

**UAB FACILITIES DIVISION  
STANDARD OFFICE INSTRUCTIONS**

**PROCEDURES FOR TRACKING OF  
PROJECT FINANCING AND SCHEDULING REPORTS (PFSRs)**

**PURPOSE:**

To establish responsibilities and overall procedures for the tracking of Project Financing and Scheduling Reports (PFSRs).

**PROCEDURES:**

- 1.0 Support staff in department originating PFSR inputs into data base the date the PFSR is created, who created it, the funding unit and date funding unit signed, date the director signed and date sent to AVP for Facilities for approval.
- 2.0 Financial Management support staff inputs date AVP signs and date sent to AVP for Finance. A copy of PFSR is maintained in Financial Management office as a means of record-keeping while original PFSR is being routed for signature.
- 3.0 When signed PFSR is returned from AVP for Finance, support staff in Financial Management is responsible for inputting date the AVP for Finance signed, date received back from Financial Affairs, and Oracle account number assigned by Finance.
- 4.0 Copies of signed PFSR are then made and distributed. (See AD-1 – 2.6)

(See related SOIs for Procedures for the Preparation and Approval of PFSRs and Phased Projects)

(END OF PROCEDURE)