

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

General Information

Agency or Establishment	Office of Management and Budget
Record/Scheduling Group	0051 - Records of the Office of Management and Budget
Records Schedule Applies To	Department-wide
Additional Agencies This Schedule Applies To	Office of Management and Budget
Schedule Subject	Records of the Budget Review Division (Series I)
Additional Schedule Information	BRD is an OMB-Wide Support Office that provides leadership and analysis for OMB to support the formulation, production, and enactment of the President's Budget. BRD analyzes trends in aggregate budget policy, provides strategic and technical support for budget decision-making and negotiations, and monitors and scores congressional action on appropriations and other spending legislation. BRD is also the hub for the Executive Branch's technical experts on budget concepts and related budget execution. BRD also maintains the budget database used to aggregate budget decisions, and other IT tools that support budget development and collaboration within OMB and with Federal agencies.
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	No - the records covered by this schedule do not implicate Tribal interests

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Item Count

Total number of disposition items: 11

Number of Temporary disposition items: 6

Number of Permanent disposition items: 5

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Outline of Records Schedule Items for DAA-0051-2022-0001

Item #	Title	Disposition
0001	Budget Procedures Memoranda (BPMs) and Budget Data Requests (BDRs)	Permanent
0002	Data Collection and Process Management Records	Temporary
0003	Budget Tracking Support Records	Temporary
0004	Content and Presentation Guidelines Records	Temporary
0005	Budget Formulation – Decision Records	Permanent
0006	Budget Appendix Production– Final Markups of Language and Narrative	Temporary
0007	Budget Appendix Production – System History Language and Narrative	Temporary
0008	Budget Rollout – Final Briefing Records	Permanent
0009	Appropriations and Congressional Budget Activities - Reports, Submissions, and Views	Permanent
0010	Appropriations Activities – Final Internal Scoring, Tracking, and Memorandums	Permanent
0011	Continuing Resolution Anomalies – Decision Records	Temporary

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Records Schedule Items

DAA-0051-2022-0001-0001		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Budget Procedures Memoranda (BPMs) and Budget Data Requests (BDRs)	
Item Description	<p>Records include final versions of BPMs and BDRs issued by the Budget Review Division (BRD), organized chronologically. BPMs and BDRs are internal guidance memos from BRD to OMB Resource Management Offices (RMOs) and other impacted offices.</p> <ul style="list-style-type: none"> • BPMs can be used to provide supplementary guidance to OMB staff regarding materials submitted by agencies in response to OMB Circulars or Bulletins. BPMs can also be used as standalone instructions for significant internal exercises. • BDRs are used to gather budget data and information from OMB staff, and include instructions and deadlines for submitting the data and information to BRD, or in some cases, another OMB Office. 	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Permanent	
Cutoff Instructions	Other: Cutoff at the end of a presidential administration	
Are there multiple instructions for this item?	No	
Transfer Instruction	Transfer to the National Archives 16 year(s) after cutoff	
ADDITIONAL INFORMATION		
Current Records Format	Textual data:600 MB	
Approximate first year of records covered by this authority	1997	
End year of records covered by this authority	Still being created	

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

Date span of the initial transfer	From: 01/01/1997 To: 01/20/2001
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0051-2022-0001-0002		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Data Collection and Process Management Records	
Item Description	<p>Records created by BRD or collected from other OMB Offices related to BRD’s responsibilities in consolidating information across OMB when BRD’s role is to assemble and review the submissions prior to circulating to policy officials for document review, further action, decision, or as information; and process management records associated with this role and other BRD functions. These records include but are not limited to the individual submissions from OMB offices; records communicating feedback on draft submissions; the draft text and tables that evolve to final documents; document review records; routine process documentation; centralized dashboards that include instructions, reference materials, status tracking, and budget season reports; bill monitoring records communicating deadlines and providing status updates; scheduling and logistical records pertaining to meetings associated with the process; migration instructions; user manuals; data collection/exercise level tool templates and other artifacts pertaining to data collections -- e.g., publishing scripts, permissions, organization, and workflow; ad hoc process guidance; process enhancements tracking; division and branch level annual strategic planning records; records pertaining to annual priority improvement projects, and non-final versions of documents to facilitate process knowledge management.</p> <p>Records also include agency submissions when housed in a BRD-controlled system (but only to the extent they pertain to BRD’s responsibilities in consolidating information across OMB as described above).</p> <p>Records also include similar records where BRD provides process assistance to another OMB Offices.</p>	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at transmittal of the Budget, start of Budget Year, or end of Budget Year as specified in agency file plan
Retention Period	Destroy 3 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0051-2022-0001-0003	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Budget Tracking Support Records
Item Description	<p>Staff-level records pertaining to tracking and analysis of discretionary, mandatory, and revenue proposals, and the overall fiscal path throughout budget formulation, congressional action, and current year tracking processes. These records include but are not limited to discretionary scorekeeping and bill scoring worksheets and other mechanisms to enter or upload data to budget databases; mandatory and revenue proposal and fiscal path tracking worksheets; discretionary topline tracking; staff tracking of deficit, outlays, and receipts, including estimates associated with authorizing and reconciliation legislation; back up calculations for discretionary guidance levels on budget targets; BRD staff summaries of scoring, topline, and technical issues on budget recommendations and options; BRD staff notes on Director's Review meetings and related emails/correspondence with RMO examiners to confirm RMO notes of action records and scorekeeping levels; post-review communications updating decisions; ad hoc non-decisional data collections; staff emails or other communications with the Congressional Budget Office on scoring differences; correspondence with RMO examiners to determine enacted legislation's Statutory PAYGO status and develop PAYGO</p>

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

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scores; draft summaries of staff-prepared budget work products; ad-hoc top line staff-level analysis; continuing resolution base calculation and scoring records; continuing resolution anomaly tracking; preliminary analysis/reads of appropriations and budget bills; staff analysis of Congressional Budget Office baseline estimates and re-estimates of the President’s Budget; staff analysis of budget resolutions and reconciliation bills; BRD comments, views, and input on legislation coordinated by OMB’s Legislative Reference Division, including associated Statements of Administration Policy and Enrolled Bill Memorandums; staff summaries of monthly treasury statements; and similar routine budget formulation, congressional action, and current year tracking and analysis records. Records also include non-final iterations (e.g., House only) of BRD scoring reports, Appropriations Tracking reports, and similar reports. The final versions of these reports are scheduled under “10 - Appropriations Activities – Final Scoring and Tracking Reports and Enrolled Bill Memorandums.”

Exclusions: Records of mandatory proposals exercises, discretionary levels, and bill tracking data residing in the budget and bill tracking databases (i.e., after upload or entered directly in these databases).

Is this item media neutral?	Yes
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Is this item a Big Bucket?	No
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SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS

Does this item supersede existing disposition authorities?	No
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Is this item a deviation from the GRS?	No
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DISPOSITION INSTRUCTION

Final Disposition	Temporary
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Cutoff Instructions	Other: Cutoff at transmittal of the Budget, start of Budget Year, or end of Budget Year as specified in agency file plan
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Retention Period	Destroy 3 year(s) after cutoff
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ADDITIONAL INFORMATION

Are any of the records covered by this item national security classified?	No
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GAO Approval Required	No
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National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
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DAA-0051-2022-0001-0004		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Content and Presentation Guidelines Records	
Item Description	Records pertaining to guidelines on routine scope and presentation issues in the Budget volumes and other public documents (e.g., presentation of the “current year” when Congress does not enact appropriations in time to reflect in the Budget; changes in chapters in a budget volume; guidelines on presentation of summary tables). Also includes BRD records pertaining to content included in the budget volumes that is coordinated by another OMB office. Records include but are not limited to emails, narrative summaries, tabular information, and mock-ups explaining the issue and options to present in the budget volumes or other public documents.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Cutoff Instructions	Other: Cutoff at end of Budget Year	
Retention Period	Destroy 10 year(s) after cutoff	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?	No	
GAO Approval Required	No	

DAA-0051-2022-0001-0005		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Budget Formulation – Decision Records	

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

Item Description	<p>These records include consolidated, final budget formulation documents presenting recommendations to OMB policy officials for decision or documenting final decisions on the budget, as well as any related decision memos decided by the OMB Director (or designee) and any final budget formulation guidance memos to agencies coordinated by BRD (e.g., spring planning guidance). BRD collects materials from OMB Offices, principally OMB’s Resource Management Offices, and consolidates materials for the Director’s Office. Includes documents pertaining to annual processes, including but not limited to final consolidated summary of agency budget submissions; final consolidated books on RMO recommendations on agency budget appeals and associated BRD summary tables; final wrap materials; final version of the discretionary scorekeeping reserve tracker; and final RMO recommendations on appropriations language issues. Also includes similar documents for non-recurring and situational budget formulation records where documents reflect final recommendations and decisions that are akin to the specifically delineated documents herein (e.g., rebaselining decisions due to late appropriations). This record schedule item also includes decision materials that only pertain to BRD decision issues (e.g., a director’s review book on budget process issues).</p>
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Other: Cutoff at the end of a presidential administration
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 16 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:800 MB
Approximate first year of records covered by this authority	2001

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2001 To: 01/20/2009
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0051-2022-0001-0006		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Budget Appendix Production– Final Markups of Language and Narrative	
Item Description	These records include final versions of the production records for appropriations language and narrative text that are published annually in the Appendix—Budget of the United States, one of several volumes that constitute the President's Budget. The records include the data systems/files of the final versions of each stage, including the agency original submission, the base language (usually the most recent enacted), the previous budget's final language, the final mark-up for the President's budget, and any corrections to the final language that are transmitted as a budget amendment following the transmittal of the Budget.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Cutoff Instructions	Other: cutoff at the start of the Budget Year	
Retention Period	Destroy 10 year(s) after cutoff	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?	No	
GAO Approval Required	No	

DAA-0051-2022-0001-0007	STATUS: Active
ITEM GENERAL INFORMATION	

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

Item Title	Budget Appendix Production – System History Language and Narrative
Item Description	These records include the systems history data records of the appropriations language and narrative text that are used to produce the annual Budget Appendix. It excludes the final markups described in disposition item 6.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at start of Budget Year
Retention Period	Destroy 3 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

DAA-0051-2022-0001-0008		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Budget Rollout – Final Briefing Records	
Item Description	These records include final versions of BRD-coordinated Budget and Mid-Session Review (MSR) rollout briefing materials to prepare the Director of OMB and other policy officials for Budget rollout, including hearings before the House and Senate pertaining to the Budget. These records include, but are not limited to, the consolidated final book prepared for initial rollout and hearings on the President’s Budget or MSR, as well as any additional books that are coordinated by BRD for subsequent hearings.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	

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Records Schedule Number: DAA-0051-2022-0001

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Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Other: Cutoff at the end of a presidential administration
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 16 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:300 MB
Approximate first year of records covered by this authority	2001
End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2001 To: 01/20/2009
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0051-2022-0001-0009	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Appropriations and Congressional Budget Activities - Reports, Submissions, and Views

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Status: APPROVED
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Item Description	Records include final versions of Statements of Administration Policy (SAP) and Presidential designation letters pertaining to appropriations bills (including but not limited to regular, continuing, and supplemental appropriations bills). These records also include final letters, reports, and budget and mid-session review rollout tables transmitted to, or required by, the Congress or congressional committees coordinated by BRD, including but not limited to conference and similar letters sharing views on appropriations bills; explanations of changes proposed for government-wide general provisions; appropriations summary tables; budget and midsession review rollout summary tables (aka briefing book); budget enforcement reports; Statutory PAYGO reports and scorecards; technical assistance identifying anomalies necessary for continuing resolutions (both appropriations and expiring authorization anomalies); and other BRD-coordinated reports specified in appropriations or budget committee bills (final reports only, when final reports encompass information included in prior periodic (e.g., monthly, quarterly) reporting or provide updated final amounts).
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Other: Cutoff at the end of a presidential administration
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 16 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:650 MB
Approximate first year of records covered by this authority	2001
End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2001 To: 01/20/2009

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Are any of the records covered by this item subject to a FOIA exemption?	No
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DAA-0051-2022-0001-0010	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Appropriations Activities – Final Internal Scoring, Tracking, and Memorandums
Item Description	Records include final versions of reports reflecting internal OMB scoring and analysis of congressional action compared to the President’s budget and Enrolled Bill Memorandums (EBM) pertaining to appropriations bills (including but not limited to regular, continuing, and supplemental appropriations bills). Records include but are not limited to final versions of BRD Scoring Reports, Appropriations Priorities Tracking, and EBMs.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Other: Cutoff at the end of a presidential administration
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 16 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:450 MB
Approximate first year of records covered by this authority	2001
End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2001 To: 01/20/2009
Are any of the records covered by this item subject to a FOIA exemption?	No

DAA-0051-2022-0001-0011	STATUS: Active
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National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0051-2022-0001

Status: APPROVED
Date Approved: 06/22/2024

ITEM GENERAL INFORMATION	
Item Title	Continuing Resolution Anomalies – Decision Records
Item Description	Decision records created and received pertaining to considering agency requests for continuing resolution (CR) anomalies that would be needed if the congress were to enact one or more continuing resolutions. The final records associated with this decision records are technical assistance that OMB transmits to appropriations committee staff and this final transmittal is scheduled under “9 - Appropriations and Congressional Budget Activities - Reports, Submissions, and Views.” Records include but are not limited to: decision documents detailing recommendations on each anomaly; summary decision documents and memos; final versions of decision trackers; and records pertaining to decisions on agency appeals.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the Budget Year
Retention Period	Destroy 10 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

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Signatory Information

Action	User	Date
Accept	Data Migration	09/12/2022
Approve	Colleen Shogan	06/22/2024