

Employee Last Name: _____

Employee Start Date: _____

UC DAVIS

DEVELOPMENT AND ALUMNI RELATIONS

Training Acknowledgement for PMATS Access

Addendum to the Advance Security and Use Statement

Please return to:

Andrea Dickens
Prospect Management and Research
University Development Office
UC Davis Conference Center, 2nd Floor
pmats@ucdavis.edu

PMATS access is granted after completion of the following:

- **Advance Web Training** completed through Development Officer Access level (see the Advancement Services Advance System Access website: <http://ais.ucdavis.edu/learningcenter/systemaccess.html>).
- **PMATS Training** completed for the required level of access (see table below for requirements). Prospect Management and Tracking System [documents](#) and [videos](#) can be found on the DEVAR Organizational Toolkit: https://dot.ucdavis.edu/development_outreach/research/pmats/index.html.

Select level of access requested “√”	Level of Access	Policy & Definitions documents	Contact Reports documents & Contact Report Video	Metrics & Portfolio Management documents	PMATS Videos
	PMATS INQUIRY ONLY:	X			
	CONTACT REPORT MAINTENANCE:	X	X		
	PMATS PORTFOLIO MAINTENANCE:	X	X	X	X

Note: Required PMATS documents and videos are listed on **page 2**. Additional training may be suggested or required as needed.

To be filled out by requestor

I acknowledge that I have studied the above Advance training materials that pertain to my job function. I understand that I am responsible for all entries made thereunder.

Employee Signature: _____ Date: _____ Phone#: _____

Print Name: _____ Job Function: _____

E-Mail: _____

I acknowledge that the above employee has studied the above Advance training materials that directly pertain to her/his job function. I authorize the appropriate security rights and profile be assigned to this employee in the AIS systems to perform his/her job function.

Supervisor’s Signature: _____ Date: _____ Phone#: _____

Print Name: _____ Dept/Unit: _____

PMATS Manager’s Signature: _____ Date: _____

Development Officer's Toolkit PMATS Documents and Training Videos

Policy & Definitions documents (required for PMATS Inquiry, Contact Report Maintenance and PMATS Portfolio Maintenance access)

- PMATS Policy, Guidelines and Key Concepts
- DO Metrics - Planned Gifts Policy and Process
- PMATS Definitions

Contact Reports documents and videos (required for Contact Report Maintenance and PMATS Portfolio Maintenance access)

- Contact Report Quick-Start
- Contact Report Essentials
- HIPPA resource document
- Printing Full Text Contact Reports for Review
- Add a Contact Report (**video**)

Metrics & Portfolio Management documents (required for PMATS Portfolio Maintenance access)

- DO Metrics Overview Report Instructions
- Finding Proposals behind Dollars Raised in the current fiscal year
- Active MG Solicitations Report (pm-023) Instructions
- Solicitation / Proposal Adding & Updating
- Dropping Prospect Assignments

PMATS Videos (required for PMATS Portfolio Maintenance access)

- Add a Prospect to PMATS
- Update and Maintain a Prospect Record
- Add/Update RM or TM
- Add New Ask/Proposal
- Update and Maintain an Existing Ask
- Add/Update Solicitation Team