Curriculum Review Process in Dynamic Forms

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ROLE OF ORIGINATOR (aka, Faculty member submitting the Request Form)

Steps to Complete the eForm
1. Click the appropriate form link on the Curriculum Review Resources website.
2. Sign on with UNT Dallas EUID and password to get to this screen.

Screen Shot 1

3. Click on Complete this Form.
4. Next, the Originator will have to select the appropriate reviewer of the form throughout the workflow (see Screen Shot 2).

Assign the routing for the form*:

IMPORTANT RULE IN ROUTING: We cannot change the routing of a form once it is submitted, so select routing options wisely, otherwise the Originator will have to submit the form again.

* Dawn Remmers, Assistant Provost, or Rebecca Taylor, Administrative Specialist in Academic Affairs, can assist you with the selection of appropriate Form Participants below if needed.

Select a Program Coordinator from the list.

Naming convention = School Abbreviation_Program(s) Abbreviations_PC

The person assigned to those programs is attached to the role. For instance, for AY2020-2021, Pamela Thompson is attached to BUS_ACCT-UG_PC. Criminal Justice is split into a UG PC and a GR PC so be sure to review the entire list to select the best option.

Select a School Committee from the list.

Naming convention = School Abbreviation_Comm

The person assigned to those programs is attached to the role. For instance, for AY2020-2021, Iftekhar Amin is attached to HS_Comm for the School of Human Services.

Select a Dean for review from the list.

Naming convention = School Abbreviation_Dean
The person assigned to those programs is attached to the role. For instance, for AY2020-2021, Orlando Perez is attached to LAS_Dean for the School of Liberal Arts and Sciences.

Select a University Committee from the list.

Naming convention = Committee_Level

UCC-UG should receive all documents related to the undergraduate curriculum. GC-GR should receive all documents related to the graduate curriculum.

**Screen Shot 2**

5. Click **Continue** when all selections are made.
6. Complete the online form.
Form Hints:

- Comments in red on the forms provide directions, examples and explanations to help faculty successfully complete the form.

- The software platform will time out at 30 minutes of inactivity, so it is recommended that Originators preview what content needed, prepare the content and then try to complete the form in one sitting. If faculty cannot complete the form in one sitting, they can see the section in Originator Queue (page 6) to get access to any forms that were saved using the Save Progress button.

- This form workflow has one major limitation that we will have to work around for the time being – what happens if a reviewer at any point in the chain recommends edits to clarify? In these cases, if more explanation, clarification, or corrections are needed the form will be “Stopped” at that level, and the reviewer will share comments with the Originator to improve the Request. In these cases, the Originators of the form will need fill out the form again reflecting the new content. For this reason, it is recommended to screen shot sections of the form before submission and copy and paste “Justification” content into a copy document in case there is a need to resubmit the form.

- Be sure to mark the item accurately as an Original Document or Resubmission as well for the future reviewers (see Screen Shot 4). The workflow will start from the beginning, but lower levels of review can approve more quickly if they know that a particular Request form is a resubmission at another level.
Be accurate in the submission of information into fields and thorough in the explanations provided in long answer fields like Justifications or attached documents like the syllabus.
  
- Unless the course or program is new, content lives in the University Catalogs. Refer to that document when submitting changes to courses or academic programs. Be sure to present accurately what is currently listed in the Catalog and then share what needs to be changed clearly when prompted. Your colleagues and the Registrar do not have always have access to historical information or the intent so try not to make assumptions.
- Do not hesitate to reach out to Dawn Remmers, Assistant Provost, for consultation about the process, proper forms, and content to include in a Request form.

7. When finished filling out the form, click **Next** under the signatures. (If the Originator clicks Save Progress, the form will not route forward and will only be in the Originator Queue.)

8. Fill out the Electronic Signature and click **Sign Electronically**. Do not use the **Opt out and print** as it will interfere with the electronic routing (see Screen Shot 6).
9. The final screen verifies submission of the Request form.

Screen Shot 7

This screen allows an Originator to print or save a copy of the submission. However, if there are any uploaded attachments, the Originator will not be able to access those documents from this PDF file, so save any uploaded documents in a folder with this submission for your records.

10. Once the document has been successfully submitted, the Originator will get the following email message:
Sometimes, these emails get sent to the Junk folder if faculty have been working with the Dynamic Forms system a lot. Check there if a confirmation email does not come.

* Dawn Remmers, Assistant Provost, or Rebecca Taylor, Administrative Specialist, can assist you to see if your submission went through if you cannot locate an email confirmation of your submission.

**Originator’s Queue**

If Originators cannot complete a form in one sitting, they can access a queue in Dynamic Forms to return to a previously started form in which **Save Progress** (a button at the end of the form) was conducted before exiting the form.

1. **Log-In to Dynamic Forms:**
   

2. Use your EUID and password as log in credentials (same as needed to get into your email).

**Screen Shot 9**

3. **CLICK on** Pending/Draft Forms **to get to a queue that will look similar to this below.**
Copies of Other Request Forms
Some forms, like the New Course Request form, asks Originators to attach a copy of the Program Change Request Form if the new course is impacting the major program like being placed in the major requirements, major concentration or track.

To access previously completed forms and any documents that were attached, click on the HTML icon (see Screen Shot 10) to access the form and embedded links to documents. Download and save the documents for later access.

Stopped Forms After Committee Evaluations
If a reviewer has an issue that needs clarification or editing, the document will be “Stopped,” and the reviewer will send the Originator feedback via the UNT Dallas email on what needs to be addressed in the original request.

You will then need to complete the form again making sure to denote in the questions for completion that it the form is being resubmitted and which committee needs to review. Unfortunately, others in the line of approval will have to approve the form again. (We are working with the software vendor to find other options for this routing issue, so please be patient).

Save your work from previous submissions for easier resubmission.
ROLE OF PROGRAM COORDINATOR

Review of Request Forms

For each form submitted for review, the PC will get an email like this:

**Screen Shot 11**

![Email example]

Dear Program Coordinator,

You have a curriculum document that pertains to your program for review, a decision and routing.

If you approve of the curriculum request, sign the document and route to the Chair of your School Curriculum Committee.

If you have concerns to share with the faculty member submitting the document, reject the form and provide feedback to the submitter for a new submission.

[Click here to complete your section of the form](#).

1. PCs can click on [Click here to complete your section of the form](#) in Screen Shot 11 to review the form.

   or

Queue Access

1. If the PC has multiple items to review at once and wants to see the queue of documents to review, follow these directions to get into Dynamic Forms to access the queue of documents to review:

   Log-In to Dynamic Forms:

   Use your EUID and password as log in credentials (same as needed to get into your email).

**Screen Shot 12**

![Dynamic Forms interface example]
CLICK on **Pending/Draft Forms.** This will take the PC to a queue of all documents currently in play. New Request forms that need review will indicate **Incomplete** in the status column.

2. Enter the form by clicking the **Action** button and selecting **Complete Form** from the drop down menu.

*Screen Shot 13*

![Screen Shot 13](image)

3. Review the form. Be sure to review attached documents that are uploaded by the originator throughout the form (see **Screen Shot 14**). If the PC wants to keep copies of the Request form and attachments, the PC can download these attachments and save for later access.

*Screen Shot 14*

![Screen Shot 14](image)

4. After reviewing, sign the document by clicking in the pink shaded area.

---

**Example of an embedded attachment**
5. Fill out your name and click on **Sign Electronically**. Do not click on **Opt out and print** as it will disrupt routing.

The form then looks like this:

**Screen Shot 16**

6. Click on **Submit Form**.
7. Click Yes.

8. **DECISION POINT APPROVED:** If the document has been approved as is, maintain the NO and then click NEXT and the form will route to the next committee.

**DECISION POINT NOT APPROVED:** If the PC has issues that need to be addressed in edits before the document can move forward to the next committee, click YES and click NEXT. This will STOP the form from proceeding through the process and END the routing.

In the case of a Not Approved Request Form, the PC will need to email the Originator of the form to explain in detail the issues that need to be addressed to improve or correct the Request form.

The Originator will then have to complete the form again for Resubmission and send it back through for review and approvals.

**Review of Resubmissions**

When a document is resubmitted with edits, the Originator has to mark the Request form as a Resubmission after Review:
If it is a resubmission, the committee with the recommended edits is marked. If the PC is not the level of resubmission, approve quickly and allow the document to route through without extensive review at this level.
ROLE OF THE SCHOOL COMMITTEE

Review of Request Forms

For each form received for you to review, the Chair of the school committee will get an email like this:

*Screen Shot 20*

Dear School Committee Chair,

Please share this curriculum request for new course UGST from Dawn Remmers for review.

If the Committee approves this request, sign the document and route to the Dean.

If the Committee has concerns about the request, reject the form and send feedback to the faculty member submitting the request so that they can resubmit the request.

[Click here to complete your section of the form.]

1. The Chair can click on **Click here to complete your section of the form** in Screen Shot 20 to review the form....
   
   Or

**Queue Access**

1. If the Chair has multiple items to review at once and wants to see the queue of Request forms, follow these directions to get into Dynamic Forms to access the queue to review documents:

Log-In to Dynamic Forms:

Use your EUID and password as log in credentials (same as needed to get into your email).
Click on **Pending/Draft Forms**.

Your queue will look something like this:

**Screen Shot 22**

2. The Chair of the school committee will need to download copies of the forms and attached documents requiring committee review. New documents will show up with **Incomplete** in the status column. (**Pending** forms are forms that you have previously reviewed and routed on, but are still active in the workflow process at another level).

Click on the HTML icon on the row for that Request form (see Screen Shot 22) to download a copy of the form and all of the embedded attachments that may be attached to a given submission (see Screen Shot 23):
Click on the live links in the Request form to open the document and download so that the materials can be shared with the committee for review. There may be several documents depending on the type of Request form.

3. After the Committee has reviewed a request, enter the queue (second part of step 1) and click on Action and select Complete Form from the menu to enter the routable form (see Screen Shot 24).

4. Scroll down to the Approvals section and click the shaded pink area.
5. Enter your name and click **Sign Electronically**. Do not click on **Opt out and print** as it will disrupt the workflow.

*Screen Shot 26*

The signature will then populate.

*Screen Shot 27*

6. Click **Submit Form**.
7. Click **YES**.

8. **DECISION POINT - APPROVED**: If the document has been approved as is, maintain the **NO** and then click **NEXT** and the form will route to the next committee.

   **DECISION POINT - NOT APPROVED**: If the committee has issues that need to be addressed in edits before the document can move forward to the next committee, Click **YES** and click **NEXT**. This will STOP the form from proceeding through the process and END the routing.

   In the case of a “Not Approved” Request Form, the **Chair of the Committee** will need to email the **Originator of the form** to explain in detail the issues that need to be addressed to improve or correct the Request form.

   The Originator will then have to complete the form again for Resubmission and send it back through for review and approvals.

**Review of Resubmissions**

When a document is resubmitted with edits, the Originator has to mark the Request form as a **Resubmission after Review**:
If it is a resubmission, the committee with the recommended edits is marked. If the School Committee is not the level of resubmission, approve quickly and allow the document to route through without committee review.
ROLE OF THE DEAN REVIEW

Review of Request Forms
For each form submitted for review, the Dean will get an email like this:

Screen Shot 31

1. The Dean can click on **Click here to complete your section of the form** in Screen Shot 31 to review the form....
   Or

Queue Access

1. If the Dean has multiple items to review at once and wants to see a queue, follow these directions to get into Dynamic Forms to access your queue to review documents:

   Log-In to Dynamic Forms:

   Use your EUID and password as log in credentials (same as needed to get into your email).

Screen Shot 32

Click on **Pending/Draft Forms**.
Your queue will look something like this:

**Screen Shot 33**

2. Anything marked **Incomplete** needs review and approval. (**Pending** forms are forms that you have previously reviewed and routed on, but are still active in the workflow process at another level).

   Click on **Action** and select **Complete Form** from the drop down menu in the queue.

**Screen Shot 34**

3. Click on **Complete the Form** to enter the routable Request Form.
4. Be sure to review the form and any embedded attached documents (see below).

Click on those live links to open the document. There may be several documents depending on the type of Request form.
5. Scroll down to the Approvals section and click the shaded pink area.

**Screen Shot 38**

6. Enter your name and click **Sign Electronically**. Do not click **Opt out and print** as it will disrupt the workflow.

**Screen Shot 39**

7. Click **Submit Form**.
8. **Click YES.**

**Screen Shot 41**

9. **DECISION POINT - APPROVED:** If the document has been approved as is, maintain the NO and click **NEXT** and the form will route to the next committee.

**DECISION POINT - NOT APPROVED:** If the committee has issues that need to be addressed in edits before the document can move forward to the next committee, Click **YES** and click **NEXT.** This will STOP the form from proceeding through the process and END the routing.
In the case of a “Not Approved” Request Form, **the Dean will need to email the Originator of the form to explain in detail the issues that need to be addressed to improve or correct the Request form.**

The Originator will then have to complete the form again for Resubmission and send it back through for review and approvals.

**Review of Resubmissions**

When a document is resubmitted, the Originator has to mark the Request form as an Original Submission or a Resubmission:

*Screen Shot 42*

If it is a resubmission, the committee with the recommended edits is marked. If the Dean is not the level of resubmission, approve quickly and allow the document to route through without committee review.
ROLE OF THE UNIVERSITY COMMITTEE

Review of Request Forms

For each form submitted for review, the Chair will get an email like this:

Screen Shot 43

![Email example]

Dear Chair,

You have a UNT Dallas Curriculum Review - New Course Request Form - TEST for new course UGST from Dawn Remmers for your Committee to review. Please share the relevant documents with your committee for review and comment.

If the Committee approves the changes requested, please sign and route the document back to the appropriate Dean who will place the request on the agenda for Academic Council to review.

Click here to complete your section of the form.

1. The Chair can click on Click here to complete your section of the form in Screen Shot 43 to review the form....
   Or

Queue Access

1. If the Chair has multiple items to review at once and wants to see the queue, follow these directions to get into Dynamic Forms to access your queue to review documents:

Log-In to Dynamic Forms:

Use your EUID and password as log in credentials (same as needed to get into your email).

Screen Shot 44

![Dynamic Forms example]

Click on Pending/Draft Forms.
Your queue will look something like this:

**Screen Shot 45**

2. The Chair of a university committee will need to download copies of the forms and attached documents requiring committee review. New documents will show up with **Incomplete** in the status column. *(Pending forms are forms that you have previously reviewed and routed on, but are still active in the workflow process at another level).*

Click on the HTML icon on the row for that Request form (see Screen Shot 45) to download a copy of the form and all of the embedded attachments that may be attached to a given submission (see Screen Shot 46):

**Screen Shot 46**

Click on the live links in the Request form to open the document and download so that the materials can be shared with the committee for review. There may be several documents depending on the type of Request form.

3. After the Committee has reviewed a request, enter the queue (second part of step 1) and click on **Action** and then select **Complete Form** from the drop down menu to enter the routable form.
Scroll to the Approval section of the document.

4. Click on the pink shaded area.
5. Enter your name and click on **Sign Electronically**. Do not click on **Opt out and print** to avoid disrupting the workflow.

*Screen Shot 50*

6. Click **Submit Form**.

*Screen Shot 51*

7. Click **YES**.

*Screen Shot 52*

8. **DECISION POINT - APPROVED**: If the document has been approved as is, maintain the **NO** and click **NEXT**, and the form will route to the next committee.
**DECISION POINT - NOT APPROVED:** If the committee has issues that need to be addressed in edits before the document can move forward to the next committee, Click **YES** and click **NEXT**. This will **STOP** the form from proceeding through the process and **END** the routing.

In the case of a “Not Approved” Request Form, the **Chair of the committee will need to email the Originator of the form to explain in detail the issues that need to be addressed to improve or correct the Request form.**

The Originator will then have to complete the form again for Resubmission and send it back through for **review and approvals.**

**Review of Resubmissions**

When a document is resubmitted, the Originator has to mark the Request form as Resubmission after Review:

**Screen Shot 53**

If it is a resubmission, the committee with the recommended edits is marked. If the PC is not the level of resubmission, approve quickly and allow the document to route through without committee review.
ROLE OF THE DEAN AFTER UNIVERSITY COMMITTEE

Deans will get an email like Screen Shot 54 when the university committee has approved the Request form.

*Screen Shot 54*

![Email]

Dear Dean,

The University-level curriculum committee has approved the UNT Dallas Curriculum Review - Course Change Request Form -TEST_Cop for UGST 1100. Please download the approved request (and all uploaded files attached) and add it to the Academic Council agenda when agenda items are requested.

[Click here to complete your section of the form.](http://example.com)

Queue Access

1. Log into the queue in Dynamic Forms.

Log-In to Dynamic Forms:


Use your EUID and password as log in credentials (same as needed to get into your email).

*Screen Shot 55*

![Dynamic Forms]

Click on **Pending/Draft Forms**.
The queue will look something like this:

*Screen Shot 56*

Anything marked **Incomplete** needs your attention. **(Pending** forms are forms that you have previously reviewed and routed on, but are still active in the workflow process at another level).

2. You will need to download copies of the forms and attachments to place on the next Academic Council agenda.
3. Click on the HTML icon on the row for that Request form (see Screen Shot 56) and download a copy of the form and all of the embedded attachments that may be attached to a given submission (see Screen Shot 57):

*Screen Shot 57*

Click on the live links to open the document and download so that you can share all materials with Academic Council. There may be several documents depending on the type of Request form.

**Naming Convention for Files**

Please use the following naming convention for documents related together so that you can easily add them to the Academic Council agenda, and members of Academic Council can see which documents are related:

- **Type of form** = New Course or New Program or Change Course or Change Program
- **Course** = ACCT#### or Program = Sociology
- **Document type** = e.g. Form...Syllabus..., Consultation documents...Catalog Degree Worksheet...Program Change Submission
For example, if there was a New Course Request for Psychology, you might name associated documents as such:

- NewCourse_PSYC4399_Form
- NewCourse_PSYC4399_Syllabus
- NewCourse_PSYC4399_ProgramChangeSubmission
- NewCourse_PSYC4399_Consultation

This will allow all members of the Academic Council to see what documents belong to each other and if there are possibly any missing documents. For instance, a New Course cannot be submitted without a syllabus, but could be submitted without Consultation or a Program Change Submission if the course was only an elective and did not change the major.

4. Once the documents have been downloaded and named per the naming convention, click on Action and select Complete Form in the drop down menu in Screen Shot 56.

**Screen Shot 58**

5. Scroll to the bottom of the form and click Next.
6. Enter your name and click **Sign Electronically**. Do not click on **Opt out and print**.

This is the end of this document in the workflow. It will allow the document to move out of all of the approvers’ queues and into the History folder when this step is completed.

7. **Add the documents to the MS Teams site for the Academic Council agenda for the appropriate date of the meeting.**
COMPLETING THE DECLARATION OF INTENT TO PROPOSE A NEW ACADEMIC PROGRAM

Steps to Complete the eForm

1. Click the appropriate form link on the Curriculum Review Resources website.
2. Sign on with UNT Dallas EUID and password to get to this screen.

3. Complete the form. At the end you can either SAVE PROGRESS to return to it later or SUBMIT FORM when you are ready to send it on for review.

4. Click YES

5. The final screen will look like this, allowing you to click on VIEW FORM PDF where you can view your submission and download it for your records.
6. You will also receive a confirmation email of submission.