

<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b> <i>(See Instructions on reverse)</i>		<b>LEAVE BLANK (NARA use only)</b>	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR) WASHINGTON, DC 20408		JOB NUMBER <i>11-51-95-01</i>	DATE RECEIVED <i>1-20-1995</i>
1. FROM (Agency or establishment) EXECUTIVE OFFICE OF THE PRESIDENT		NOTIFICATION TO AGENCY  In accordance with the provisions of 44 U.S.C. 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	
2. MAJOR SUBDIVISION OFFICE OF ADMINISTRATION			
3. MINOR SUBDIVISION RECORDS MANAGEMENT OFFICE			
4. NAME OF PERSON WITH WHOM TO CONFER Nell Doering	5. TELEPHONE (202) 395-6471	DATE <i>6/21/95</i>	ARCHIVIST OF THE UNITED STATES <i>John W. Cal</i>

6. AGENCY CERTIFICATION  
I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal on the attached \_\_\_\_ page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies,

is not required;  is attached; or  has been requested.

DATE 1/7/95	SIGNATURE OF AGENCY REPRESENTATIVE <i>Nell Doering</i>	TITLE EOP RECORDS MANAGEMENT OFFICER
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7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
	<p>Executive Office of the President Office of Management and Budget Budget Review Budget Analysis and Systems Division/ Budget Review and Concepts Division</p> <p>Schedule for MAX (formerly Central Budget Management System (CBMS) and Budget Preparation System (BPS)) attached.</p>		

*Copies sent to agency, NNT, NSX, NIA 6/27/95*

**EXECUTIVE OFFICE OF THE PRESIDENT  
OFFICE OF MANAGEMENT AND BUDGET  
BUDGET REVIEW  
BUDGET ANALYSIS AND SYSTEMS DIVISION/  
BUDGET REVIEW AND CONCEPTS DIVISION**

**MAX (formerly Central Budget Management System(CBMS) and Budget Preparation System(BPS))**

MAX (formerly Central Budget Management System(CBMS) and Budget Preparation System(BPS)) supports the formulation, analysis, revision, and publication of the Budget of the United States Government.

**1. Budget Data Files - On-line Versions.**

On-line versions consist of agency data entry for the budget, mid-session, or major baseline collection; internal OMB data collection exercises; and ad hoc budget scenarios. These versions cover a wide range. They include experimental, training, preliminary, and erroneous data. At any one time there may be three hundred on-line versions of budget data and supporting text files. Some versions (a minority) document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget. When versions of budget data files document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget they are moved off-line and saved to tape ("archived" in OMB parlance). The archived versions of budget data have been scheduled for permanent retention. See Item 2. (below)

**DISPOSITION: TEMPORARY.**

- A.** Versions necessary to document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget: Delete on-line versions only after moving the versions off-line to tape. (see Item 2.)
- B.** Other on-line versions: Delete when no longer needed for current business.

**2. Budget Data Files - Archived Versions.**

Archived versions of budget data files include those files containing the budget data and any files containing supporting text data. Archived versions of budget data files are moved off-line and saved to tape because they document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget.

**DISPOSITION: PERMANENT.**

- A. Former Central Budget Management System (CBMS) Versions Archived 1982-1988: Transfer a copy of each archived version of budget data to the National Archives no later than October of 1996.
- B. Former Central Budget Management System (CBMS) Versions Archived 1989-1994: Transfer a copy of each archived version of budget data to the National Archives no later than eight years after the Administration to which the data pertain leaves office.
- C. MAX Versions Archived 1994- : Transfer a copy of each archived version of budget data to the National Archives no later than eight years after the Administration to which the data pertain leaves office.
- D. Presidential Budget (Formerly produced by the Budget Preparation System): Annually transfer a copy of the data file(s) used to produce the President's Budget as presented to Congress once the Budget has been published. NOTE: This data was previously produced by the Budget Preparation System. This item supersedes N1-51-93-001, Item 1.A.2.

NOTE: All transfers of data will be done in accordance with 36 CFR § 1228.

**3. MAX (formerly Central Budget Management System(CBMS) and Budget Preparation System(BPS)) Documentation.**

Documentation will include- but not be limited to- the user manuals, systems descriptions, data dictionaries, baseline requirements reports, report listings, the version archive book, the record layout/file structure and codes for each data file. When available, the documentation for each data file will include any additional information about the content of the data file and/or the context in which the data file was created.

**DISPOSITION: PERMANENT.**

Transfer a copy of the systems documentation to the National Archives no later than October of 1996 with the data files in 2.A.(above). Transfer any updates to the documentation with subsequent transfers of data files in 2.B. and 2.C. (above). Transfer a copy of the documentation for the President's Budget with the initial transfer of the data in 2.D. (above). Transfer any updates to this documentation with subsequent transfers of the President's Budget in 2.D. (above).  
NOTE: The documentation for the President's Budget was previously produced by the Budget Preparation System. This item supersedes N1-51-93-001, Item 1.B.2.

NOTE: All transfers of documentation will be done in accordance with 36 CFR § 1228.

**4. Auxiliary Data Files.**

Auxiliary data files include- but are not limited to- specification tables, lookup tables, packaged operations (e.g., Query, Sort, Field, Compose, Process, Report Template, etc.) and Partitioned Data Sets containing macros or programs for manipulating data. The auxiliary data files provide additional information necessary to understand how data were manipulated to produce a particular output. Some auxiliary data files provide the explanations for coded budget data.

**DISPOSITION: PERMANENT.**

Transfer a copy of the auxiliary data files that support the archived versions of the budget data files to the National Archives no later than October of 1996 with the data files in 2.A.(above). Thereafter, transfer new or updated auxiliary data files with subsequent transfers of budget data files in 2.B., 2.C. and 2.D. (above).

NOTE: All transfers of data will be done in accordance with 36 CFR § 1228.

**5. Auxiliary Data Files Documentation.**

Documentation will include- but not be limited to- the record layout/file structure and codes for each data file.

**DISPOSITION: PERMANENT.**

Transfer a copy of the documentation for the auxiliary data files listed in 4. (above) to the National Archives when the auxiliary data files are sent to the National Archives.

NOTE: All transfers of documentation will be done in accordance with 36 CFR § 1228.