

Programs & Plans: Checklists

Note: All form fields with text boxes (e.g., Declaration Requirements, Minimum Average(s) Required, Graduation Requirements, etc.) must follow [text box formatting guidelines](#).

All proposals

Kuali CM Form Field	Criteria
Effective Term and Year	Should match the information in Important! field unless special permission from the RO has been granted and stated in the Rationale. Watch out for the incorrect combination of an Effective Term and Year change with a "Revision" proposal.
Academic Unit Approval	If applicable, should be a date in the past
Faculty/AFIW Path(s) for Workflow	AFIW: List self + associated faculty (if applicable) Faculties: List self Non-faculty/AFIW areas: Leave blank

New Programs and Plans

Create using "New" button [though duplicate can be used]

Kuali CM Form Field	Criteria
Proposal Type	Must be "New"
Quality Assurance Designation	Must have been selected from list
Field of Study	Cannot be blank > if a new one needs to be created for a new area of study, submit a Jira ticket and the RO will create one
Faculty [Calendar Display]	If a new combination needs to be created, submit a Jira ticket and the RO will create it for the pull-down menu
Undergraduate Credential Type	Ensure the type selected matches the name type chosen
Program/Plan Name	Follows program/plan name guidelines
Degree	If a new degree needs to be added to the list for a major listing, submit a Jira ticket and the RO will create it for the pull-down menu
Option is available for students in the following degrees	If a new degree needs to be added to the list for connection to the options listing, submit a Jira ticket and the RO will create it for the menu; make sure it is not left blank
Specialization is available for students in the following majors	Ensure this field is not left blank
Admission Entry point	Direct entry = usually for bachelors/diplomas; Declare plan = usually for majors, minors, options, specializations
Admission Requirements: Minimum Requirements	Should list the requirements that should be listed in the Academic Calendar. Not for items in marketing brochures or websites. Review for grammatical, typographical issues.
Declaration Audience	Certificate and Minor: Should select "This credential is open to students enrolled in any degree program"

	<p>Diploma: Should select "This credential is open to students enrolled in degree programs or any non- or post-degree academic plan"</p> <p>The option of "This credential is open to students enrolled in any non- or post-degree academic plan" should not be used (this is permitted only for academic plans created pre-2018).</p>
Declaration Requirements	<p>List requirements that should be listed in the Academic Calendar that students need to meet in order to be admitted to the academic plan (e.g., specific average or courses needing to be completed). Review for grammatical, typographical issues.</p> <p>If plan is listed in the invalid credential combinations table, the following statement should be listed as a bullet:</p> <ul style="list-style-type: none"> • Before declaring this academic plan, see invalid credential combinations. [link to come]
Minimum Average(s) Required	Review for grammatical, typographical issues. Follows style guide .
Graduation Requirements	Uses paragraphs and bullet lists. Headers start with H4. Review for grammatical, typographical issues.
Co-operative Education Program Requirements	Uses paragraphs and bullet lists. Headers start with H4. Review for grammatical, typographical issues.
Course Requirements (units)	Should only be used where requirements are simple and list active University of Waterloo courses. Should follow guidelines for building rules .
Course Requirements (no units)	The default field to build lists of course requirements for most plans. Should follow guidelines for building rules .
Required Courses (Term by Term)	Can only be used by plans that are promoted on a term-by-term basis (i.e., Engineering, Optometry, Pharmacy). Should follow guidelines for building rules .
Cross-Listings Options	<p>If "All cross-listings to be displayed" option is selected, ensure all cross-listed courses are listed in course list fields.</p> <p>If "Some cross-listings not to be counted" option is selected, ensure the Removing Cross-Lists field is completed. This permanently tracks which courses Senate has approved which cross-lists are excluded from requirements and calculations (exceptions to calendar guiding principles).</p>
Additional Constraints	Should be formatted as a numbered list that explains requirements listed in course list fields. Must be contractual in nature.
Notes	Should be formatted as a list of round bullets and follow the guidelines dictating allowable notes .
Specialization Details	Review for grammatical, typographical issues. Follows style guide .
Specializations List	All specializations that apply should be listed, and placed in alphabetical order.
Specializations	Should follow guidelines for building rules .

Retiring Programs & Plans

Create using "Propose Changes" function

Kuali CM Form Field	Criteria
Status	Must be changed to "Retired"
Proposal Type	Must be "Retire"
Quality Assurance Designation	Must have been selected from list

Changing Programs & Plans

Create using "Propose Changes" function

Kuali CM Form Field	Criteria
Proposal Type	Must be "Change"
Quality Assurance Designation	Must have been selected from list
Field of Study	Cannot be blank > if a new one needs to be created for a new area of study, submit a Jira ticket and the RO will create one
Faculty [Calendar Display]	If a new combination needs to be created, submit a Jira ticket and the RO will create it for the pull-down menu
Undergraduate Credential Type	Ensure the type selected matches the name type chosen
Program/Plan Name	If changed, ensure it follows program/plan name guidelines
Degree	If a new degree needs to be added to the list for a major listing, submit a Jira ticket and the RO will create it for the pull-down menu
Option is available for students in the following degrees	If a new degree needs to be added to the list for connection to the options listing, submit a Jira ticket and the RO will create it for the menu; make sure it is not left blank
Specialization is available for students in the following majors	Ensure this field is not left blank
Admission Entry point	Direct entry = usually for bachelors/diplomas; Declare plan = usually for majors, minors, options, specializations
Admission Requirements: Minimum Requirements	If changed, review for grammatical, typographical issues. Not for items in marketing brochures or websites.
Declaration Audience	If changed, check for following: Certificate and Minor: Should select "This credential is open to students enrolled in any degree program" Diploma: Should select "This credential is open to students enrolled in degree programs or any non- or post-degree academic plan" The option of "This credential is open to students enrolled in any non- or post-degree academic plan" should not be used (this is permitted only for academic plans created pre-2018).
Declaration Requirements	If changed, review for grammatical, typographical issues. Follows style guide . If plan is listed in the invalid credential combinations table, the following statement should be listed as a bullet:

	<ul style="list-style-type: none"> • Before declaring this academic plan, see invalid credential combinations. [link to come]
Minimum Average(s) Required	If changed, review for grammatical, typographical issues. Follows style guide .
Graduation Requirements	If changed, check that it uses paragraphs and bullet lists. Headers start with H4. Review for grammatical, typographical issues.
Co-operative Education Program Requirements	If changed, check that it uses paragraphs and bullet lists. Headers start with H4. Review for grammatical, typographical issues.
Course Requirements (units)	If changed, check that it follows the guidelines for building rules .
Course Requirements (no units)	If changed, check that it follows the guidelines for building rules .
Required Courses (Term by Term)	If changed, check that it follows the guidelines for building rules .
Cross-Listings Options	<p>If changed, check for the following:</p> <p>If “All cross-listings to be displayed” option is selected, ensure all cross-listed courses are listed in course list fields.</p> <p>If “Some cross-listings not to be counted” option is selected, ensure the Removing Cross-Lists field is completed. This permanently tracks which courses Senate has approved which cross-lists are excluded from requirements and calculations (exceptions to calendar guiding principles).</p>
Additional Constraints	If changed, check that is formatted as a numbered list of notes that explains requirements listed in course list fields. Must be contractual in nature.
Notes	If changed, check that is formatted as a list of round bullets and follow the guidelines dictating allowable notes .
Specialization Details	If changed, review for grammatical, typographical issues. Follows style guide .
Specializations List	If changed, check that all specializations that apply are listed, and placed in alphabetical order.
Specializations	If changed, check that it follows the guidelines for building rules .