

## EGATS – Supported Purpose Review

**Process:** The Endowment and Gift Account Tracking System (EGATS) allows you to view details of an Endowment’s purpose.

### Procedures

#### Supported purpose explained

Each endowment is setup with specific purpose(s) as requested by the donor. The donor’s purpose(s) for the endowment is outlined in the endowment’s governing document.

A governing document which outlines three different uses, such as scholarship, fellowship, and research, would have three supported purposes. Each supported purpose would have its own spending distribution cost center.

In EGATS, a spending distribution cost center is referred to as a “supported purpose”.

#### On the EGATS dashboard

- Enter the Name, fund number, or cost center for the Endowment you would like to review.

Search by entering title, fund number, or cost center.

Title, fund number, or cost center

- You will be directed to the information panel which contains the details for the selected Endowment.

Endowment Detail 0705181300 - Endowed Chair in Child Neurology

Type: CHAIR RCTF: False Match: NONE Validation Status: N

	Total	Chair	Prof	Lect	Fell	Schol	Enric	Other	Acct Only
Active Supported Purpose	1	1	0	0	0	0	0	0	0

Held By: Import Review: HIST

GovDoc ID: 1773 Ref Title: Governing Document for Neurology Research Chair

Override Validity Dates Validity Dates: 12/10/2004 - 12/31/9999 ACTIVE

Override Dept. Fund Dept: 7H852 Neurology

Naming Rights Access Dept: 7H852 Neurology EG\_ID: 1780

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- At the bottom of the screen, you will see the Cost Center information for the endowment.
- The Supported Purpose tab is displayed by default.

**Viewing the donor purpose language**


The written descriptions of the donor purpose can be found on the Donor Purpose tab.

- The default view under the Donor Purpose tab will give you a snapshot of the Purpose from the Governing Document, the Purpose Summary, and the Purpose Explanation.

Eff Date	End Date	Purpose Governing Document	Purpose Summary
1/1/1900	12/31/9999	The Fund shall be known as the Endowed Chair/Distinguished Scholars in Rural Healthy Policy and shall be used to support health policy research and development with an emphasis on rural health. ...	This endowment was est costs, with a focus in the

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- To view the entire written purpose, click the “glasses” icon to the left of the Eff Date.

	Eff Date
	1/1/1900

Donor Purpose for 0705265300 - Endowed Chair/Distinguished Scholar in Rural Health Policy x

Valid from 1/1/1900 to 12/31/9999

Verbatim from Document

The Fund shall be known as the Endowed Chair/Distinguished Scholars in Rural Healthy Policy and shall be used to support health policy research and development with an emphasis on rural health. The annual salary of the Chair/Distinguished Scholar, research projects, and other designated support costs may be partially or totally supported with the income from the Fund. The focus of the work of the Chair/Distinguished Scholar shall be in the area of health policy particularly as it relates to rural areas. Particular research and work will be mutually agreed upon by the Chair/Scholar and the Donor. This will be accomplished by close and ongoing collaboration and dialogue between Donor, the Chair/Scholar and the University, and the chair/scholar in health policy endowed by the foundation at the University of Louisville. The work of the Chair/Distinguished Scholar shall complement, inform and assist the the overall work of the Foundation for a Healthy Kentucky as a participant in the debate on health policy which leads to cohesive, integrative health care delivery in the Commonwealth of Kentucky. A search committee consisting of at least five Inembers shall be established by the University to perform a nationwide search for a faculty member to fill the Chair or for a person to be appointed as a Distinguished Scholar. The Foundation for a Healthy Kentucky shall appoint two representatives on the Search Committee. The Chancellor of the Chandler Medical Center shall recommend for appointment the person nominated by the Search Committee for the Chair/Distinguished Scholar to the University Board of Trustees in accordance with the provisions concerning academic employment as set forth in the University Governing Regulations and Administrative Regulations. The duties and responsibilities of the endowed Chair/Distinguished Scholar shall be defined by the Chancellor of the Chandler Medical Center.

This endowment was established in 2001 to support the annual salary, research projects and other designated support costs, with a focus in the area of health policy as it relates to rural areas.

Purpose Explanation

Donor purpose information is written in three different forms.

1. Verbatim from Document: The Verbatim from Document purpose in EGATS contains the entire written donor purpose as it appears in the governing document for the endowment fund.
2. Summary for Reporting: The Summary for Reporting purpose in EGATS is a brief synopsis of the donor’s purpose in the endowment agreement and is used primarily for donor relations.
3. Purpose Explanation: The Purpose Explanation in EGATS is added to endowments with complex or unusual agreement terms. The explanation clarifies the terms of the agreement to better assist campus with the utilization of the endowment funds.

### Viewing the supported purpose(s) for the endowment

The supported purpose tab displays each cost center associated with the endowment.

- The cost center list appears on the left side of the panel

Supported Purpose Documents Donor Purpose Validation

EG-SP Link  
Active

1215380840 CHAIR Dist: 0.00%  
9/3/2001 to 12/31/9999  
Endowed Chair/Distinguished Scholar in Rural Health Policy  
**Held By:** Bush, Matthew L., M.D. 01/01/2019 to 12/31/2023;  
Borders, Tyrone F., PhD 07/01/2018 to 06/30/2023

**Appt Period:** 01/01/2019 to 12/31/2023, 07/01/2018 to 06/30/2023;  
respectively  
**Usage Contact:** N/A

1 of 3

1215505760 OTHER Dist: 0.00%  
9/3/2001 to 12/31/9999  
NO APPTS, ACCTNG USE ONLY - Endowed Chair/Distinguished  
Scholar in Rural Health Policy  
**Held By:** N/A

**Appt Period:** N/A

- The Active dropdown allows you to view Active, Inactive, or All (both active and inactive) supported purposes for the endowment.

Active

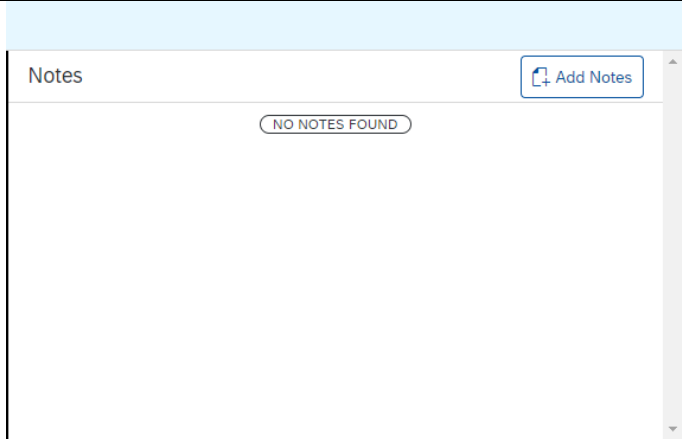

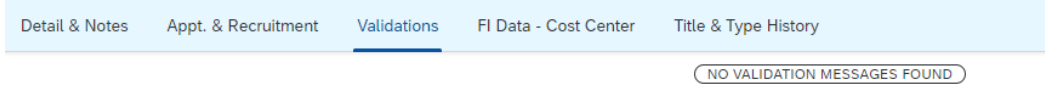
Active

Inactive

All

<p><b>Viewing supported purpose information</b></p>	<p>Supplemental information for each supported purpose is available on the Details &amp; Notes, Appt. &amp; Recruitment, Validations, FI Data – Cost Center, and Title &amp; Type History tabs.</p> <div data-bbox="511 346 1550 1134" style="border: 1px solid gray; padding: 5px;"> <p><b>1215380840 Endowed Chair/Distinguished Scholar in Rural Health Policy</b></p> <p>Detail &amp; Notes    Appt. &amp; Recruitment    Validations    FI Data - Cost Center    Title &amp; Type History</p> <ul style="list-style-type: none"> <li>To view the information for a different supported purpose, click the View Entity button for the cost center. <b>Note:</b> The View Entity button will not appear on the active cost center.</li> </ul> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>1215505760 OTHER    Dist: 0.00%                      9/3/2001 to 12/31/9999                      NO APPTS, ACCTNG USE ONLY - Endowed Chair/Distinguished Scholar in Rural Health Policy  <b>Held By:</b> N/A</p> <p><b>Appt Period:</b> N/A  <b>Usage Contact:</b> N/A</p> </div> <p style="text-align: right;">2 of 3    <a href="#">View Entity</a></p> </div>
<p><b>Details &amp; Notes</b></p>	<p>The Details &amp; Notes tab will show the effective date of the cost center, whether the fund can be converted from a professorship to chair, and whether there are any active validation messages.</p> <ul style="list-style-type: none"> <li>If a fund can be converted to a Chair, the Amount section will list the minimum amount that must be reached before the conversion can take place. The threshold amount comes from the governing document.</li> </ul> <div data-bbox="511 1659 1550 1764" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p><b>Prof To Chair:</b> False                      <b>Amount:</b> 0.00                      <b>Validation Status:</b> Okay</p> <p><b>Effective:</b> 9/3/2001 - 12/31/9999    ACTIVE</p> </div> <ul style="list-style-type: none"> <li>Cost center notes are located to the right of the tab.</li> </ul>

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<p><b>Appt. &amp; Recruitment</b></p>	<p>The Appt. &amp; Recruitment tab will show the history of appointments for the selected cost center. Additional information regarding this section, can be found in our <a href="#">EGATS – Faculty Appointments</a> guide.</p>  <table border="1"> <thead> <tr> <th>Entry Type</th> <th>Status</th> <th>Period</th> <th>Occupant</th> <th>Academic Appointment / Recruitment Notes</th> </tr> </thead> <tbody> <tr> <td>Appointment</td> <td></td> <td>7/1/2013 - 6/30/2022</td> <td>Stamm, Stefan, Ph.D. 10345680</td> <td>Medicine / Molecular and Cellular Biochemistry Professor / Regular</td> </tr> <tr> <td>Appointment</td> <td></td> <td>7/1/2008 - 6/30/2013</td> <td>Stamm, Stefan, Ph.D. 10345680</td> <td>Medicine / Molecular and Cellular Biochemistry Associate Professor / Regular</td> </tr> <tr> <td>Appointment</td> <td></td> <td>7/1/2004 - 10/4/2004</td> <td>Pauly, Thomas H., M.D. X0003866</td> <td>Medicine / Pediatrics Professor / Clinical</td> </tr> </tbody> </table>	Entry Type	Status	Period	Occupant	Academic Appointment / Recruitment Notes	Appointment		7/1/2013 - 6/30/2022	Stamm, Stefan, Ph.D. 10345680	Medicine / Molecular and Cellular Biochemistry Professor / Regular	Appointment		7/1/2008 - 6/30/2013	Stamm, Stefan, Ph.D. 10345680	Medicine / Molecular and Cellular Biochemistry Associate Professor / Regular	Appointment		7/1/2004 - 10/4/2004	Pauly, Thomas H., M.D. X0003866	Medicine / Pediatrics Professor / Clinical
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<p><b>Validations</b></p>	<p>If the cost center contains any unresolved validation messages, these will appear on the Validations tab.</p> <p><b>1215380840 Endowed Chair/Distinguished Scholar in Rural Health Policy</b></p> 																				

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**FI Data – Cost Center**

The FI Data – Cost Center tab allows you to view cost center expenses for the year. The information on this screen matches that data found in SAP under transaction GR55.

FYear	Commitment Items	Annual Budget	Actuals	POS Encumb	Fund Reserve	Parked FI Docs	Available
2022	480010 Prior Year Fund Balances	\$0.00	-\$929.71	\$0.00	\$0.00	\$0.00	\$929.71
2022	480020 Appropriations of Fund Balances	-\$930.00	\$0.00	\$0.00	\$0.00	\$0.00	-\$930.00
2022	Revenues - Private funds	-\$930.00	-\$929.71	\$0.00	\$0.00	\$0.00	-\$0.29

**Title & Type History**

The Title & Type History tab shows a history of name changes to the endowment and cost center.

Title	Entity Type	Eff. Date	End Date
Endowed Chair/Distinguished Scholar in Rural Health Policy	Chair	1/1/1900	12/31/9999

**Questions**

- For questions, please contact Endowment and Gift Accounting:
  - Email – [endowment@uky.edu](mailto:endowment@uky.edu)
  - **Web Inquiry** –