

SPAC

- **Presenters:**
- Janel Williams: Collections & Accounts Receivable (CAR) Supervisor
- Beryl Gwan: Assistant Director
- Krissy Long: Non-Fed Billing Manager
- Danijela Macakanja: VMS & Fed Billing Manager
- Michelle Ward–Director
- Rama Camara Spasic –Director



- 1. Remittance Address for Sponsored Projects Accounts**
- 2. Costing and Compliance Updates**
 - **FY26 Fringe Benefit Rates Approval Update**
 - **HRMS/Peoplesoft Deadlines: Direct Retro and Budget Retro**
 - **Overpayments to PSC**
 - **Salary Cap Pending**
- 3. Updated Process for ROEs Bulk**
- 4. Update on Volume Milestone Schedule (VMS) Awards**
 - **Extension of Awards**
 - **SSAC-CCT Group Update**
- 5. Billing Compliance**
- 6. Other General Information**

Remittance Address for Sponsored Projects Accounts

- If the Notice of Award (NOA) is pending with SPA, and you receive any email or notification from the sponsor or SPA to register within an invoicing platform, or to complete any financial forms please forward the email to spacollections@umaryland.edu for processing.
- If the department also requires access to the platform, we will complete one centralized access form listing all necessary parties.

- For contracts not involving an invoicing platform, please ensure that any department contacts who would like to receive remittance advices are clearly listed in the contract.
- Also, please include spacollections@umaryland.edu on the contract so that remittance advices are properly identified, posted and reconciled by the CAR team.

- If the Notice of Award (NOA) is pending with SPA, and you receive a Purchase Order email or notification from the sponsor or SPA please forward to spacollections@umaryland.edu.
- The address to use for all purchase orders is:
❑ PO BOX 41428 Baltimore, MD 21203-6428

***Please do not use the departments or SPA's address**

- If your department is submitting invoices through a sponsor portal (e.g., IQVIA, Greenphire), someone within your team typically has access to view payments and remittance advices. If additional access is needed, please coordinate directly with your sponsor study contact to request access.
- **Be sure to also include spaccollections@umaryland.edu** to the access form to ensure that the CAR team can properly identify, post, and reconcile payments in a timely manner.
- For more information on the SPAC CAR's processes, please access the PRECIPIO training: [Percipio Course Collections and Accounts Receivable Training](#)

Costing and Compliance Updates

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FY26 Fringe Benefit Rates – Pending Approval

- Final approval has not yet been received
 - Changes in Federal Cost Accounting Standards (CAS) office
 - We are now in correspondence with the CAS office
- A memo will be sent out to Campus to announce the approval of the already Implementation Fringe Benefit Rate Agreement
- FY26 rates have been set up in HRMS from 26-01
- The memo and rate agreement will be uploaded to our website

Final Date to Post DRS/BRs in HRMS/PeopleSoft

- The Direct Retro cut off date to submit a Direct Retro to be posted in Peoplesoft/HRMS is **Friday, 10/17/25 by close of business (COB)**
 - Note that this is different from the usual Tuesday prior to the payday deadline to allow Costing and Compliance enough time to process the anticipated fiscal year end increased volume.
 - More information will be submitted regarding the payroll cost transfer process in HCM
- DEADLINE for Budget Retros to be posted in People Soft/HRMS is **Friday 10/17/2025, by 8PM** (they must be fully approved in HRMS)
- **Departmental Access to HRMS to will cut off from Saturday 10/18/2025.**

Direct Retro/Budget Retro Cut Off Dates for PeopleSoft/HRMS PP26-08

	Deadline	Pay Period Processed	Pay Period End Date	Pay Period Pay Date	Posted in HRMS/ PeopleSoft
DR: When Received by Cost Analysis	Friday, 10/17/25 @ COB	26-08	10/18/2025	Friday 10/24/2025	PeopleSoft/ HRMS
DR: When entered and processed by Cost Analysis	Tuesday, 10/21/2025 by 8pm	26-08	10/18/2025	Friday 10/24/2025	PeopleSoft/ HRMS
BR: When fully approved in HRMS	Friday, 10/17/25 by COB	26-08	10/18/2025	Friday 10/24/2025	PeopleSoft/ HRMS

Overpayments Related to PSC

- Physician Services Contracts:
 - Generally, no Direct Retros moving payroll to or from a PSC account in the prior fiscal year will be processed after a new fiscal year
 - However, all overpayments to a PSC in a prior year will be processed according, and the PSC credited
 - Payroll overpaid on a specific SOAPF can only be credited to that specific SOAPF.
 - Please review and plan accordingly

DHHS Salary Cap_Cost Sharing for Payroll Expenses

- There is no information at this time regarding any increased to the DHHS Salary Cap effective 10/01/2025 to 09/30/25
 - The current \$225,700 cap ends on Sept 30th 2025
- Monitor the link below for any changes:
 - <https://grants.nih.gov/grants/guide/notice-files/NOT-OD-25-085.html>

Questions or Comments



Updated Process for ROEs Bulk

SPA/SPAC Advisory Council (SSAC)

Subgroup: Report of Expenditure



Purpose: To examine the current process for closing awards with billing basis cost and schedule/cost using the ROE form. Identify inefficiencies and collaborate with departmental volunteers to enhance efficiency by streamlining operations and eliminating redundant processes.

SPA/SPAC Advisory Council (SSAC)

Subgroup: Report of Expenditure



ADMINISTRATION AND FINANCE

OUT WITH THE OLD.....



For an award with a final due within 60days:

1. An email with ROE attached, 3rd week of every month
2. An email with ROE attached, 21 days before the NLT date for each Award
3. An email with ROE attached, 14 days before the NLT date for each Award
4. An email with ROE attached, 7 days before the NLT date for each Award
5. Additional emails if the ROE was not returned by the NLT date

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SPA/SPAC Advisory Council (SSAC)

Subgroup: Report of Expenditure

For an award with a final due within 60days:

1. One bulk email 3rd week of every month with an attached excel file to applicable departments, detailing awards ending the prior month and final invoice due dates for each award.
2. 2 weeks prior to final due date an email with roe excel file attached to the responsible dept with cost in QA through that day and subject line noting the No later than (NLT) date
3. Additional emails ONLY if ROE is not returned by NLT date
 - a. these follow-ups will include PI and Dean
 - b. SPAC will complete an unofficial final if ROE is not returned by NLT date and will be communicated in emails



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IN WITH THE NEW....



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- **1st email:** The 3rd week of every month, SPAC will send a BULK email with an attached excel file to departments, detailing awards ending the prior month and final invoice due dates for each award.

Context: Awards that end 4/30/2025; email will be sent 5/19/2025



ADMINISTRATION AND FINANCE

Subject April 2025 Cost & Schedule/Cost Award Ended, Finals Due Upcoming

No Label

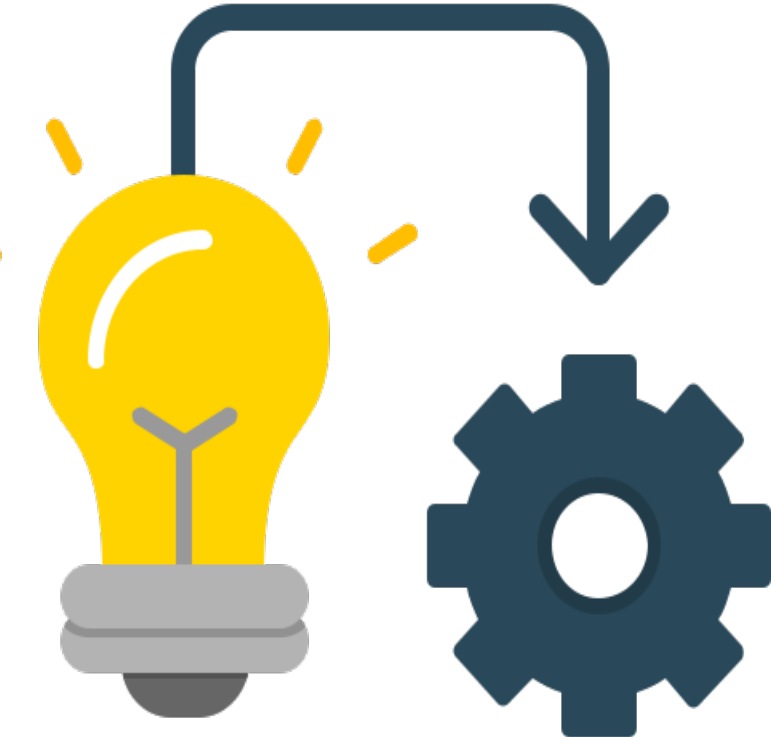
Greetings Department,

Sponsored Projects Accounting and Compliance has compiled the attached listing of Schedule/Cost-Based & Cost- Based to be closed. These projects have end dates of 04/30/2025 and have upcoming finals.

Please filter on your department using column M labeled, "award organization" to view each project respective final due date. **Actual ROE excel files will be sent two weeks prior to the final due date for review and signature.**

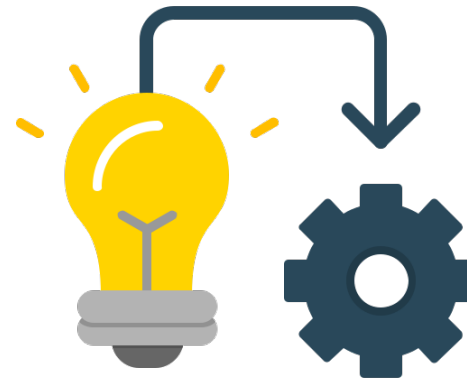
To prepare for closing please note the following:

- (1) If the account is in a deficit, please be preared to provide your funding SOAPF for this deficit.
- (2) There are raw commitments on this project. Please ensure that all invoices associated with this PO have been processed. If the raw commitment is no longer valid, please email your procurement contact (and cc this team) to have it removed.
- 3) There is activity on account codes (7062/7072). Please make sure the balances are zero. |
- (4) To avoid audit findings on your award, please ensure that all your effort reports for this award are certified within 120 days of the expiration date of this project/award.
- (5) If carryover is not automatic and funds remain available on the PID, a request to carryover funds would need to be presented to the Sponsor.**



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A closer look at the attachment:

A	B	D	F	G	L	M	O	P	Q	R	S	T	U	V	W	X	Z
AWARD NUMBER	PROJECT NUMBER	PROJECT STATUS	PROJECT START DATE	PROJECT END DATE	PROJECT NAME	AWARD ORGANIZATION	SPONSOR NAME	Contract Amount	LTD AWARD COST	LTD INVOICED AMOUNT	LTD 7062 COST	LTD 7072 COST	Total Commitme nts	Total Obligations	LTD PROJECT COST	AWARD NET BALANCE	Final Invoice/Financi al Rept Due (T&C)
3000725	30007252	Active	5/1/2021	4/30/2025	Institutional Career Development	10217000-Clinical Tr	Johns Hopkins University	1,622,561.00	1,517,135.04	1,498,991.75	-	-	-	-	1,226,883.55	52,917.49	Year 3 final due 06/3
3001881	30018811	Active	7/1/2020	4/30/2025	Defining disease mechanisms in	10409092-Neu Epilep	University of North Carolina	619,319.00	626,956.16	619,229.17	-	-	-	-	626,956.16	13,797.88	06/29/2025
3002090	30020901	Active	7/1/2020	4/30/2025	Using Multimodal Neuroimaging	10417120-Psych Psyc	University of MD College Pa	442,575.00	423,372.98	414,064.60	-	-	-	-	423,372.98	18,375.02	06/29/2025
3003618	30036181	Active	12/1/2021	4/30/2025	The Jivita Vaginal Microbiome S	10213000-SOM Institi	Johns Hopkins University	376,966.00	307,288.36	304,628.86	-	-	-	-	307,288.36	2,659.50	6/29/2025
3003626	30036261	Active	5/1/2022	4/30/2025	Development of a Convolutional	10409040-Neu Multip	National Multiple Sclerosis	586,820.30	513,272.78	586,820.29	-	-	-	43,164.11	513,272.78	(73,547.51)	due within 90 days a
3004086	30040862	Active	5/1/2023	4/30/2025	Ocular Blood Flow Imaging for G	10412000-Ophthalmic	Vasoptic Medical Inc.	437,031.00	411,796.30	283,375.09	427.00	-	-	629.20	376,239.49	128,421.21	6/29/2025
3004157	30041573	Active	5/1/2024	4/30/2025	Center for Antiviral Medicines &	10303000-Microbiolo	The Scripps Research Instit	167,252.00	167,251.97	142,789.08	-	-	-	-	86,614.17	42,831.15	06/29/2025
3004736	30047361	Active	2/1/2023	4/30/2025	COMP : Linshom Continuous Pre	10219260-STAR W Ch	Maryland Industrial Partner	10,000.00	10,000.00	10,000.00	-	-	-	-	10,000.00	-	06/29/2025
3004737	30047371	Active	2/1/2023	4/30/2025	UNIV : Linshom Continuous Prec	10219260-STAR W Ch	Maryland Industrial Partner	70,944.00	65,325.76	62,571.94	-	-	-	-	65,325.76	21,555.78	06/29/2025
3004772	30047721	Active	5/1/2023	4/30/2025	Discovering Ion Channel-Based	10301000-Neurobiolo	Cure Addiction Now	75,000.00	74,969.75	75,000.00	-	-	-	-	74,969.75	(30.25)	06/29/2025
3004790	30047902	Active	4/29/2024	4/28/2025	Optimizing the Outcomes of Adu	10405070-EPH Genon	Johns Hopkins University	219,656.00	189,603.55	148,746.51	825.00	-	-	-	117,519.67	97,143.02	6/27/25
3004857	30048571	Active	5/1/2023	4/30/2025	iKinnect Mobile Technology to R	10417051-Child Psycl	Evidence Based Practice Ins	92,223.00	90,068.23	84,557.81	-	-	-	-	90,068.23	10,674.15	06/29/2025
3004959	30049592	Active	5/1/2024	4/30/2025	Deciphering a Novel Mechanism	10408015-Med Dean	University of Pittsburgh	87,840.00	82,115.02	77,849.07	-	-	-	-	48,857.39	7,228.24	6/29/2025
3005137	30051372	Active	5/1/2024	4/30/2025	Network Medicine, Systems Phai	10408050-Med Cardic	Vanderbilt University Medic	245,040.00	248,288.16	220,292.38	-	-	-	-	127,170.09	31,490.72	06/29/2025
3005305	30053051	Active	5/1/2023	4/30/2025	Temple University of The Commc	10301000-Neurobiolo	Temple University of The Co	49,727.94	49,062.00	47,367.16	-	-	-	-	49,062.00	3,389.67	06/30/2025
3005324	30053241	Active	8/15/2023	4/30/2025	The Paycheck Protection Prograr	10416000-Physical Th	New York University	85,580.00	69,484.46	69,593.09	-	-	-	-	69,484.46	69,484.46	06/29/2025
3005369	30053691	Active	7/1/2023	4/30/2025	Molecular mechanisms of calcif	10302000-Biochemis	Medical College of Wiscons	704,812.00	543,866.36	514,588.55	-	-	-	140,648.00	543,866.36	59,110.94	05/30/2025
3005415	30054151	Active	8/1/2023	4/30/2025	Coalition for National Trauma R	10219470-STAR Trans	Coalition for National Trau	30,119.00	29,811.27	29,031.85	-	-	-	-	29,811.27	1,558.84	06/29/2025

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- **2nd Email:** two weeks before final is due to the sponsor SPAC will send an email containing the actual roe file with cost as of that day **6/13/2025**



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Send To ☐ DL GRANTS SOM MED 10408011

Cc

Bcc

Subject 3000725 ROE REQ 6/13 NLT 6/20 DUE 6/27

3000725.xlsx 39 KB

Share as a link. Anyone on the internet with this link can access. [Yes](#) [No](#)

Hello department,

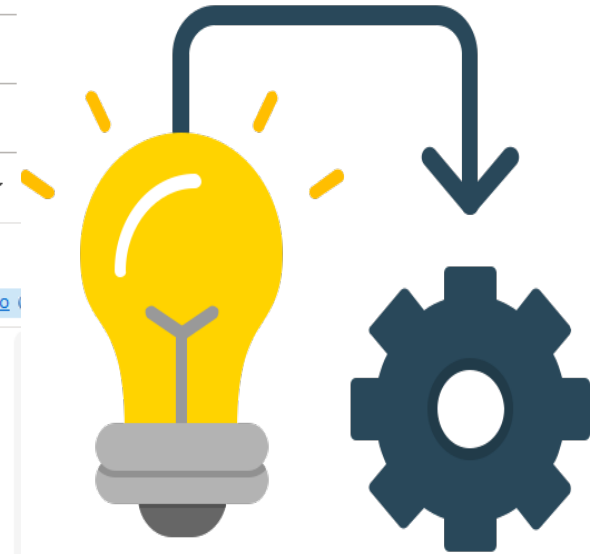
The final is due to the sponsor on __6/27__, please return by __6/20__ so we have ample time to complete and deliver to the sponsor. Be sure to include all backup that map clearly to the adjustments listed on the ROE adjustments page, and both roe sheets must be sent to spac.

In accordance with our policy we will be issuing a final invoice on **6/24** based on actual cost in Quantum Analytics to the sponsor if we do not receive the signed roe by __6/20__. If the sponsor refuses to pay this will be communicated to you. If any additional charges post and you wish to bill these please seek prior-approval from the sponsor and send said approval to SPAC via email.

Notes:

- (1) The account is in a deficit of _____ and cannot be at a balance less than zero. Please provide your funding SOAPF for this deficit. **(if applicable/ delete if does not apply)**
- (2) There are raw commitments on this project. Please ensure that all invoices associated with this PO have been processed. If the raw commitment is no longer valid, please email your procurement contact (and cc this team) to have it removed. **(if applicable/ delete if does not apply)**
- (3) There is activity on account codes (7062/7072). Please make sure the balances are zero. **(if applicable/ delete if does not apply)**
- (4) To avoid audit findings on your award, please ensure that all your effort reports for this award are certified within 120 days of the expiration date of this project/award.
- (5) If carryover is not automatic and funds remain available on the PID, a request to carryover funds would need to be presented to the Sponsor.

Thanks,
University of Maryland Baltimore
NON Fed Billing Team



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- **3rd email:** if the ROE is not returned by the no later than date (NLT), SPAC will send a follow-up for the ROE and communicate when an unofficial final invoice will be sent 6/20/2025



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Send To

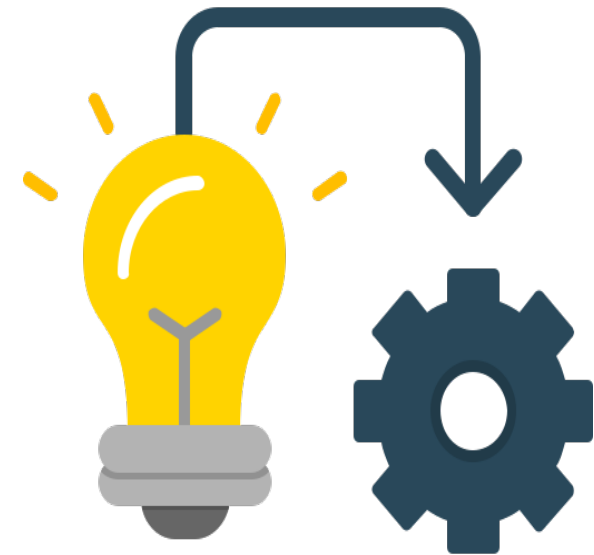
Cc

Bcc

Subject 3000725 REQ 6/13 NLT 6/20 DUE 6/27

3000725.xlsx 39 KB

Share as a link. Anyone on the internet with this link can access. [Yes](#) [No](#)



Hello department,

The final is due to the sponsor on __6/27__, please return by __6/20__ so we have ample time to complete and deliver to the sponsor. Be sure to include all backup that map clearly to the adjustments listed on the ROE adjusmtents page, and both roe sheets must be sent to spac.

In accordance with our policy we will be issuing a final invoice on **6/24** based on actual cost in Quantum Analytics to the sponsor if we do not receive the signed roe by __6/20__. If the sponsor refuses to pay this will be communicated to you. If any additional charges post and you wish to bill these please seek prior-approval from the sponsor and send said approval to SPAC via email.

The roe is still required for audit purposes please send this as soon as possible so the award can be closed.

To avoid audit findings on your award, please ensure that all of your effort reports for this award are certified within 120 days of the expiration date of this project/award.

Thanks,
University of Maryland Baltimore
NON Fed Billing Team

OH NO! ROE NOT RETURNED BY 6/24!

Send

To

Cc

Bcc

Subject

3000725 ROE PAST DUE 6/27

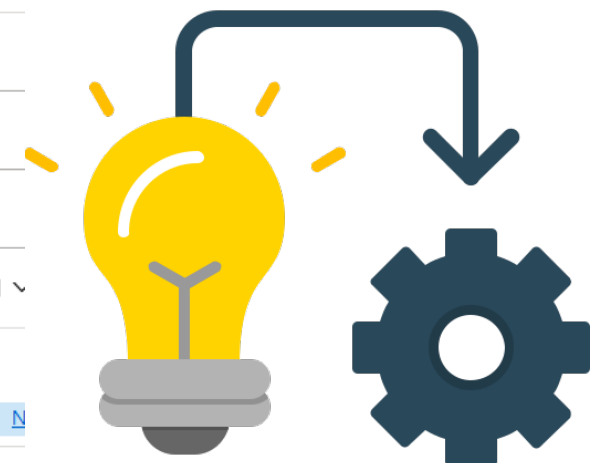
DL GRANTS SOM MED 10408011

No Label

3000725.xlsx

45 KB

Share as a link. Anyone on the internet with this link can access. [Yes](#) [No](#)



Hello department,

In accordance with our policy we issued an unofficial final invoice on 6/24 based on actual cost in Quantum Analytics to the sponsor because we did not receive a signed roe timely. If the sponsor refuses to pay, this will be communicated to you. If any additional charges post and you wish to bill these **please seek prior-approval from the sponsor first and send said approval to SPAC via email before we can create a trailing invoice.**

The roe is still required for audit purposes please send this as soon as possible so the award can be closed.

To avoid audit findings on your award, please ensure that all of your effort reports for this award are certified within 120 days of the expiration date of this project/award.

Thanks,
University of Maryland Baltimore
NON Fed Billing Team

Implementation



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This will start in September 2025, for awards that end August 2025.

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What's to come....

ROE Quantum Analytics



ADMINISTRATION AND FINANCE

QA4 - Sponsored Management

Search

QA4.P3 - PI Profile

QA4.P4 - Award Detail

QA4.P5 - Find My Award

QA4.P6 - F&A Yield

QA4.P7 - 7062 Activity

QA4.P8 - Report of Expenditures

QA4.P9 - 7072 Activity

QA4.P10 - SEFA Report

Once all necessary adjustments have been made to the report of expenditures, have the PI sign the report and return to SPAC by the date noted in "Due Date Requested by SPAC"

Projects on this Award

(All Column Values)

Reset

and prompts
ports on this
w filtered by:
al to 2025
ual to Jun
r-Name is
IHU Inst. for
al Research
is equal to

Award Number : 3000725

Award Name : KL2 JHU Inst. for Clinical and Translational Research

Sponsor Number : 204363

Sponsor Name : Johns Hopkins University

Principal Investigator : 018890-Davis,Stephen

Owning Org : 10217000-Clinical Translational Science

Contract Period : 5/1/2020 to 4/30/2025

Time Run : 6/11/2025

Due Date Requested by SPAC :

Projects on this Report : 30007251

30007252

Object Level B	Cost Structure	Object Level C	Budget	LTD Costs	Budget Variance Favorable/ (Unfavorable)	Adjustments	Adjusted LTD Expense
B100-Direct Costs	MTDC	C100-Salaries	\$990,000.00	\$1,062,970.71	(\$72,970.71)	\$0.00	
		C200-Fringe Benefits	\$260,260.00	\$281,052.95	(\$20,792.95)	\$0.00	
		C300-Operating Expenses	\$196,726.00	\$57,001.81	\$139,724.19	\$0.00	
	MTDC Total		\$1,446,986.00	\$1,401,025.47	\$45,960.53		
B100-Direct Costs Total			\$1,446,986.00	\$1,401,025.47	\$45,960.53		
B100-Direct Costs	Non-MTDC	C300-Operating Expenses	\$60,200.00	\$11,041.10	\$49,158.90	\$0.00	
		Non-MTDC Total	\$60,200.00	\$11,041.10	\$49,158.90		
B100-Direct Costs Total			\$60,200.00	\$11,041.10	\$49,158.90		
B600-Indirect Costs	F&A	C600-Indirect Costs	\$115,375.00	\$112,081.97	\$3,293.03	\$0.00	
		F&A Total	\$115,375.00	\$112,081.97	\$3,293.03		
B600-Indirect Costs Total			\$115,375.00	\$112,081.97	\$3,293.03		
Grand Total			\$1,622,561.00	\$1,524,148.54	\$98,412.46		

Principal Investigator

018890-Davis,Stephen

Date



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QUESTIONS?



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Update on Volume Milestone Schedule (VMS) Awards

Volume Milestone Schedule Award Closeouts



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- A spreadsheet of expired volume/milestone and schedule awards/projects is generated and sent to the departments on the following quarterly schedule:
 - October spreadsheet is sent in November
 - January spreadsheet is sent out in February
 - April spreadsheet is sent out in May
 - July spreadsheet is sent out in August

The closeout sheet will include VMS projects that expired **three months prior** to the reporting month.

Example: April's spreadsheet will list projects that ended on or before January 31st.

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VMS closeout cont'd

Column AJ on spreadsheet is provided for department to insert additional comments or reason why project/award should not be closed.

If award should **not** be closed and is:

- **Volume** – can request extension on this spreadsheet to VMS Team.
- **Milestone and/or Schedule** must have an amendment for adjustments. These need to be processed by SPA first.

SPA SPAC Advisory Group (SSAC) CCT group



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Aim: SSAC CCT group is dedicated to managing the award cycle and financial oversight. The goal is to review current guidelines and/or develop new guidance to help the research community more effectively manage clinical trial awards.

Working on finalizing:

- Startup Fee Routing Guide – Outlines the collaborating departments involved in clinical trials, the type of fees they handle, and their associated contact information.
- Startup invoice FAQ one pager

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Billing Compliance

Billing for Sponsored Projects at UMB are regulated by our institutional policies which align with Uniform Guidance, sponsor requirements and good internal controls.

Our Billing must be timely, accurate, based on allowable, allocable, and reasonable costs and is subject to review and reconciliation.

As part of the compliance check, SPAC aims to ensure that expenses are:

- Within the project period.
- Consistent with sponsor terms and UMB policies.
- Reconciled between the general ledger and billed amounts.
- Supported by adequate documentation.

To ensure invoices submitted on behalf of UMB are in compliance we ask that departments:

- Spend within the approved budget lines.
- Charge only costs that are allowable under Uniform Guidance (2 CFR 200) , sponsor guidelines and UMB policy.
- Ensure expenses have a direct benefit to the project and within the **approved** scope of work.
- Expenses are supported by adequate documentation (receipts, invoices, etc.)

- For unusual or high- risk charges, provide **clear justification** showing project benefit.
- Ensure salary charges align with effort actually expended on the project.
- Avoid unallowable costs.
- Complete costs transfers within 90 days.

Following these guidelines help enable a smooth billing and collections process.



Other General Information & Reminders

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1) Creation of internal departmental invoices:

- ☐ Make sure to list on the invoice the correct bank information and remittance address:
PO BOX 41428 Baltimore, MD 21203-6428
- ☐ If the invoice is for a Volume or Milestone award, create a volume-based event (VBE) for the total amount of the invoice so that the VMS billing team can create an invoice in our Financial system. For more information, refer to the guidance [Volume-and-Milestone-Billing-not-on-SPAC-Billing-Template.docx](#)
- ☐ If the invoice is for a Cost-based award, provide the invoices to the Non-Fed billing team at billnonfed@umaryland.edu

PLEASE NOTE: no departmental invoice should be created for a Cost based billing award.

Reminders:



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1. Adjusted naming convention for PID numbers to align with NIH award numbers. Ex. If current funding is year is 20. PID number would be 3XXXXXX20.
2. Service contract reporting due October 31, 2025. Please provide labor hours for your sub-recipients by October 15.
3. CMAS Drop-in-Session

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CMAS Drop-In Session : Legislative Audit Updates and Audit Trends

Thursday, September 18, 2025, at 11am

- Change Management and Advisory Services (CMAS) hosts periodic drop-in sessions to discuss a variety of compliance and/or change management issues.
- **Join CMAS at 11 a.m. Sept. 18** for a one-hour session on audit-related topics. The emphasis will be on the findings in the Office of Legislative Audits [report dated Aug. 19, 2025](#). Common University System of Maryland internal audit findings will be discussed as well. A presentation will provide an overview of the findings, describe the steps necessary to resolve the audit concerns/avoid repeat findings, and give updates on next steps/timelines for auditor follow-up.
- Attendance is open to anyone who may interact with auditors, but is especially encouraged for individuals:
 - involved with grants administration
 - with any role in purchasing (requisition initiators, pcardholders, approvers, etc.)
 - handling cash receipts or study participant payments
 - with a travel approval role
- Use this link to obtain the meeting information: [Sept. 18: CMAS Drop-In Session Focuses on Legislative Audit Updates and Audit Trends - The Elm](#)





SPAC Office Hours- on a biweekly schedule

- **Mondays 9am-10am**
- **Next one will be Monday 9/22/2025**
- **Link to access the Zoom meetings:**
<https://umaryland.zoom.us/j/97615207827?pwd=zOewladF13ahcBPVMfC3eTNUFw048V.1>



1) Customer Service Platform (VEOCI):

- ☐ SPAC plans to go live in early November 2025
- ☐ OOTC and CASS have already implemented the platform
- ☐ Training and user guides will be provided before and after the launch

2) Brown Bag Session

The Setup Team will host a brown bag session in late October/ early November. More info to come.