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: Most of the time, it is impossible to 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. Often times, ignoring this guidance results in the need for revision of a form. Ask questions if something is unclear and follow the directions.

- 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 to get access to any forms that were saved using the Save Progress button.

- Be sure to mark the request 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.

Screen Shot 4

- 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 official document when submitting changes to courses or academic programs. Be sure to present accurately what is listed currently 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 saved 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).

**Screen Shot 5**

![Screen Shot 5](image)

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).

**Screen Shot 6**

![Screen Shot 6](image)
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. The Originator can also access the uploaded documents in their Originator’s Queue via the HTML link to the form.

10. Once the document has been successfully submitted, the Originator will get the following email message:

**Screen Shot 8**

Sometimes, these emails are 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. Originators will now also receive emails when each level approves the document making tracking easier the progress of a request.

* 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.

Screen Shot 10

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.

Approved Document

When a document has been reviewed and approved by an approver/committee chair, the Originator will receive a message like this:
Return for Revision

In the case that reviewers recommend revisions to the request before approving the document, they will “Return for Revision” and provide detailed comments to help the Originator improve the submission. For example, see Screen Shot 12.

Screen Shot 12

Dear Originator Name,

The School Curriculum Committee has met and would like to share some feedback on the proposal for revision:

1. List of questions about the structure of the program, i.e., the classes included in the program. Please submit a new Catalog Degree Worksheet.

2. In the section on the goals for enrollment, there is question about if this might pull students from another major....can you address that issue?

3. In the Program Learning Outcomes, you have listed PLO's that do not include some of the new courses being developed. Why are those courses necessary if they do not contribute to measuring the PLO's?

As the chair, I am happy to talk with you more about our committee findings or maybe you can attend our next meeting to discuss.

Click here to complete your section of the form.

- “Click here to complete your section of the form” and it will take you back to the form that was submitted allowing the opportunity to revise the document based on the feedback.
• Be sure to mark this version as a “Resubmission after feedback” and mark the approver who requested the revisions (Screen Shot 13).

**Screen Shot 13**

- All of the radial buttons, check boxes, and text boxes in the form can now be edited (with the exception of the “Submitted by” as this form is tied to the email of the Originator).

- Address the concerns shared by the reviewers. If there are questions related to the written feedback, please reach out to the reviewer for further conversation before making any changes.

- As a result of the feedback, the Originator may need to revise some of the uploaded documents. Simply click “Delete file” (see Screen Shot 14) and the original file will be removed. The Upload file button will populate so that a new file can be added. It is a good idea to name the files by version so that reviewers can see that this is a new document.

- Once all of the edits have been completed, Click “Submit” at the bottom of the page to start the routing of the form with the revised material.
Catalog Degree Requirements

Upload a copy of the Catalog Degree Requirements Worksheet that reflects all of the changes requested in this form.

New Courses for the Program

Are new courses being proposed to support this new program? If so, please list them all here.

Helpful Hint: Use the current degree plans in the current academic catalog as the basis for the layout and headings for the new worksheet (not this Advising Worksheet). This document will be used to update the next catalog so accuracy and alignment with the request form is imperative.

<table>
<thead>
<tr>
<th>Course 1</th>
<th>Course 2</th>
<th>Course 3</th>
</tr>
</thead>
</table>

Upload the PDF copies of the new courses proposed for reference in consideration of this new program.

*New Course Request form 10-01-2019.pdf* [Delete file]
ROLE OF PROGRAM COORDINATOR (PC)

Review of Request Forms
For each Request form, a PC will receive an email prompting review of a new Request form.

Click on **Click here to complete your section of the form** to access the Request form.

*Screen Shot 15*

Queue Access and Navigation
PCs can also access multiple Request forms from their Dynamic Forms queue.

Here are some tips for accessing and navigating the queue:

Log-In to Dynamic Forms:
h&TargetResource=https://dynamicforms.ngwebsolutions.com/MyForms/StudentHome.aspx

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

Click on **Pending/Draft Forms**.

*Screen Shot 16*
This will take the user to a queue of all documents currently in play (see Screen Shot 17).

- All Request forms marked **INCOMPLETE** in the Status column need review and a **decision action**: **Signature to Approve and route forward or Return for Revision**. Once a PC has completed a decision action the incomplete document will disappear from the queue...however, a pending version of that document will remain.
- **PENDING** Request forms are a draft version of any forms that a user is assigned to review at some point in the workflow process. The Pending file stays in the Pending /Draft Forms queue until the final action of the Dean After University Committee Review to complete the workflow.
- To review a Request form and all of the upload documents within the request, click on the **HTML version of the document**. This allows a user to review the form and provides live links to the uploaded documents for review and downloading if needed. The PDF version of the form will only allow a user to review the form.

To complete a decision action, click the **Action** dropdown button and select **Complete Form**.

**Screen Shot 17**

This will open the Request form for review of the form content and any uploaded documents attached to the form. See example in Screen Shot 18.

**Screen Shots 18**
At the bottom of the document, users have the option to: 1) sign the document, which approves and routes it forward to the next reviewer or 2) return the document to the Originator for revisions.

**How to Approve a Request Form**

Scroll to the bottom of the document to the section for APPROVALS.

**Screen Shot 19**

Click on the shaded area (click to sign).

Users should enter their first and last names.
Click on **Sign Electronically**. Do not click on **Opt out and print** as it will disrupt routing.

**Screen Shot 20**

Then users will see a version of their signature on the form.

**Screen Shot 21**

Next, click on **Submit Form**.
Finally, click **Yes**.

The Request form will then be routed to the next approver and also send an email to the Originator that approval has been given by this level of review.

**How to Return a Request Form for Revision**

Scroll to the bottom of the document and click on **Return for Revision**.

**Screen Shot 23**

An “email” form will pop-up for completion.
Enter a distinctive subject line to alert the Originator that review and revision is needed.

Provide detailed comments in the body that will allow the Originator to improve the request and resubmit.

FYI. When the form is returned, the Originator will be able to edit the current request form within the system and will not have to re-enter all of information, so providing specific feedback for specific sections of the form will be very helpful.

Once comments are entered, click the red button for Return this form for revision.

Screen Shot 25 shows a successful return:

**Review of Resubmissions**

When a document is returned for revision, the Originator has to mark the Request form as a Resubmission after Review and then the approver requesting the revisions.
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 receive an email prompting review of a new Request form.

Click on **Click here to complete your section of the form** to access the Request form.

Queue Access and Navigation
The Chair can also access multiple Request forms from their Dynamic Forms queue. Chairs will also have to download copies of the Request forms and uploaded documents, so familiarity with the queue is important.

Here are some tips for accessing and navigating the queue:

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.**
This will take the user to a queue of all documents currently in play (see Screen Shot 29).

- All Request forms marked INCOMPLETE in the Status column need review and a decision action: Signature to Approve and route forward or Return for Revision.
- PENDING Request forms are a draft version of any forms that a user is assigned to review at some point in the workflow process. The Pending file stays in the Pending/Draft queue until the final action of the Dean After University Committee Review to complete the workflow.

Users who are Chairs of a committee will have to download copies of the Request forms and the attached uploaded documents so that they can share with the members of their committee via a platform like Microsoft Teams.

- For the copy of the Request form, download a PDF version of the document.
- Then, click on the HTML version of the document. This allows the user to access the live links to the uploaded documents for downloading (see Screen Shot 30 for uploaded documents example).
- Tip – Using a naming convention for the Request form and uploaded files that makes it obvious the files that are connected to a Request form will make it easier to share with your committee members.

To review complete a decision action, Click the Action dropdown button and select Complete Form.

This will open the Request form for review of the form content and any uploaded documents attached to the form as seen in Screen Shot 30.
At the bottom of the document, users have the option to: 1) sign the document, which approves it and moves it forward to the next reviewer or 2) return the document to the Originator for revisions.

**How to Approve a Request Form**

Scroll to the bottom of the document to the section for Approvals. (see Screen Shot 31).

Click on the shaded area – (click to sign).
Users should enter their first and last names.

Click **Sign Electronically**. Do not **Opt Out and print** as it will disrupt routing.

**Screen Shot 32**

The signature will then populate.
Click **Submit Form** at the bottom of the page.

**Screen Shot 34**

Click **YES**.

The Request form will then be routed to the next approver and also send an email to the Originator that approval has been given by this level of review.

**How to Return a Request Form for Revision**

Scroll to the bottom of the document and click on **Return for Revision**.
An “email” form will pop-up for completion.

In the Return for Revision page, be sure to select the Originator in the drop down menu

Enter a distinctive subject line to alert the originator that review and revision is needed.

Provide detailed comments in the body that will allow the Originator to improve the request and resubmit.

FYI. When the form is returned, the Originator will be able to edit the current request form within the system and will not have to re-enter all of the information, so providing specific feedback for specific sections of the form will be very helpful.
Once comments are entered, click the red button for **Return this form for revision.**

**Screen Shot 37**

![Screen Shot 37](image)

**Review of Resubmissions**

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

**Screen Shot 38**

![Screen Shot 38](image)

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 receive an email prompting review of a new Request form.

Click on **Click here to complete your section of the form** to access the Request form.

*Screen Shot 39*

Queue Access and Navigation

Deans can also access multiple Request forms from their Dynamic Forms queue.

Here are some tips for accessing and navigating the queue:

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**.

*Screen Shot 40*

This will take the user to a queue of all documents currently in play (see Screen Shot 41).
• All Request forms marked **INCOMPLETE** in the Status column need review and a **decision action**: **Signature to Approve and route forward or Return for Revision**. Once a Dean has completed a decision action, the incomplete document will disappear from the queue....however, a pending version of that document will remain.

• **PENDING** Request forms are a draft version of any forms that a user is assigned to review at some point in the workflow process. The Pending file stays in the Pending/Draft Forms queue until the final action of the Dean After University Committee Review to complete the workflow.

• To review a Request form and all of the uploaded documents within the request, click on the **HTML version of the document**. This allows a user to review the form and provides live links to the uploaded documents for review and downloading if needed. The PDF version of the form will only allow the user to review and download the form.

To complete a decision action, click the **Action** dropdown button and select **Complete Form**.

**Screen Shot 41**

![Pending / Draft Forms](image)

This will open the Request form for review of the form content and any uploaded documents attached to the form. See example in Screen Shot 42.

**Screen Shot 42**

![NEW COURSE REQUEST](image)
At the bottom of the document, users have the option to: 1) sign the document, which approves and routes it forward to the next reviewer or 2) return the document to the Originator for revisions.

**How to Approve a Request Form**

Scroll to the bottom of the document to the section for APPROVALS.

**Screen Shot 43**

Click on the shaded area (click to sign).

Users should enter their first and last names.

Click on **Sign Electronically**. Do not click on **Opt out and print** as it will disrupt the routing.
Then users will see a version of their signature on the form.

Next, click on **Submit Form**.
Finally, click YES.

The Request form will then be routed to the next approver and also send an email to the Originator that approval has been given by this level of review.

**How to Return a Request Form for Revision**
Scroll to the bottom on the document and click on Return for Revision.

**Screen Shot 47**
An “email form will pop-up for completion.

**Screen Shot 48**

- In the Return for Revision page, **be sure to select the Originator** in the drop down menu
- Enter a distinctive subject line to alert the Originator that review and revision is needed.
- Provide detailed comments in the body that will allow the originator to improve the request and resubmit.
- FYI. When the form is returned, the Originator will be able to edit the current request form within the system and will not have to re-enter all of the information, so providing detailed feedback on specific sections of the form will be very helpful.
- Once comments are entered, click the red button for **Return this form for revision**.
- Screen Shot 25 shows a successful return.

**Screen Shot 49**

Review of Resubmissions

When a document is returned for revision, the Originator has to mark the Request form as an Original Submission or a Resubmission:
If the Dean is not the level of resubmission, approve quickly and allow the document to route through without extensive review at this level.
ROLE OF THE UNIVERSITY COMMITTEE

Review of Request Forms
For each Request form, the Chair will receive an email prompting review of a new Request form.

Click on **Click here to complete your section of the form** to access the Request form.

*Screen Shot 51*

Queue Access and Navigation
The Chair can also access multiple Request forms from their Dynamic Forms queue.

Here are some tips for accessing and navigating the queue:

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**.

*Screen Shot 52*

This will take the user to a queue of all documents currently in play (see Screen Shot 53).
All Request forms marked **INCOMPLETE** in the Status column need review and a **decision action**: Signature to Approve and route forward or Return for Revision.

**PENDING** Request forms are a draft version of any forms that a user is assigned to review at some point in the workflow process. The Pending file stays in the Pending/Draft queue until the final action of the Dean After University Committee Review to complete the workflow.

Users who are Chairs of a committee will have to download copies of the Request forms and the attached uploaded documents so that they can share with the members of their committee via a platform like Microsoft Teams.

- For the copy of the Request form, download a **PDF version of the document**.
- Then, click on the **HTML version of the document**. This allows the user to access the live links to the uploaded documents for downloading (see Screen Shot 30 for uploaded documents example).
- Tip – Using a naming convention for the Request form and uploaded files that makes it obvious the files that are connected to a Request form will make it easier to share with your committee members.

To complete a decision action, click the **Action** dropdown button and select **Complete Form**.

**Screen Shot 53**

This will open the Request form for review of the form content and any uploaded documents attached to the form. See **Screen Shot 54** for an example.

**Screen Shot 54**
At the bottom of the document, users have the option to: 1) sign the document, which approves and routes to forward to the next reviewer or 2) return the document to the Originator for revisions.

How to Approve a Request Form
Scroll to the bottom of the document to the section for APPROVALS.

Screen Shot 55

Click on the shaded area (click to sign).

Users should enter their first and last names.

Click on Sign Electronically. Do not click on Opt out and print as it will disrupt routing.
The users will see a version of their signature on the form.

Next, click on **Submit Form**.

Finally, click **Yes**.

The Request form will then be routed to the next approver and also send an email to the Originator that approval has been given by this level of review.
How to Return a Request Form for Revision

Scroll to the bottom of the document and click on **Return for Revision**.

**Screen Shot 59**

An “email” form will pop-up for completion.

**Screen Shot 60**

- In the Return for Revision page, **be sure to select the Originator** in the drop down menu
- Enter a distinctive subject line to alert the Originator that review and revision is needed.
• Provide detailed comments in the body that will allow the originator to improve the request and resubmit.
• FYI. When the form is returned, the Originator will be able to edit the current request form within the system and will not have to re-enter all of the information, so providing detailed feedback on specific sections of the form will be very helpful.
• Once comments are entered, click the red button for Return this form for revision.
• Screen Shot 25 shows a successful return.

**Screen Shot 61**

This form has been returned and sent back to the previous participant.

[View Form PDF]

**Review of Resubmissions**

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

**Screen Shot 62**

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ROLE OF THE DEAN AFTER UNIVERSITY COMMITTEE

Once a document has been approved by UCC or GC, the Dean takes the final steps to end the workflow and download the documents for the Academic Council agenda.

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

*Screen Shot 63*

Dear Dean,

The University-level curriculum committee has approved the UNT Dallas Curriculum Review - Course Change Request Form -TEST_Copy 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.]

Queue Access and Navigation

Deans can also access multiple Request forms from their Dynamic Forms queue.

Here are some tips for accessing and navigating the queue:

Log-In to Dynamic Forms:
[https://qafederation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sso.unt.edu/idp/shibbolet
h&TargetResource=https://dynamicforms.ngwebsolutions.com/MyForms/StudentHome.aspx)

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

Click on **Pending/Draft Forms**.
This will take the user to a queue of all documents currently in play (see Screen Shot 65).

- All Request forms marked **INCOMPLETE** in the Status column need review and a **decision action**: Signature to Approve and route forward or Return for Revision.
- **PENDING** Request forms are a draft version of any forms that a user is assigned to review at some point in the workflow process. The Pending file stays in the Pending/Draft queue until the final action of the Dean After University Committee Review to complete the workflow.

Deans will need to download documents to add to the Academic Council Agenda on behalf of their school. For a copy of the Request form, download a **PDF version of the document**.

- Then, click on the **HTML version of the document**. This allows the user to access the live links to the uploaded documents for downloading (see Screen Shot 30 for uploaded documents example).
- Tip – Using a naming convention for the Request form and uploaded files that makes it obvious the files that are connected to a Request form will make it easier to share with your committee members.

To complete a decision action, click the **Action** dropdown button and select **Complete Form**.

**Screen Shot 65**

This will open the Request form for review of the form content and any uploaded documents attached to the form. See example in Screen Shot 66.
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_Course/Program_Document type**

- 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.

**Add the documents to the MS Teams site for the Academic Council agenda for the appropriate date of the meeting.**

**Final Action to Complete the Workflow**

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 67**

 Scroll to the bottom of the form and click **Next**.

**Screen Shot 68**

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 as a **Pending status** Request form and into the History folder when this step is completed.
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.