



Session Listing

General Session: Impact of COVID-19 on F&A and Foreign Influence (1.1)

Presented by Jim Luther, Associated Vice President, Research Costing Compliance & Federal Reimbursement, Duke University; Sara Bible, Senior Consultant, MAXIMUS and Former Senior Associate Dean for Finance & Administration and Associate Vice Provost for Research, Stanford University; Jeff Silber, Sr. Director, Sponsored Financial Services, Cornell University; and David Schultz, AVP, Research Administration, Rensselaer Polytechnic Institute

CRIS Lab – Open Lab (2.6)

Open Lab is the opportunity for users to ask questions about any of the features, upcoming releases and provide recommendations for future enhancements. Users may also bring up questions concerning their own models, or files, to discuss a particular issue.

Course Level: All
Track: CRIS
Course Method: Demonstration
Course Prerequisites: None
Speaker: Inna Gvozdeva, Director, MAXIMUS

Allocations & Statistics - Part 1: Overview & CRIS Defined Stats (3.1)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics. We will give an overview of the allocation table and how it is linked to the statistics. This session show examples for creating allocations and statistics using CRIS-defined statistics.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Prerequisites: None
Speakers: Mira Levine, Senior Manager, MAXIMUS and Mitzi Singleton, Senior Manager, MAXIMUS



Maximus 33rd Annual
Higher Education Virtual Meeting
 September 22–24, 2020

How to Use your Previous CRIS Model for your New Base Year (3.2)

If you are still using and updating a CRIS model that was originally created many rate cycles ago, this is the session for you! We'll go over the benefits of starting with a new model, discuss tips on what to bring over from your previous model and discuss how to streamline your F&A Proposal process.

Course Level: All
 Track: CRIS
 Course Method: Presentation
 Course Prerequisites: None
 Speakers: Chuck Wuensch, Senior Manager, MAXIMUS and Janusz Stepień, Manager, MAXIMUS

Service Centers - Avoiding the Pitfalls and Dealing with the COVID-19 Impact (3.3)

This session will include presentation of past audit findings and how to avoid them at your university. We will discuss the impact COVID-19 has had on service center operations and ways to deal with those impacts.

Course Level: All
 Track: Costing
 Course Method: Presentation
 Course Prerequisites: None
 Speakers: Caroline Beeman, Director, MAXIMUS, Jim Childers, Consultant, MAXIMUS; Sara Bible, Senior Consultant, MAXIMUS and Former Senior Associate Dean for Finance & Administration and Associate Vice Provost for Research, Stanford University; and Sharon Barrett, AVP Finance & Operations, Radford University

CRIS Lab - Useful Tools and Helpful Hints (3.4)

In this session, we will demonstrate how to perform unique functions in CRIS. This lab will showcase the underutilized features and helpful tools.

Course Level: All
 Track: CRIS
 Course Method: Demonstration
 Course Prerequisites: Familiarity with CRIS
 Speaker: Anne Feuerborn, Director, MAXIMUS



Best Practices for Working Remotely (3.5)

This session, facilitated by a member of the Maximus Center for Employee Development team, provides a review of best practices for a more successful and enjoyable experience when working remotely. Topics discussed include balancing structure and flexibility in your day, staying connected, and prioritizing self-care.

Course Level: All
Track: WFH
Course Method: Presentation
Course Prerequisites: None
Speaker: Maximus Center for Employee Development (CED)

Allocations & Statistics - Part 2: User Defined Stats (4.1)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics and is a companion to Part 1 of 3. This session will have examples for creating allocations and statistics for User-defined statistics.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Prerequisites: Familiarity with CRIS, understand what it means to allocate cost pools, recommend attending Part 1, but not required.
Speakers: Mitzi Singleton, Senior Manager, MAXIMUS and Chuck Wuensch, Senior Manager, MAXIMUS

Discussion Group: Service Centers - Avoiding the Pitfalls and Dealing with the COVID-19 Impact (4.2)

This session will allow the university participants to discuss the unique circumstances at their university, and address concerns with service center rates and operations during disruptions of COVID-19.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None, recommend attending 3.3 Service Centers - Avoiding the Pitfalls and Dealing with the COVID-19 Impact
Speakers: Caroline Beeman, Director, MAXIMUS, Jim Childers, Consultant, MAXIMUS; and Sharon Barrett, AVP Finance & Operations, Radford University



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Mitigate False Claims Act Risks Attached to COVID-19 Funding (4.3)

This session will provide insight as to how to mitigate False Claims Act Risk during a pandemic, including:

- Overview of the False Claims Act
- Increased FCA Risk during the pandemic
- COVID-19 funding and associated FCA risk
- Mitigating risk of whistleblowers
- Handling self-disclosures

Course Level: All
 Track: Costing
 Course Method: Presentation
 Course Prerequisites: None
 Speaker: Derek Adams, Partner, Potomac Law Group, PLLC

CRIS Lab - Reporting in CRIS (4.4)

This session will be a structured step-by-step introduction to reporting topics, including standard, federal and custom reports as well as report batch process.

Course Level: All
 Track: CRIS
 Course Method: Demonstration
 Course Prerequisites: Familiarity with CRIS
 Speaker: Inna Gvozdeva, Director, MAXIMUS

Conducting Space Surveys under COVID-19 Conditions (5.1)

In this session we will discuss how space survey can be conducted given COVID-19 conditions, including training, implementation and quality review.

Course Level: All
 Track: Costing
 Course Method: Presentation
 Course Prerequisites: None
 CPE Credit: 1.0
 Speakers: Inna Gvozdeva, Director, MAXIMUS; Chuck Wuensch, Senior Manager, MAXIMUS; and Kim Hoebel, Assistant Comptroller, Purdue University



Selected Federal Reports & their Use in Diagnostics of the F&A Proposal (5.2)

This session will showcase how to use selected Federal Reports as a diagnostic tool for the F&A Proposal.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speakers: Janusz Stepień, Manager, MAXIMUS; Steve Bradley, Senior Consultant, MAXIMUS; and Brenda Harrell, Assistant Controller, University of Florida

Rate Extensions and OMB Memo M-20-17 (COVID-19 administrative relief) (5.3)

Since the inception of COVID-19, there has been much uncertainty in how to move forward with calculating the university's F&A rate. We will discuss the strategic points related to: getting an F&A deadline extension, the considerations to evaluate for deciding whether to change the base year, asking for a longer term extension, and how to account for space in this unusual circumstance, in which folks may be working remotely or labs are less populated than usual.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speakers: Harold Horton, Senior Vice President, MAXIMUS; Anne Feuerborn, Director, MAXIMUS; Jim Nolan, VP, Federal Costing Concepts and Alison Monroe, Financial Mgmt Analyst, Duke University

CRIS Lab - Fundamentals of CRIS (5.4)

This session will be a structured, step-by-step demonstration by an instructor. This lab session will cover the fundamentals of CRIS operations, including navigation, working with data, creating and reviewing rules, importing and exporting data.

Course Level: All
Track: CRIS
Course Method: Demonstration
Course Prerequisites: None
Speaker: Caroline Beeman, Director, MAXIMUS



Best Practices for Working Remotely (5.5)

This session, facilitated by a member of the Maximus Center for Employee Development team, provides a review of best practices for a more successful and enjoyable experience when working remotely. Topics discussed include balancing structure and flexibility in your day, staying connected, and prioritizing self-care.

Course Level: All
Track: WFH
Course Method: Presentation
Course Prerequisites: None
Speaker: Maximus Center for Employee Development (CED)

Planning and Managing the F&A Process (6.1)

This session will review ideas to organize the many tasks that are a part of the proposal process.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speaker: Doyle Smith, Senior Consultant, MAXIMUS; Evonne Pedawi, Director of Grant & Contract Admin., Michigan State University; and Jill Mortali, Director of Sponsored Programs, Dartmouth College

Discussion Group: Rate Extensions & the OMB Memo M-20-17 (6.2)

This session will allow the university participants to discuss the unique circumstances at their university, and address concerns with calculating the F&A rate during disruptions of COVID-19. We will discuss how to strategize decision making for the base years and deadlines.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None, recommend attending 5.3 Rate Extensions & the OMB Memo M-20-17
Speakers: Harold Horton, Senior Vice President, MAXIMUS; Anne Feuerborn, Director, MAXIMUS; Jim Nolan, VP, Federal Costing Concepts and Alison Monroe, Financial Mgmt Analyst, Duke University



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Allocations & Statistics Part 3 - Troubleshooting Allocations (6.3)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics and is a companion to Parts 1 and 2. This session will have examples for troubleshooting allocations and statistics.

Course Level: All
 Track: CRIS
 Course Method: Presentation
 Course Prerequisites: Familiarity with CRIS allocations process, recommend attending parts 1 and 2
 Speakers: Caroline Beeman, Director, MAXIMUS and Mitzi Singleton, Senior Manager, MAXIMUS

CRIS Lab - How to Assess COVID-19 Impact Using Trend (6.4)

This session will cover the use of Trend feature and how it can be used to conduct various analyses, specifically assessing the impact of COVID-19.

Course Level: All
 Track: CRIS
 Course Method: Demonstration
 Course Prerequisites: Familiarity with CRIS
 Speaker: Inna Gvozdeva, Director, MAXIMUS

Managing Your Time as a Remote Worker (6.5)

This interactive session, facilitated by a member of the Maximus Center for Employee Development team, is designed to help you think through ways to increase your productivity as a remote worker through managing your energy and time more efficiently.

Course Level: All
 Track: WFH
 Course Method: Presentation
 Course Prerequisites: None
 Speaker: Maximus Center for Employee Development (CED)



Discussion Group: Conducting Space Surveys under COVID-19 Conditions (7.1)

This session will allow university participants to discuss how space survey can be conducted given COVID-19 conditions, including training, implementation and quality review.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None, recommend attending 5.1 Conducting Space Surveys under COVID-19 Conditions
Speakers: Inna Gvozdeva, Director, MAXIMUS; Chuck Wuensch, Senior Manager, MAXIMUS; and Kim Hoebel, Assistant Comptroller, Purdue University

Managing Your Time as a Remote Worker (7.2)

This interactive session, facilitated by a member of the Maximus Center for Employee Development team, is designed to help you think through ways to increase your productivity as a remote worker through managing your energy and time more efficiently.

Course Level: All
Track: WFH
Course Method: Presentation
Course Prerequisites: None
Speaker: Maximus Center for Employee Development (CED)

Final F&A Proposal Submission & Review (7.3)

In this session we will explain the diagnostic review step used by MAXIMUS. The diagnostic tests include data consistency tests using CRIS reports to identify "red flags" and ensure all proposal components have been included.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speakers: Mira Levine, Senior Manager, MAXIMUS and Doyle Smith, Senior Consultant, MAXIMUS



CRIS Lab – Allocations (7.4)

In this session, we will demonstrate navigating through allocation data and reports in CRIS, using the Stepdown Schedule, Review System Messages, Allocation, and Allocation Detail. We will look at identifying and cleaning up stepdown issues, as well as verifying the allocation results.

Course Level: All
Track: CRIS
Course Method: Demonstration
Course Prerequisites: Familiarity with CRIS
Speaker: Anne Feuerborn, Director, MAXIMUS

Fringe Benefit Rates - Panel (8.1)

This session will include a panel of presenters who will discuss topics related to Fringe Benefit Rates. We will also discuss the how the provisions of the OMB Memo 20-17 related to extension of indirect costs might also apply to the fringe benefit rates covered under those indirect cost rate agreements.

Course Level: All
Track: Costing
Course Method: Presentation & Discussion
Course Prerequisites: None
Speakers: Mira Levine, Senior Manager, MAXIMUS; Jim Childers, Consultant, MAXIMUS; Janet Ianni, Director, Office of Research & Sponsored Programs, University of Denver; and Cheresa Boston, Director of Sponsored Research, University of North Florida

Maximizing O&M Components in a COVID-19 Environment (8.2)

In this session, we will discuss the O&M component of the Facilities and Administrative rate calculation in a COVID-19 environment. This session will present how institutions can utilize best practices to mitigate risk and optimize recovery. Topics will also include compliance, common issues and challenges, and opportunities to maximize the O&M components.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speakers: Mitzi Singleton, Senior Manager, MAXIMUS; Doyle Smith, Consultant, MAXIMUS; Sara Bible, Senior Consultant, MAXIMUS and Former Senior Associate Dean for Finance & Administration and Associate Vice Provost for Research, Stanford University; and Shelly Benson, Senior Director, University of Illinois



WebSpace Forum (8.3)

In this session, we will review the functionality available in the latest version of WebSpace as well as begin the discussion of potential improvements for future releases of WebSpace.

Course Level: All
Track: WebSpace
Course Method: Presentation & Discussion
Course Prerequisites: None
Speaker: Inna Gvozdeva, Director, MAXIMUS

CRIS Lab - Space Processing and Analytics (8.4)

In this session, we will demonstrate how to use CRIS reports and views to look at space data from various angles. We will address how to detect issues in the processing of space data and verify the university's space is appropriately representing the university.

Course Level: All
Track: CRIS
Course Method: Demonstration
Course Prerequisites: Familiarity with CRIS
Speaker: Anne Feuerborn, Director, MAXIMUS

Facing Virtual Team Challenges (8.5)

This session, facilitated by a member of the Maximus Center for Employee Development team, will discuss the common challenges that virtual teams often face and provide tips for how to overcome them. Challenges discussed include communicating effectively in a remote environment, maintaining team cohesiveness, and keeping employees engaged.

Course Level: All
Track: WFH
Course Method: Presentation
Course Prerequisites: None
Speaker: Maximus Center for Employee Development (CED)



How WebSpace Can Help in a COVID-19 Environment (9.1)

In this session, we will provide an in-depth demonstration of WebSpace and discuss how it can be used in a COVID-19 environment.

Course Level: All
Track: WebSpace
Course Method: Presentation
Course Prerequisites: None
Speakers: Inna Gvozdeva, Director, MAXIMUS; Janusz Stepien, Manager, MAXIMUS; and Kim Hoebel, Assistant Comptroller, Purdue University

F&A/CRIS/Fringe Benefits Considerations for new ERP Implementations (9.2)

This session will include what items to consider in the areas of F&A, CRIS processing and Fringe Benefit set up in a new ERP system that should be reviewed during the planning phase.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
Speakers: Mira Levine, Senior Manager, MAXIMUS; Doyle Smith, Senior Consultant, MAXIMUS; Kimberly Croft, Senior Direction, Research Administration, Penn State University; and Jennifer Rowles, Department Manager, Cost Analysis, Penn State University

Discussion Group: Maximizing O&M Components in a COVID-19 environment (9.3)

Discussion group to discuss maximizing O&M Components in a COVID-19 environment. Participants will be asked to share O&M trends from their respective University.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None, recommend attending 8.2 Maximizing O&M Components in a COVID-19 environment
Speakers: Caroline Beeman, Director, MAXIMUS; Mitzi Singleton, Senior Manager, MAXIMUS; Sara Bible, Senior Consultant, MAXIMUS and Former Senior Associate Dean for Finance & Administration and Associate Vice Provost for Research, Stanford University; and Shelly Benson, Senior Director, University of Illinois



CRIS Lab - Importing of Data (9.4)

This lab will demonstrate features for importing data into CRIS, including appending records, updating records, and performing a file analysis before importing data.

Course Level: All
Track: CRIS
Course Method: Demonstration
Course Prerequisites: Familiarity with CRIS
Speaker: Chuck Wuensch, Senior Manager, MAXIMUS

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Track: WFH
Course Method: Presentation
Course Prerequisites: None
Speaker: Maximus Center for Employee Development (CED)