



OMB MAX Schedule Submission and Credit Supplement Report Exercise

PROBLEM STATEMENT

RD-FO must submit budget data into OMB MAX at the budget account level, with separate Schedule X submissions for credit subsidy cost data that flows through the OMB Credit Supplement Report Exercise (CSR), and the manual nature of MAX schedule construction and the iterative back-and-forth on the CSR consumes substantial OBP analyst time.

WHY IT MATTERS

Late or error-prone MAX submissions delay the President's Budget lock-in, distort the OMB Credit Supplement, and undermine RD's credibility on the OMB exam side. Smooth MAX submission is a foundational OBP capability.

HSG'S APPROACH

1. Build a MAX schedule construction tool pulling cohort-level data from CSC, BICS, and Essbase and assembling MAX-ready Schedule X loads automatically.
2. Cross-validate Schedule X reestimate and interest-on-reestimate obligations against CSR control totals before submission.
3. Wrap MAX submission in a workflow that drafts the supporting narrative and citation library.
4. Maintain a MAX submission calendar tied to OMB-published due dates with milestone tracking.
5. Document submission lineage so every figure in MAX traces to a source extract and a calculation.

EXPECTED DELIVERABLES

- MAX schedule construction tool
- Schedule X / CSR cross-validation workbook
- MAX submission narrative auto-draft tool
- MAX submission calendar with milestone tracker
- Documented lineage from MAX figure to source extract

EXPECTED OUTCOME

Cut MAX schedule construction time by 50%, eliminate Schedule X / CSR reconciling differences before submission, and deliver every MAX submission on or before OMB due date.

ENGAGEMENT TEAM

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