

# Automated *Appendix* Text

## Users' Guide



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# Introduction

The Automated Appendix Text system is part of the MAX A-11 Data Entry application (MAX). If you work with MAX to input budget authority and obligation data, you will have a head start on learning to use MAX to work with text. Text data, like other data, is stored in exercises and accounts, and you have to upload it to save it to the system.

To work with text, you will need to:

- Know how to use MAX
- Understand the Appendix text workflow
- Know how to edit your data
- Know how to print your data

It would also be helpful to:

- Know how to troubleshoot your data
- Know how to use the miscellaneous features

This guide will cover all of these topics.

# How to Use MAX

## First Steps

To work with the Appendix Text system, you will need:

- A MAX ID and password
- The MAX software

If you work at OMB, you already have these things. Skip to the next page. Otherwise ...

### MAX ID and password

To register for a MAX ID, follow this link:

<https://max.omb.gov/maxportal/registrationForm.do>

Make sure to check the box next to 'MAX A-11 Text Data' under 'Please check the application(s) needed' towards the bottom of the registration form.

If you already have a MAX ID but you have forgotten your password, you can get a new password here:

<https://max.omb.gov/maxportal/pub/recoverypswd.do>

### MAX software

You can download the software from the MAX homepage:

<https://max.omb.gov/maxportal/>

From the homepage, follow the link under 'MAX A-11'. You will need your ID and password.

## Downloading an Account

Open the application and click on the OMB Host menu. Click on Connect. Enter your user name (your email address) and password. [OMB users can skip this step; click Download instead.]

Click on the OMB Host menu again and choose Download. OK the pop-up window. You will then see a window that looks like the one below, except you should see the name of your agency in the Agency box on the left.

For training purposes, choose the current exercise that begins with **TA – Training Appropriations** for all appropriations language, including administrative and general provisions. For everything else, including text tables and bureau introductions, choose **TN – Training Narrative**. **When the database opens for the actual text for the Budget, the exercises will begin with PA and PN.**

Account Selection

Exercise: PA2011 Budget Appendix Appropriations Language

OMB Acct:

Treasury Acct:

Pub Chap:

Account Type

All

Appropriation

Receipt

Agency:

- 2008 Proposals
- 2009 Proposals
- Access Board
- Administrative Conference of the United States
- Advance Appropriations
- Advisory Council on Historic Preservation
- Affordable Housing Program
- African Development Foundation

Bureau:

< All accounts >

Selections:

Download if only one account is found

Ignore ALT versions

Auto Select

OK Add Clear Cancel

At this point, the account selection process is the same as it is for standard MAX: you can type in an OMB account number, a Treasury account number, or you can select the agency or bureau from the list.

You can get some interesting information by selecting an entire agency or bureau. On the list below, you'll see some accounts with letters as part of the account numbers. These are administrative and general provisions. We have created account 'numbers' for these so they can be stored and downloaded like other accounts. You'll also see, in the Version column, what stage each account is in. (Stages are described in the next section.) When the database opens with production data, most accounts will be in the Agency stage. If you scroll to the right, you'll see the name and phone number of the examiner associated with each account.

Choose an account to download. Agency folks should choose one in 'Agency' and OMB folks should choose one in 'RMO'.

OMB Acct	Treasu...	Tr...	Stage	Account Title	Last Download	Examiner	Examiner
005-03-0015	12-0015	0	Agency	Healthy Foods, Healthy Neighborhoods Initiati...	2010-09-2113.01.14 - Ewell,Rhodia	Chan,Benjami...	(202) 395-
005-03-9913	12-9913	0	Agency	Office of the Secretary (Office of the Secretary)	2010-09-2113.04.16 - Ewell,Rhodia	Johnson,Barb...	(202) 395-
005-05-0117	12-0117	0	Agency	Agriculture Buildings and Facilities and Rental ...	-	Johnson,Barb...	(202) 395-
005-05-0500	12-0500	0	Agency	Hazardous Materials Management (Departme...	-	Johnson,Barb...	(202) 395-
005-05-9915	12-9915	0	Agency	Departmental Administration (Departmental M...	-	Johnson,Barb...	(202) 395-
005-06-0150	12-0150	0	Agency	Office of Communications (Office of Communic...	-	Johnson,Barb...	(202) 395-
005-08-0900	12-0900	0	Agency	Office of the Inspector General (Office of the Ins...	-	Johnson,Barb...	(202) 395-
005-09-0123	12-0123	0	Agency	Office of the Chief Economist (Office of Chief Ec...	-	Johnson,Barb...	(202) 395-
005-10-2300	12-2300	0	Agency	Office of the General Counsel (Office of the Ge...	-	Johnson,Barb...	(202) 395-
005-11-0706	12-0706	0	Agency	National Appeals Division (National Appeals ...	-	Johnson,Barb...	(202) 395-
005-13-1701	12-1701	0	Agency	Economic Research Service (Economic Rese...	-	Engelberg,No...	(202) 395-
005-15-1801	12-1801	0	Agency	National Agricultural Statistics Service (Nation...	-	Engelberg,No...	(202) 395-
005-18-1400	12-1400	0	Agency	Salaries and Expenses (Agricultural Research...	-	Engelberg,No...	(202) 395-
005-18-1401	12-1401	0	Agency	Buildings and Facilities (Agricultural Research ...	-	Engelberg,No...	(202) 395-
005-20-0502	12-0502	0	Agency	Extension Activities (National Institute of Food ...	-	Engelberg,No...	(202) 395-

Select All    Previous Window    Download Dir    Download

Clear All    Total available = 77    Cancel

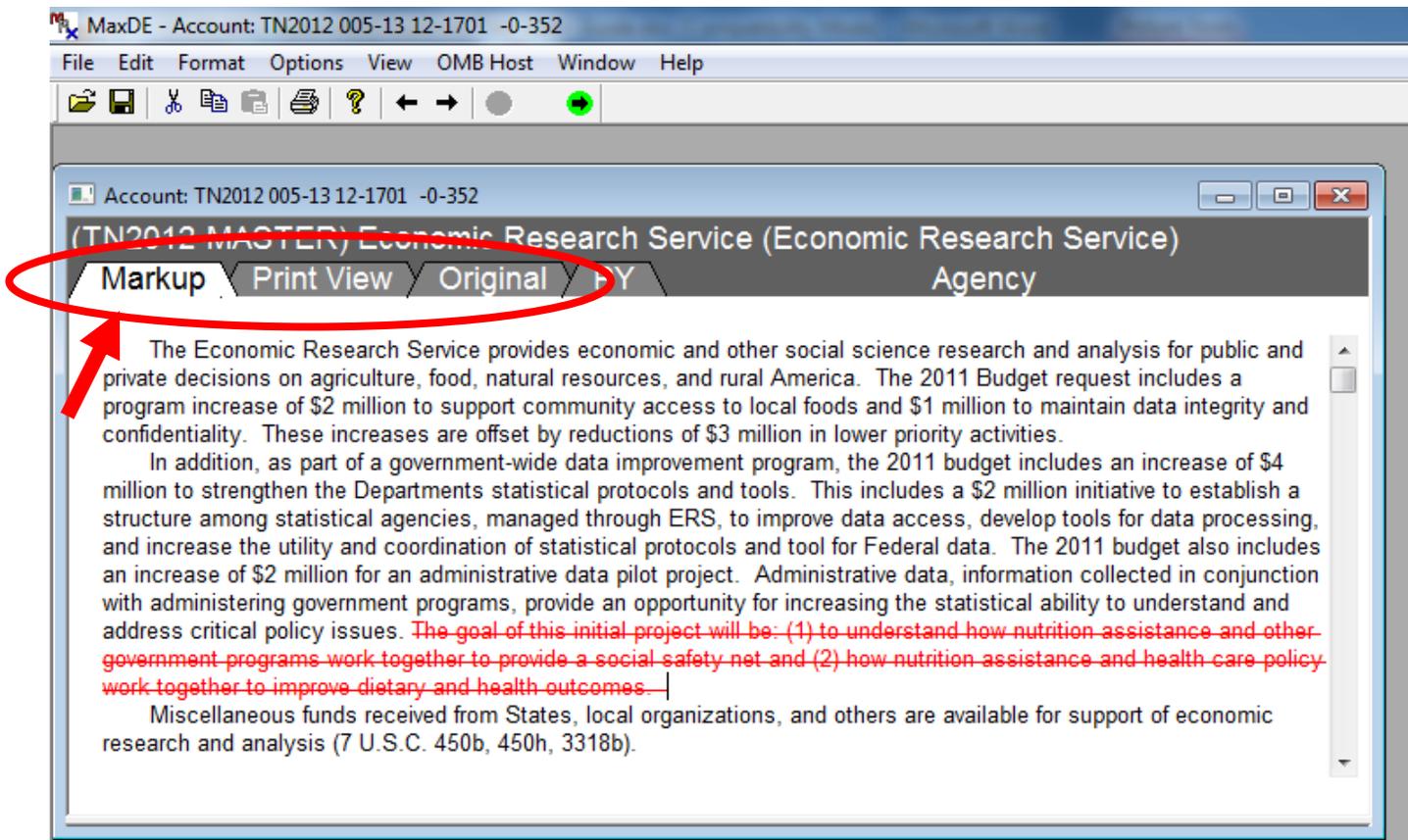
# The Workflow

## Tabs and Stages of Action

The first things to notice when you download an account are the tabs. When an account is in the first stage of action, there will be three tabs, as you can see below. (Appropriations language now includes a fourth tab called PY, which includes last year's proposed language.)

The Markup tab is where the agency folks actually do the work – inserting and deleting language. In this tab, text proposed for deletion appears in red with a line through it. Text proposed for addition appears in blue. OMB users do their work in the OMB tab.

The Print View tab shows you the language as it will print, with brackets and italics. The Original tab shows you the language as loaded from the appropriations bills.



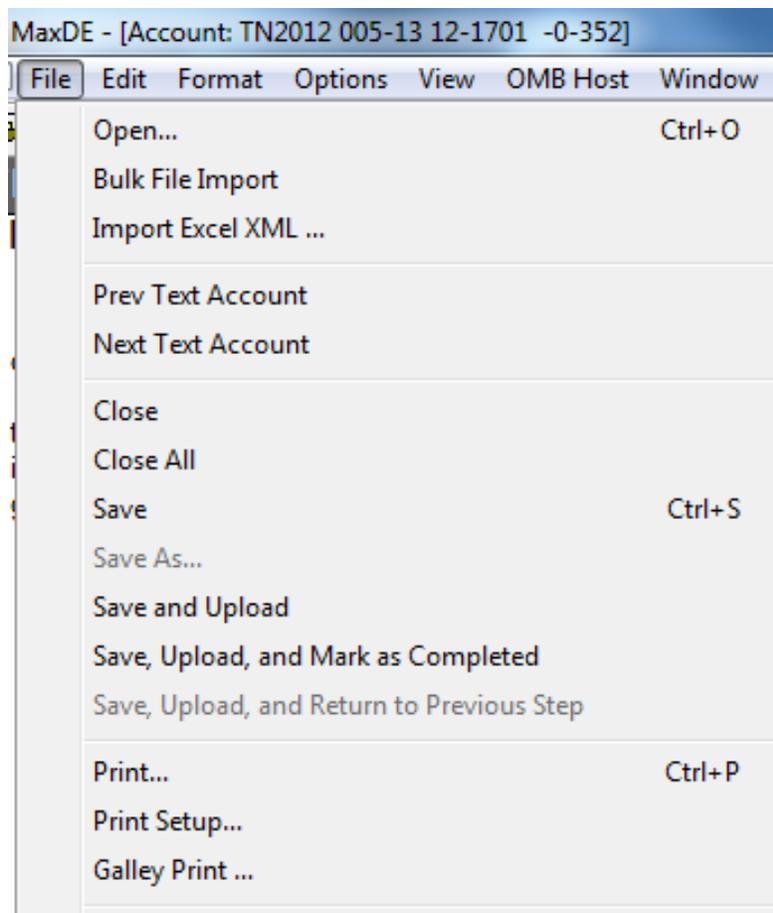
Just like in standard MAX, choosing Save from the File menu saves the data locally on your computer; Save and Upload stores the data on the system so other users can see it. To be sure that your edits are captured properly, you may (and should) Save and Upload as many times as you like.

## Tabs and Stages of Action - continued

When working with Appendix text, the stage of action determines who has access to edit an account at any time. Accounts begin at the Updates by Agency stage. (More on this soon.) When an account is at that stage, only agency users can edit the account; OMB users have read-only access.

When the agency user has finished editing the text – typically, for appropriations language, this means that the agency’s General Counsel has signed off on it – someone at the agency must mark the account as completed. This moves the account to the Updates by RMO stage and allows the OMB users to begin editing. (For some agencies, every user can upload text, but only certain central users have the ability mark an account as complete. At other agencies, all users can both upload and mark as completed.)

To mark an account as completed, click on the File menu, then choose Save, Upload, and Mark as Completed. To upload your data to the MAX database, but not mark as completed, click on the File menu, then choose Save and Upload.



## **Tabs and Stages of Action - continued**

### **Upload vs. Mark as Completed**

#### Save and Upload

You should upload your work frequently. Uploading saves your data in the MAX database, so you have a backup in case something terrible happens to your computer. If there is something wrong with your account, uploading will alert OMB's technical experts and allow them to fix the problem. Uploading will also allow other users at your agency to see your uploaded text.

Uploading does not move an account to the next stage in the workflow, so you can upload as many times as you like.

#### Save, Upload, and Mark as Completed

You may mark an account as completed only one time for each stage in the workflow. If any user marks the account as completed, the account will move to the next stage and you will lose the ability to edit the account. Make sure all interested parties at your agency are finished before marking as completed!

You must mark an account as completed to move the account to the next stage in the workflow. If your examiner has given you a deadline for completing your text, she is expecting you to mark your accounts as completed by that date so she can begin to work on them. If you miss your deadline, OMB has the ability to move accounts to the next stage.

If you accidentally mark an account as completed, contact your examiner.

## Tabs and Stages of Action - continued

When an agency user marks an account as completed, the account moves to the next stage of action: Updates by RMO. When the RMO user downloads an account at this stage, she will see 4 tabs:

- The OMB tab is where the RMOs will make any additions or deletions, using the agency's version as the starting point. This tab is where all edits will be made for the rest of the process.
- The Print View tab shows the language as it will print, with brackets and italics.
- The Agency tab shows the agency's submission.
- The Original tab shows the language as loaded from the appropriations bills.
- The new PY tab show the language as proposed last year.



When the OMB general counsel (GC) marks the GC stage as complete, the agencies will have an opportunity to update the dollar amount of appropriations (more on that soon), then the RMOs will have a chance to update dollar amounts, and then BRD will sign off.

**Note for Agency users:** You will edit amounts during the Update amounts – Agency stage in the OMB tab.

## Tabs and Stages of Action - continued

The stages of action for appropriations language and narrative are slightly different; for appropriations language, agency users and then RMOs will get a chance to edit only dollar amounts after the Updates by RMO stage.

The stages of action are described below.

**Note:** Comments between OMB examiners and OMB general counsel are not viewable by agency users at any time.

### Appropriations

Step #	Step Name	Access		
		Agency	RMO	BRD
1)	Original	Read	Read	Read
2)	Agency	Write	Read	Read
3)	RMO	Read	Write	Write
4)	GC (OMB)	Read	Read	Read
5)	Amounts Agency	Write amounts	Read	Read
6)	Amounts RMO	Read	Write amounts	Write amounts
7)	Final	Read	Read	Write

### Narrative

Step #	Step Name	Access		
		Agency	RMO	BRD
1)	Original	Read	Read	Read
2)	Agency	Write	Read	Read
3)	RMO	Read	Write	Write
7)	Final	Read	Read	Write

# How to Edit Your Data

## Standard Appropriations Language

Note: For appropriations language you must follow all A-11 markup guidelines detailed in [Section 95](#) of Circular A-11. See also the additional guidance on Appendix Print Materials in BDR 10-08 of November 2, 2009, which can be found at: <https://max.omb.gov/community/x/jgNiFw>

- To propose a deletion, highlight the word/phrase to be deleted and click the delete button. The proposed deletion will appear in red. To undelete, highlight the word/phrase and press delete.
- To propose new language, type in the word/phrase. The proposed addition will appear on screen in blue. You should insert proposed additions after proposed deletions.
- To see how the language will print, click on the Print View tab at any time. Proposed deletions will be marked by brackets; proposed additions will be italicized.
  - The data you see in the Print View is based on what you have right at that moment on screen; it does not matter if you have saved it or not.
  - Sometimes the formatting on Print View will not be perfect. If you have a problem with that, you can always run a Galley Print or On-demand Print.
- To propose a new dollar amount, delete the original, then type a dollar sign followed by a number or series of numbers. For example: [\$10,000,000] \$6,000,000. You will be able to edit the number after the dollar sign during the Update Amounts stage. If you do not have final funding levels, use the following as a placeholder: \$0,000,000. Note: if you type \$xxx,xxx,xxx instead of a dollar sign followed by a number, you will not be able to delete the 'xxx,xxx,xxx' later in the process (so use \$0,000,000 instead).



## Standard Appropriations Language - continued

- There is no undo.
- Do not place inserts in the middle of words. For example, a misspelled word must be marked for deletion and followed by the insertion of the correct spelling.
- Be careful with spaces.
  - Space incorrectly marked: Every [good ]bird does fly.
  - Space correctly marked: Every [good] bird does fly.
- Do not cut and paste from Microsoft Word or other word processing software. Word uses hidden characters that the Appendix Text system may not be able to interpret.
- Do not type a square bracket in appropriations language; brackets will appear when you delete text.

# General Provisions

## Inserting/Adding Sections

The system will automatically re-number sections after a section is added or deleted. For example, to add a section at the end of 208:

Place your cursor after the citation.

Press the [Enter] key to obtain a carriage return:

(c) in subsection (b), by striking "June 30, 2010" and inserting "June 30, 2012".

Sec. 208. Notwithstanding any other provision of law, of amounts made available under section 2507 of the Farm Security and Rural Investment Act of 2002 (43 U.S.C. 2211 note; Public Law 107-171), the Secretary of the Interior acting through the Commissioner of Reclamation, shall allocate--

(1) \$300,000 to the Desert Research Institute for LIDAR acquisition data in the Walker River Basin, to supplement water rights research and data funded under section 208(a)(1) of the Energy and Water Development Appropriations Act, 2006 (Public Law 109-103; 119 Stat. 2268); and

(2) \$300,000 to the Director of the United States Fish and Wildlife Service to conduct a multiyear assessment of and monitoring of the ability of west central Nevada lakes to support migratory loons, and identification of wintering areas and annual range of loons using Walker Lake during migration.

(Energy and Water Development and Related Agencies Appropriations Act, 2009.)

For Help, press F1

F:\MAXA11\DATA\TA2011-010-SP- -BBBB-0-GENERAL PROVISIONS\_DEPARTME ONLINE PROD NUM

Type the first letter for your new added section. The system will automatically number the new sections.

Grande Valley, New Mexico.

Sec. 207. Section 208 of the Energy and Water Development and Related Agencies Appropriations Act, 2008 (Public Law 110-161; 121 Stat. 1953) is amended--

(1) in subsection (a)--

(A) in paragraph (2)(B), by inserting "", as determined by the nonprofit conservation organization" after "Lake"; and

(B) in paragraph (4), by striking "retirement of water rights" and all that follows through the semicolon at the end and inserting "retirement of water rights;"; and

(2) in subsection (b), by striking "June 30, 2010" and inserting "June 30, 2012".

Sec. 208. Notwithstanding any other provision of law, of amounts made available under section 2507 of the Farm Security and Rural Investment Act of 2002 (43 U.S.C. 2211 note; Public Law 107-171), the Secretary of the Interior acting through the Commissioner of Reclamation, shall allocate--

(1) \$300,000 to the Desert Research Institute for LIDAR acquisition data in the Walker River Basin, to supplement water rights research and data funded under section 208(a)(1) of the Energy and Water Development Appropriations Act, 2006 (Public Law 109-103; 119 Stat. 2268); and

(2) \$300,000 to the Director of the United States Fish and Wildlife Service to conduct a multiyear assessment of and monitoring of the ability of west central Nevada lakes to support migratory loons, and identification of wintering areas and annual range of loons using Walker Lake during migration.

Sec. 209. This is the beginning of a new section.

Sec. 210. This is a second new section.(Energy and Water Development and Related Agencies Appropriations Act, 2009.)

For Help, press F1

F:\MAXA11\DATA\TA2011-010-SP- -BBBB-0-GENERAL PROVISIONS\_DEPARTME ONLINE PROD NUM

In cases where the previous section ends with a subsection, hit backspace before beginning to type the language for the new proposed section.

# General Provisions - continued

## Inserting/Adding subsections

To add subsections, for example, at the end of section 302:

Go to the last line of section 302.

Press the [Enter] key to obtain a carriage return.

Press the tab key before you begin typing. When you begin typing, your text will be indented and preceded by: (a)

Subsequent subsections will be renumbered/relettered as appropriate.

MaxDE - [Account: PA2007 018-SP -AAAAA -0-999]

File Edit Options View OMB Host Window Help

(PA2007-MASTER) GENERAL PROVISIONS

Markup Print View Original Updates by - Agency

GENERAL PROVISIONS

Sec. 301. No funds appropriated in this Act may be used for the transportation of students or teachers (or for the purchase of equipment for such transportation) in order to overcome racial imbalance in any school or school system, or for the transportation of students or teachers (or for the purchase of equipment for such transportation) in order to carry out a plan of racial desegregation of any school or school system.

Sec. 302. None of the funds contained in this Act shall be used to require, directly or indirectly, the transportation of any student to a school other than the school which is nearest the student's home, except for a student requiring special education, to the school offering such special education, in order to comply with title VI of the Civil Rights Act of 1964. For the purpose of this section an indirect requirement of transportation of students includes the transportation of students to carry out a plan involving the reorganization of the grade structure of schools, the pairing of schools, or the clustering of schools, or any combination of grade restructuring, pairing or clustering. The prohibition described in this section does not include the establishment of magnet schools.

(a) This is a new subsection

(b) So is this

(1) Me too.

Sec. 303. No funds appropriated in this Act may be used to prevent the implementation of programs of voluntary prayer and meditation in the public schools.

(transfer of funds)

Sec. 304. Not to exceed 1 percent of any discretionary funds (pursuant to the Balanced Budget and Emergency Deficit Control Act of 1985, as amended) which are appropriated for the Department of Education in this Act may be transferred between appropriations, but no such appropriation shall be increased by more than 3 percent by any such transfer: *Provided*, That the Appropriations Committees of both Houses of Congress are notified at least 15 days in advance of any transfer.

Sec. 305. For an additional amount to carry out subpart 1 of part A of title IV of the Higher Education Act of 1965 for the purpose of eliminating the estimated accumulated shortfall of budget authority for such subpart, \$4,300,000,000, pursuant to section 303 of H. Con. Res. 95 (109th Congress), the concurrent resolution on the budget for fiscal year 2006.

Sec. 306. Subpart 12 of part D of title V of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 7265 et seq.) is amended--

(1) in section 5522(b) (20 U.S.C. 7265a(b)), by adding at the end the following:

“(4) To authorize and develop cultural and educational programs relating to any Federally recognized Indian tribe in Mississippi.”;

(2) in section 5523 (20 U.S.C. 7265b)--

“(B) The Mississippi Band of Choctaw Indians in Choctaw, Mississippi.”; and

(A) in subsection (a)--

(i) by redesignating paragraphs (6) through (8) as paragraphs (7) through (9) respectively; and

For Help, press F1 O:\MAX\APPS\DATA\PA2007-018-SP- -AAAAA-0-GENERAL PROVISIONS.mud ONLINE TEST NUM

## General Provisions - continued

### Deleting Sections/ Sub-Sections

If you need to delete a section or subsection, right-click in the section and choose 'Delete Paragraph'.

If you prefer, you may:

Highlight the text.

Select "Edit" from the Menu Bar

Click on "Delete Section"

You will be prompted "Are you sure you want to delete this section?"

Select or click "Yes"

The result will be all highlighted text converted to ~~RED-Strikeout~~!!! If you are deleting a section proposed for insertion (in blue type), it will just be removed.

**Note:** You cannot delete a section by highlighting it and pressing the Delete key.

**Note:** If you want to delete a section that contains subsections, right click on the word "Sec." at the beginning of the paragraph and choose "Delete Paragraph".

### Undeleting Sections/ Sub-Sections

If you need to undelete a section or subsection, right-click in the section and choose 'Undelete Section'.

If you prefer, you may:

Highlight the deleted Section.

Please note that only the deleted Section should be highlighted. Any additional paragraphs or text will result in the option to "Delete a Section"!!

Select "Edit" from the Menu Bar.

Click on "Undelete Section".

The text will be restored and numbered appropriately.

## Narrative

Editing narrative looks a lot like editing appropriations language; deletions appear on screen in red, additions appear in blue. Agency users edit in the Markup tab, OMB users in the OMB tab. The Original tab contains the original text as loaded, and the Print View shows how the language will print.

The most important difference is that, when printed, deleted text is removed instead of bracketed, and added text is not italicized.

Good things to remember:

- There is no undo. If something goes horribly wrong, you can always go back to the beginning by choosing the 'Copy Original to Markup' option from the Edit menu.
- Do not cut and paste from Microsoft Word or other word processing software. Word uses hidden characters that the Appendix Text system may not be able to interpret.
- Various formatting options, such as italics and indentation, are available under the Edit menu.
- There is no spell check in the system. To spell check, cut and paste your text into Microsoft Word or something similar, and spell check it there. Do not copy the text back from word into MAX! Any error you find in Word, you will fix separately in MAX.

## Narrative Tables

In narrative, you have the ability to insert a table (called a “text table”). To insert a table, make sure you’re in the tab in which you can make changes, place your cursor in the spot where you want your table to appear, then go to the Edit menu and choose Add table.



When you choose a table, count your line descriptions as one column. The wide tables have wider non-stub columns.

After you choose a table to insert, a grey code will appear in your narrative:

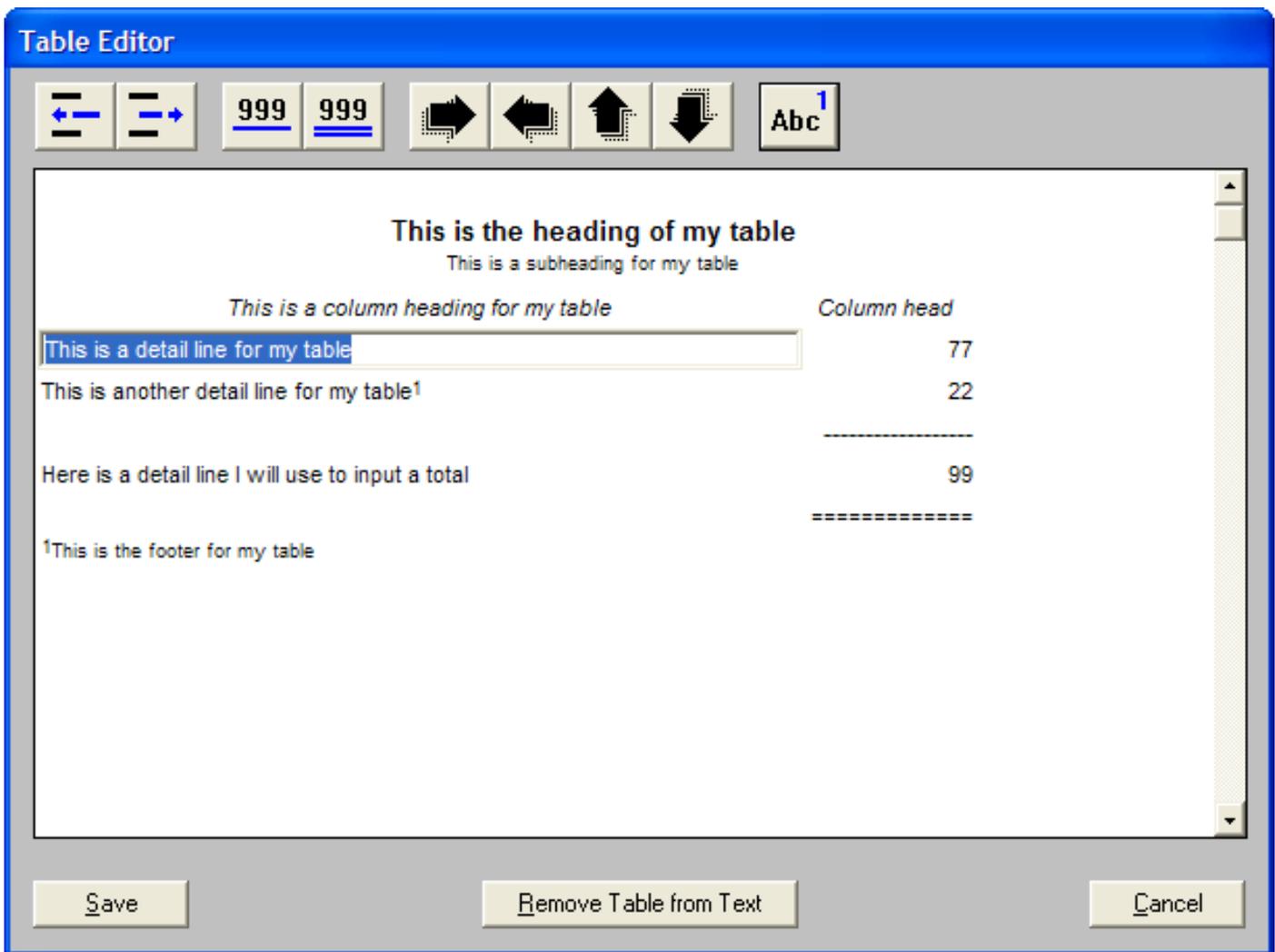
```
<Table Start> 4W  
<Table End>
```

Double click on this code to edit your table, or right click and choose ‘Edit Table’. At this point, a table editing application will appear.

**Note:** To edit a table that is already in your narrative, double click on it.

## Narrative Tables - continued

The table editor looks like this:



Use the buttons on the top to add or delete a row, insert lines or double lines, indent or remove indentation, move a row up or down, add or remove a column, or add a superscript.

**NOTE:** The table will not perform calculations. If you want a total, you will have to type it in.

**NOTE:** To see the table as it will look in the Appendix, you will need to run an on-demand print or a galley print. (We discuss print options in the next section.)

# How to Print Your Data

## Print Options

The appendix text system produces 3 print products:

1. Galley Print. You can run a galley print of the data on your PC at any time by choosing Galley Print from the File menu. This is a well-formatted print of a single account. For appropriations, text proposed for deletion is bracketed; proposed new text is italicized. For narrative, deleted text is removed. Agency users: to run a galley print, you must be connected.

Agency: Department of Education  
Bureau: Office of Postsecondary Education

Printed: 4:01 PM Friday, August 25  
For General Counsel Review

### HIGHER EDUCATION

For carrying out, to the extent not otherwise provided, titles [II,] III, IV, V, VI, and VII of the Higher Education Act of 1965 ("HEA"), as amended, [section 1543 of the Higher Education Amendments of 1992,] the Mutual Educational and Cultural Exchange Act of 1961, [title VIII of the Higher Education Amendments of 1998,] and section 117 of the Carl D. Perkins Vocational and Technical Education Act, [\$1,970,760,000] *\$1,108,711,000: Provided, That* [\$9,797,000] *\$9,699,000*, to remain available through September 30, [2007] *2008*, shall be available to fund fellowships for academic year [2007-2008] *2008-2009* under part A, subpart 1 of title VII of [said Act] *the HEA*, under the terms and conditions of part A, subpart

2. PC Print. You can run a PC Print of the data on your PC at any time by choosing Print from the File menu. The formatting on the PC print may not match the final Appendix as well as in the Galley Print – certain formatting does not work in the PC print. We have retained the PC print so agency users will be able to print when they are not connected.

### Land acquisition

For expenses necessary to carry out the Land and Water Conservation Fund Act of 1965, as amended (16 U.S.C. 4601-4 through 11), including administrative expenses, and for acquisition of land or waters, or interest therein, in accordance with statutory authority applicable to the United States Fish and Wildlife Service, \$28,408,000 to be derived from the Land and Water Conservation Fund and to remain available until expended: *Provided, That* none of the funds appropriated for specific land acquisition projects can be used to pay for any administrative overhead, planning or other management costs. (*Department of the Interior, Environment, and Related Agencies Appropriations Act, 2006.*)

## Print Options – continued

3. You can print an on-demand PDF at any time. This will give a good sense of what the chapter (or account, or bureau) will look like - both text and numerical data.

To run the on-demand PDF, choose OMB Reports from the OMB Host menu, then choose Order Report. In the pop-up box, in the top window, choose APPENDIX TEXT. In the bottom, choose Appendix Tables and Text Report. Enter TR2010 for the exercise for training (PB2010 for production data), then the agency or account you would like to see.

**Report Parameter Options**

Report Group: APPENDIX TEXT  
Report Title: Appendix Tables and Text Report

PB2008 EXERCISE (MS2006 | PB2006 | TR2006 | MS2005)

018 Starting Account (AGY|AGY-BU|AGY-BU-ACCT)

018 Ending Account (AGY|AGY-BU|AGY-BU-ACCT)

ALL Appendix Schedules (ALL OR N,P,...)

OK Cancel

The next window is the report status window, which you will have to refresh until it says the job status is 'Success'. Do not be alarmed if it says there are 999 pages! There aren't really.

## How to Troubleshoot Your Data

- If you cannot edit the account:
  - Are you on the correct tab? You cannot make edits to the Original or Print View tab; OMB users cannot edit text on tabs for the agency users, and vice versa.
  - At what stage of action is the account? If the account is at a stage during which you don't have write privileges, you will not be able to edit the account.
- If you are having a technical problem with the system, e.g., you receive an error message, send an email to the Appendix Text group.
  - Within OMB, the address is DL-OMB-Appendixtext
  - Outside of OMB, the address is [appendixtext@omb.eop.gov](mailto:appendixtext@omb.eop.gov)
- Have your OMB examiner contact the Appendix Text group if:
  - You think the wrong appropriations language or citation has been loaded into the system
- If you cannot access any appropriations language for your agency:
  - Has the appropriations bill been passed by the Congress and signed by the President? After the happens, OMB will need several days to load the new language into the system.
- If you don't have access to an account:
  - If you work at a large agency, an administrator at your security
  - If you work at a small agency, OMB may control your security. If so, send an email to [appendixtext@omb.eop.gov](mailto:appendixtext@omb.eop.gov). We will rely on the examiners to let us know who should have access.
- Training demonstrations are available at <https://max.omb.gov/maxportal/webPage/home/training>
  - Note that the address begins with [https](https://max.omb.gov/maxportal/webPage/home/training).

# Miscellaneous Features

## Text Account Management

This is a feature that is available only to the Appendix Text group, your BRD contact, and the 'Super RMO', who is the examiner responsible for marking the stage 'Final Update RMO/BRD' as complete.

This feature allows those people to move an account back to a previous stage or forward to a new stage, or even to skip a stage. For example, the Super RMO can move an account from Updates by Agency to Update by RMO. It also allows you to see at what stage an account is, or at what stage all the accounts in a bureau or agency are.

To use text account management, choose Text Account Status from the OMB Host menu, then choose an account, bureau, or agency.

Text Account Management - TN2007

Check one or both of the check boxes and then click the accounts you want to modify. If you select the first check box, you must also select a new stage and phase prior to selecting the accounts you want to modify.

Set the selected accounts to stage  phase

Mark the stage/phase as complete

OMB Acct	Treasury	Trans	Stage/Phase	New Stage/Phase	Account Title
010-04-1109	14-1109	0	Updates by - Agency		Management of lands and
010-04-1110	14-1110	0	Updates by - Agency		Construction
010-04-1116	14-1116	0	Updates by - Agency		Oregon and California gra
010-04-1125	14-1125	0	Updates by - Agency		Wildland fire management
010-04-4053	14-4053	0	Updates by - Agency		Helium fund
010-04-4525	14-4525	0	Updates by - Agency		Working capital fund
010-04-5017	14-5017	0	Updates by - Agency		Service charges, deposits
010-04-5033	14-5033	0	Updates by - Agency		Land acquisition
010-04-5132	14-5132	0	Updates by - Agency		Range improvements
010-04-9921	14-9921	0	Updates by - Agency		Miscellaneous permanent
010-04-9926	14-9926	0	Updates by - Agency		Permanent operating fund
010-04-9971	14-9971	0	Updates by - Agency		Miscellaneous trust funds
010-04-ww...	ww...	0	Updates by - Agency		Bureau of Land Managerr
010-06-1917	14-1917	0	Updates by - RMO		Royalty and offshore mine
010-06-4529	14-4529	0	Updates by - Agency		Interior Franchise Fund
010-06-5002	14-5002	0	Updates by - Agency		Mineral leasing and seces

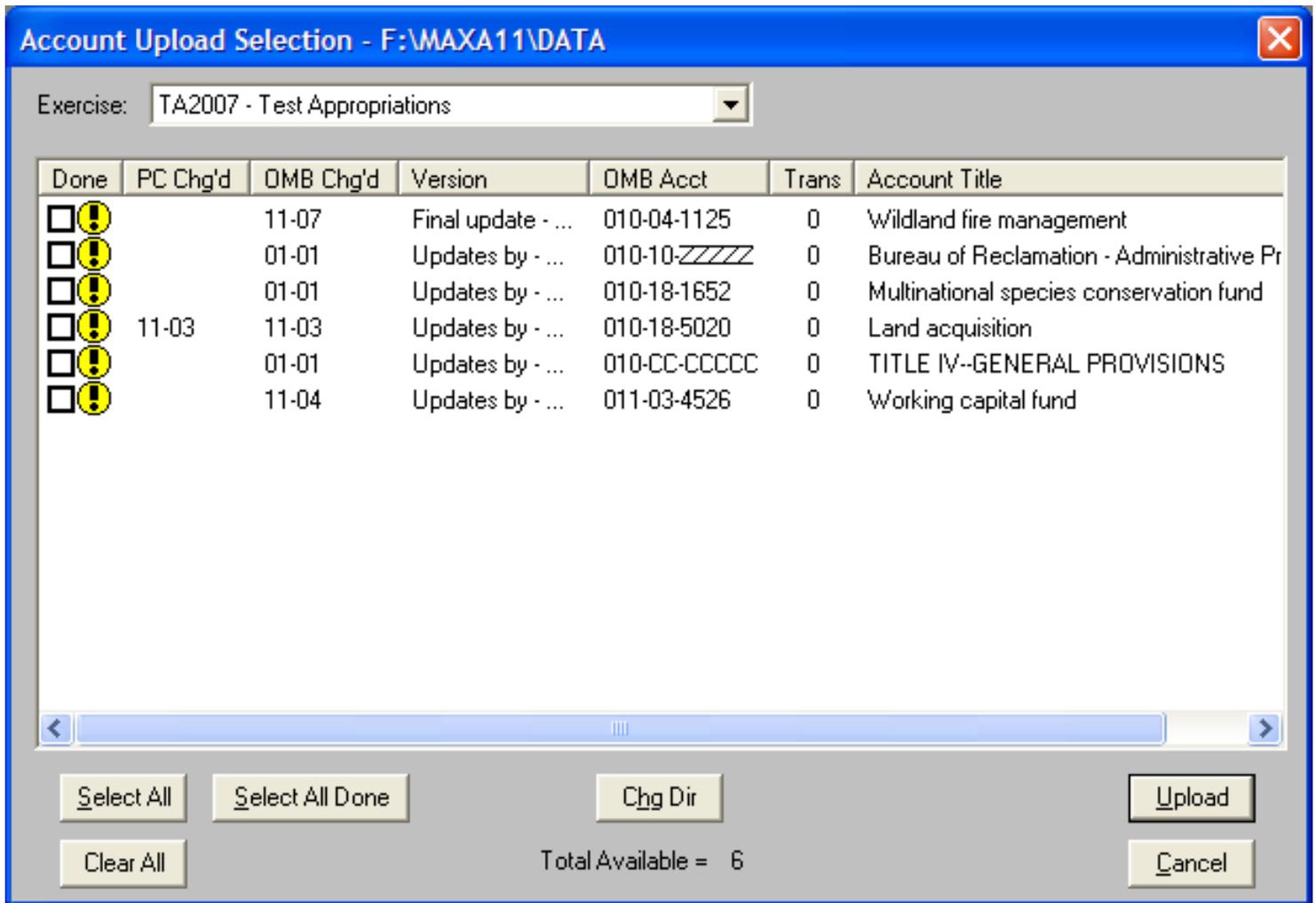
Set All Previous Window Update

Clear All Total available = 108 Cancel

To mark a stage as complete for several accounts, or to set several accounts to a new stage, first choose the appropriate options at the top, then click on the appropriate accounts to highlight them, and finally click on Update to perform the operation.

### ***Uploading several accounts***

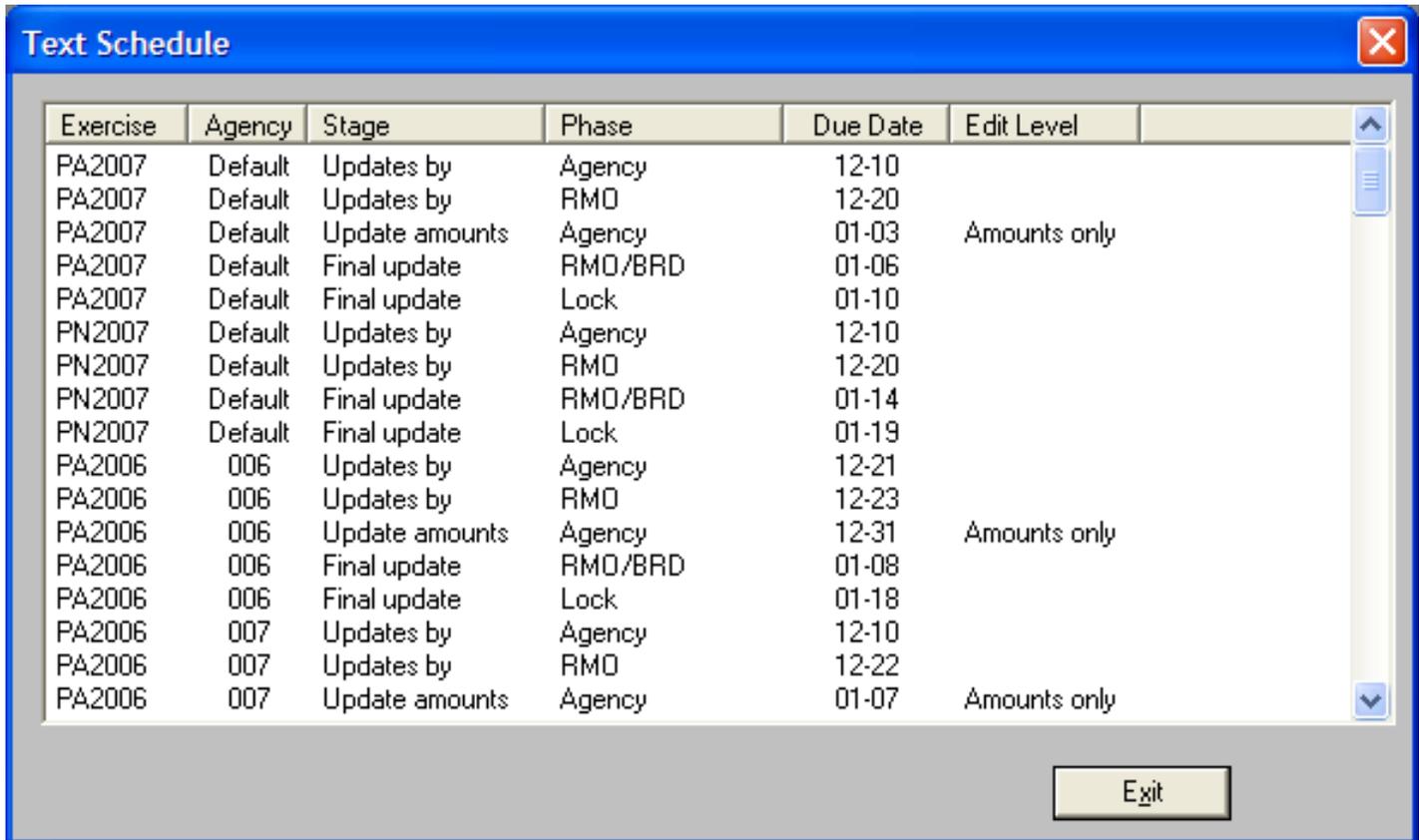
Any user can upload several accounts by using the 'Upload' option from the OMB Host menu. This will upload the latest information saved on your hard drive or network.



To simply upload, highlight the appropriate accounts and click on Upload. To upload and mark as complete, click the Done box.

## ***Text Schedule***

To see the due dates for each stage of action, choose Text schedule from the View menu. The dates that are in the system now are placeholders; you will be informed by your RMOs when due dates have been set.



The screenshot shows a window titled "Text Schedule" with a table of data. The table has columns for Exercise, Agency, Stage, Phase, Due Date, and Edit Level. The data is organized into groups for exercises PA2007, PN2007, PA2006, and PA2006. The "Edit Level" column contains "Amounts only" for certain rows. An "Exit" button is located at the bottom right of the window.

Exercise	Agency	Stage	Phase	Due Date	Edit Level
PA2007	Default	Updates by	Agency	12-10	
PA2007	Default	Updates by	RMO	12-20	
PA2007	Default	Update amounts	Agency	01-03	Amounts only
PA2007	Default	Final update	RMO/BRD	01-06	
PA2007	Default	Final update	Lock	01-10	
PN2007	Default	Updates by	Agency	12-10	
PN2007	Default	Updates by	RMO	12-20	
PN2007	Default	Final update	RMO/BRD	01-14	
PN2007	Default	Final update	Lock	01-19	
PA2006	006	Updates by	Agency	12-21	
PA2006	006	Updates by	RMO	12-23	
PA2006	006	Update amounts	Agency	12-31	Amounts only
PA2006	006	Final update	RMO/BRD	01-08	
PA2006	006	Final update	Lock	01-18	
PA2006	007	Updates by	Agency	12-10	
PA2006	007	Updates by	RMO	12-22	
PA2006	007	Update amounts	Agency	01-07	Amounts only

## ***Transmits and new accounts***

If there is an OMB account or transmittal code that does not appear on your download list in the appropriations or narrative exercise, download the account in the PB exercise, go to the transmittal code you're interested in (if there is more than one), then choose 'Add Appropriation Language To This Account' or 'Add Narrative To This Account' from the OMB Host menu.

## Formatting

Below is a galley print of a narrative account with some commonly used formatting features. The commands in the boxes are the options you would choose from the Edit menu to apply the appropriate formatting.

**Note:** If you want to return to the text as originally loaded, make sure that you're in the tab that allows editing, then choose Copy Original to Markup from the Edit menu. You will lose all your changes if you do this (but you can always get the back to your last saved version).

SUMMARY OF GRANTS TO STATES PROGRAM LEVEL

[In millions of dollars]

	2005-2006 academic year	2006-2007 academic year	2007-2008 academic year
Current Budget Authority .....	\$5,177	\$5,159	\$4,468
Advance appropriation .....	5,413	5,424	6,215
	-----	-----	-----
Total program level .....	10,590	10,583	10,683
	-----	-----	-----
Change in advance appropriation from the previous year .....		+11	+791

**New Header**

*Grants to States.*—Formula grants are provided to States to assist them in providing special education and related services to children with disabilities ages 3 through 21.

*Preschool grants.*—FORMULA GRANTS PROVIDE ADDITIONAL *funds to States to further assist* them in providing special education and related services to children with disabilities ages 3 through 5 served under the Grants to States program.

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Add table



Add subtitle



New Header

Increase  
para  
indent



Add small caps

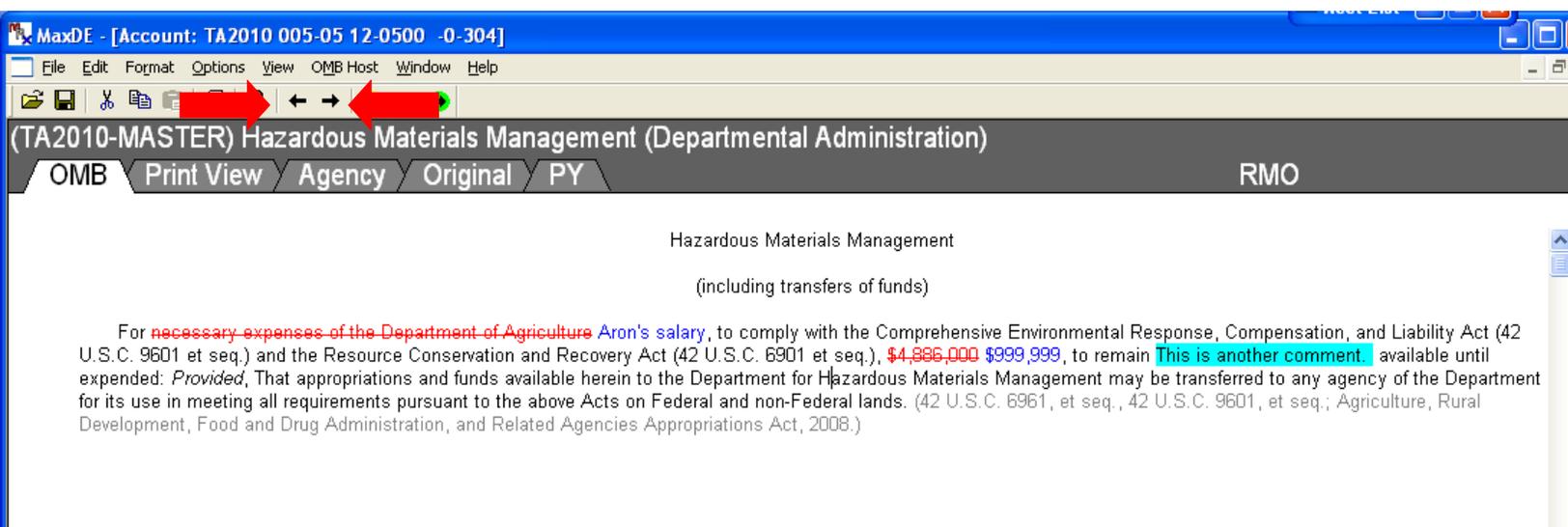


Add italics



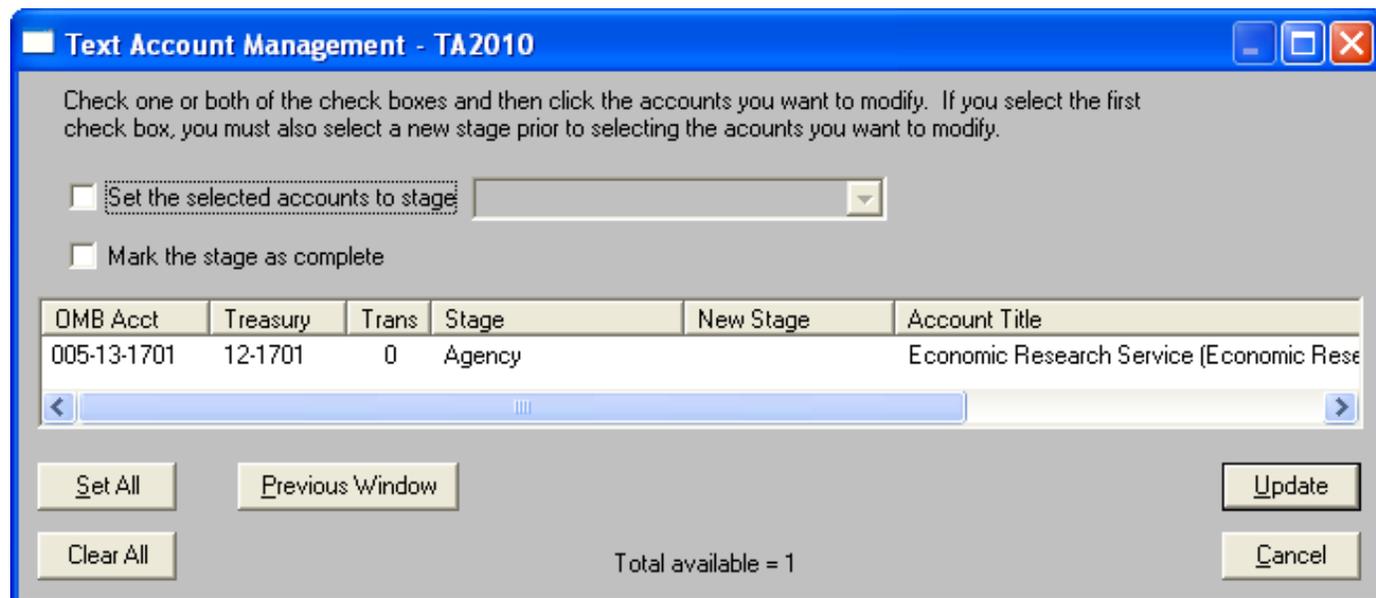
## How to move accounts forward or back in the workflow

If you are working on an account at a stage where you have access to edit, you can mark the account as completed using the 'Save, Upload, and Mark as Completed' option under the file menu; or just click on the green button up top. Similarly, examiners can now easily move an account back one stage to the agency by choosing the 'Save, Upload, and Return to Previous Step' option under the file menu, or with the yellow button up top.



You can also move an account forward from the agency stage if necessary. For example, for some of the small agencies, agency staff don't touch MAX, so examiners will need to move accounts to the RMO update stage before they can edit the account.

To do this, choose Text Account Status from the OMB Host menu, then choose the account, bureau, or agency you need to change. You will get a window that looks like this:



Check the box next to 'Set the selected accounts to stage', then choose the new stage you want to set the account to form the drop down. Then click on the account or accounts you want to move to highlight them, and click Update.

You will then be able to edit the account.