

Committee Chair’s Guide to “Making Decisions” for Proposals

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NOTE: If you are using the Agenda Function in Curriculog, you must "unlink" a proposal from the agenda in order to make any decisions on a proposal. See the guide "How to create an Agenda" for more information.

To APPROVE a proposal:

1. Click on the “Decisions” checkmark.
2. Make any comments
3. Then click on “Make My Decision.”

Your Decision

What would you like to do with this proposal?

Approve Hold

Reject Suspend

Cancel

Custom Route

Please comment on your decision below.

Make My Decision

Discussion

Workflow Status

Signatures

Files

Decisions

Custom Route

The Status in the workflow will reflect your decision:

UCC Chair (All comments are public to user accounts.)

Approved

Participants

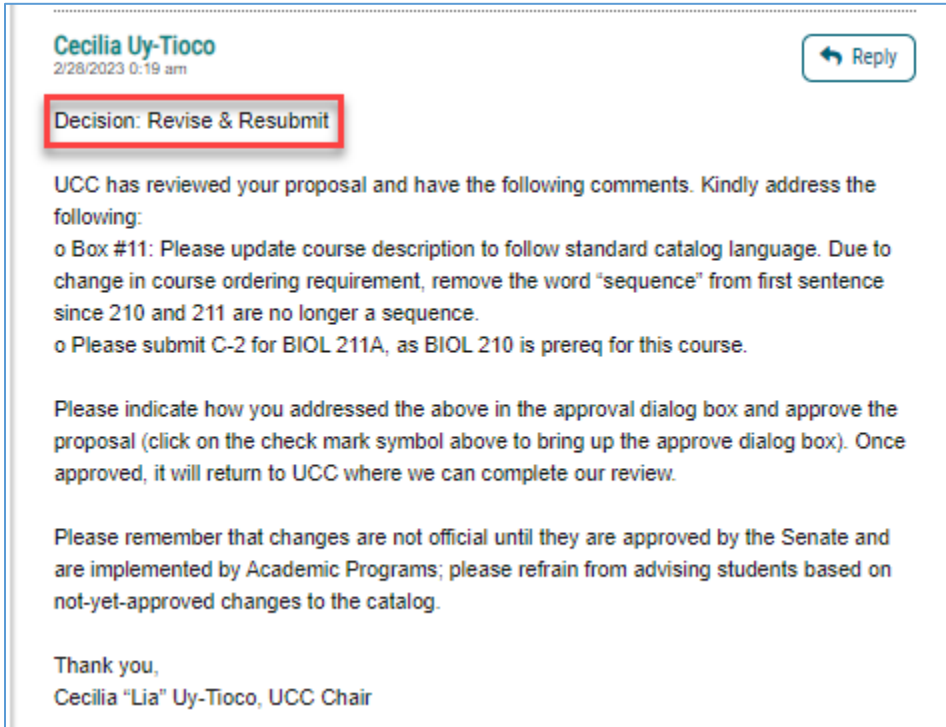
UCC

Cecilia Uy-Tioco * | 3/13/2023 6:29 PM

Step Details

To REJECT a proposal:

Though the software function uses the word “reject” it might be helpful to faculty to note in your comment the phrase “Revise and Resubmit”:



Cecilia Uy-Tioco
2/26/2023 0:19 am

Decision: Revise & Resubmit

UCC has reviewed your proposal and have the following comments. Kindly address the following:

- o Box #11: Please update course description to follow standard catalog language. Due to change in course ordering requirement, remove the word “sequence” from first sentence since 210 and 211 are no longer a sequence.
- o Please submit C-2 for BIOL 211A, as BIOL 210 is prereq for this course.

Please indicate how you addressed the above in the approval dialog box and approve the proposal (click on the check mark symbol above to bring up the approve dialog box). Once approved, it will return to UCC where we can complete our review.

Please remember that changes are not official until they are approved by the Senate and are implemented by Academic Programs; please refrain from advising students based on not-yet-approved changes to the catalog.

Thank you,
Cecilia “Lia” Uy-Tioco, UCC Chair

Make any comments, select the “Reject” dial, and click on “Make My Decision.”



CoBA Undergraduate Curriculum Committee Chair (All comments are public to user accounts.)

Participants

CoBA Undergraduate Curriculum Committee

Emily Tarr * | 2/20/2023 3:02 PM

Step Details

Rejected

NOTE: When you Reject a proposal, after the Originator makes any revisions and resubmits, the proposal will follow the original approval steps, back up through Dept. Chair, CAPC, College Dean, etc.

The Reject option is used generally if there are significant changes requested of the originator, that would be beneficial for all other reviewers to see as well.

To CUSTOM ROUTE a proposal:

Custom Route to Originator for “Revise & Resubmit” is an alternative to the Reject function. The **Custom Route function “leap-frogs”** the proposal back to the committee, once the originator makes the changes.

Whereas the **Reject function** moves the proposal back up the chain of approval steps.

NOTE: a proposal can custom route from a particular step **only one time**; so, you'll want to make sure that everyone has reviewed and given their input before requesting the custom route. Once the originator makes the corrections, the proposal will go directly back to the committee. **But the committee cannot route the proposal a second time.** (In that case you would have to make comments and edits “on behalf of” the originator.)

1. Click on “**Make My Decision**” and choose “**Custom Route**”

Your Decision

What would you like to do with this proposal?

Approve Hold
 Reject Suspend
 Cancel
 Custom Route

Please comment on your decision below.

Enter comments after route request is created

Make My Decision

Discussion
Workflow Status
Signatures
Files
Decisions
Custom Route

2. This window appears:

My Pending Custom Route

Custom Route (requested by Rebecca Romine)

Step Name:
Custom Route

Participants
Rules
Decisions
Deadlines/Reminders

Please comment on this custom route

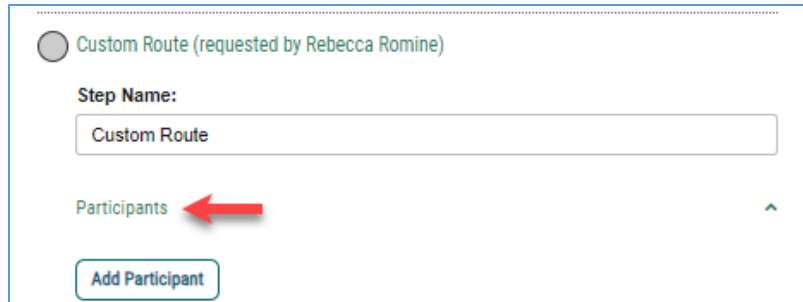
Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.

If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.

Preview Custom Route


Request Custom Route Cancel Custom Route

3. First Choose **to Whom you are routing the proposal:**



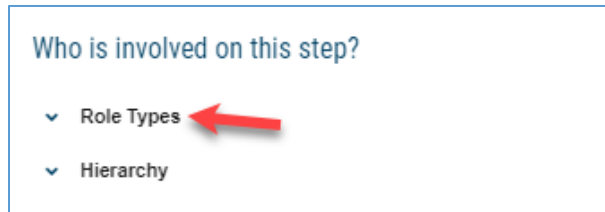
Custom Route (requested by Rebecca Romine)

Step Name:
Custom Route


Participants 

Add Participant

a. Choose **“ROLE TYPES”**

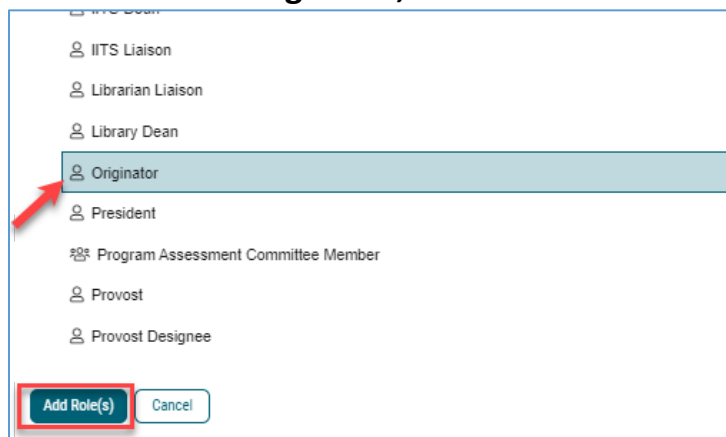


Who is involved on this step?

▼ Role Types 

▼ Hierarchy


b. Scroll down to **Originator**, click on Add Role



IITS Liaison

Librarian Liaison

Library Dean

Originator 

President

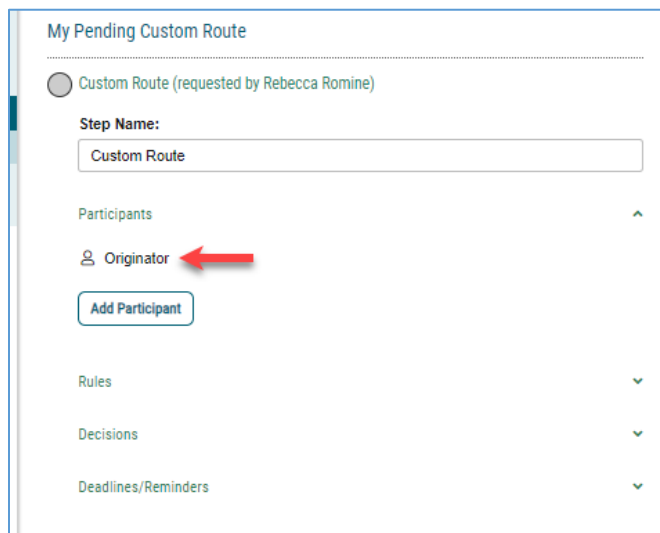
Program Assessment Committee Member

Provost

Provost Designee

Add Role(s) Cancel


c. And it shows this window:



My Pending Custom Route

Custom Route (requested by Rebecca Romine)

Step Name:
Custom Route

Participants 

Originator

Add Participant

Rules

Decisions

Deadlines/Reminders

NOTE: If you accidentally select a wrong person or role and want to delete them before you send the custom route:

1. Click the "Add Participant" link for the Custom Route. (*I know, it's counter-intuitive!*)
2. **De-select** the user you wish to remove by clicking the name/Role/Role Type in order to remove the highlight.
3. Click the "Add Participant(s)" button.

This will remove the user selected in error from the Custom Route step and then you can complete the Custom Route request.

4. **Choose Rules:** Choose both **Edit** and **Make Comments** so that originator can do both. Choose every user in the proposal so that everyone can see the comments.

Rules

What work is allowed on each Proposal?

- Edit Proposal
- Make Comments

Is a signature required?

Yes

Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?

Yes **For committee steps only**

Who can view the comments during this step?

Every user involved in the proposal at any step

5. **Choose Decisions:** Choose **Require 100%** and Choose "Proposal should come back to this step" (meaning the committee).

Decisions

What type of decision is this?

- Requires 100% participation and 100% approval.
- Requires 100% participation and % for approval.
- Requires % participation and majority approval.

What kind of decision flags will you allow to be used on this proposal?

Hold Suspend

Cancel

Where will the proposal go after the custom route?

- Proposal should come back to this step.
- Proposal should advance to the next step.

Who should be notified when the step is completed?

If Approved:

If Rejected:

6. No need to set Deadlines/Reminders:

Deadlines/Reminders 

7. Make any comments in the Comments field:

Decision: Revise & Resubmit

UCC has reviewed your proposal and have the following comments. Kindly address the following:

- o Box #11: Please update course description to follow standard catalog language. Due to change in course ordering requirement, remove the word "sequence" from first sentence since 210 and 211 are no longer a sequence.
- o Please submit C-2 for BIOL 211A, as BIOL 210 is prereq for this course.

Please indicate how you addressed the above in the approval dialog box and approve the proposal (click on the check mark symbol above to bring up the approve dialog box). Once approved, it will return to UCC where we can complete our review.

Please remember that changes are not official until they are approved by the Senate and are implemented by Academic Programs; please refrain from advising students based on not-yet-approved changes to the catalog.


Thank you,
Cecilia "Lia" Uy-Tioco, UCC Chair

NOTE: Once you click on "Request Custom Route" it will not immediately be sent to your recipient – the Originator. The request first must be "approved" by Academic Programs:

Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.

If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.

8. After Academic Programs "approves" your request, the notice will appear in your Dashboard:

My Recent Notifications 

Jun 26 **Proposal Routed:** The proposal, LBST - TEST - TEST, has been routed, and is no longer your task. [Click here](#) to view the proposal.

Then, when you click back on the proposal and **view the Workflow Status**, it will indicate your custom route:

The screenshot displays a workflow status interface with three steps:

- Step 1:** UCC Chair (All comments are public to user accounts) - Status: Routed. Participants: UCC. Cecilia Uy-Tioco * | 5/2/2023 9:41 PM. A red box highlights the "Routed" status and the "Workflow Status" button in the right-hand menu.
- Step 2:** Custom Route - Status: Incomplete. Participant: Paul Stuhr. A red box highlights the "Custom Route" label. A callout box with an arrow pointing to the "Step Details" button contains the text: "Once the originator makes revisions and again 'approves', it will return to the committee step".
- Step 3:** UCC Chair (All comments are public to user accounts) - Status: Incomplete.

The right-hand menu includes icons for Discussion, Workflow Status, Signatures, Files, Decisions, Custom Route, Crosslistings, and Proposal Lookup.

To place a proposal on HOLD:

1. If the Chair deems necessary or the Originator requests it, the Chair may request admin place a “Hold” on that program proposal.

The screenshot shows a 'Your Decision' form with the following elements:

- What would you like to do with this proposal?**
 - Approve
 - Reject
 - Hold (indicated by a red arrow)
 - Suspend
 - Cancel
 - Custom Route
- Please comment on your decision below.**
 - A text input field containing the placeholder text: "Enter comment indicating reason for hold" (highlighted with a purple box).
- Buttons:**
 - A "Make My Decision" button (highlighted with a red box) at the bottom left.
 - A "Decisions" button with a checkmark icon (highlighted with a red box) in the right-hand sidebar.
- Sidebar:** Includes icons for Discussion, Workflow Status, Signatures, Files, and Custom Route.

- 2.

The screenshot shows a workflow step with the following details:

- Originator:** A system administrator is reviewing requests made on this step. (Status: Awaiting Administrator Action)
- Participants:**
 - Rebecca Romine | 6/23/2023 11:17 AM
- Action:** A "Step Details" button.

3. Once the System Administrator approves your hold request, it will appear in “Status”:

The screenshot shows a workflow step with the following details:

- Originator:** (Status: Held)
- Participants:**
 - Rebecca Romine | 6/23/2023 11:17 AM
 - Rebecca Romine (System Administrator) | 6/23/2023 11:18 AM
- Action:** A "Step Details" button.

4. If you click on the “Decision” button  again, you will see this message:

5. In order to release the hold, you will need to email Academic Programs Curriculum Specialist (Criselda Yee, cye@csusm.edu) or Academic Programs Assistant (Rebecca Romine, rromine@csusm.edu) to make this request.
6. The “Hold” will be released and now available for the Chair to “Make a Decision.” **Return to the proposal and select “Approve.”**