CourseLeaf Handbook

Introduction

CourseLeaf – From Leepfrog Technologies, this software platform is designed for the management of curriculum inventories within institutions of higher education. In the spring of 2023, UM purchased and launched CourseLeaf to provide a streamlined process for managing our curriculum inventory, including the approval process for making changes to that inventory. The CourseLeaf system provides unprecedented opportunities for collaboration, communication, and innovation.

Email Notifications – With this platform, the process of getting multiple approvals on a curriculum proposal will be seamless and quick – no need to print out forms and carry them from building to building. However, the efficiency of this process is dependent upon close attention to CourseLeaf email notifications. Please note that due to the automated nature of these notifications they are easily confused as spam. The “from” name will be CourseLeaf Curriculum Management, and the subject line will begin with [CIM Courses], [CIM Programs], or [CIM Misc] depending upon the type of proposal being noticed. The subject line will also include information regarding the type of notice and to whom it is directed.

This Handbook – This document is designed to provide succinct information on how to navigate the CourseLeaf platform. As such, this handbook reflects the organizational structure of the CourseLeaf platform, including the naming conventions used within the platform.

This handbook is NOT intended to be a guide to the curriculum approval process. Please refer to the following resources for more information:

Faculty Senate curriculum approval processes:

  o Faculty Senate - curriculum page
  o Faculty Senate Procedure 201.00 - Curriculum Overview
  o Faculty Senate Procedure 201.30 - Criteria for Evaluating Curriculum Changes

OCHE Level I, Level II, and RTP approval processes:

  o Office of the Provost - Curriculum page
  o MUS - Academic Affairs Procedural Guidebook
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CourseLeaf Links

Prior entering the CourseLeaf platform, determine what is to be accomplished using the resources listed in the introduction for guidance.

CourseLeaf is accessed through **FOUR different entry points** based upon what changes are being proposed:

1) Course Inventory Management – [https://umt-next.courseleaf.com/courseadmin/](https://umt-next.courseleaf.com/courseadmin/)
   a. Propose new courses (new GenEd designation may be selected within each proposal)
   b. Propose substantive changes to existing courses (adding the GenEd designation may be selected within each proposal)

   a. Propose new programs (including degrees, majors, minors, certificates, etc.)
   b. Propose substantive changes to existing programs

   a. Propose a Request to Plan (RTP) – (for new programs and units)
   b. Submit RENEWAL of general education designation forms

   a. Rollback – to reject proposal and add comments/justification
   b. Approve – to sign off on the proposal and move it forward in the process

Please note – Each of the four entry points will ask for the UM single sign-on authentication similar to all UM online processes. On first sign-on, a second authentication will appear – just click on the center of the screen.
1. **Course Inventory Management**

This area of CourseLeaf provides options to propose new courses, make changes to existing courses, and propose new general education and writing courses.

**New Courses**

To propose a NEW course, begin with the green "Propose New Course" button.

![Course Inventory Management](image)

A new window will open where information can be entered from scratch into the blank fields (all required fields are outlined in red):
OR → the fields can be pre-filled with information from an existing course. For this option, begin with the green “Propose New from Existing Course” button.

A search window will open with drop-down menus for College and Subject, revealing a list of the current courses available.

Select an appropriate/similar course to use as the template for the new course. The fields will fill with the existing information – each field should be carefully checked and edited to match the new proposal.
To avoid duplication when choosing a course number, be sure to check the list of existing course numbers by clicking the “Course Numbers in Use” button.

Once all of the fields have been filled, including uploading a syllabus at the “Attach Syllabus” green button, changes can be saved with the “Save Changes” button at the bottom of the form. This allows the proposer to return to the proposal and make further changes or edits prior to submission.

When the proposal is complete to the satisfaction of the proposer, click the green “Start Workflow” button at the bottom of the window to begin the approval process. This will trigger an email notification to the first approver in the process, requesting them to examine the proposal and provide either their comments/concerns via the “Rollback” button, or their approval via the “Approve” button.
Editing Courses

This area of CourseLeaf also provides the opportunity to make changes to existing courses. (This does NOT include General Education designation renewals [aka: rolling review] – see Miscellaneous Request Management below.)

[Editorial Catalog Changes that do not require approvals are not currently being processed through CourseLeaf – these should be emailed directly to Troy Morgan, Associate Registrar.]

To make changes to an existing course, begin by searching for the specific course. Follow the instructions on the screen to successfully use the search function:

Select the course from the list that appears and then click the green "Edit Course" button on the right-hand side.
A new window will open with all the fields pre-filled with the current course information. Each field should be examined and edited as needed to complete the proposed change.

As with a new course, a syllabus should be uploaded at the “Attach Syllabus” green button.

At the bottom of the page, choose from “Save Changes” in order to return to the proposal to make further edits prior to submission, or “Start Workflow” when the proposal is ready to begin the approval process.

To terminate or delete a course from the catalog, begin by searching for the course as above. Select the course and then click the red “Terminate” button. A new window will open. Complete the information requested and click “Start Workflow” to begin the approval process.
2. Program Management

This area of CourseLeaf provides options to propose new programs and make changes to existing programs.

New Programs

To propose a new program, begin with the green "Propose New Program" button.

A new window will open. The first field is a drop-down menu for the different types of new program proposals available. The type of program selected in this menu will determine what fields will appear below based upon the procedural and approval requirements for the specific type of program being proposed.
Choose from the following options:

- **Level 2 (after RTP): New programs** – this creates a new undergraduate or graduate degree program (these are the Level II documents that require OCHE approval and must come AFTER the Request to Plan has been approved by BOR – see *Miscellaneous Request Management* below for the RTP form - #11 in the MUS handbook.)

- **Level 1 (OCHE approval): New minor w/in existing major** – (requires Level 1 approval from OCHE - #8 in the MUS handbook.)

- **Level 1 (OCHE approval): New temporary CAS/AAS** – this is the first step to creating a new associates degree program (requires Level 1 approval from OCHE - #10 in the MUS handbook.)

- **Level 1 (OCHE notice): New BAS/AA/AS area of study** – this creates a concentration within the BAS/AA/AS programs (requires notification to OCHE - #3 in the MUS handbook.)

- **Level 1 (OCHE notice): New/revised/terminated certificate <30 credits** – this is for all actions regarding campus certificates (requires notification to OCHE - #2 in the MUS handbook.)

- **Dual Degree** – this creates a program where two existing degrees may be pursued simultaneously as opposed to consecutively (no OCHE submission.)

Once all of the fields have been filled, including uploading all required supporting documents, changes can be saved with the “Save Changes” button. This allows the proposer to return to the proposal and make further changes or edits prior to submission.

When the proposal is complete to the satisfaction of the proposer, click the green “Start Workflow” button to begin the approval process. This will trigger an email notification to the first approver in the process, requesting them to examine the proposal and provide either their comments/concerns via the “Rollback” button, or their approval via the “Approve” button.
Editing Programs

This area of CourseLeaf also provides opportunity to make changes to existing programs. Begin by following the instructions on the search function to find the specific program you plan to change, select the program and then click the green "Edit Program" button on the right-hand side.

A new window will open. The first field is a drop-down menu for the different types of changes available. The type of change selected in this menu will determine what fields will appear below based upon the procedural and approval requirements for the specific type of change being proposed.
Choose from the following options:

- **Minor program change** – this is for change of less than 20% (no OCHE submission.)

- **Level 1 (OCHE approval): Re-titling** – changing the title of a program, minor, option/concentration, or certificate – (requires Level 1 approval from OCHE - #5 in the MUS handbook.)

- **Level 1 (OCHE approval): Revising** – this is for change of more than 20% (requires Level 1 approval from OCHE - #9 in the MUS handbook.)

- **Level 1 (OCHE approval): Consolidation** – consolidating two or more existing programs (requires Level 1 approval from OCHE - #7 in the MUS handbook.)

- **Level 1 (OCHE notice): Online delivery of existing program** – offering an existing program via distance/online delivery – (requires notification to OCHE - #4 in the MUS handbook.)

- **Level 2 (no RTP): Permanent authorization of CAS/AAS** – this is the second step in establishing a new associates degree program (requires Level II approval from OCHE, but no RTP - #12 in the MUS handbook.)

- **Level 2 (no RTP): Exceeding 120-credit maximum** – (requires Level II approval from OCHE, but no RTP - #13 in the MUS handbook.)

To terminate a program or place it into moratorium, after selecting the program from the search menu, click the red “Terminate” button. A new window will open with the required fields and a green “Save and Start Workflow” button at the bottom. (Moratorium requires Level 1 notification to OCHE - #1 in the MUS handbook. Termination requires Level 1 approval from OCHE - #6 in the MUS handbook.)
3. Miscellaneous Request Management

Request to Plan (RTP)
- Please email a signature document with department chair, college dean, and any other impacted programs as a supporting document directly to Megan Burns, Academic Policy Manager in the Office of the Provost.

Renewal of General Education Designation (including Writing courses)
- Please upload the completed renewal document (including signatures of department chair and college dean), syllabus, assessment reports & data, and any other required supporting documents.

This area of CourseLeaf houses several forms that fall outside the typical approval path (workflow) from either courses or programs, including RTP’s and GenEd Rolling Review.

Please note that some new programs require the initial, pre-planning step called a "Request to Plan" or RTP. Only after the RTP has been approved by the Provost, President, and BOR can the Level II forms be submitted for consideration by the committees and the Senate.

In addition, this is where the rolling review for General Education Designation, including Writing Courses, can be found. While new courses seeking General Education Designation should be submitted in the Course Inventory Management area, renewals are submitted here.

Select the appropriate “request type” from the drop-down menu. This will prompt the system to open the required fields and upload/attach buttons.
Miscellaneous Request Management

Choose from the following options:

- **Request to Plan (RTP): New programs or units** – this is the first step to creating a new academic program or unit (requires BOR approval - #11 & #14 in the MUS handbook.)

- **Renew GenEd or Writing designation (internal approvals only)** – this is for Rolling Review submission, as well as submission of assessment reports and data for courses with provisional status – no OCHE approval.

- **Level 2 (after RTP): New/change to Academic or Administrative Unit** – these are the Level 2 forms used after the RTP is approved (requires OCHE approval - #14 in the MUS handbook.)

- **Level 2 (after RTP): New/change to Center or Research Unit** – these are the Level 2 forms used after the RTP is approved (requires OCHE approval - #14 in the MUS handbook.)

- **Level 2 (no RTP): Re-titling a unit** – this is for retitling centers, research units, academic units, or administrative units – these are the Level 2 forms (requires OCHE approval, no RTP - #15 in the MUS handbook.)
4. Pages Pending Approval

This area of CourseLeaf will most commonly be accessed by the link that approvers (chair, dean, committees, senate, and provost) will receive in an email notification from the CourseLeaf platform. Due to the automated nature of these email notifications they are easily confused as spam. The “from” name will be CourseLeaf Curriculum Management, and the subject line will begin with [CIM Courses], [CIM Programs], or [CIM Misc] depending upon the type of proposal being noticed. The subject line will also include information regarding the type of notice and to whom it is directed.

Approvers can also access the list of proposals in the approval queue via Pages Pending Approval.

The upper left-hand box will contain the list of proposals waiting in the approval queue. When one of the proposals is selected (or when the link in the notification email is clicked), the proposal will appear in the lower half of the screen.

On the right-hand side, the workflow and approval path will appear showing the current status of the proposal.

The approver has the option to reject the proposal by using the red “Rollback” button. A window will open requiring the approver to state their reasons for the rollback. The proposal may be rolled back to any previous step. This action will trigger an email notification for the person to whom the proposal is rolled back.

The approver also has the option to approve the proposal by clicking the green “Approve” button. This action will trigger an email to the next person in the workflow. If the approver wishes to add comments to the proposal, they should use the green “Add Comment” button prior to approving. Please remember that clicking this “Approve” button is equivalent to signing the document.

It is currently recommended to disregard the blue “Edit” button. If the approver feels that edits should be made to the proposal, they should use the “Rollback” button and provide their suggested edits to the proposer in their rollback justification.

For questions and to provide feedback, please contact Troy Morgan in the Registrar’s office, or Megan Burns in the Provost’s office.