

## CourseLeaf CIM Agreement Management Job Aid

### Purpose:

CIM Agreement Management is used to route and store current and historical academic agreements.

- For approval of academic agreements that need the Provost's signature.
- Provost signature line should include:
  - Heather Shipley  
Interim Provost and Senior Vice President for Academic Affairs  
Peter T. Flawn Chair
- Approval steps vary depending on the type of agreement.
- Approvals are integrated in the system with customized workflows that capture The University of Texas at San Antonio (UTSA) approval process for each type of agreement.

### Note:

- **Agreements that involve services rendered or payments** should still route through the Business Contracts Office.
- **Agreements that require the President's signature** can route in CourseLeaf. A memo will need to be attached to the proposal summarizing the request. The header should include the Provost's name, to show approval before moving to the President's office. Once the agreement routes through CourseLeaf, Academic Affairs will forward to the President's office for final signature.

### CIM Agreement Management – UTSA Website:

[Academic Agreements webpage](#) (for information about types of agreements and resources)

### Access/Support/Training

Email [academicprograms@utsa.edu](mailto:academicprograms@utsa.edu) to request access to the CourseLeaf system, for assistance in the system, and for training. Training can be on an individual user basis or can include groups from units/colleges/departments.

- Training is mandatory for individuals who propose new agreements and changes/updates to existing agreements and those in approver roles.
- Once a user has access to the system, they can initiate academic agreements and changes/updates.

### Login

Login is located on the CourseLeaf Access webpage. Use your abc123 username and passphrase to log in.

## Instructions for Proposing New Agreements

Once logged into the system, select the green “Propose New Agreement” button. On the Agreement Request, fill out the appropriate information.

- **Desired Implementation Date** – Should correspond with Agreement Start Date.
- **Title of Agreement** - Use a purposeful naming convention for Title of Agreement (to help with searches in the system).
  - Agreements originating in a department/school should use their college acronym, department/school acronym, and the name of the entity the agreement is with. For example, HCAP-COU-Family Therapy Center.
  - College-level agreements should use their college acronym and the name of the entity the agreement is with. For example, COLFA-Judson ISD.
  - University-level agreements should include UTSA, the name of the entity the agreement is with, and any helpful information about the type of agreement. For example, UTSA and Northside Independent School District MOU.
- **Department or Other Approver** - If the agreement is associated with a specific department/school and needs department chair/school director approval, select the appropriate department/school. College Approver will then autofill with the associated college. If the agreement is college-level and not associated with a specific department/school, select NOT APPLICABLE. Do not use “Other” for department/school.
- **College Approver** – Autofill when department/school is selected. If NOT APPLICABLE is selected for Department or Other Approver and this is a college-level agreement, you must select the appropriate college under College Approver so the dean can approve the agreement.
- **University-Level Agreement:** If the agreement is at the university-level (not associated with a specific department/school or college), select “Not Applicable” for the Department Approver, and do not select a College Approver.
- **Academic Support Unit Approver:** Leave blank unless routing an academic support unit agreement. Academic support unit agreements are agreements that originate in one of these areas: Career Engaged Learning, Graduate School, Honors College, Library/ITC, School of Data Science, Strategic Enrollment, Student Affairs, or Student Success. They are not housed within a department/college. You would:
  - select “Not Applicable” for the Department Approver;
  - do not select a College Approver;
  - and select the appropriate Academic Support Unit Approver.

The agreement will now route through the Vice Provost of the selected academic support unit for approval.

- **Does this agreement involve another college at UTSA?** – If yes, select the collaborating college. The dean will be included in the approval workflow.
- **Does this agreement involve another department at UTSA?** – If yes, select the collaborating department/school. The department chair/school director will be included in the approval workflow.
- **Contact Information:** Enter contact information for primary responsible party at UTSA and at the institution or entity that UTSA will collaborate with.
- **Academic Level:** Level chosen determines the appropriate workflow to include Vice Provost and Dean for Graduate Studies and/or Vice Provost and Dean for Undergraduate Studies.

- **Type of Agreement:** Definitions for agreement types are located on the [Academic Agreements webpage](#). Select the appropriate agreement type. Email [academicprograms@utsa.edu](mailto:academicprograms@utsa.edu) for help with agreement types.
  - Select International Agreement for any type of agreement that is with an international entity. Email [globalrelations@utsa.edu](mailto:globalrelations@utsa.edu) for help with international agreements.
- **Agreement Expiration Date:** Should match date on attached agreement.
- **Agreement Renewal Date:** Should match date on attached agreement.
- **Agreement Start Date:** Should match date on attached agreement.
- **Provide a brief description:** Include brief description of the agreement.
- **Does this proposal build on or override an existing agreement?** If yes, identify the existing agreement and provide a copy of the overridden signed existing agreement.
- **Is this a UTSA template of THECB (Texas Higher Education Coordinating Board) form?** If no is selected, Legal Affairs will be included in the workflow and could reach out to you for further details about this agreement.
  - **Are there any substantive changes being made to the UTSA template form?** This is a follow up question if yes is selected for the previous question. If you answer yes (there have been substantive changes made to the form), Legal Affairs will be included in the workflow and could reach out to you about these changes.
- **Does this agreement involve fee waivers from UTSA?** If yes, describe the fee waiver(s) and provide a copy of the approved fee waiver memo, where applicable.
- **Is this an agreement with UT Health San Antonio?** UTSA has an umbrella agreement with UTHSA regarding cross-registration fees. A link with more information is provided here.
- **Is this an agreement with an international entity/partner?** If yes is selected, Global Initiatives will be included in the workflow.
- **Name of Existing Degree Program:** Include if agreement is related to an existing degree program.
- **Supporting Documents:** Attach the signed agreement. Make sure there is a signature field for the Provost on the agreement. Agreements that also require the President’s approval should include a memo to the President through the Provost with this request.

Save Changes (if you are not ready to submit). You can come back to the proposal later.

Start Workflow (if you are ready to submit for approval).

### **Instruction for Changes to Existing Agreements**

Once logged into the system, search for the agreement (can search by keyword).

- Click on the agreement that you want to update/edit.
- Click the green “Edit Agreement” button.
- Fill in/update the appropriate fields following directions above.
- Make sure to update the expiration and renewal dates of the current agreement. These dates should match what is in the attached agreement.
  - Attach the updated agreement to the supporting documents. When naming the updated agreement, include the date and the word “final.” Do not delete the original agreement(s).
  - Do not delete original agreement(s). They should be left as a historical record.

Save Changes (if you are not ready to submit). You can come back to the proposal later.

Start Workflow (if you are ready to submit for approval).

## **Roles for Academic Agreements**

Roles in the academic agreement workflows are pre-set based on entities at UTSA that need to review and/or approve academic agreements or need to be notified of a new agreement. Roles include but are not limited to: Department Chairs/School Directors, Associate Deans, Deans, College Financial Leads, Vice Provosts for Academic Support Units, the Vice Provost and Dean for Graduate School, the Vice Provost and Dean for Undergraduate Studies, Legal Affairs, Global Initiatives, Continuous Improvement and Accreditation, and Academic Affairs.

Some roles in the workflow are FYI only. If your role is FYI only, you will receive an email notification that an agreement has been proposed. Below the link to the proposal, the email will say, "No approval is necessary; this is for your review only." This means no action is needed on your part in the system.

## **Directions for Approvers**

The workflow will route to an approver when it is their step in the approval process. Approvers will get email notifications from CourseLeaf when their approval is required in the system.

- Approvers can navigate to the CourseLeaf Console using their Page Approval link from their automated email.
- Only approvers can edit a form, rollback a form as needed or approve in workflow.
- Review content in the Page Review window. Any changes to content will be shown in red and green: red for deleted text, green for new text.
- Click the Edit button to make changes to the page (if applicable).
- Rollback the page to a previous approver and add comments about why the page has been rolled back (if applicable).
- Click Approve to send to the next step in the workflow.