What is eGFA?

This is a process facilitated by a web-based tool for the purpose of nominating and managing requests for Graduate Faculty membership at UNC Charlotte. This online format allows you to submit nominations, upload required documents as well as update and review the status of your existing graduate faculty appointments any time you wish and from any location with Wi-Fi accessibility.

What do I need to use the system?

A desktop or tablet is recommended when accessing the eGFA application. The system is not optimized to work using a smart phone.

What if I need assistance?

eGFA is fully supported by the Graduate School and is backed up daily by One/IT. We will work with you to ensure that you can view, edit and submit your nomination requests. The system was designed using a Google platform, but should still work with Firefox. If you have any technical issues, please contact Michelle Hypki, mlhypki@charlotte.edu (Graduate School).

Contact Information

Michelle Hypki, Asst. Director of Graduate Academic Services mlhypki@charlotte.edu 7-5121

Ash Bowers, Business Application Developer abower16@charlotte.edu 7-5119
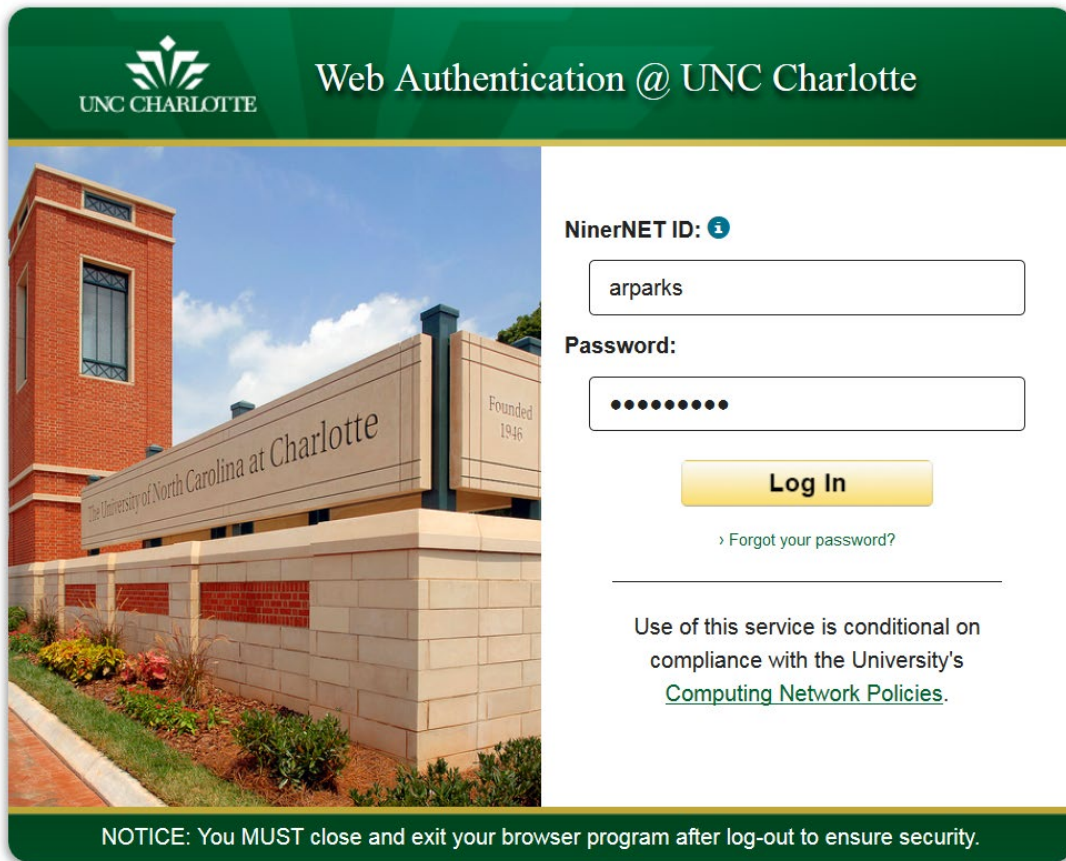
Table of Contents

Logging Into eGFA

Click on link. **https://egfa.charlotte.edu**

Any modern web browser should work, but we've had the best results working with Google Chrome. iOS devices (smart phones) are not optimized to get the best experience.

Sometimes it takes a brief moment for this page to be presented. Type in your NinerNet ID and password and click Log in.
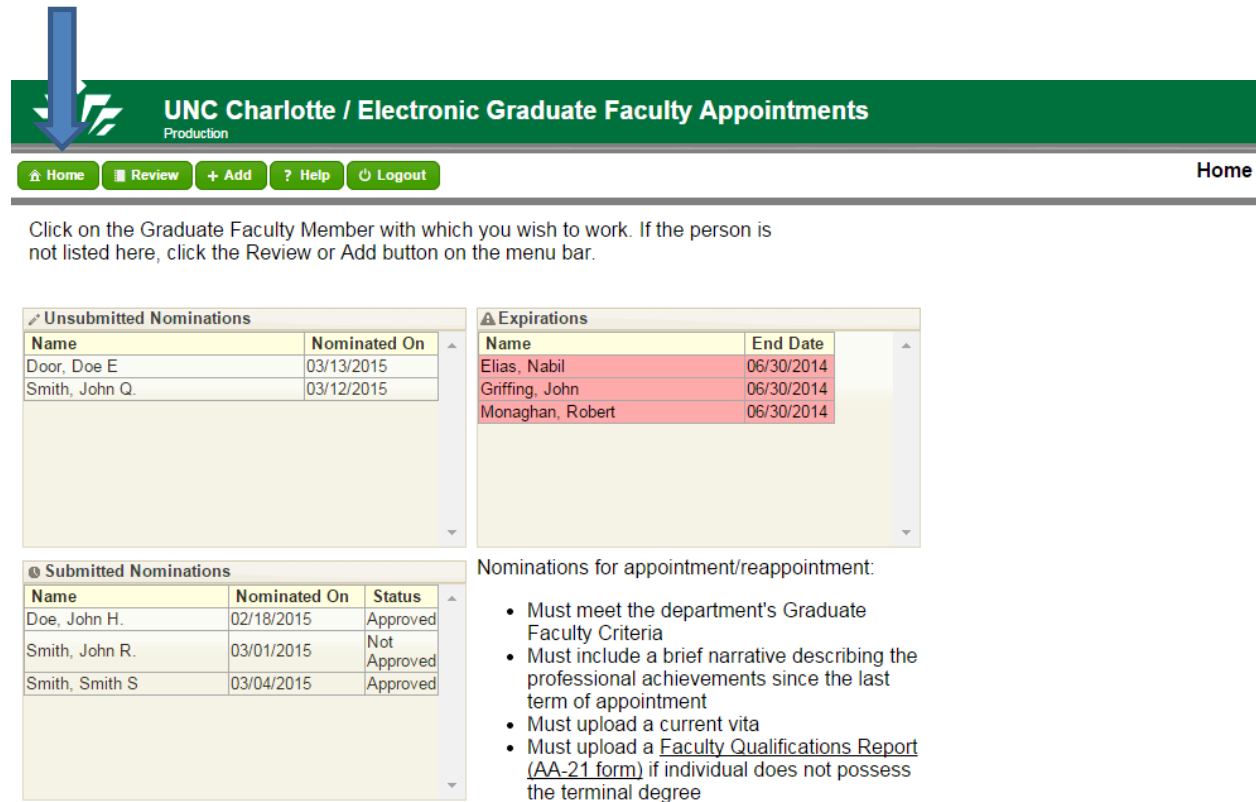
Home Tab

The Home page gives you an overview of the status of your graduate faculty members.

Un-submitted Nominations – This section displays faculty nominations which you have started but have not yet submitted to the Graduate School for review and approval. You might also see nominations in this area that have been returned to you to provide additional information, (examples include: returned to include an AA-21 Exception form, returned to include a more current CV, etc.). Nominations in this stage can still be edited by you.

Submitted Nominations - Nominations in this area have been sent to the Graduate School and are under review for approval. The nomination form itself cannot be edited. You can, however, edit the personal information relating to the individual (i.e., rank, degree, etc.).

Expirations – Individuals listed in this area have expired appointment terms or may be expiring soon. You can click on their name to open the Member Overview screen. At this point, you can begin the appointment or reappointment process.

Review Tab

The review page gives you essentially a full report of your graduate faculty members. This page shows key information regarding faculty appointments (Name, Email, Department, Type of appointment, Expired term (yes or no) and the appointment term Start and End dates. The list is color coded by their current status. Color legend is at the bottom of the screen. Clicking any name will take you to the Member Overview screen.

Un-submitted or Referred – These nominations can be in either of two stages – the nomination could have been started, but has not been submitted to the Graduate School for review, or has been returned to you for additional information. The nomination form can be edited at this time.

Pending – These are nominations that have been sent to the Graduate School and may be in various stages of the review process. The nomination form may not be edited at this stage.

Expiring/Expired – These appointments have expired or are due to expire soon.

Archived (Expired) – These are appointments that have been expired for more than 6 months and a reappointment request has not been submitted.

Missing Data – This legend color means the file or record is incomplete or missing key data elements.
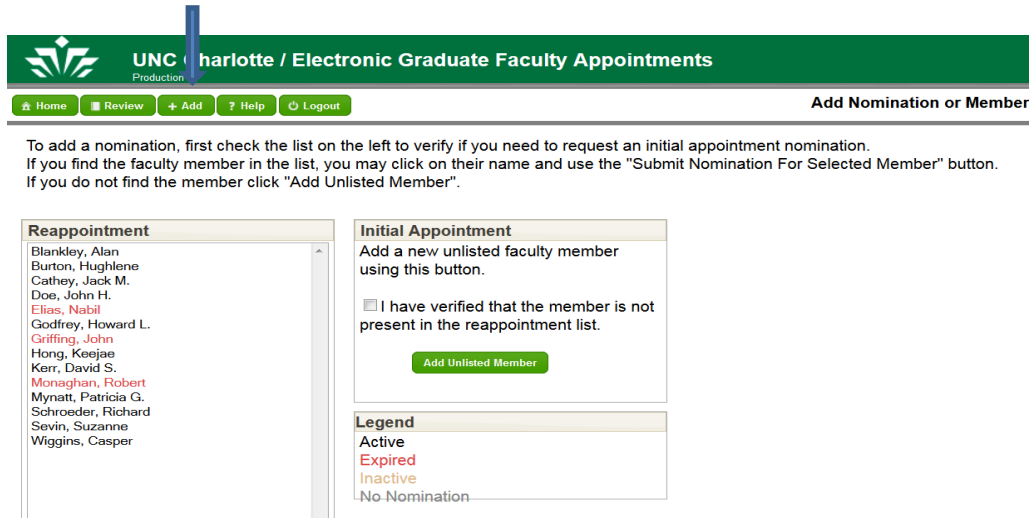
+ Add/Reappoint Tab

This page is used to add a new or reappoint an existing Associate or Regular Graduate Faculty member. There are 4 member categories: Regular, Associate, Emeritus and Administrative. You will mainly be working with Regular and Associate memberships. Regular members are tenured/tenure-track faculty on campus at UNC Charlotte. Associate and Associate -External Committee members are essentially everyone else (Lecturers, Adjunct, Clinical Professors, Research Associates, Visiting faculty, and Graduate Student Committee members, etc.). Emeritus faculty are appointed by the Chancellor; these appointments are for life and can carry the same level of participation as Regular members. Administrative appointments are designated to a small group of individuals on campus such as the Chancellor, Provost, and Deans and is more of an honorary membership. For more information on graduate faculty appointments, please visit the Graduate School's website https://graduateschool.charlotte.edu click on *Faculty and Staff Resources* tab and select *Faculty Appointment* from the drop-down menu.

For other questions relating to appointment types, please feel free to call our office.

Reappointment box – The reappointment box is an all-inclusive listing of your graduate faculty and the color-coded stage of their appointment. You cannot perform any functions in this field.

Initial Appointment box – You will use this area to add new (Initial) appointment requests for new Associates or Regular members.

Legend box - The color codes refer to the status of the graduate faculty member. A member becomes inactive if they are not reappointed within 1 year of the expiration date. "No nomination" is a holding or pending status. You may have started a nomination, but have not submitted because you are holding for more information or haven't completed the file. This classification may also list some individuals that transferred over from the old system but the record is incomplete.   Let us know if any of these names need to be inactivated.

Help Tab

General guidelines are displayed for help in navigating around the system.

Logout

Clicking this tab allows you to logout of the system.

Be sure and click the Create/Save tab after making edits to avoid losing any revisions.

Member Overview Page

You can get to this screen by clicking on a person's name in most any list. This page contains key information about the member such as their name, email address, ID number, rank, etc.

General member information can be found in the left column of the page and as long as the "pencil" icon is not grayed you, you may update that field. The Nomination Form is located in the right column. Any previous nomination information will be located here.

The *Linked Documents* tab allows you to view any documents linked to the currently selected nomination. See screenshot below.

The *All Documents* tab will list all documents attached to this individual.

Adding a new nomination (Associate or Associate – External Committee)

*Note: For "**initial" Regular appointments** (Tenured or tenure-track positions), the Graduate School will process these for you. When a new tenure-track faculty member is hired, we receive a report from HR. We will email the department chair to confirm that the new faculty member will be involved in graduate education. If this is confirmed, we will then process the appointment and send out the appointment e-letter.*

In some instances, the faculty member may only be working with undergraduate education processes and will not need a graduate faculty appointment at this time. In those situations, no further action will be taken by our office.

- For appointing Associate or Associate – External Committee member, please follow the steps below:

Before you begin, you will need a current CV or resumè and the reason for the nomination. You can opt to enter the nomination request by uploading a brief memo or you can copy and paste the information in the Brief Memo and Recent Achievements box. If the Associate member does not possess the terminal (highest) degree for your program, you must complete an AA-21 form, securing all approval signatures. This is now an electronic form. You can access the form by clicking on the link below or you can access by going to the Office of the Provost on the UNC Charlotte website. Click on the Faculty & Staff Resources tab. Click on the first link in the dropdown box for Academic Budget & HR. Click on Forms, and then click on Part-Time Faculty Forms. It is the first link under Hiring Forms.

https://webauth.uncc.edu/idp/profile/SAML2/Redirect/SSO?execution=e1s1

Once you have the documents required, you are ready to enter your nomination in eGFA.

- Click on the green tab labeled Add/Reappoint.
- Make sure that the person you are trying to enter is not listed in the column on the left labeled Reappointment. Duplicate records take extra work to merge. If the person is not listed and but you're getting an error message, contact Michelle Hypki mlhypki@charlotte.edu in the Graduate School. It's possible the individual was nominated by another department.

If you know the Banner ID Number, type it in the ID Number box. If you do not know the 800#, type in the full name of the person, **last name, first** (Example: Clark, Sarah). Click Search. This may take a few minutes for the system to check Banner. If the correct person is presented, double-click on the name and then click complete to continue.
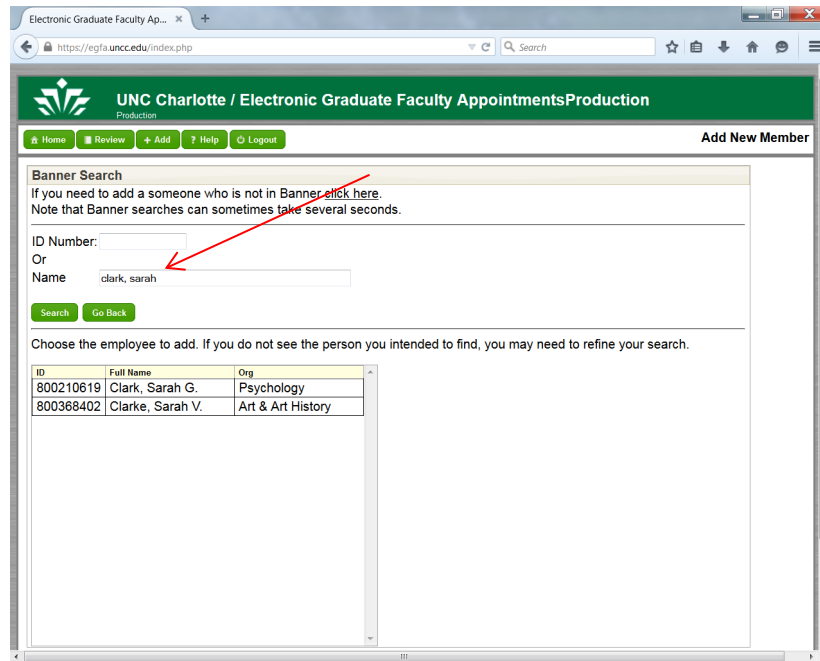
If the correct person does <u>not</u> appear, click here to add.
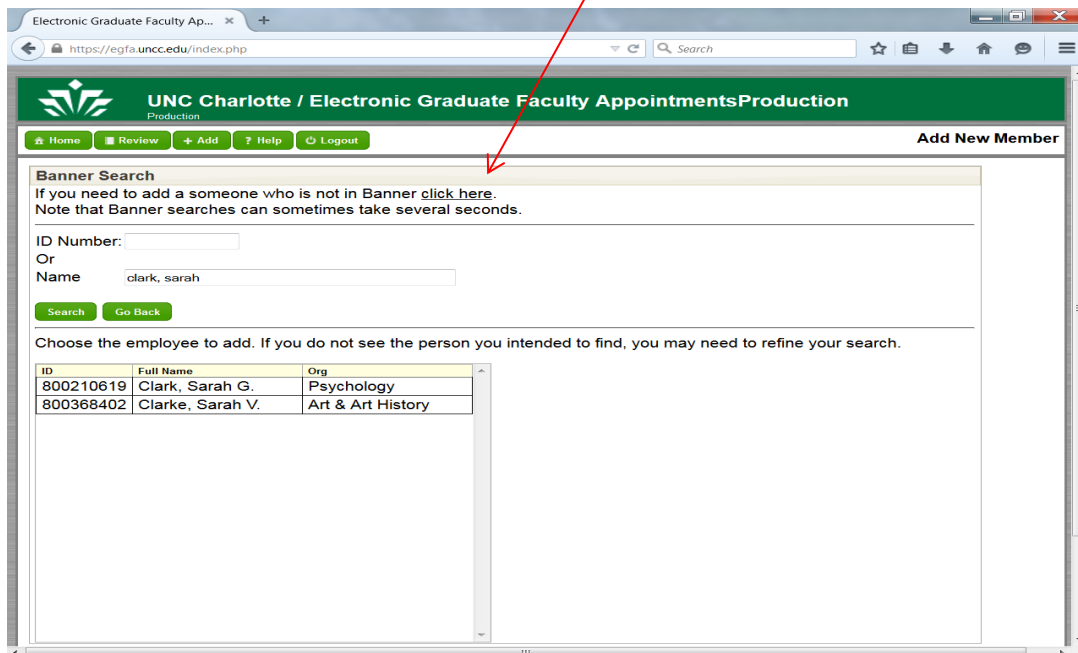
Complete all fields. Click Add Member to continue. Once you click Add Member, that person is then added and will show up in your graduate faculty list. You can always choose to withdraw the nomination, but the person will still be listed with your other faculty. For historical purposes, records are never deleted, but we can hide and/or make them inactive, thus providing an accurate total number and view of your department faculty.

After you click Add, this screen will display. Read and then click Close Help to continue.

Double-click each pencil icon on this screen to add faculty credentials. Click SAVE after entering data for each section. If you have a question about any of these categories, feel free to give our office a call.

Once Rank, Membership, College, Degrees and Department fields have been entered, click on the plus sign next to *Appointment/Nomination History* heading.
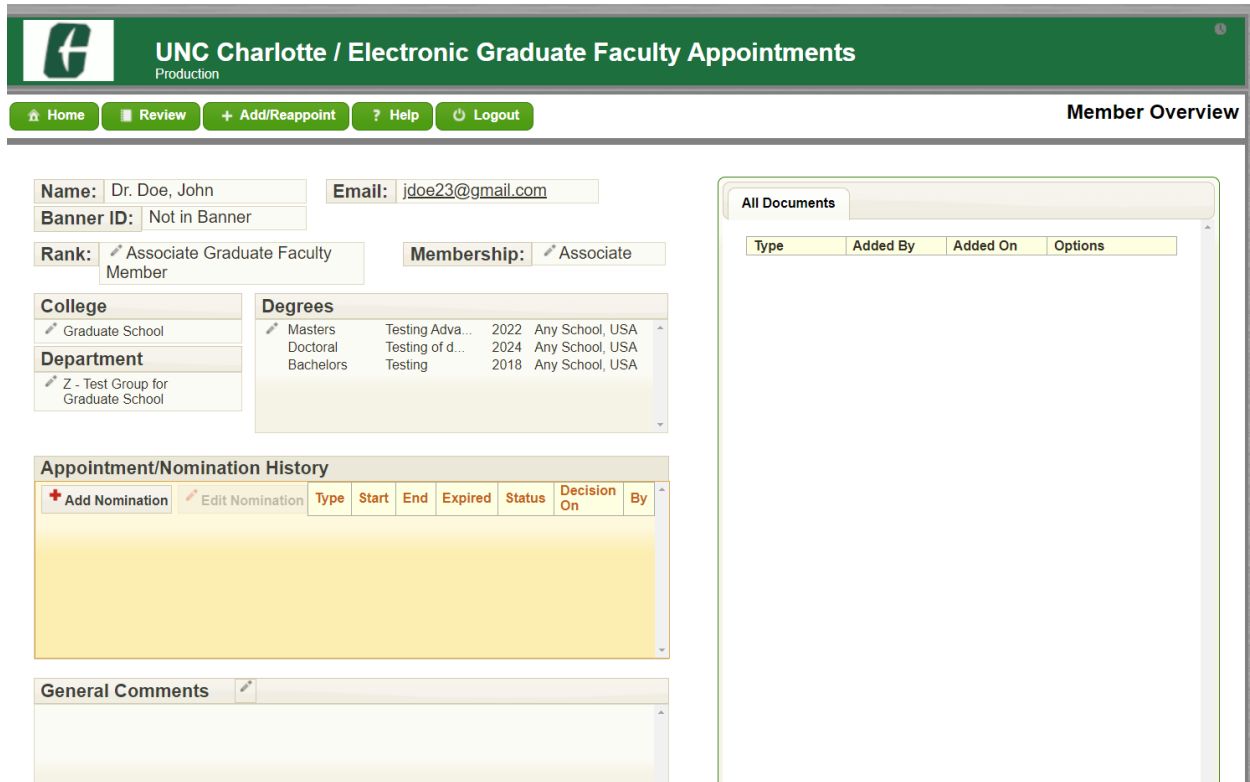
eGFA - Electronic Graduate Faculty Appointments

Next, select the appropriate appointment term by clicking on the down arrow next to **End** below. Initial appointments for Regular and Associate members are for 3 years. Note: Associate members can be nominated from 1-5 years depending on department or program need. Re-appointment terms are five years for everyone. Emeritus appointments are for life and Administrative appointments are as along as the faculty member is employed in their current administrative position.
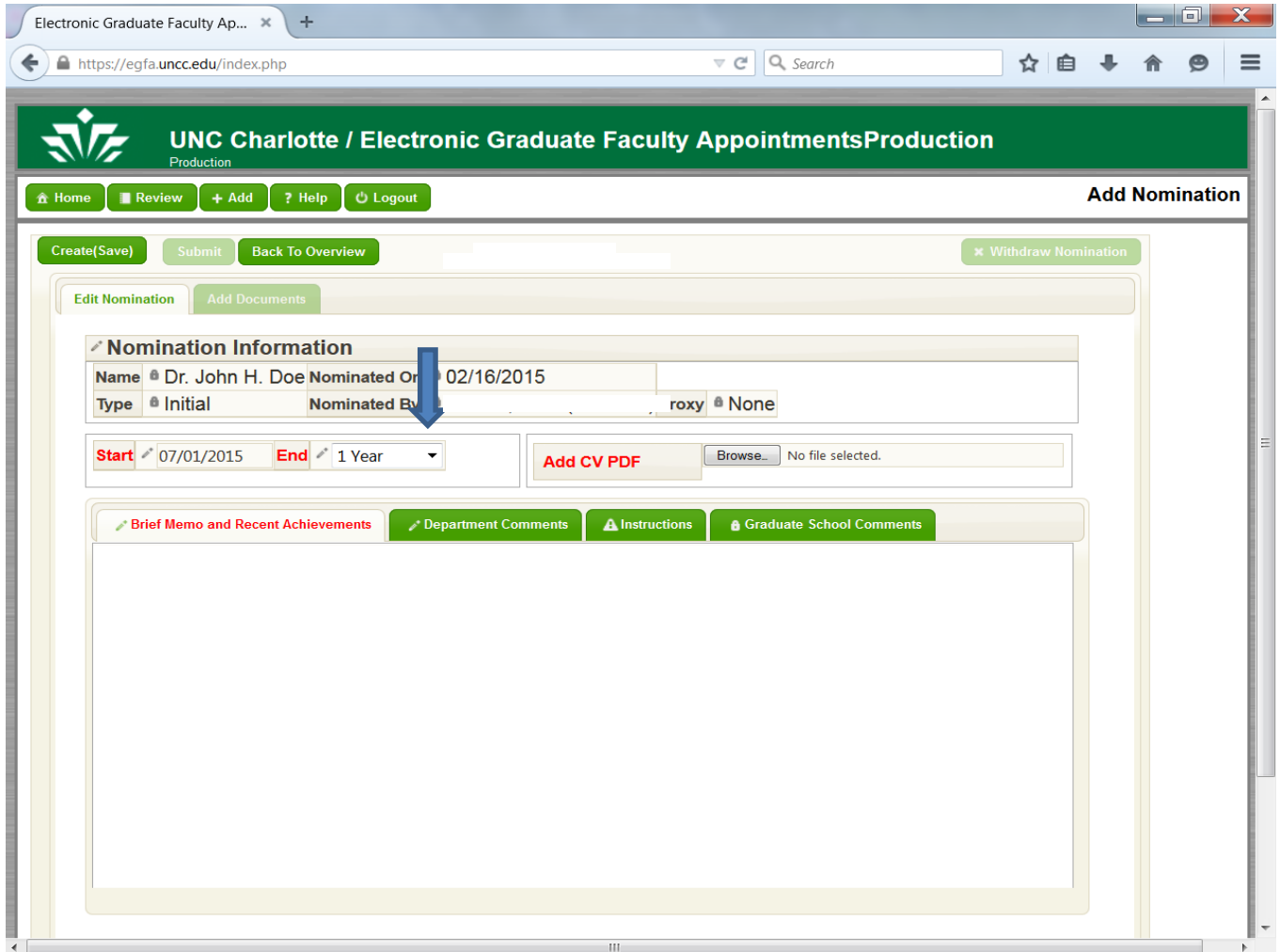
Now click in the box labeled **Brief Memo and Recent Achievements**. This is the area where you will communicate the reason for the nomination. This field can take the place of an uploaded memo. Please be thorough in your description of the person's participation for your program. See example below. If you prefer to type a memo, please use your department letterhead. You can upload the document as a *Letter of Recommendation.*   There must be some text in the Brief Memo box so if uploading a memo, please type "See attached letter of recommendation".
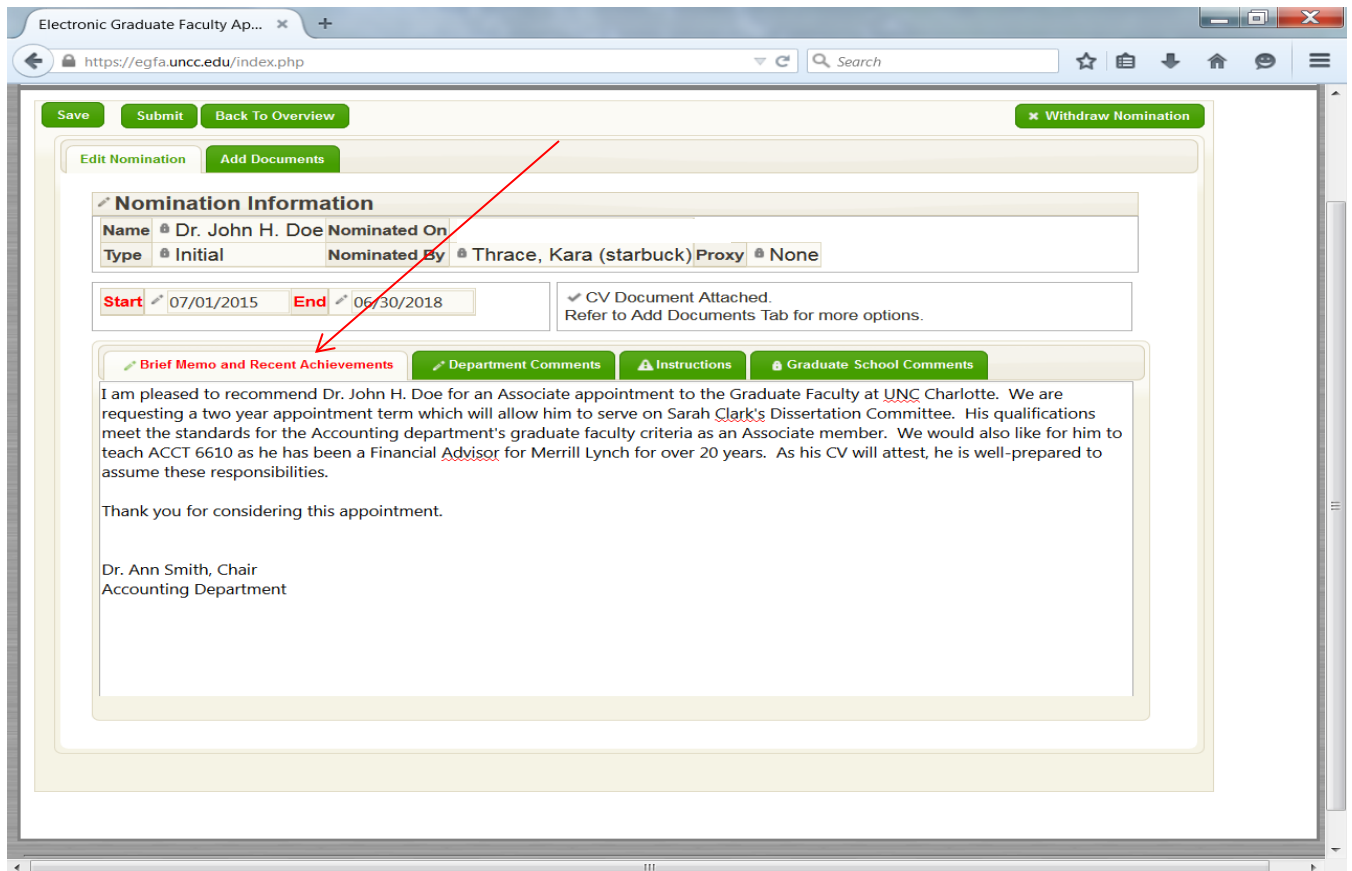
For new Associate appointments, please make sure that the nominee meets your department's graduate faculty criteria as an Associate member and describe how this nominee will participate in graduate education. If the Associate member is teaching, please be sure to add the following information:

- In the Brief Memo and Recent Acheivements box, please include the course number and name that the faculty member will be teaching.

For new Associate – External Committee appointments, please include the following in the Brief Memo and Recent Acheivements box.

- Student's full name
- 800#
- Program of study
- Relevance of the individual with the student's project or research.
- Anticipated graduation date
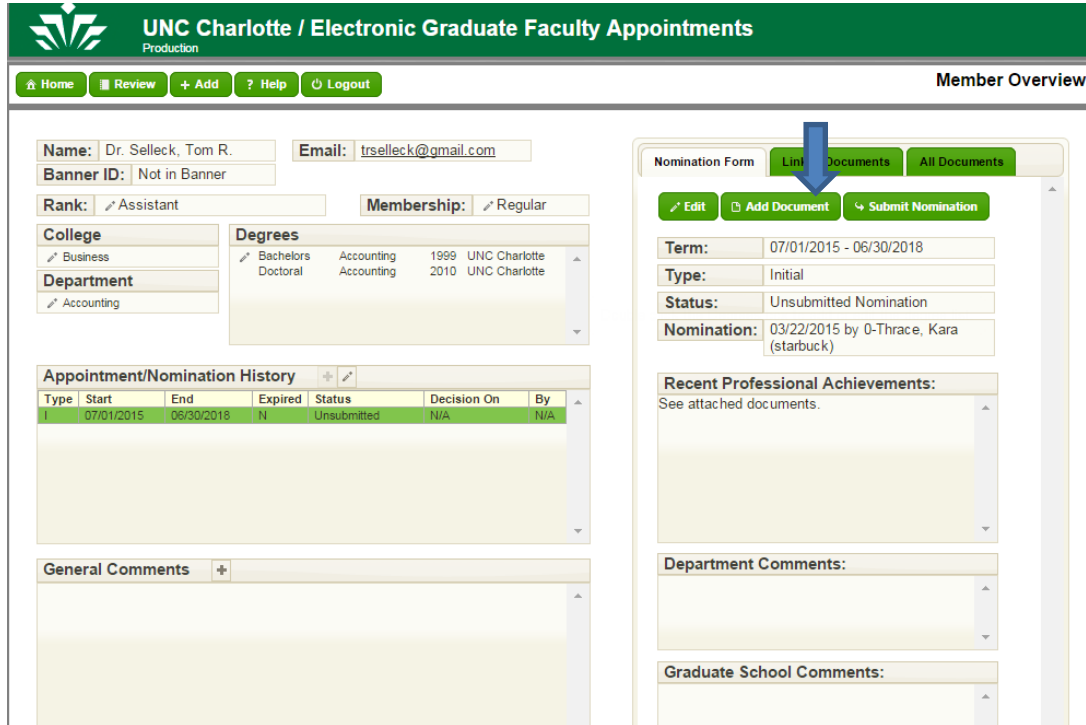
When you have either completed the memo section or stated "See attached documents", click Choose File to attach a current CV or resume and any other appropriate documents.
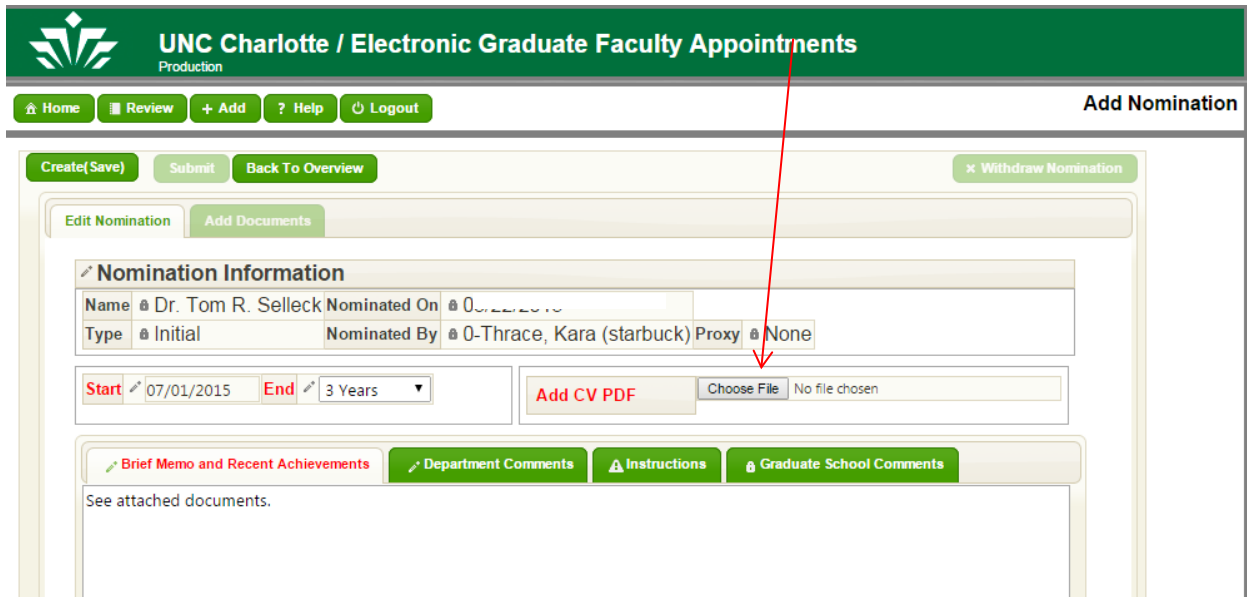
Search and select the appropriate document and double-click . Remember, the system will only accept documents in pdf format. You should see your document listed here.
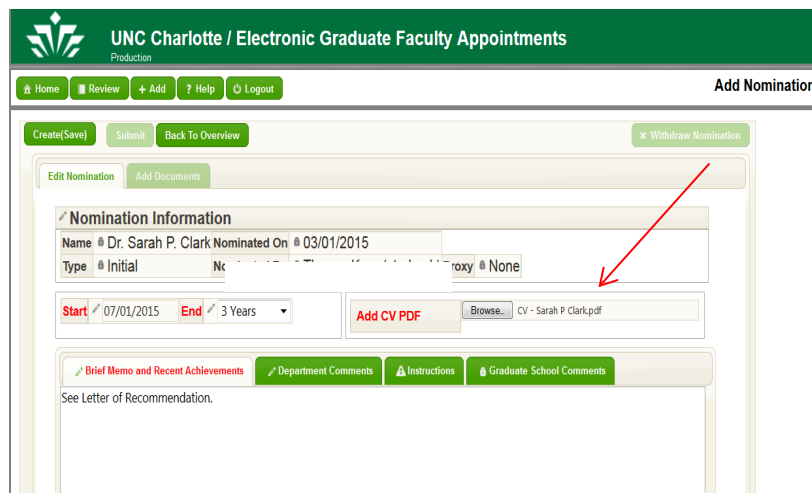
If you need to upload another document, click Add Document from the Member Overview page.

Select the type of document you are uploading (document label will highlight), then click on Choose File. Search for the document, double-click on document. Then click Add, under Choose File.

If you have uploaded all appropriate documents, click on the Create/Save tab from the Add Nomination page. **You must click Save or you will lose your entries.**

At this point, you have four options going forward:

- You can review the request by selecting the *Back To Overview* tab
- You can withdraw the nomination if circumstances have changed.
- You can edit the Nomination form by selecting the *Back to Overview* tab.
- Or, you can Submit the Nomination if you are satisfied with the record. Once you submit, you will no longer have access to edit the *Nomination Form*.

- You can withdraw the nomination if circumstances have changed.

- You can "Edit" the nomination form by selecting the *Back to Overview* tab. The *Member Overview* screen displays. Click the *Edit* tab.

- Or, you can Submit the Nomination if you are satisfied with the record. Once you submit, you will no longer have access to edit the *Nomination Form*.

Editing a Nomination

If you've started a nomination but have not submitted, you can still edit the Nomination Form. From the Home tab, click on the name of the person you want to edit in the Unsubmitted Nominations box.

The Member Overview screen will display. To verify the status of a nomination, see the *Appointment/Nomination History* text box. For this record, *Unsubmitted* is listed under Status. This means you can still make edits to the nomination form because it has not been submitted. If *Approved* or *Pending* is shown under Status, then edits are not permitted for the nomination form. To edit the individual's record (left column), double-click on the specific Pencil Icon next to the field to be revised. Then click Edit next to the line item you wish to revise.

To edit the Nomination Form, click the *Edit* tab (found under Nomination Form tab). You can then choose the fields you want to add or change. Remember to click SAVE after each edit.
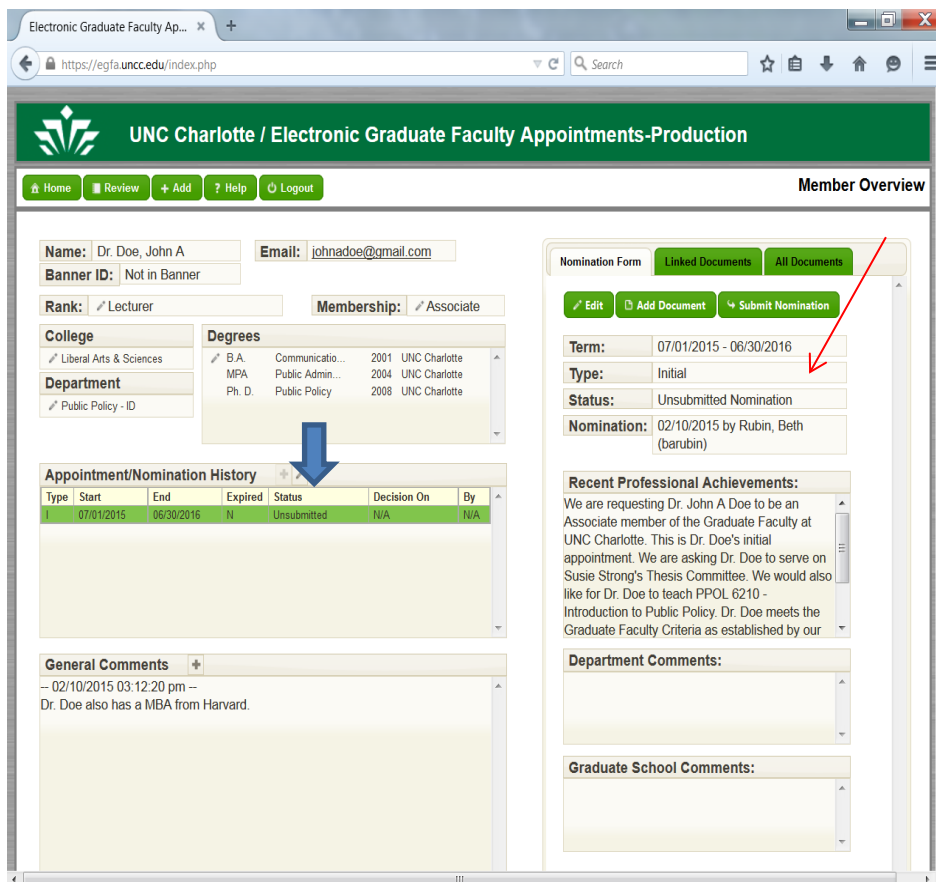
Reappointing Associate and Regular members

From the Home screen, you can select the individual to be reappointed by double-clicking their name in the *Expirations* box. You can also select a person to reappoint from the Review tab by selecting the member highlighted as Expiring/Expired.

The Member Overview screen will display. Please confirm that the information shown is accurate. If the rank classification has changed, double-click on the pencil icon next to Rank and update from the drop down box. Using the individual's CV, confirm that all of the degree fields are complete. After verifying the accuracy for all fields, you can proceed to the *Appointment/Nomination History* field.

Click on the Plus Icon ⊞ in the Appointment/Nomination History area.

You will then be taken to the *Add Nomination* Page.

Select the appropriate appointment term by clicking on the down arrow next to the End field. Initial appointments are for three years while reappointments are for five years. Note, Associate members can have from 1-5 year reappointment terms. Start dates will always begin July 1 of the current year and the end date will always be June 30 three or five years out. For example, a three year term above will be: Start: **07/01/2015** and End: **06/30/2018**. A 5-year term would be: Start: **07/01/2015** and End: **06/30/2020.**

Next, click in the box labeled **Brief Memo and Recent Achievements**. This is the area you will communicate the reason for this nomination to the Graduate School Dean. This field can be completed in place of the brief memo, but please be thorough. If you prefer to upload a brief memo, you can upload as a *Letter of Recommendation*, please state "See attached letter of recommendation" in this memo box, as it requires text in this field to proceed.
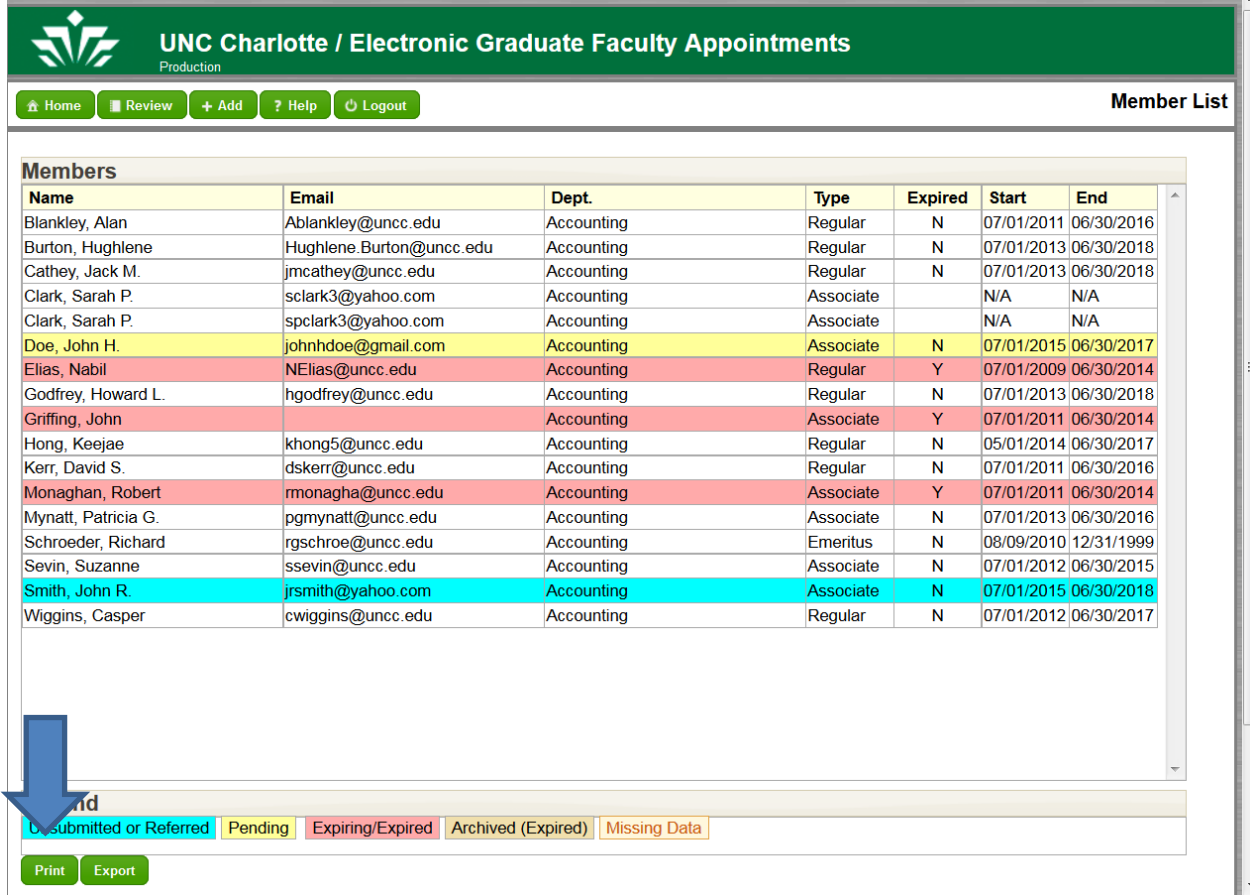
To complete nomination process, please refer to pages 15 – 17. After reviewing the information in the Member Overview for accuracy, you can then select Select Nomination.

Printing Graduate Faculty List Reports

Click on the Review tab. Click Print at the bottom of the screen.

You can also click on Export in the same location, to download your graduate faculty list into an Excel spreadsheet to sort.