

EGATS – Faculty Appointments

- Process:** Specific information from the Faculty Database is made visible in the Endowment and Gift Account Tracking System (EGATS) to assist units with the utilization of endowment spending distributions for professorship and chair appointments. Please note that the appropriate Dean’s Office is responsible for the chair and professorship appointment data that links to EGATS from the Faculty Database.

Procedures

When the endowment fund is open on the Endowment Detail screen, the faculty appointment information can be displayed for chairs and professorships.

- Click on Supported Purpose. If there is more than one supported purpose listed on the left of the screen, choose the supported purpose to be reviewed and then click on Appt. & Recruitment.

The screenshot shows the EGATS interface. At the top, there are tabs: Supported Purpose (selected), Documents, Donor Purpose, Validation Messages, FI Data - Fund, and Title and Type History. Below the tabs, there is a search bar with 'EG-SP Link' and a dropdown menu set to 'Active'. To the right, the text '1215375760 Jacqueline A. Noonan Professorship in Pediatrics' is displayed. Below this, there is another set of tabs: Detail & Notes, Appt. & Recruitment (selected), Validations, FI Data - Cost Center, and Title & Type History. Below the tabs, there is a table with columns: Entry Type, Status, Period, Occupant, and Academic Appointment / Recruitment Notes.

- Information regarding the appointment will be displayed.

Appt. & Recruitment [Add Recruitment Info](#)

| 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 |

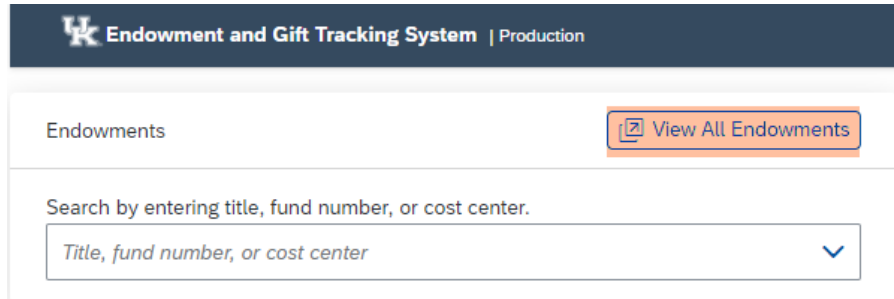
- Entry Type**
 - Appointment – An approved appointment that went through a formal board action approval process in the Faculty Database.
 - Board Action - An appointment board action *pending* approval in the Faculty Database. Once the board action is resolved (approved or rejected) it will no longer be listed under this category.
 - Recruitment - Recruitment notes that will be present for periods when a chair or professorship is vacant. The notes can be added by users with the edit role.

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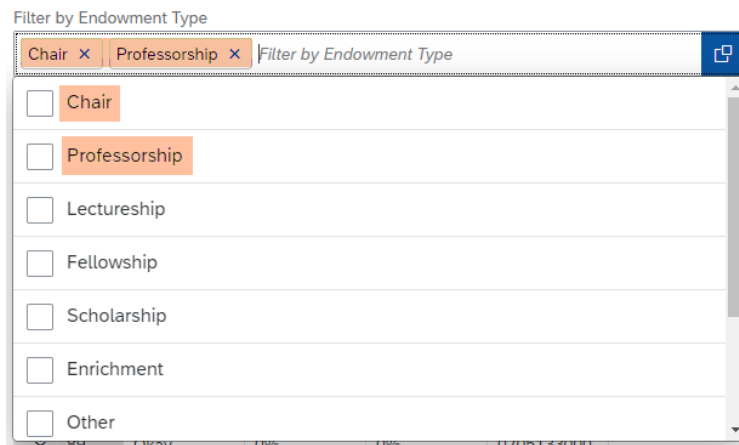
- Status
 - *Active* - *For Appointment or Recruitment entry types*, the value will be Active if it is current, per the effective period.
 - *Inactive* - *For Appointment or Recruitment entry types*, the value will be Inactive if the end date is in the past.
 - *Future* - *For Appointment or Recruitment entry types*, the value will be Future if the begin date is in the future. It will be possible for departments to enter future recruitment notes, for example, if they know that after an appointment ends, they will build principal for a period.
 - *At xxxxxxx level* - *For Board Action entry types*, the value will indicate the current workflow level awaiting approval.
- Period – the effective dates of the appointment
- Occupant – the name and person ID of the person holding the appointment
- Academic Appointment/Recruitment Notes
 - University Area
 - Name of the appointment
 - Notes added by the unit
- To add recruitment notes to the appointment, see the EGATS – Notes Quick Reference Guide.

If multiple professorships or chairs need to be reviewed, utilize the View All Endowments option.

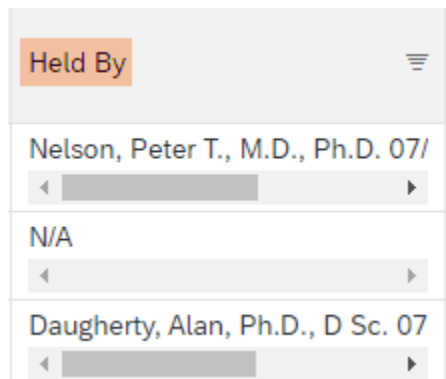
- From the Dashboard, click on View All Endowments.



- The user will see a report that shows all endowments for which they have access.
- The filters can be used to only see chairs or professorships. Click on Filter by Endowment Type.



- One of the columns is titled Held By and will show the name(s) of the faculty member(s) who holds the appointment and the effective date(s) of the appointment.

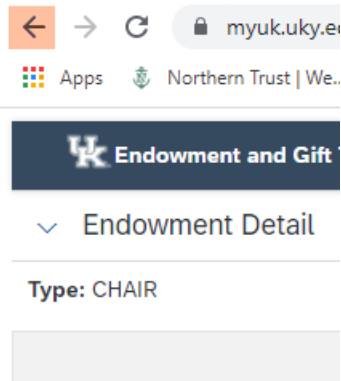


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- To see more information regarding the appointment, click on the down arrows in the far left column of the report.

| ID | Validation Flag | Underwater Status | Underwater Annual Status | Fund | Endowment Title | Fund Short Name |
|----|-----------------|-------------------|--------------------------|------------|-----------------------------------|-----------------|
| 57 | Okay | 0% | 0% | 0705121000 | R.C. Durr Chair in Alzheimer's Di | DURR CHAIR |

- The endowment fund and supported purpose detail will appear.
- Follow the instructions in the first section of this quick reference guide to view the appointment information or add recruitment notes.
- Once the specific endowment has been reviewed, click on the back arrow at the top of the screen to return to the endowment report.



Validation errors

- There may be validation errors on the supported purposes in relation to the appointments. Examples include:
 - Effective periods of appointments and recruitment entries overlap (they should not overlap)
 - Warning for vacant chairs or professorships if there is no recruitment or board action entry for the current date
- If validation errors are present, research the issue and make the appropriate notes in EGATS or changes in the faculty database regarding the appointment

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| Questions | <ul style="list-style-type: none">• For EGATS questions please contact the following: Email – endowment@uky.edu• For faculty appointment questions, please contact the Office of Faculty Advancement at facultyadv@uky.edu. |
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