

Updated: 07-08-2026

GET /v1/export/app/allFaculty/annualCertification/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_annual_certifications_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty annual certifications for a given fiscal year. Returns a flat list where each entry represents one faculty member's certification record for the specified fiscal year, including their status, due date, submission date, and owe-to-plan calculation.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/allFaculty/annualCertification/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

{

```
"snapshotDate": "07/01/2025 03:00:00",
"campusCode": "UCLA",
"fiscalYear": "2024-2025",
"facultyList": [
  {
    "ucPathID": "80012345",
    "email": "jsmith@university.edu",
    "firstName": "Jane",
    "lastName": "Smith",
    "formStatus": "Accepted",
    "queueLabel": "",
    "policyName": "APM-025",
    "primaryUnitCode": "DEPTX",
    "primaryUnitTitle": "Department of Computer Science",
    "submittedDate": "10/15/2024",
    "dueDate": "10/31/2024",
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
    "oweToPlan": "3,500.00"
  },
  {
    "ucPathID": "80067890",
    "email": "jdoe@university.edu",
    "firstName": "John",
```

```
"lastName": "Doe",
"formStatus": "Not Submitted",
"queueLabel": "Faculty",
"policyName": "APM-025",
"primaryUnitCode": "DEPTY",
"primaryUnitTitle": "Department of Mathematics",
"submittedDate": "",
"dueDate": "10/31/2024",
"secondaryUnitCodeList": [],
"oweToPlan": "0"
},
{
"ucPathID": "80011111",
"email": "awhite@university.edu",
"firstName": "Alice",
"lastName": "White",
"formStatus": "In Process",
"queueLabel": "Department Chair",
"policyName": "APM-025",
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"submittedDate": "10/20/2024",
"dueDate": "10/31/2024",
```

```
"secondaryUnitCodeList": ["DEPTZ"],
"oweToPlan": "0"
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
fiscalYear	string	Fiscal year range (e.g., "2024-2025")
facultyList	array	Array of faculty certification objects

Faculty Certification Object

Field	Type	Description
ucPathID	string	UCPath identifier
email	string	Faculty member email address
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Field	Type	Description
formStatus	string	Certification status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
policyName	string	Applicable policy number (e.g., "APM-025")
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
submittedDate	string	Date last submitted (empty if not submitted)
dueDate	string	Certification deadline date (MM/DD/YYYY)
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Error Responses

Invalid fiscal year range:

```
{
  "response_code": "Error",
  "response_message": "Fiscal Year range not valid",
  "response_body": ""
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated daily by the scheduled `proc ucoats::report::v1::generate_faculty_annual_certifications_snapshot`.
- Snapshots are generated for the last 10 fiscal years from the current fiscal year.
- The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
- The `fiscal_year` value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
- Unlike the individual certification endpoints (`/faculty/AnnualCertifications/ucpathID/` and `/faculty/AnnualCertifications/email/`), this endpoint returns all faculty certifications for a single fiscal year in a flat list rather than one faculty's certifications across all fiscal years.
- The `formStatus` is derived from the workflow state: "pending" → "Not Submitted", "approved" → "Accepted", all other states → "In Process".
- When status is "Not Submitted", the `submittedDate` is returned as empty.
- The `oweToPlan` calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals `total_income - income_threshold`, formatted to two decimal places.

Updated: 07-08-2026

GET /v1/export/app/batch/faculty/activity/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_activities_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty members with their outside activities for a given fiscal year. Includes faculty profile data, time/income aggregates per activity, and approval form statuses. This is a mid-level export — more detailed than the faculty list but without the individual effort/income line items provided by the effort endpoint.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/batch/faculty/activity/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{  
  "snapshotDate": "07/01/2025 03:00:00",  
  "campusCode": "UCLA",  
  "facultyCount": "85",  
  "facultyList": [  
    {  
      "firstName": "Jane",  
      "lastName": "Smith",  
      "email": "jsmith@university.edu",  
      "UID": "123456789",  
      "UCPathID": "80012345",  
      "employmentStatus": "A",  
      "separationDate": "",  
      "primaryUnitCode": "DEPTX",  
      "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],  
      "facultyStatusTagList": ["notInGoodStanding"],  
      "policyName": "APM-025",  
      "timeThreshold": "48",  
      "incomeThreshold": "25,000.00",  
      "activityList": [  
        {
```

```
"label": "Consulting for Acme Corp",
"category": "cat1",
"timeEntered": "120.00",
"timeAgainstTh": "100.00",
"timeOverTH": "20.00",
"incomeEntered": "18,000.00",
"incomeAgainstTh": "15,000.00",
"incomeOverTh": "5,000.00",
"formList": [
  {
    "formID": "8001",
    "Form": "cat1",
    "formStatus": "Accepted",
    "queueLabel": "",
    "lastUpdated": "09/01/2024"
  }
],
{
  "label": "Board Member at Tech Foundation",
  "category": "cat1",
  "timeEntered": "40.00",
  "timeAgainstTh": "40.00",
```

```
"timeOverTH": "",
"incomeEntered": "5,000.00",
"incomeAgainstTh": "5,000.00",
"incomeOverTh": "",
"formList": [
  {
    "formID": "8002",
    "Form": "cat1",
    "formStatus": "In Process",
    "queueLabel": "Department Chair",
    "lastUpdated": "10/15/2024"
  }
]
}
]
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyCount	string	Total number of faculty in the response
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
secondaryUnitCodeList	array	List of secondary unit codes

Field	Type	Description
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
timeEntered	string	Total hours reported (all effort entries)
timeAgainstTh	string	Hours counted against the threshold
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income reported (all effort entries)
incomeAgainstTh	string	Income counted against the threshold
incomeOverTh	string	Income exceeding the threshold (empty if N/A)

Field	Type	Description
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Error Responses

Invalid fiscal year range:

```
{
  "response_code": "Error",
  "response_message": "Fiscal Year range not valid",
  "response_body": ""
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{
  "response_code": "Error",
```

```
"response_message": "Data Not Found",
```

```
"response_body": ""
```

```
}
```

Site report configuration error:

```
{
```

```
"response_code": "Error",
```

```
"response_message": "Could not get information from ucoats-site-report package",
```

```
"response_body": ""
```

```
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated weekly by the scheduled proc ucoats::report::v1::generate_faculty_activity_snapshot.
- Snapshots are generated for the last 10 fiscal years from the current fiscal year.
- The response is delivered as a file download (ad_return_string_as_file) with MIME type json.
- The fiscal_year value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
- This endpoint provides two levels of time/income data per activity: timeEntered/incomeEntered (total reported) and timeAgainstTh/incomeAgainstTh (amounts counted against the policy threshold).
- Unlike the effort endpoint (/batch/facultyActivityEffort/), this endpoint does not include individual income/effort line items (incomeEffortList).
- The facultyStatusTagList is dynamically built during snapshot generation: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.

GET /v1/export/app/batch/facultyActivityEffort/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_activities_effort_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty members with their outside activities and detailed effort/income entries for a given fiscal year. This is the most granular export endpoint — it includes individual income and effort line items (hours, compensation amounts, stock details) for each activity, in addition to approval form statuses.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/batch/facultyActivityEffort/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

{

```
"snapshotDate": "07/01/2025 03:00:00",
"campusCode": "UCLA",
"facultyCount": "85",
"facultyList": [
  {
    "firstName": "Jane",
    "lastName": "Smith",
    "email": "jsmith@university.edu",
    "UID": "123456789",
    "UCPathID": "80012345",
    "employmentStatus": "A",
    "separationDate": "",
    "primaryUnitCode": "DEPTX",
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
    "facultyStatusTagList": ["notInGoodStanding"],
    "policyName": "APM-025",
    "timeThreshold": "48",
    "incomeThreshold": "25,000.00",
    "activityList": [
      {
        "label": "Consulting for Acme Corp",
        "category": "cat1",
        "timeEntered": "120.00",
```

```
"timeAgainstTh": "100.00",
"timeOverTH": "20.00",
"incomeEntered": "18,000.00",
"incomeAgainstTh": "15,000.00",
"incomeOverTh": "5,000.00",
"formList": [
  {
    "formID": "8001",
    "Form": "cat1",
    "formStatus": "Accepted",
    "queueLabel": "",
    "lastUpdated": "09/01/2024"
  }
],
"incomeEffortList": [
  {
    "remunerationType": "Honorarium",
    "stockInfo": {},
    "numHours": "40.00",
    "startDate": "07/01/2024",
    "isPodiumHours": "No",
    "endDate": "09/30/2024",
    "isCompensated": "Yes",
```

```
"Amount": "5,000.00"
},
{
  "renumerationType": "Stock as Compensation",
  "stockInfo": {
    "numShares": "100",
    "receiptDate": "08/15/2024",
    "pricePerShareAtTimeOfReceipt": "50.00"
  },
  "numHours": "0.00",
  "startDate": "08/01/2024",
  "isPodiumHours": "No",
  "endDate": "08/31/2024",
  "isCompensated": "Yes",
  "Amount": "5,000.00"
}
]
}
]
}
]
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyCount	string	Total number of faculty in the response
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code

Field	Type	Description
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
timeEntered	string	Total hours reported (all effort entries)
timeAgainstTh	string	Hours counted against the threshold
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income reported (all effort entries)
incomeAgainstTh	string	Income counted against the threshold

Field	Type	Description
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects
incomeEffortList	array	Array of individual income/effort entry objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Income/Effort Entry Object

Field	Type	Description
remunerationType	string	Type of compensation (e.g., "Honorarium", "Stock as Compensation", "Stock Purchase Agreement", "Stock Options")
stockInfo	object	Stock-specific details (empty object {} for non-stock types)
numHours	string	Hours reported for this entry
startDate	string	Effort period start date (MM/DD/YYYY)

Field	Type	Description
isPodiumHours	string	Whether hours are podium hours ("Yes"/"No")
endDate	string	Effort period end date (MM/DD/YYYY)
isCompensated	string	Whether the effort is compensated ("Yes"/"No")
Amount	string	Income amount reported for this entry

stockInfo Object (varies by remunerationType)

Stock as Compensation:

Field	Type	Description
numShares	string	Number of shares received
receiptDate	string	Date shares were received
pricePerShareAtTimeOfReceipt	string	Share price at time of receipt

Stock Purchase Agreement:

Field	Type	Description
purchaseDate	string	Date of stock purchase
purchasePricePerShare	string	Price per share at purchase
fairMarketValueAtTimeOfPurchase	string	Fair market value at purchase time
amountAgainstThreshold	string	Amount counted against threshold

Stock Options:

Field	Type	Description
numShares	string	Number of option shares
optionOfferDate	string	Date options were offered
exercisePricePerShare	string	Exercise price per share
fairMarketValueAtTimeOfDisclosure	string	Fair market value at disclosure
amountAgainstThreshold	string	Amount counted against threshold

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated weekly by the scheduled proc ucoats::report::v1::generate_faculty_activity_effort_snapshot.
 - Snapshots are generated for the last 10 fiscal years from the current fiscal year.
 - The response is delivered as a file download (ad_return_string_as_file) with MIME type json.
 - The fiscal_year value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
 - This endpoint provides two levels of time/income data per activity: timeEntered/incomeEntered (total reported) and timeAgainstTh/incomeAgainstTh (amounts counted against the policy threshold).
 - The incomeEffortList breaks down each activity into individual effort/income line items, including stock compensation details when applicable.
 - The stockInfo object structure varies depending on the remunerationType value. For non-stock types, it is an empty object.
-
-

Updated: 07-08-2026

GET /v1/export/app/faculty/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty members for a given fiscal year. The data is generated daily and served from a stored JSON file. Returns basic faculty profile information including employment status, policy, unit assignments, and status tags.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/faculty/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{  
  "snapshotDate": "07/01/2025 03:00:00",  
  "campusCode": "UCLA",  
  "facultyList": [  

```

```
{
  "firstName": "Jane",
  "lastName": "Smith",
  "email": "jsmith@university.edu",
  "policyName": "APM-025",
  "UCPathID": "80012345",
  "facultyTagList": ["notInGoodStanding", "onleave"],
  "employmentStatus": "A",
  "primaryUnitCode": "DEPTX",
  "secondaryUnitCodeList": ["DEPTY", "DEPTZ"]
},
{
  "firstName": "John",
  "lastName": "Doe",
  "email": "jdoe@university.edu",
  "policyName": "APM-025",
  "UCPathID": "80067890",
  "facultyTagList": [],
  "employmentStatus": "A",
  "primaryUnitCode": "DEPTY",
  "secondaryUnitCodeList": []
}
]
```

}

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
policyName	string	Applicable policy number (e.g., "APM-025")
UCPathID	string	UCPath identifier
facultyTagList	array	Status tags (e.g., "notInGoodStanding", "onleave"); empty array if none apply
employmentStatus	string	"A" (Active) or "S" (Separated)

Field	Type	Description
primaryUnitCode	string	Primary department/unit code
secondaryUnitCodeList	array	List of secondary unit codes

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

}

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated daily by the scheduled proc ucoats::report::v1::generate_faculty_snapshot.
- Snapshots are generated for the last 10 fiscal years from the current fiscal year.
- The response is delivered as a file download (ad_return_string_as_file) with MIME type json.
- The fiscal_year value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
- The facultyTagList is dynamically built during snapshot generation: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.
- The employmentStatus is derived from the separated_p flag: "A" for active faculty, "S" for separated.

Updated: 07-08-2026

GET /v1/export/app/faculty/AnnualCertifications/email/:email

Proc: oats::ws_faculty::export::v1::get_annual_certification_by_email

Description: Retrieves the list of Annual Certifications for a faculty member, identified by their email address. Returns the faculty's basic identifying information along with all their annual certification records across fiscal years, including certification status, due dates, and owe-to-plan calculations.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
email	path	yes	The email address of the faculty member (e.g., jsmith@university.edu).

How to Call

GET /v1/export/app/faculty/AnnualCertifications/email/jsmith@university.edu

Authorization: Bearer <token>

Response

Content-Type: application/json

Success (HTTP 200):

```
{
  "response_code": "Ok",
  "response_message": "ws annual certification list run successfully",
  "response_body": {
    "annualCertificationData": {
      "facultyInfo": {
        "UID": "123456789",
        "UCPathID": "80012345",
        "firstName": "Jane",
        "lastName": "Smith"
      },
      "annualCertificationList": [
        {
          "primaryUnitCode": "DEPTX",
          "primaryUnitTitle": "Department of Computer Science",
          "policyName": "APM-025",
```

```
"fiscalYear": "2024",
"status": "Approved",
"dueDate": "10/31/2024",
"submittedDate": "10/15/2024",
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"oweToPlan": "3,500.00"
},
{
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"policyName": "APM-025",
"fiscalYear": "2023",
"status": "Approved",
"dueDate": "10/31/2023",
"submittedDate": "10/20/2023",
"secondaryUnitCodeList": ["DEPTY"],
"oweToPlan": "0"
},
{
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"policyName": "APM-025",
"fiscalYear": "2025",
```

```
"status": "Not Submitted",
"dueDate": "10/31/2025",
"submittedDate": "",
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"oweToPlan": "0"
}
]
}
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	Contains the annualCertificationData object

annualCertificationData Object

Field	Type	Description
facultyInfo	object	Basic faculty identification data

Field	Type	Description
annualCertificationList	array	Array of annual certification objects

facultyInfo Object

Field	Type	Description
UID	string	Campus UID
UCPathID	string	UCPath identifier
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Annual Certification Object

Field	Type	Description
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
policyName	string	Applicable policy number (e.g., "APM-025")
fiscalYear	string	Fiscal year for this certification
status	string	Certification status: "Approved", "Not Submitted", or "In Process"
dueDate	string	Certification deadline date (MM/DD/YYYY)
submittedDate	string	Date last submitted (empty if not submitted)

Field	Type	Description
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Error Responses

Faculty not found by email:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with Email = jsmith@university.edu in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
- This proc delegates to `oats::ws_faculty::export::v1::get_annual_certification` with `search_type "email"`.
- The certification status is derived from the workflow state: "pending" → "Not Submitted", "approved" → "Approved", all other states → "In Process".

- When status is "Not Submitted", the submittedDate is returned as empty.
 - The oweToPlan calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals total_income - income_threshold, formatted to two decimal places.
 - The response includes certifications across all fiscal years available for the faculty member (not limited to a single fiscal year).
-

Updated: 07-08-2026

GET /v1/export/app/faculty/AnnualCertifications/ucpathID/:ucpath_id

Proc: oats::ws_faculty::export::v1::get_annual_certification_by_ucpath_id

Description: Retrieves the list of Annual Certifications for a faculty member, identified by their UCPath ID. Returns the faculty's basic identifying information along with all their annual certification records across fiscal years, including certification status, due dates, and owe-to-plan calculations.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
ucpath_id	path	yes	The UCPath ID of the faculty member (e.g., 80012345).

How to Call

GET /v1/export/app/faculty/AnnualCertifications/ucpathID/80012345

Authorization: Bearer <token>

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "ws annual certification list run successfully",  
  "response_body": {  
    "annualCertificationData": {  
      "facultyInfo": {  
        "UID": "123456789",  
        "UCPathID": "80012345",  
        "firstName": "Jane",  
        "lastName": "Smith"  
      },  
      "annualCertificationList": [  
        {  
          "primaryUnitCode": "DEPTX",  
          "primaryUnitTitle": "Department of Computer Science",  
          "policyName": "APM-025",  
          "fiscalYear": "2024",  
          "status": "Approved",  
          "dueDate": "10/31/2024",  
          "submittedDate": "10/15/2024",  
          "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],  
          "oweToPlan": "3,500.00"  
        }  
      ]  
    }  
  }  
}
```

```
},  
{  
  "primaryUnitCode": "DEPTX",  
  "primaryUnitTitle": "Department of Computer Science",  
  "policyName": "APM-025",  
  "fiscalYear": "2023",  
  "status": "Approved",  
  "dueDate": "10/31/2023",  
  "submittedDate": "10/20/2023",  
  "secondaryUnitCodeList": ["DEPTY"],  
  "oweToPlan": "0"  
},  
{  
  "primaryUnitCode": "DEPTX",  
  "primaryUnitTitle": "Department of Computer Science",  
  "policyName": "APM-025",  
  "fiscalYear": "2025",  
  "status": "Not Submitted",  
  "dueDate": "10/31/2025",  
  "submittedDate": "",  
  "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],  
  "oweToPlan": "0"  
}
```

```
]
}
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	Contains the annualCertificationData object

annualCertificationData Object

Field	Type	Description
facultyInfo	object	Basic faculty identification data
annualCertificationList	array	Array of annual certification objects

facultyInfo Object

Field	Type	Description
UID	string	Campus UID
UCPathID	string	UCPath identifier

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Annual Certification Object

Field	Type	Description
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
policyName	string	Applicable policy number (e.g., "APM-025")
fiscalYear	string	Fiscal year for this certification
status	string	Certification status: "Approved", "Not Submitted", or "In Process"
dueDate	string	Certification deadline date (MM/DD/YYYY)
submittedDate	string	Date last submitted (empty if not submitted)
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Error Responses

Faculty not found by UCPath ID:

```
{
```

```
"response_code": "Error",  
"response_message": "No matching faculty with UCPath ID = 80012345 in UCOATS",  
"response_body": ""  
}
```

Site report configuration error:

```
{  
"response_code": "Error",  
"response_message": "Could not get information from ucoats-site-report package",  
"response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
- The certification status is derived from the workflow state: "pending" → "Not Submitted", "approved" → "Approved", all other states → "In Process".
- When status is "Not Submitted", the submittedDate is returned as empty.
- The oweToPlan calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals total_income - income_threshold, formatted to two decimal places.
- The response includes certifications across all fiscal years available for the faculty member (not limited to a single fiscal year).
- The annualCertificationList includes the current workflow queue label in the state_cur field internally, but this is only surfaced through the status field mapping in the response.

GET /v1/export/app/facultyInfo/email/:email/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_info_by_email

Description: Retrieves detailed faculty information and their reported outside activities for a specific fiscal year, identified by the faculty member's email address. Returns faculty profile data including employment status, policy thresholds, and a list of activities with associated approval forms.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
email	path	yes	The email address of the faculty member (e.g., jsmith@university.edu).
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/facultyInfo/email/jsmith@university.edu/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
 - The email must match an existing faculty member in the subsite.
-

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "ws faculty info run successfully",  
  "response_body": {  
    "firstName": "Jane",  
    "lastName": "Smith",  
    "email": "jsmith@university.edu",  
    "UID": "123456789",  
    "UCPathID": "80012345",  
    "employmentStatus": "A",  
    "separationDate": "",  
    "primaryUnitCode": "DEPTX",  
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],  
    "facultyStatusTagList": ["notInGoodStanding", "onleave"],  
    "policyName": "APM-025",  
    "timeThreshold": "48",  
    "incomeThreshold": "25,000.00",  
    "activityList": [  
      {  
        "label": "Consulting for Acme Corp",  
        "category": "cat1",  
        "timeEntered": "120.00",
```

```
"timeOverTH": "20.00",
"incomeEntered": "15,000.00",
"incomeOverTh": "5,000.00",
"formList": [
  {
    "formID": "8001",
    "Form": "cat1",
    "formStatus": "Accepted",
    "queueLabel": "",
    "lastUpdated": "09/01/2024"
  }
],
{
  "label": "Board Member at Tech Foundation",
  "category": "cat1",
  "timeEntered": "40.00",
  "timeOverTH": "",
  "incomeEntered": "5,000.00",
  "incomeOverTh": "",
  "formList": [
    {
      "formID": "8002",
```

```
"Form": "cat1",
"formStatus": "In Process",
"queueLabel": "Department Chair",
"lastUpdated": "10/15/2024"
}
]
}
]
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	The faculty data payload

Faculty Object (response_body)

Field	Type	Description
firstName	string	Faculty member first name

Field	Type	Description
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Faculty not found by email:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with Email = jsmith@university.edu in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
- This proc delegates to the same shared `oats::ws_faculty::export::v1::get_faculty_info` logic as the UCPath ID variant, using `search_type "email"` instead.

- The facultyStatusTagList is dynamically built: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.
- The employmentStatus field is derived from the separated_p flag: "A" for active faculty, "S" for separated faculty.
- The timeThreshold and incomeThreshold reflect the policy limits configured for the faculty member.
- Activities include all types (not just COI/Cat1). Each activity shows aggregated time and income for the requested fiscal year.

Updated: 07-08-2026

GET /v1/export/app/facultyInfo/ucpathID/:ucpath_id/:fiscal_year

Proc: oats::ws_faculty::export::v1::get_faculty_info_by_ucpath_id

Description: Retrieves detailed faculty information and their reported outside activities for a specific fiscal year, identified by the faculty member's UCPath ID. Returns faculty profile data including employment status, policy thresholds, and a list of activities with associated approval forms.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
ucpath_id	path	yes	The UCPath ID of the faculty member (e.g., 80012345).
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v1/export/app/facultyInfo/ucpathID/80012345/2024-2025

Authorization: Bearer <token>

Validation Rules

- The `fiscal_year` must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
 - The `ucpath_id` must match an existing faculty member in the subsite.
-

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "ws faculty info run successfully",  
  "response_body": {  
    "firstName": "Jane",  
    "lastName": "Smith",  
    "email": "jsmith@university.edu",  
    "UID": "123456789",  
    "UCPathID": "80012345",  
    "employmentStatus": "A",  
    "separationDate": "",  
    "primaryUnitCode": "DEPTX",  
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],  
    "facultyStatusTagList": ["notInGoodStanding", "onleave"],  
    "policyName": "APM-025",
```

```
"timeThreshold": "48",
"incomeThreshold": "25,000.00",
"activityList": [
  {
    "label": "Consulting for Acme Corp",
    "category": "cat1",
    "timeEntered": "120.00",
    "timeOverTH": "20.00",
    "incomeEntered": "15,000.00",
    "incomeOverTh": "5,000.00",
    "formList": [
      {
        "formID": "8001",
        "Form": "cat1",
        "formStatus": "Accepted",
        "queueLabel": "",
        "lastUpdated": "09/01/2024"
      }
    ]
  },
  {
    "label": "Board Member at Tech Foundation",
    "category": "cat1",
```

```
"timeEntered": "40.00",
"timeOverTH": "",
"incomeEntered": "5,000.00",
"incomeOverTh": "",
"formList": [
  {
    "formID": "8002",
    "Form": "cat1",
    "formStatus": "In Process",
    "queueLabel": "Department Chair",
    "lastUpdated": "10/15/2024"
  }
]
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure

Field	Type	Description
response_message	string	Status message
response_body	object	The faculty data payload

Faculty Object (response_body)

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")

Field	Type	Description
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")

Field	Type	Description
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Faculty not found by UCPATH ID:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with UCPATH ID = 80012345 in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",
```

```
"response_message": "Could not get information from ucoats-site-report package",  
"response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
 - The facultyStatusTagList is dynamically built: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.
 - The employmentStatus field is derived from the separated_p flag: "A" for active faculty, "S" for separated faculty.
 - The timeThreshold and incomeThreshold reflect the policy limits configured for the faculty member.
 - Activities include all types (not just COI/Cat1). Each activity shows aggregated time and income for the requested fiscal year.
-
-

Updated: 07-08-2026

GET /v1/export/app/jwt-login

Proc: ctrl::restful::jwt::login_default_type_email

Description: Authenticates a user by email and password and returns a signed JWT token. This token is then used as a Bearer token for subsequent authenticated API calls.

Authentication: None (this is the login endpoint used to obtain a Bearer token)

Parameters

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message describing the result
response_body	string	The signed JWT token (on success) or empty string (on error)

Error Responses

Authentication failed (HTTP 401):

```
{  
  "response_code": "Error",  
  "response_message": "User authentication failed",  
  "response_body": ""  
}
```

This is returned when:

- The email does not match any user in the system
- The password is incorrect for the given email

Notes

- This proc is marked as **deprecated** in the current codebase.
- The JWT token includes registered claims: iss (issuer), sub (subject, formatted as email:<user_email>), aud (audience), exp (expiration timestamp), and iat (issued at timestamp).
- The token also includes custom claims: client_id and cust_acc_token.
- Token expiration is configured in the JWT setup for the package instance. After expiration, a new token must be obtained by calling this endpoint again.

- The signing algorithm and keys are configured per package instance via the JWT setup.