

## EGATS – Governing Documents

**Process:** Governing documents are available for viewing and downloading in the Endowment and Gift Account Tracking System (EGATS).

### Procedures

#### Governing document definition

A governing document is the document used to establish and administer the endowment fund. It sets out the purpose of the funds, endowment policies, stewardship requirements, and other contract language.

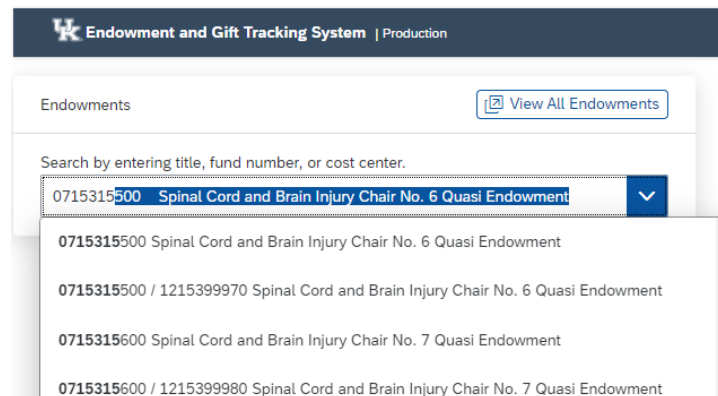
Governing documents should be used by units when determining the expenses to charge to the spending distribution cost center and overall administration of the endowment fund.

Common types of governing documents include the following:

- Endowment agreement – document signed by the donor and representatives of the University.
- Board document – FCR or other document which has Board of Trustee approval
- Memo or letter from a donor
- Donor’s will or other legal documents

#### On the EGATS dashboard

Type the fund number in the search box and click on the fund in the dropdown.



**In the middle of the screen, tabs contain searchable items and data**

Click on the Documents tab to see the available documents.

		Reference Name	Document Date / Type	Curr GovDoc?
☰	63	Spinal cord and Brain Injury Chair No. 7 FCR 6 ID: 1791	4/22/2008 FCR	False
☰	63	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Agreement ID: 1790	5/7/2008 Endowment Agreement	True

**Identifying Documents**

A list of all documents relating to the endowment fund will be displayed.

- Click the display details icon next to the document to display its related information.

☰	63	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Agreement ID: 1790	5/7/2008 Endowment Agreement	True
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- Active governing documents will be marked as “True” in the Curr GovDoc? column on the Documents tab. These documents should contain the current information that the unit needs to administer the endowment fund.

Document List

		Reference Name	Document Date / Type	Curr GovDoc?
☰	63	Spinal cord and Brain Injury Chair No. 7 FCR 6 ID: 1791	4/22/2008 FCR	False
☰	63	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Agreement ID: 1790	5/7/2008 Endowment Agreement	True

- Documents marked “false” in the Curr GovDoc? column are in EGATS for historical or informational purposes and should not be used for current administration of the endowment fund.

Quick Reference Card – EGATS - Governing Documents

Supported Purpose Documents Donor Purpose Validation Messages FI Da

Document List

	Reference Name	Document Date / Type	Curr GovDoc?
68	Spinal cord and Brain Injury Chair No. 7 FCR 6 ID: 1791	4/22/2008 FCR	False
68	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Agreement ID: 1790	5/7/2008 Endowment Agreement	True

- Special note: Amendments change an agreement either in total or in part.
  - Amendments that supersede and replace **all** terms of the original agreement will become the sole governing document.
  - If an amendment only changes specific terms of the original agreement, both documents would be governing documents.
- Descriptive Data will appear to right of the document that gives information such as the following:
  - Title on the document
  - Document type
  - Is the document confidential?
  - Modified date

Descriptive Data

Reference Name: Spinal cord and Brain Injury Chair No. 7 FCR 6  
 Date on Document: 4/22/2008 Document Type: FCR Doc ID: 1791  
 Title on Document: Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Is Confidential: False  
 Notes: N/A  
 Open Text ID: 0050569DF8711EDB8DC525DA5C65186A Source Filename: 0715315600 FCR 6.pdf  
 Added By: KEBOYD00 Date: 12/4/2020 Mod By: KEBOYD00 Date: 12/4/2020

- Linked to Funds data will be displayed in the lower right corner of the screen. If a governing document established more than one endowment fund, a list of endowments will be displayed.

Linked to Funds

	Fund	EGATS Status	Description	Is Curr GovDoc?	Document Purpose	Name Change	Purpose Change	Dept Change	Other Change
✎	0715315600	Active	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment	False	Establishment	False	False	False	False

**Viewing the governing document**

Click on the glasses icon of the document that you want to view. The governing document will appear in its own window.

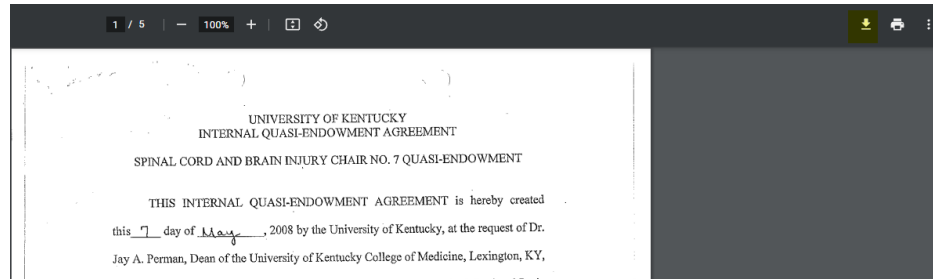
Document List

		Reference Name	Document Date / Type	Curr GovDoc?
☰	👓	Spinal cord and Brain Injury Chair No. 7 FCR 6 ID: 1791	4/22/2008 FCR	False
☰	👓	Spinal Cord and Brain Injury Chair No. 7 Quasi Endowment Agreement ID: 1790	5/7/2008 Endowment Agreement	True

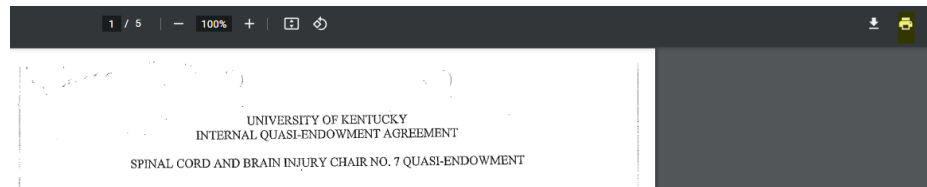
**Downloading or printing the governing document**

If needed, the governing document can be downloaded or printed from the window.

- Downloading the document
  - Click on the download arrow in the upper right corner of the screen.

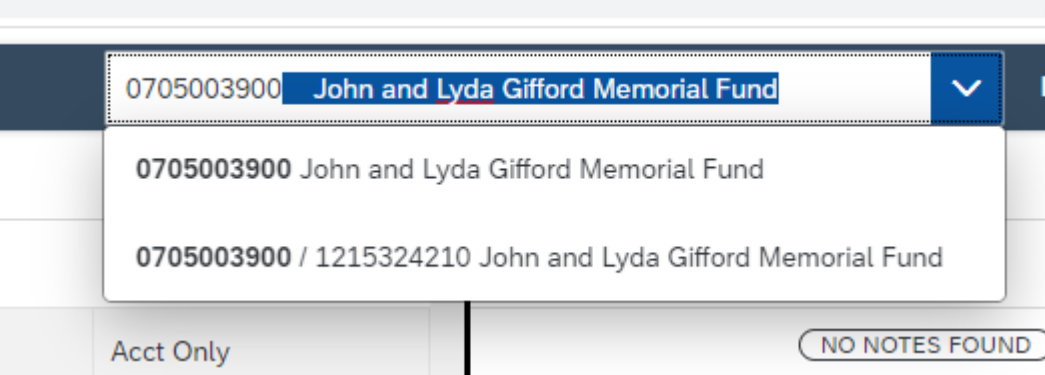


- When the Save As box appears, save the document to the appropriate drive on the computer.
- Printing the document
  - Click on the printer icon in the upper right corner of the screen.



- Choose the printer destination and click Print.

Quick Reference Card – EGATS - Governing Documents

<p><b>To view documents for a different fund</b></p>	<p>Scroll to the top right of the screen and enter the new fund number in the search box. Click on the fund in the dropdown.</p> 
<p><b>Questions</b></p>	<ul style="list-style-type: none"><li>• For questions, please contact Endowment and Gift Accounting: Email – <a href="mailto:endowment@uky.edu">endowment@uky.edu</a></li></ul>