

AGENDA

(All times are listed in Eastern Time)

Tuesday, September 15, 2026

11:00 AM - 11:15 AM

Welcome

11:15 AM - 12:30 PM

General Session

Presenters: TBA

12:30 PM - 12:45 PM

Break

12:45 PM - 2:00 PM

Concurrent Sessions

- 2.1 ONR Round Table
- 2.2 CAS Round Table
- 2.3 CAS Round Table
- 2.4 CRIS: Open Lab

2:00 PM - 2:30 PM

Break

2:30 PM - 3:45 PM

Concurrent Sessions

- 3.1 Presenting a New Innovative CRIS Module

3:45 PM - 4:00 PM

Break

4:00 PM - 4:30 PM

Breakout Room Topics

Legal Update
Federal Updates
SCOT

Wednesday, September 16, 2026

11:00 AM - 12:15 PM

Concurrent Sessions

- 4.1 CRIS Lab - Fundamentals of CRIS
- 4.2 Service Centers: Strategic Conversations That Drive Results
- 4.3 Maximizing Facilities

12:15 PM - 12:45 PM

Break

12:45 PM - 2:00 PM

Concurrent Sessions

- 5.1 CRIS Lab - Importing Data
- 5.2 Webspaces Forum
- 5.3 Rate Impact - Sub Awards, Equipment Threshold, and SRL

2:00 PM - 2:30 PM

Break

2:30 PM - 3:45 PM

Concurrent Sessions

- 6.1 CRIS Lab - Space Processing and Analytics
- 6.2 Fringe Benefit Rates - Current Issues and solutions
- 6.3 Navigating ICAS with Confidence: An Introductory Session

3:45 PM - 4:00 PM

Break

4:00 PM - 4:30 PM

Breakout Room Topics

Maximizing Facilities
Service Centers
Experiences in iCAS portal
CRIS

Thursday, September 17, 2026

11:00 AM - 12:15 PM

Concurrent Sessions

- 7.1 CRIS Lab - Allocations
- 7.2 Using CRIS with the FAIR Model
- 7.3 Space Planning

12:15 PM - 12:45 PM

Break

12:45 PM - 2:00 PM

Concurrent Sessions

- 8.1 CRIS Lab - CRIS Standard Reports
- 8.2 Using WebSpace for FAIR Model Space Assessments
- 8.3 Talking to Management

2:00 PM - 2:30 PM

Break

2:30 PM - 3:45 PM

Concurrent Sessions

- 9.1 CRIS Lab - Trend and Custom Reporting
- 9.2 Designing Defensible Internal Overhead Rates Using CRIS

3:45 PM - 4:00 PM

Break

4:00 PM - 4:30 PM

Breakout Room Topics

FAIR Model

Talking to Management

Internal Overhead (Auxiliary and other) Rates

CRIS

CONCURRENT SESSION DESCRIPTIONS

Tuesday, September 15, 2026

12:45 PM - 2:00 PM

2.1 - ONR Round Table

This discussions will cover the results of the past year negotiations and the personalities, approaches and preferences of each agency.

Track: Round Table

Course Level: All

Course Method: Discussion

Course Prerequisites: None

CPE Credit: 1

Speakers: Jen Rowles, Senior Manager-Maximus; Josh Tivis, Manager-Maximus

2.2 - CAS Round Table

This discussions will cover the results of the past year negotiations and the personalities, approaches and preferences of each agency.

Track: Round Table

Course Level: All

Course Method: Discussion

Course Prerequisites: None

CPE Credit: 1

Speakers: Caroline Beeman, Director-Maximus; Chuck Wuensch, Senior Manager-Maximus; Kathy Vanvalen, Manager-Maximus

2.3 - CAS Round Table

This discussions will cover the results of the past year negotiations and the personalities, approaches and preferences of each agency.

Track: Round Table

Course Level: All

Course Method: Discussion

Course Prerequisites: None

CPE Credit: 1

Speakers:

Anne Feuerborn, Director-Maximus; Jenny Smolnik, Senior Manager-Maximus; Matt Watson, Manager-Maximus

2.4 - CRIS: Open Lab

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.

Track: CRIS

Course Level: All

Course Method: Hands-on Lab / Demonstration

Course Prerequisites: None

CPE Credit: 1

Speakers: Inna Gvozdeva,
Sr Director - Maximus

Tuesday, September 15, 2026

2:30 PM - 3:45 PM

3.1 - Presenting a New Innovative CRIS Module

As institutions face increasing pressure to allocate fewer indirect costs to grants and instead charge more expenses directly, service (recharge) centers are becoming more important than ever. To support this shift, Maximus is developing a CRIS-linked module designed to streamline rate setting, billing, scheduling, and overall operations for service (recharge) centers. In this session, we will introduce and demonstrate the key features and functionality of this new module.

Track: GenSession

Course Level: All

Course Method: Presentation

Course Prerequisites: None

CPE Credit: 1

Speakers: Caroline Beeman, Director-Maximus; Jenny Smolnik, Senior Manager-Maximus; Leann Lopez, Senior Consultant-Maximus; Walt Carper, Founder-Cogsentia

Wednesday, September 16, 2026

11:00 AM - 12:15 PM

4.1 - CRIS Lab - Fundamentals of CRIS

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.

Track: CRIS
Course Level: All
Course Method: Hands-on Lab / Demonstration
Course Prerequisites: None
CPE Credit: 1
Speakers: Jen Rowles, Senior Manager-Maximus

4.2 - Service Centers: Strategic Conversations That Drive Results

This session will look at key decisions you need to make when building a university service center structure. These decisions shape how the center operates, who is responsible for what, and how costs are recovered. We will cover types of sales and service activities, roles and responsibilities, administrative impact of leadership choices, and financial implications of several important decisions.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Caroline Beeman, Director-Maximus; Jenny Smolnik, Senior Manager-Maximus

4.3 - Maximizing Facilities

In this session, we will explore the most effective strategies for maximizing the facilities components, including Building, Equipment, Interest, Operations and Maintenance and Library. Audience participation is encouraged, to share the cost treatments that have been most effective at your institution.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Anne Feuerborn, Director-Maximus

Wednesday, September 16, 2026

12:45 PM - 2:00 PM

5.1 - CRIS Lab - Importing Data

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

Track: CRIS
 Course Level: All
 Course Method: Hands-on Lab / Demonstration
 Course Prerequisites: None
 CPE Credit: 1
 Speakers: Chuck Wuensch, Senior Manager-Maximus; Josh Tivis, Manager-Maximus

5.2 - Webspaces Forum

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.

Track: F&A Sessions
 Course Level: All
 Course Method: Discussion
 Course Prerequisites: None
 CPE Credit: 1
 Speakers: Inna Gvozdeva, Sr Director - Maximus; Pai Siwamutita, Sr. Application Development-Maximus

5.3 - Rate Impact - Sub Awards, Equipment Threshold, and SRL

This session will focus on Rate Impacts regarding the Sub Award Threshold Change to \$50K (and NIH reverting to \$25K as well as no foreign subawards), the Salary Rate Limitation (SRL), and Equipment Capitalization Threshold change.

Track: F&A Sessions
 Course Level: All
 Course Method: Presentation
 Course Prerequisites: None
 CPE Credit: 1
 Speakers: Jenny Smolnik, Senior Manager-Maximus; Jen Rowles, Senior Manager-Maximus

Wednesday, September 16, 2026

2:30 PM - 3:45 PM

6.1 - CRIS Lab - Space Processing and Analytics

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.

Track: CRIS
 Course Level: All
 Course Method: Hands-on Lab / Demonstration

Course Prerequisites: None
CPE Credit: 1
Speakers: Inna Gvozdeva,
Sr Director - Maximus

6.2 - Fringe Benefit Rates - Current Issues and solutions

This session will discuss current issues and solutions related to using Fringe Benefit Rates. Issues such as expanding allowable fringe costs in your existing fringe rates, optimizing fringe benefit recovery, provisional vs proposed rates usage considerations and ICAS portal submission.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Michael Meunier, Senior Consultant-Maximus; Jim Childers,
Senior Consultant-Maximus

6.3 - Navigating ICAS with Confidence: An Introductory Session

This introductory session provides a guided walkthrough of the ICAS portal for new users. Using screenshots, we'll explore the system's layout, key features, and navigation, along with practical tips learned from real-world use—so you know what to expect when it's time to submit.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Jen Rowles, Senior Manager-Maximus

Thursday, September 17, 2026

11:00 AM - 12:15 PM

7.1 - CRIS Lab - Allocations

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.

Track: CRIS
Course Level: All
Course Method: Hands-on Lab / Demonstration
Course Prerequisites: None

CPE Credit: 1
Speakers: Jenny Smolnik, Senior Manager-Maximus; Chuck Wuensch, Senior Manager-Maximus

7.2 - Using CRIS with the FAIR Model

This session will demonstrate what views and reports are helpful to utilize in CRIS to do analyses of the FAIR model cost pools. Prior CRIS knowledge is encouraged, but not required.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Anne Feuerborn, Director-Maximus; Kathy Vanvalen, Manager-Maximus

7.3 - Space Planning

The space survey is one of the most important supporting activities associated with preparing the F&A rate proposal. Space is used to allocate bond debt interest, building and equipment depreciation, and operations and maintenance cost pools. These are part of the uncapped facilities component and are scrutinized by the federal government from both an allowable cost and allocation standpoint. An institution must approach the space survey with careful planning and coordination. The survey process should include facilities management space planning, academic departments that will be surveyed, office of sponsored programs and payroll.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Inna Gvozdeva, Sr Director - Maximus

Thursday, September 17, 2026

12:45 PM - 2:00 PM

8.1 - CRIS Lab - CRIS Standard Reports

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.

Track: CRIS
Course Level: All
Course Method: Hands-on Lab / Demonstration
Course Prerequisites: None

CPE Credit: 1
Speakers: Matt Watson, Manager-Maximus; Josh Tivis, Manager-Maximus

8.2 - Using WebSpace for FAIR Model Space Assessments

In this lab 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.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Inna Gvozdeva, Sr Director - Maximus; Jen Rowles, Senior Manager-Maximus

8.3 - Talking to Management

Many of our institutional leaders are trying to plan for the future of direct and indirect costing. In this session, we will review salient points about current regulations and how we can inform leadership in their responding to changes in federal policy. We will evaluate recent updates in federal guidance that may impact our F&A proposal planning, as well as discuss best practices in costing that can protect your institution in an audit.

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Caroline Beeman, Director-Maximus; Jenny Smolnik, Senior Manager-Maximus

Thursday, September 17, 2026

2:30 PM - 3:45 PM

9.1 - CRIS Lab - Trend and Custom Reporting

In this session, users will learn to navigate CRIS.Net using the CRIS University data model. The session will offer step-by-step instruction and will focus on custom reporting and the Trend feature. We will demonstrate how these tools can be utilized to conduct various analyses.

Track: CRIS
Course Level: All
Course Method: Hands-on Lab / Demonstration
Course Prerequisites: None

CPE Credit: 1
Speakers: Anne Feuerborn, Director-Maximus; Matt Watson, Manager-Maximus

9.2 - Designing Defensible Internal Overhead Rates Using CRIS

This session introduces how to use CRIS to develop internal overhead rates. Through a guided walkthrough and practical insights from experience, we'll demonstrate how to navigate the system, build rates, and produce defensible results

Track: F&A Sessions
Course Level: All
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1
Speakers: Caroline Beeman, Director-Maximus; Jen Rowles, Senior Manager-Maximus