To APPROVE a proposal:
1. Click on the “Decisions” checkmark.
2. Make any comments
3. Then click on “Make My Decision.”

The Workflow Status will reflect your decision:
To REJECT (Revise & Resubmit) 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” or similar:

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

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 previous reviewers to see as well.
01/06/2021
For example: this proposal was “rejected” by CAPC, so that after the originator made changes and re-approved, the proposal went back through the chain starting with Department Chair again, then to CAPC:
To CUSTOM ROUTE a proposal (Revise & Resubmit):

Custom Route to Originator for “revise & resubmit” is an alternative to the Reject function.
The Custom-route function “leap-frogs” the proposal back to you the reviewer, 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 you have reviewed and made all comments before requesting the custom route.
Once the originator makes the corrections and re-approves their proposal, it will go directly back to you. **But you cannot custom route the proposal a second time.**
(In that case you would have to use the "reject" function OR make comments and edits “on behalf of” the originator.)

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

2. This window appears:
3. First Choose to Whom you are routing the proposal:

a. Choose “ROLE TYPES”
Scroll down to Originator, click on “Add Role”

And it shows this window:

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.

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

   ![Rules Image](image)

   **DISREGARD:** CSUSM does not use this sig function

C. **Choose Decisions:** Choose “**Require 100%**” and choose “**Proposal should come back to this step** (meaning you).”

   ![Decisions Image](image)
D. no need to set Deadlines/Reminders:

Comment: Type in your comments to the originator and click “Request Custom Route”.

![Comment box](image)

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

**NOTE:** It’s great to format your comment in a formal way with clear precise requests, similar to this:

Carrick Williams
11/25/2020 12:09 pm

Decision: Approved pending revision

UCC has reviewed your proposal. We had a few requests that we would like you to consider.

1. Box 12: Please add a comma after “cultural” in the catalog description. We use Oxford commas in the catalog, and it helps to emphasize that cultural issues are separate from technical issues.
2. Syllabus: Please provide a complete syllabus for the course. The template is missing many critical components of a syllabus.
3. As indicated in the catalog description, this course is used by CS majors as well. Please contact the chair of the Computer Science program as an affected program to receive an acknowledgement that they are aware of the change you are making. Load a copy of that email acknowledgement into the proposal. Finally, please indicate in Box 23a the names of the affected programs.

Please indicate how you addressed the points in the approval dialog box and approve the proposal (click on the check mark symbol above to bring up the approval 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,

Carrick Williams, 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:

After Academic Programs “approves” your request, the notice will appear in your Dashboard:

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

1. If deemed necessary or the Originator requests it, you may request admin place a “Hold” on that program proposal. Similar to “Custom Route” it will go through “Administrator” (Academic Programs) to approve the “Hold” request.

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

   ![Image of a hold request](image)

   - Participants
     - UCC
     - Carrick Williams * | 12/7/2020 10:03 AM
     - Additional Participants
   - Status: Held

3. In order to release the hold, you will need to email Academic Programs Curriculum Specialist (Criselda Yee, cyee@csusm.edu) or Academic Programs Coordinator (Gayle Feallock, gfeallock@csusm.edu) to make this request.

4. The “Hold” will be released and now available for you to “Make a Decision.” Return to the proposal and select “Approve.”