

## Guide to Reviewing & “Making Decisions” for Proposals

### Contents

To APPROVE a proposal:.....	1
To REJECT (Revise & Resubmit) a proposal: .....	2
To CUSTOM ROUTE a proposal: .....	4
To place a proposal on HOLD:.....	10

### To APPROVE a proposal:

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

The screenshot shows the 'Your Decision' interface. At the top, it asks 'What would you like to do with this proposal?' with radio button options: Approve, Reject, Hold, Suspend, and Cancel. Below this is a text area for comments with the prompt 'Please comment on your decision below.' and a 'Make My Decision' button. A sidebar on the right contains icons for Discussion, Workflow Status, Signatures, Files, Decisions (highlighted with a red box and checkmark), Custom Route, Crosslistings, and Proposal Lookup. Red arrows point to the 'Approve' option, the comment text area, and the 'Make My Decision' button.

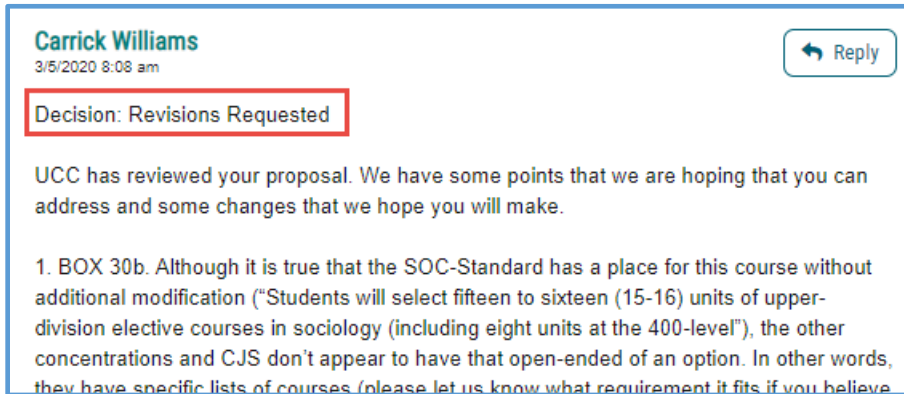
The Workflow Status will reflect your decision:

The screenshot shows the 'Workflow Status' page. It lists participants and their current status. The 'Originator' (Gayle Feallock) is marked as 'Approved' with a green thumbs-up icon. The 'Department Chair' (Marisol Clark-Ibanez) is marked as 'Working' with a red arrow pointing to the status. The 'College Curriculum Committee Chair' is marked as 'Incomplete accounts.' with a grey circle. A sidebar on the right contains icons for Discussion, Workflow Status (highlighted with a red box), Signatures, Files, Decisions, Custom Route, and Crosslistings.

01/06/2021

## 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:



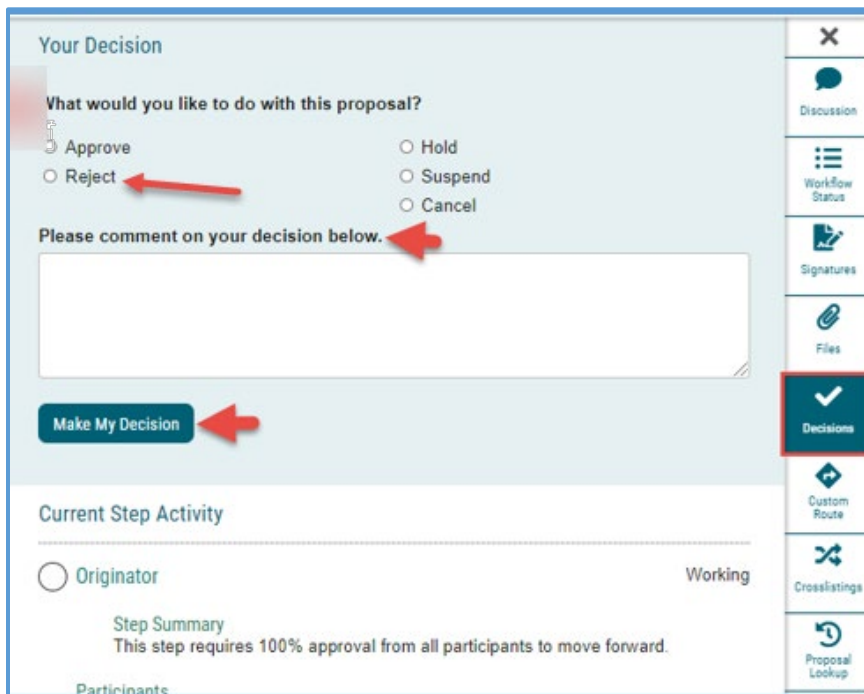
**Carrick Williams**  
3/5/2020 8:08 am

**Decision: Revisions Requested**

UCC has reviewed your proposal. We have some points that we are hoping that you can address and some changes that we hope you will make.

1. BOX 30b. Although it is true that the SOC-Standard has a place for this course without additional modification (“Students will select fifteen to sixteen (15-16) units of upper-division elective courses in sociology (including eight units at the 400-level”), the other concentrations and CJS don’t appear to have that open-ended of an option. In other words, they have specific lists of courses (please let us know what requirement it fits if you believe

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



**Your Decision**

What would you like to do with this proposal?

Approve  Hold  
 **Reject**  Suspend  
 Cancel

Please comment on your decision below.

**Make My Decision**

**Current Step Activity**

Originator Working

Step Summary  
This step requires 100% approval from all participants to move forward.

Participants

Discussion  
Workflow Status  
Signatures  
Files  
**Decisions**  
Custom Route  
Crosslistings  
Proposal Lookup

**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:

The screenshot displays a vertical sequence of five proposal steps, each with a status indicator and a 'Step Details' button. The steps are as follows:

- Step 1:** College Curriculum Committee Chair (All comments are public to user accounts.) Rejected. Participants: CHABSS Curriculum and Academic Policy Committee. Comments: Rebecca Lush \* (2/27/2019 4:15 PM), Carrick Williams \* (2/28/2019 7:23 AM).
- Step 2:** Originator Relaunch. Participants: Jon Spenard (3/27/2019 2:46 PM).
- Step 3:** Originator Approved. Participants: Jon Spenard (3/27/2019 2:46 PM).
- Step 4:** Department Chair Approved. Participants: Konane Martinez (4/17/2019 3:24 PM).
- Step 5:** College Curriculum Committee Chair (All comments are public to user accounts.) Approved. Participants: CHABSS Curriculum and Academic Policy Committee. Comment: Rebecca Lush \* (4/18/2019 11:49 AM).

## 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.

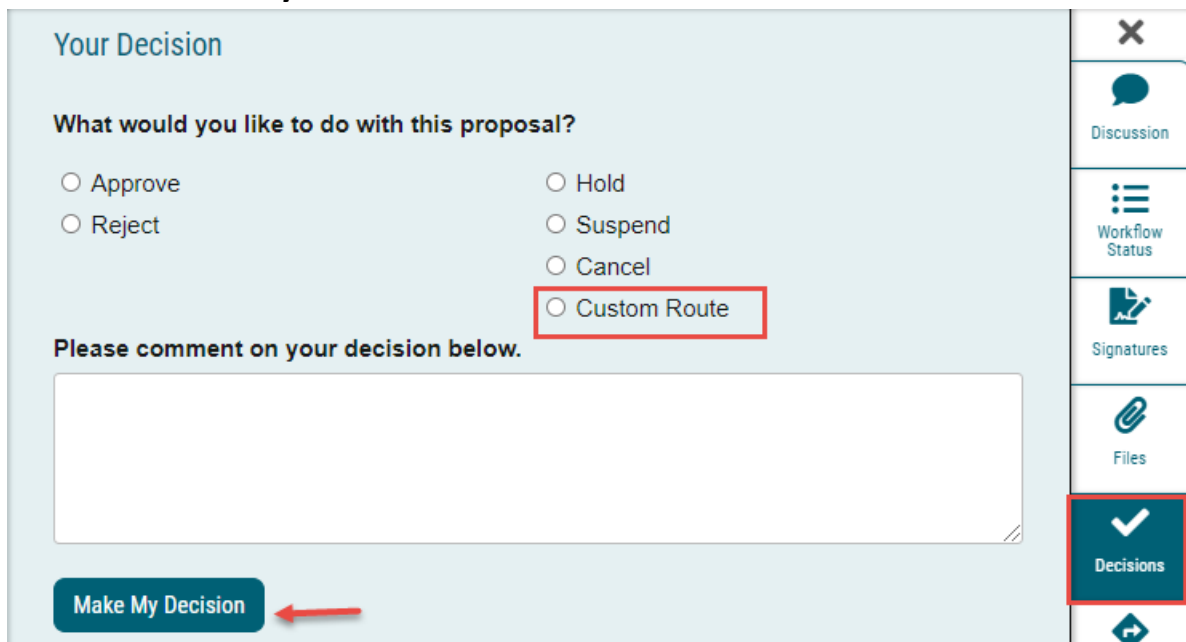
Whereas the **Reject function** moves the proposal back up the chain of approval steps.

**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**”



The screenshot shows a web interface for making a decision on a proposal. The main area is titled "Your Decision" and contains the question "What would you like to do with this proposal?". There are six radio button options: "Approve", "Reject", "Hold", "Suspend", "Cancel", and "Custom Route". The "Custom Route" option is selected and highlighted with a red box. Below the options is a text area for comments, with the prompt "Please comment on your decision below." and a red arrow pointing to the "Make My Decision" button at the bottom left. On the right side, there is a vertical sidebar with icons for "Discussion", "Workflow Status", "Signatures", "Files", and "Decisions". The "Decisions" icon, which is a checkmark, is highlighted with a red box.

2. This window appears:

**My Pending Custom Route**

Custom Route (requested by Gayle Feallock)

**Step Name:**

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.*

Discussion

Workflow Status

Signatures

Files

Decisions

**Custom Route**


Crosslistings

Proposal Lookup

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


**Step Name:**

Participants ▲



a. Choose **“ROLE TYPES”**

Who is involved on this step?

▼ Role Types 

▼ Hierarchy

**Scroll down to Originator, click on "Add Role"**

Who is involved on this step?

- GEO Coordinator
- GEW Director
- Governance & Planning Committee Member
- Graduate Studies Committee Member
- IITS Dean
- IITS Liaison
- Librarian Liaison
- Library Dean
- Originator**
- President
- Provost
- Provost Designee
- System Admin
- System Administrator
- UCC Chair
- UCC Member
- VP for Finance and Administrative Services
- VP for Students Affairs

▼ Hierarchy

**Add Role(s)** Cancel

**And it shows this window:**

My Pending Custom Route

Custom Route (requested by Gayle Feallock)

**Step Name:**  
Custom Route

Participants

- Originator

**Add Participant**

**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.

01/06/2021

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

What work is allowed on each Proposal?

- Edit Proposal
- Make Comments

Is a signature required?

Yes

DISREGARD: CSUSM does not use this sig function

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

Yes


Who can view the comments during this step?

Every user involved in the proposal at any step

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

Decisions

What type of decision is this?


- Require 100% participation and unanimous approval. 
- Require 100% participation and  % for approval.
- Require  % 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:

01/06/2021

D. no need to set Deadlines/Reminders:

Deadlines/Reminders▼

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

**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

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

**Carrick Williams**  
11/25/2020 12:06 pm

↩ Reply

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 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,

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:**

*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.*

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

**My Recent Notifications**

- Dec 2 **Modified Proposal:** Yongjie Zheng has added a file to the proposal, EE - 321 - Classical Electromagnetism. [Click here](#) to view the proposal.
- Dec 1 **Proposal Routed:** The proposal, SE - 481 - Software Project Planning and Management, has been routed, and is no longer your task. [Click here](#) to view the proposal.
- Dec 1 **Request Response:** An Administrator has approved the request to route the proposal, SE - 481 - Software Project Planning and Management. [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:**

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

Participants  
UCC  
Carrick Williams \* | 12/1/2020 2:40 PM

Additional Participants

**Custom Route** Incomplete

Participants  
Simon Fan

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

Participants  
UCC  
Carrick Williams \*

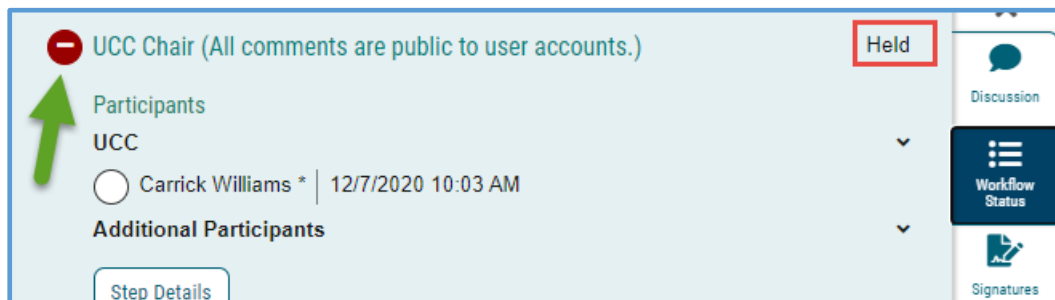
After originator revises and again "approves" their own proposal, it will return straight to Chair as requested.

Discussion  
**Workflow Status**  
Signatures  
Files  
Decisions  
Custom Route  
Crosslistings  
Proposal Lookup

01/06/2021

## 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”:



3. In order to release the hold, you will need to email Academic Programs Curriculum Specialist (Criselda Yee, [cjee@csusm.edu](mailto:cjee@csusm.edu)) or Academic Programs Coordinator (Gayle Feallock, [gfeallock@csusm.edu](mailto: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.”**