



FY 2009 User Guide to Financial Reporting in the MAX Federal Community

CFO Act Agencies Edition

Office of Management and Budget
Office of Federal Financial Management

Getting Started...

Sign up for access to the MAX Federal Community
<https://max.omb.gov/maxportal/registrationForm.do>

- ✓ Begin at the Financial Management Homepage

<https://max.omb.gov/community/x/EQ4>

- ✓ Click the link...
“2009 Agency Financial Reporting”

Home - Financial Management Community - MAX Federal Community - Microsoft Internet Explorer

Address: <https://max.omb.gov/community/display/Finance/Home>

Page Link: <https://max.omb.gov/community/x/EQ4>

Home

Added by heather.L.marcadante@omb.eop.gov, last edited by LAUREN_HOSHIBATA on Dec 19, 2008 (view change)

Page Tree

- 2009 Agency Financial Reporting
- 2009 Agency Financial Reporting by Report Type (OMB)
- Calendar of Events
- CFO Council
- Charge Cards
- Collaborations
- Data Calls and Exercises
- Documents and Guidance
- Financial Management Community
- Highlights
- Financial Management Line of Business
- Financial Management Reporting

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

Recently Updated

- Home by LAUREN_HOSHIBATA (less than a minute ago)
- 2009 Agency Financial Reporting by DEANNA DEMOTT (5 minutes ago)
- SSA Comments on Revision to OMB A-123 Appendix B.doc by Christopher Long (an hour ago)
- Financial Management Reporting by LAUREN_HOSHIBATA (18 hours ago)
- Re: OMB Circular A-123 Appendix B by Juankee Calhoun (18 Dec)
- DOL Citizens Report draft.doc by MICHAEL LAZZERI (18 Dec)
- Re: Charge Cards by VINA EVANS (18 Dec)
- Re: Charge Cards by SUZANNE HONEYCUTT (17 Dec)
- Re: Charge Cards by GREGORY PLASTERS (17 Dec)
- Re: Charge Cards by Jean Carter (17 Dec)

2009 Agency Financial Reporting
Click here to find the agency submission pages

Financial Management Community-Highlights

- IMPORTANT ANNOUNCEMENT Guidance on FY 2009 Quarterly Reporting (12.12.2008)
- IMPORTANT ANNOUNCEMENT FY 2008 PAR PRESS RELEASE (11.19.2008)
- IMPORTANT ANNOUNCEMENT Updated User Guide for Financial Management Reporting via MAX Federal Community (10.27.08)
- 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

Step 1: Click Your Agency's Seal...

This guide uses the Department of Energy as an example

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/s/5AD1DQ> Help Search

Dashboard > Financial Management Community > Home > 2009 Agency Financial Reporting Browse RANDY CAR

2009 Agency Financial Reporting

Added by [RANDY_CARUSO](#), last edited by [RANDY_CARUSO](#) on Dec 11, 2008 (view change)

Edit Add (31) OPEN (0)

Accountability of Tax Dollars Act Agencies & Government Corporations

Click on the banner below to access the 2009 financial reporting submission pages (draft & interim and Final Year-end).



CFO Agencies

Click on your agency's seal to access the upload locations for the 2009 financial reporting documents.



Step 2: Select the type of document you are ready to upload...

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/6QDIDQ> Help Search

Dashboard > Financial Management Community > Home > 2009 Agency Financial Reporting > 2009 DOE Browse RANDY CARUSO

2009 DOE

Added by RANDY CARUSO, last edited by RANDY CARUSO on Dec 11, 2008 (view change) OPEN (0)

Note: only the Final PAR/AFR and Final Citizens' Report are unrestricted pages. All others are restricted to your agency's viewing only.

Draft & Interim Documents (Viewing Restricted to Agency & OMB ONLY)

- Draft PAR**
- [Draft Citizens Report](#)
- [Management Representation Letter](#)
- [Statement of Budgetary Resources](#)
- [Interim Reporting](#)

Final Documents (Unrestricted Viewing)

- [Final PAR](#)
- [Final Citizens Report](#)

[Add Comment](#)

[Add Labels](#)

[Show page tree](#) →

! Reminder !
Watch your agency's draft pages for email alerts by clicking the "envelope" icon. This is how you will be alerted that OMB has posted comments or edits to your documents.

Step 3: Place cursor over Add and select Attachment



The screenshot shows a web application interface. 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/6wDIDQ'. Below this is a breadcrumb trail: 'Dashboard > Financial Management Community > Home > 2009 Agency Financial Reporting > 2009 DOE Draft PAR'. The main content area features a document titled '2009 DOE Draft PAR' with a red star icon next to it. Below the title, it says 'Added by RANDY CARUSO, last edited by RANDY CARUSO on Dec 11, 2008 (view change)'. A text box below the title contains the message: 'There are currently no attachments on this page.' To the right of the document, there is a toolbar with an 'Edit' icon and an 'Add' dropdown menu. The 'Add' menu is open, showing options: 'Page', 'Bookmark', 'Diagram', 'Comment', and 'Attachment'. The 'Attachment' option is highlighted with a blue background and a red star icon. Below the document, there are links for 'Add Comment', 'Labels Modify', '2009 doe draft par', and 'Show page tree'.

Step 4: “Browse...” for the file on your computer, add optional comment, and select “Attach File”

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/6wDIDQ> Help Search

Dashboard > Financial Management Community > Home > 2009 Agency Financial Reporting > 2009 DOE Draft PAR > Attachments Browse RANDY CARUSO

2009 DOE Draft PAR

There are currently no attachments on this page.

Attach File	Comment
1. <input type="text" value="C:\Documents and Settings\caruso_r\Desktop\DOE FY2009 Draft PAR"/> <input type="button" value="Browse..."/> You cannot attach files with names containing '+' or '&' characters.	<input type="text" value="DOE FY2009 Draft PAR"/> (Optional) Comment cannot be longer than 255 characters.

[Attach more files](#)

You should now see your file attached to the document page...

The screenshot shows a web application interface. At the top, there is a navigation bar with a breadcrumb trail: [Dashboard](#) > [Financial Management Community](#) > [Home](#) > [2009 Agency Financial Reporting](#) > **2009 DOE** > [2009 DOE Draft PAR](#). The '2009 DOE' link is highlighted with a red box. Below the navigation bar, there is a header section with the text '2009 DOE Draft PAR' and a search bar. The main content area displays a table with the following columns: Name, Size, Creator/Modifier, Date, and Comment. The table contains one row:

Name	Size	Creator/Modifier	Date	Comment
DOE FY2009 Draft PAR.pdf	10 kB	RANDY CARUSO	Dec 11, 2008	DOE FY2009 Draft PAR


 Below the table, there is an 'Attach File' section with a text input field and a 'Browse...' button. A note below the input field states: 'You cannot attach files with names containing '+' or '&' characters.' To the right of the 'Attach File' section is a 'Comment' section with a text input field and a note: 'Comment cannot be longer than 255 characters.' At the bottom of the 'Attach File' section, there is an 'Attach File(s)' button. A red arrow points from the '2009 DOE' breadcrumb link to the 'Attach File(s)' button.

...**Step 5**: Using the “breadcrumbs” trail in the toolbar, navigate back to your agency’s home page

Step 6: Select your next document type and repeat steps 3-5...

My Favorites | My Homepage | Directory | Page Link: <https://max.omb.gov/community/x/6QDIDQ> Help Search

Dashboard > Financial Management Community > Home > 2009 Agency Financial Reporting > 2009 DOE Browse RANDY CARUSO

 **2009 DOE** Edit + Add (0) Settings

Added by RANDY CARUSO, last edited by RANDY CARUSO on Dec 11, 2008 (view change) OPEN (0) Star Mail

Note: only the Final PAR/AFR and Final Citizens' Report are unrestricted pages. All others are restricted to your agency's viewing only.

[Draft PAR](#)

[Draft Citizens Report](#)

[Management Representation Letter](#)

[Statement of Budgetary Resources](#)

[Interim Reporting](#)

[Final PAR](#)

[Final Citizens Report](#)

**Draft & Interim Documents
(Viewing Restricted to Agency & OMB ONLY)**

**Final Documents
(Unrestricted Viewing)**

[Add Comment](#)

[Add Labels](#)

[Show page tree](#) →

! Reminders !

- There are only 2 documents to upload for each interim reporting deadline: the unaudited statements and the analysis. Please clearly identify Q1, Q2 or Q3 in the file names.
- Use the agency's full name in the year-end and final report file names to ensure they are clearly identified.