

LR Process Updates for FY22

New LR Tracking Sheet

Originators will now be responsible for generating a unique LR number and adding it to the LR form prior to routing the form for approvals. This will allow the originator to track where their form is in the approval process.

The routing number is generated using a shared Google sheet that can be found [here](#). There is also a link on the form.

Originating units/departments are responsible for completing the columns in light blue. The data entered in the first two columns (Date and Dept #) are used along with the row # of the tracking sheet to generate the LR #. The naming convention is:

- LR
- Dept #
- Date initiated in *yymmdd* format. (Starting with yy allows you to sort your files in date order. LR # is also used in the file name)
- The row # of the tracking sheet. This allows originators and reviewers to easily

Tracking Sheet.

The tracking form has yes/no questions to determine what approvals are needed.

- MCFO approvals section.
- the OVPR section of the form.
- Answering yes/no to the Late Transfer question removes the need for Chairs and Deans to maintain separate logs.

This form does *not* change what approvals are needed for your LRs.

- When grant funds are involved, PI approval is still needed. Please remember to loop in other departments/Pis for cross departmental collaborations.
- Continue to route all LRs
Manager/Director.

The originator adds the date in the first column of the blue section.

The Business Manager/Director that approves the form adds the date in the final column of the blue section once they have forwarded the form.

The file will contain different sheets for each fiscal year. It currently only has a single sheet for FY22. Any LRs originated after July 1, 2022, will be logged on a FY23 sheet (to be added). The date the LR is *originated* drives which log sheet is used (an LR for a June early July should be tracked on the FY23 sheet).

Effective 9/13/21, all LRs should be submitted using the new form and have an LR # generated (even if related to FY21).

Remember that this is a university-wide shared sheet. Since others could want to access the file at any time, make a personal copy before doing things like sorting by department or sorting to find LRs that your unit needs to approve. If you find that someone else has done this by mistake, it can be re-sorted back into its original order by sorting by column T.

Contact Tammy Grant (

Updated LR Form

Since the PRISM labor report will be included as an additional sheet in the file, everyone is encouraged to use formulas to reference the PRISM report data to minimize effort and errors.

An entry for the LR # has been added in the top section. Copy/paste this from the LR

- This LR removes all of your effort from Z project since the project had ended. Remember to include a justification (i.e., how an incorrect entry happened in the first place, how expense relates to the grant being charged, how future errors will be avoided).

Staff labor reports have multiple lines for each pay type.

- line only. No need to proportionately remove funds from each Pay Component Code.
- To remove all effort, all lines related to the effort need to be included.

When routing an LR for approvals, include the LR# in the subject line of the e-mail.

If you have more than one LR related to a particular event, feel free to attach all related LRs to the same e-mail. This will better tell the story for the reviewers. For example, if an award is overspent, send all LRs needed to bring the balance to zero in a single e-mail. The subject line of the e-mail should note the first LR # through and the final LR # in the series. Feel free to include an additional file with your closeout calculations. When submitting an LR, only send it to the next approver step. Do not include or cc others further along in the approval chain for their review.

For LRs that require MCFO approval, send to mcfo@slu.edu (not to a specific person).

LR Approvals

All approvals are now via e-mail, and all correspondence/approvals regarding an LR should stay within the same e-mail. When the LR arrives at payroll, they need to be able to see the entire approval history.

the LR to the next step.

-mail before forwarding

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Since transmission is now via e-mail, and the previous approver is noting when they have forwarded the form to the next step, of forms.

The MCFO and the OVPR approval sections collect two dates. The date the review begins, and the date the LR was approved and sent on. The only time these two dates will differ is when there are questions or corrections needed.

If the total