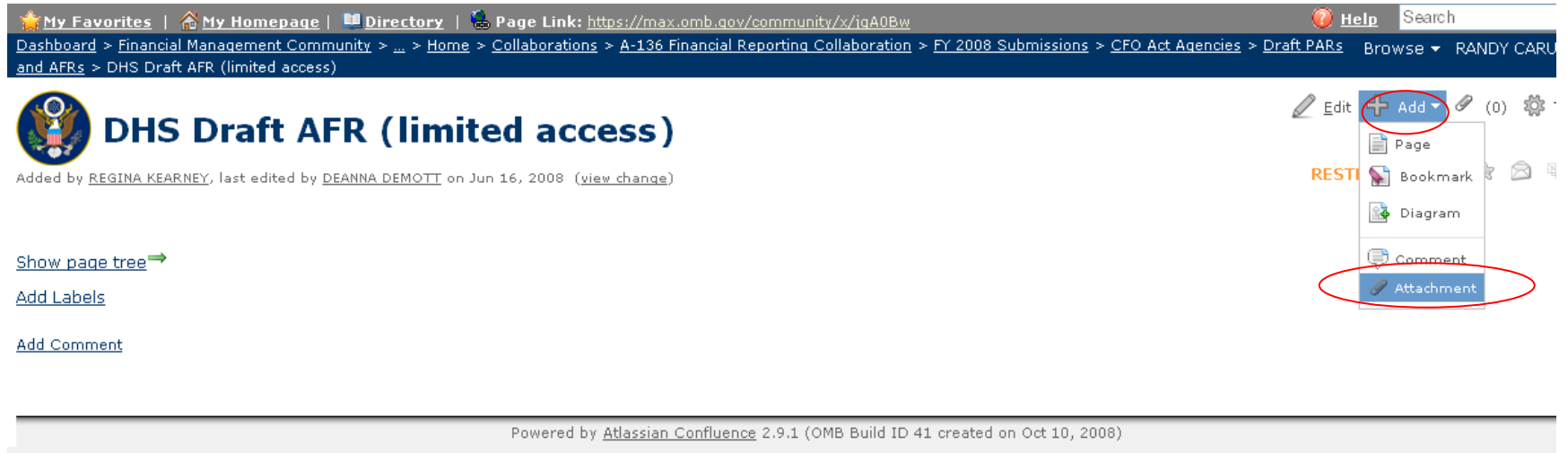
[Add Labels](#)

Children (24) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [DHS 2008 Q3 \(Limited access\)](#)
- [DOC 2008 Q3 \(Limited access\)](#)
- [DOD 2008 Q3 \(Limited access\)](#)
- [DOE 2008 Q3 \(Limited access\)](#)
- [DOI 2008 Q3 \(Limited access\)](#)
- [DOJ 2008 Q3 \(Limited access\)](#)
- [DOL 2008 Q3 \(Limited access\)](#)
- [DOT 2008 Q3 \(Limited access\)](#)
- [Ed 2008 Q3 \(Limited access\)](#)
- [EPA 2008 Q3 \(Limited access\)](#)
- [GSA 2008 Q3 \(Limited access\)](#)
- [HHS 2008 Q3 \(Limited access\)](#)
- [HUD 2008 Q3 \(Limited access\)](#)
- [NASA 2008 Q3 \(Limited access\)](#)
- [NRC 2008 Q3 \(Limited access\)](#)
- [NSF 2008 Q3 \(Limited access\)](#)
- [OPM 2008 Q3 \(Limited access\)](#)
- [SBA 2008 Q3 \(Limited access\)](#)
- [SSA 2008 Q3 \(Limited access\)](#)
- [State 2008 Q3 \(Limited access\)](#)
- [Treasury 2008 Q3 \(Limited access\)](#)
- [USAID 2008 Q3 \(Limited access\)](#)
- [USDA 2008 Q3 \(Limited access\)](#)
- [VA 2008 Q3 \(Limited access\)](#)

[Add Comment](#)

11. Place your mouse over the  Add  button and select  Attachment from the drop down menu. Follow the on screen dialog to “Browse...” for and “Attach...” your document.



The screenshot shows a web browser window displaying a Confluence page. The breadcrumb trail at the top reads: Dashboard > Financial Management Community > ... > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > Draft PARs and AFRs > DHS Draft AFR (limited access). The page title is "DHS Draft AFR (limited access)" with a logo on the left. Below the title, it says "Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Jun 16, 2008 (view change)". On the right side, there is a toolbar with several icons. The "Add" button (a plus sign) and the "Attachment" button (a paperclip icon) are circled in red. Other buttons in the toolbar include "Edit", "Page", "Bookmark", "Diagram", and "Comment". At the bottom of the page, there is a footer that says "Powered by Atlassian Confluence 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)".

12. To submit Statement of Budgetary Resources data click the **SBR Reconciliation** link. The agency link should appear.

My Favorites | My Homepage | Directory | Page Link: https://max.omb.gov/community/x/kABuC

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies

Help Search

Browse RANDY CARUSO

Edit Add (0) Toc

OPEN (0) ☆

CFO Act Agencies

Added by DEANNA DEMOTT, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change)

Click one of the links below to upload or review your agency's documents.

FY 2008 Year-End Reporting

PAR or AFR (Non-Pilot): [Draft](#) [Final](#)

APR/Citizens' Report: [Draft](#) [Final](#)

[Management Representation Letters](#)

[SBR Reconciliation](#)

Year-End Reporting Deadlines	Agencies Upload Drafts into MAX	OMB Upload Comments in MAX	Final Document Released
Agency Financial Report (AFR) or Performance and Accountability Report (PAR)	Monday November 3, 2008	NLT 6:00pm Tuesday November 7, 2008	Monday November 17, 2008
Budget, Performance and Financial Snapshot	Monday December 1, 2008	Friday December 5, 2008	Monday December 15, 2008
Annual Performance Report (APR)/ Citizens' Report	Friday January 2, 2009	Friday January 9, 2009	Thursday January 15, 2009

Interim Reporting

(Q3 2008)

[Show page tree](#) →

[Add Labels](#)

Children (7) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [Draft Citizens' Report and APR](#)
- [Draft PARs and AFRs](#)
- [Final Citizens' Report and APR](#)
- [Final PARs and AFRs](#)
- [Interim Reporting](#)
- [Management Representation Letter \(Limited Access\)](#)
- [SBR Reconciliation](#)

[Add Comment](#)

14. After the agency link is clicked, a blank table should appear. Select the “Edit” tab and input your data. Remember to save any data entered.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/1oGGC> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > CFO Act Agencies > SBR Reconciliation > EPA SBR Reconciliation

EPA SBR Reconciliation Edit + Add (0) ⚙️

Added by patrick_digregory@omb.eop.gov, last edited by [KAREN KIRKWOOD](#) on Aug 01, 2008 (view change) RESTRICTED (2) ☆ 📧

Department	Unaudited SBR Outlays (Line 19d)	SBR Distributed Offsetting Receipts (line 19c)	Unaudited SBR Outlays, Adjusted	SF 133 Net Outlays (Line 19)	Difference	Explanation	Budgetary Resources (SBR)	Budgetary Resources (133 Line 7)	Difference	Explanation	Obligations Incurred (SBR)	Obligations Incurred (133 Line 8)	Difference	Expla
Environmental Protection Agency														

[Show page tree](#) →

[Add Labels](#)

[Add Comment](#)

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b. Government Corporations and ATDA Agencies (The Accountability for Tax Dollars Act of 2002 stated other agencies not listed in the CFO Act of 1990 or Government Corporations Control Act will comply with the same requirements for financial reporting.)

1. Open the MAX Federal [Financial Management Community](#) page. Click “Collaborations.”

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/EQ4> Help Search

Dashboard > Financial Management Community > Home

Browse RANDY CARUSO

+ Add (0) Toc

OPEN (0) ☆

Home

Added by heather.l.mercadante@omb.eop.gov, last edited by LAUREN BLOOM on Oct 09, 2008 ([view change](#))

Welcome to the Financial Management Community!

[Calendar of Events](#)
[CFO Council](#)
[Charge Cards](#)
[Collaborations](#)
[Data Calls and Exercises](#)
[Documents & Guidance](#)
[FMLoB](#)
[Human Capital](#)
[Media on Financial Management](#)
[Performance Measures](#)
[Shared Information](#)

Financial Management Community-Highlights

- [IMPORTANT ANNOUNCEMENT FY 2008 Year-End Memo \(10.09.08\)](#)
- [IMPORTANT ANNOUNCEMENT Snapshot Guidance \(10.09.09\)](#)
- [IMPORTANT ANNOUNCEMENT FY 2008 Reporting Guidance\(8.29.08\)](#)
- [Click here to include your success story at CFOjobs.gov](#)
- [OMB M-08-18, Preventing Waste, Fraud, & Abuse in Use of Govt Charge Cards](#)
- [Financial Mgmt News from FSIO](#)

([Click here to Watch](#) the Financial Management Community Highlights page to get notified of significant activities.)

Other Community Highlights

[Acquisition Community](#)
[Budget Community](#)

Recently Updated

20081021 DoD 3rd qtr notes OMB Comments.pdf	by AUDREY DUCHESNE (an hour a
DoD Interim Statements Comment Sheet.doc	by AUDREY DUCHESNE (an hour a
Cover Sheets (Templates)	by DEANNA DEMOTT (11 hours a
Government Corporations and Accountability of Tax Dollars...	by DEANNA DEMOTT (12 hours a
Management Representation Letter (Limited Access)	by DEANNA DEMOTT (12 hours a
Final PARs and AFRs	by DEANNA DEMOTT (12 hours a
Final Citizens' Report and APR	by DEANNA DEMOTT (12 hours a
Draft Citizens' Report and APR	by DEANNA DEMOTT (13 hours a
Draft PARs and AFRs	by DEANNA DEMOTT (13 hours a
CFO Act Agencies	by DEANNA DEMOTT (14 hours a

2. To submit financial reports click “A-136 Financial Reporting Collaboration.”

The screenshot shows the Atlassian Confluence interface for the "Collaborations" page. At the top, there is a navigation bar with links for "My Favorites", "My Homepage", "Directory", and "Page Link: https://max.omb.gov/community/x/1Q4". A search bar and a user profile for "RANDY CARL" are also visible. The main content area features the "Collaborations" title with the OMB logo. Below the title, it states the page was added by heather.l.mercadante@omb.eop.gov and last edited by DEANNA DEMOTT on Oct 21, 2008. A list of OMB/Agency collaborations is provided, including "Financial Management Systems" and "Financial Reporting Requirements". The "A-136 Financial Reporting Collaboration" link is circled in red. Other links include "A-127 Update", "Show page tree", "Add Labels", and "Add Comment". A footer at the bottom indicates the page is powered by Atlassian Confluence 2.9.1.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/1Q4> Help Search

Dashboard > Financial Management Community > Home > Collaborations Browse RANDY CARL

Collaborations

Added by heather.l.mercadante@omb.eop.gov, last edited by [DEANNA DEMOTT](#) on Oct 21, 2008 ([view change](#)) OPEN (0)

Choose one of the following OMB/Agency collaborations

Financial Management Systems
[A-127 Update](#)

Financial Reporting Requirements
[A-136 Financial Reporting Collaboration](#)

[Show page tree](#) →

[Add Labels](#)

Children (2) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [A-127 Update](#)
- [A-136 Financial Reporting Collaboration](#)

[Add Comment](#)

Powered by [Atlassian Confluence 2.9.1](#) (OMB Build ID 41 created on Oct 10, 2008)

3. Click the current fiscal year for which the agency is reporting.

The screenshot shows a web browser window displaying the "A-136 Financial Reporting Collaboration" page. The browser's address bar shows the URL: <https://max.omb.gov/community/x/MoBkBg>. The page header includes navigation links: "My Favorites", "My Homepage", "Directory", and "Page Link". The breadcrumb trail is: "Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration". The page title is "A-136 Financial Reporting Collaboration" with a sub-header "Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change)". The main content area features a heading "A-136 Financial Reporting Collaboration" and a sub-heading "2008 Reporting Submissions" which is circled in red. Below this, it states "All agencies use this area to submit the 2008 financial reporting to OMB." and lists three items: "Q3 Interim Reporting (Due 8/21/08)", "Draft Year-end Report for OMB Review (Due 11/3/08)", and "FINAL Year-end Report to OMB (Due 11/17/08)". A note mentions that uploading in the Financial Management Community meets OMB submission requirements only. The page also includes a "Show page tree" link, "Add Labels", and a "Children (4)" section listing: "A-136 Subcommittee", "FY 2008 Submissions", "TESTING AREA FOR AGENCIES", and "Year-End Review Guidance (OMB Viewing Only)". The footer indicates the page is powered by Atlassian Confluence 2.9.1.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/MoBkBg> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration Browse RANDY CARUS

 **A-136 Financial Reporting Collaboration** Edit + Add (0) T

Added by REGINA KEARNEY, last edited by DEANNA DEMOTT on Oct 21, 2008 (view change) OPEN (0) ☆

This page is dedicated to the OMB/Agency collaborations regarding [Circular A-136: Financial Reporting Requirements](#).

You can "watch a page" to receive email alerts of any changes made by clicking on the envelope icon in the upper right. It is suggested that you watch your agency's individual pages.

2008 Reporting Submissions

All agencies use this area to submit the 2008 financial reporting to OMB.

- Q3 Interim Reporting (Due 8/21/08)
- Draft Year-end Report for OMB Review (Due 11/3/08)
- FINAL Year-end Report to OMB (Due 11/17/08)

Note: Uploading in the Financial Management Community meets the OMB submission requirements only. GAO, Treasury and Department of Justice submission processes still apply. See Circular A-136 for n details.

[A-136 Subcommittee](#)

[Show page tree](#) →

[Add Labels](#)

Children (4) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

-  [A-136 Subcommittee](#)
-  [FY 2008 Submissions](#)
-  [TESTING AREA FOR AGENCIES](#)
-  [Year-End Review Guidance \(OMB Viewing Only\)](#)

[Add Comment](#)

Powered by [Atlassian Confluence](#) 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)

4. Choose the “ATDA Agencies and Government Corporations” link.

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/LYA-C> Help Search

Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions Browse RANDY CARUS

FY 2008 Submissions

Added by [DEANNA DEMOTT](#), last edited by [DEANNA DEMOTT](#) on Oct 21, 2008 ([view change](#))

[Edit](#) [Add](#) (1) [Settings](#)

[OPEN \(0\)](#) [Star](#) [Email](#) [Print](#)

[CFO Act Agencies Submit Here](#)

Subject to the Chief Financial Officers Act of 1990: DHS, DOC, DOD, DOE, DOI, DOJ, DOL, DOT, Ed, EPA, GSA, HHS, HUD, NASA, NRC, NSF, OPM, SBA, SSA, State, Treasury, USAID, USDA, VA

[ATDA Agencies and Government Corporations Submit Here](#)

Subject to the Accountability of Tax Dollars Act of 2002: all other Executive agencies (31 USC 3515) listed on page 35 here: [OMB Bulletin 07-04: Audit Requirements for Federal Financial Statements](#)

[Show page tree](#) →

[Add Labels](#)

Children (3) [Hide Children](#) | [View in Hierarchy](#) | [Add Child Page](#)

- [CFO Act Agencies](#)
- [Cover Sheets \(Templates\)](#)
- [Government Corporations and Accountability of Tax Dollars Act Agencies \(a.k.a. "Small Agencies"\)](#)

[Add Comment](#)

5. Once the page loads, read the on screen instructions and select your agency to proceed...
[Note: The agency pages are restricted. Each agency should only see its own page AND a public PAR/AFR page.]
6. ATDA Agencies will upload all **draft financial reporting** documents on the “Attachments” tab of the **page with your agency’s name**. This includes the interim and year-end reporting.

The screenshot shows a web browser window displaying a Confluence page. The breadcrumb trail at the top reads: Dashboard > Financial Management Community > Home > Collaborations > A-136 Financial Reporting Collaboration > FY 2008 Submissions > Government Corporations and Accountability of Tax Dollars Act Agencies (a.k.a. "Small Agencies") > The John F. Kennedy Center for the Performing Arts (Draft and Interim Documents). The page title is "The John F. Kennedy Center for the Performing Arts (Draft and Interim Documents)". Below the title, it says "Added by DEANNA DEMOTT, last edited by DEANNA DEMOTT on Jul 01, 2008 (view change)". A red instruction reads: "Please upload your interim and year-end reporting here." There are links for "Show page tree", "Add Labels", and "Add Comment". On the right side, a menu is open with options: Page, Bookmark, Diagram, Comment, and Attachment. The "Add" button at the top of the menu and the "Attachment" option are circled in red. The footer of the page states "Powered by Atlassian Confluence 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)".

6. Once the “Attachment” page loads, Click the “Browse” button to search for the appropriate file, then hit the “Attach File” button to upload.

8. Note: All **Final PARs/AFRs** will be uploaded to the “*Final Year-end Documents for All ATDA Agencies and Gov't Corps” page because they are publicly available.

The screenshot shows a web browser window displaying a Confluence page. The browser's address bar shows the URL: <https://max.omb.gov/community/x/m4GGC>. The page title is ***Final Year-end Documents for All ATDA Agencies and Gov't Corps**. Below the title, it says "Added by DEANNA DEMOTT, last edited by DEANNA DEMOTT on Jul 16, 2008 (view change)". A red text block states: "Because all final PARs/AFRs are publicly available, there are no viewing restrictions on this page." Below this, there are links for "Show page tree", "Add Labels", and "Add Comment". On the right side, a sidebar menu is visible with options: "Page", "Bookmark", "Diagram", "Comment", and "Attachment". The "Attachment" option is highlighted in blue. The footer of the page reads: "Powered by Atlassian Confluence 2.9.1 (OMB Build ID 41 created on Oct 10, 2008)".