

# HOW TO SUBMIT A FIELD COURSE PROPOSAL

When an academic unit would like to offer a course that is (i) largely or wholly based off-campus (hereinafter 'field course') or (ii) incorporates travel outside of Nova Scotia, the course must be proposed via the Topic Request Management module. This process is required even if the course has been previously or is regularly offered. This is a revised process designed to ensure that all relevant parties (Department Chairs, Deans/Associate Deans, Risk Management, Service Centre, and Enrolment Services) are aware of the course, that proper approvals are in place before the course is made available to students, and that associated documentation is stored in a centralized repository.

- For courses with international travel, proposals should be submitted eighteen (18) months prior to the start of the term in which it is to be offered.
- For courses with domestic travel only, proposals should be submitted six (6) months prior to the start of the term in which it is to be offered.
- The minimum recommended ratio for supervisors to students is 1:12 with at least two university representatives traveling to mitigate risks in case of sickness or other unforeseen occurrences.
- All budget reviews and approvals will go through the appropriate Dean's Office (course expenses and course fees will be charged/credited to the appropriate Faculty Org).
- The course will only be visible on Self Service Banner once the budget has been signed off as approved by the appropriate Dean and the risk assessment process has been completed.
- Prior to courses being available for registration, students can be vetted by the instructor; however, they will only be granted overrides to register when they have read and signed the consent/waiver form. Once completed, consent/waiver forms are to be sent back to SMU Risk and Insurance Services.

## STEPS FOR INSTRUCTORS

- Go to the [CourseLeaf Access](#) landing page on SMU website. Locate the **Topic Request Management for Field Courses** section. Links to the **Budget Worksheets** and **Risk Assessment Forms** are also in this section.

# CourseLeaf Access



↓ CourseLeaf Access ☰

Dates and Deadlines ☰

How to Access CourseLeaf Modules ☰

Documentation ☰

Frequently Asked Questions ☰

## Course Management

Log in here to submit course changes or new course proposals.

See tips on using the Course Management module.

## Program Management

Log in here to submit program changes or new program proposals.

See tips on using the Program Management module.

## CourseLeaf Dashboard

Log in here to locate/review/approve proposals on the **NEW CourseLeaf 10 Dashboard** or log in to the Approval site.

See documentation on how to review/approve proposals and how to navigate the new CL10 Dashboard.

## Contact us

Courseleaf Support

✉ curriculum@smu.ca

## Topic Request Management for Field Courses

Log in here to submit field course proposals. **Complete the budget Field Study Budget Worksheet and Off Campus Course Budget Template then upload to the proposal. You will also need to complete and upload either the International Field Activity Risk Assessment or the Domestic Field Risk Assessment form.**

## Undergraduate and Graduate Calendars

- Undergraduate Calendar
- Graduate Calendar

- Click on link to log in to [Topic Request Management](#). \*\*\*Only full time faculty have access to enter field course proposals.
- Click **Propose New Topic Course**.

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## Topic Request Management ONLY

Help ⓘ

Search, edit and add one-time offerings/topic courses - such as X98 courses for the CAS. Please do not submit course proposals for regularly offered departmental courses. (To submit regular course proposals, please use our standard Course Inventory Management site.)

Use an asterisk (\*) in the search box as a wild card. For example, MATH\* will find everything that starts with "MATH", \*MATH everything that ends with "MATH", and \*MATH\* everything that contains "MATH". The system searches the Course Code, Title, Workflow step and CIM Status.

\*    History - OR   ▾

Request Code	Title	Workflow	Status
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- The instructor completes the required fields marked in red under **Field Course Proposal** only.

**Field Course Proposal**

Field Course Type

Field Course Department

Field Course Faculty

Effective Term

Subject  Field Course Number

Field Course Title

Field Course Credit Hours

Calendar Course and Descriptions

Instructor(s)

Date(s) of Trip

Location(s)

Instructor Cost Model

Estimated per-student course fee

Budget Overview

Budget Worksheet & Template  Uploaded Files:   
Files To Be Uploaded:

Rationale and objectives

Connections to Curriculum

Field activities to be undertaken

Anticipated number of students

Recruitment and student selection criteria

Course details and practical considerations

Note: Include transportation, accommodation, meals, supports, partnerships, any non-SIMU, non-student individuals accompanying the field course.

Risks and hazards

- When completed scroll down to the bottom of the form and either click **Save Changes** (if still working on proposal) or **Start Workflow**.
- Once a proposal has been submitted, an email notification will be sent to the next step in the workflow process.

## WORKFLOW/ROLES

1. **Field Course Monitor** – The Field course monitor will review Workflow steps and update if necessary
2. **Department Review** - Chair/Program Coordinator are responsible for reviewing the full proposal, including budget & course fee, and risk assessment.

### Department Review

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Included on Schedule 2  Yes  No

Reviewer

Comments

3. **Faculty Review** – Course and funding review and budget sign off

### Course & Funding Review

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Costs Associated & Program Fee Review Completed  Yes  No

Funding Source

Reviewed Budget  Yes  No

Reviewer

Comments

4. **Risk Assessment Process** – International Mobility, HR Office and Science Safety Advisor (if Science field course)

### Risk Assessment Process

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Performed Risk Management (coordinated with Global Learning if International)  Yes  No

Risk Assessment Completed with Instructor

Risk Assessment Received/Signed by Dean and Filed  Yes  No

Uploaded Files:

Files To Be Uploaded:

5. Enrollment Services

### Enrollment Services

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Viewable on Self Service Banner  Yes  
 No

Received Schedule 2		<input type="radio"/> Yes	<input type="radio"/> No
Built in Banner		<input type="radio"/> Yes	<input type="radio"/> No
Course Number			
CRN			
Last Day for Registration			

6. Service Centre

### Service Centre

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Accounting line/FOAP set up Yes No

Revenue FOAP

Expense FOAP

Program Fee

Deposit Amount Deposit Due Date

Balance Amount Balance Due Date

Communicated Program Fee Amounts and Posting dates Yes No

7. Risk and Insurance Services Section – Completed before start of field course.

### Risk and Insurance Services

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Set up Informed Consent/Waiver forms for students	Yes	No
Provided Informed Consent/Waiver Forms to Instructor	Yes	No
Received signed Informed Consent/Waiver forms	Yes	No

8. Service Centre

### Service Centre

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Students Enrolled  
in Banner

Reviewed student Banner accounts and ensured all fees are paid  Yes  No

9. Instructor Post Trip

### Instructor Post Trip

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Have you submitted reimbursement forms to Finance?  Yes  
 No

If there was an incident or injury, have you submitted the necessary paperwork?

Yes No

10. Department Chair Post Trip

### Department Chair Post Trip

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Expenses Approved  Yes  No

Final Reports Submitted  Yes  No

Reviewer

Comments

## HOW TO REVIEW AND APPROVE FIELD COURSE PROPOSALS

### RECEIVING WORKFLOW NOTIFICATION AND ACCESSING PROPOSALS

There are two types of notifications automatically generated by the system:

- 1) **Approver** – requires action within workflow
- 2) **FYI** – does not require action in workflow but this type of notification provides information that may require action outside of workflow. This includes committees, non-academic units and units who are included in the course ecosystem.

You will receive an email for each item that requires your approval. You will only be prompted to log in once using your SMU email and network password.

### ACCESSING A PROPOSAL FROM EMAIL LINK

- Click the link provided in the email notification you received. You will be redirected to the **Approval** site.

### ACCESSING A PROPOSAL ON THE COURSELEAF ACCESS LANDING PAGE

- Go to the SMU website, <https://www.smu.ca/>, under **Academics**, click **view all**.

Home / Academics

## Academics



#### Our Programs

Browse our undergraduate and graduate programs.



#### Academic Resources

Saint Mary's provides a wide range of services that provide academic support to students and faculty.



#### Service Centre

The Service Centre offers combined services of the Registrar's office, Student Accounts and Financial Aid & Awards.

#### ↓ Academics

Academic Programs

Academic Calendar →

Faculty of Arts

Faculty of Education

Faculty of Science

Sobey School of Business

Registrar

Planning and Registration

The Patrick Power Library

Academic Resources

Co-op Education

Studio for Teaching and Learning

Executive and Professional Development

CourseLeaf Access →

Extended Learning

Online Learning

- Click on **CourseLeaf Access** to access the landing page.

Home / CourseLeaf Access

# CourseLeaf Access



- CourseLeaf Access
- Dates and Deadlines
- Documentation
- Frequently Asked Questions

**Courseleaf Support**  
 Shelley Clarke-Raftus  
 shelley.clarke-raftus@smu.ca

**Course Inventory Management**

Log in here to submit course changes or new course proposals. For "how to" tips on using the Course Inventory Management module click here.

**Program Management**

Log in here to submit program changes or new program proposals. For "how to" tips on using the Program Management module click here.

**Courseleaf Approvals**

Log in here if you have an approval role in the curriculum process to approve courses. For "how to" tips on reviewing and approving proposals click here.

**Undergraduate and Graduate Calendars**

Click here to view the current Undergraduate and Graduate Calendars.

- Access the **CourseLeaf 10 Dashboard** under **CourseLeaf Approvals**.

## REVIEWING/APPROVING A PROPOSAL ON THE DASHBOARD

### APPROVER

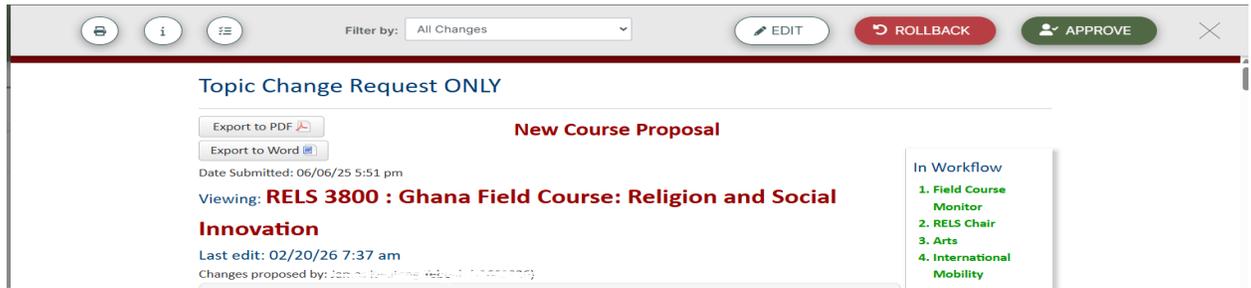
- Once logged in to the dashboard you will automatically see the proposals under the **Workflow** tab. Click on **Workflow** tab.

ITEMS <span style="border: 2px solid red; border-radius: 10px; padding: 2px 5px;">WORKFLOW 27</span>							
Role	Type	Term					
My roles	Any Type	Any Term					
Filters Applied: <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: AADV Chair</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Arts</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Arts Curriculum Committee Chair</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Arts Faculty Council Chair</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Arts Faculty Executive</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Arts Review</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Myles McCallum</span>							
Page Title	Type	Term	Submitter	Approver	Submitted	Modified	
FREN 3500: Indigenous Lit. in French	Courses	2025-2026	Shelley Clarke-Raftus	Arts Faculty Executive	Oct 2, 2024	May 12, 2025	
PHIL 1000: University Education	Courses	2026-2027	Mark Mercer	Arts Curriculum Committ...	Feb 14, 2025	Mar 21, 2025	
ENGL 2460: Indigenous Media/Literature	Courses	2025-2026	Shelley Clarke-Raftus	Arts Curriculum Committ...	Oct 2, 2024	Oct 2, 2024	

- Select the proposal from the list.

ITEMS <span style="border: 2px solid #000; border-radius: 10px; padding: 2px 5px;">WORKFLOW 6</span>							
Role	Type	Term					
My roles	Any Type	Any Term					
Filters Applied: <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Registrar/Service Centre</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Service Centre</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">X roles: Tanya Killam</span>							
Page Title	Type	Term	Submitter	Approver	Submitted	Modified	
RELS 3800: Ghana Field Course: Religion and Social Innovation	Field Courses	n/a	<del>Shelley Clarke-Raftus</del>	Registrar/Service Ce...	Jun 6, 2025	Feb 20, 2026	
ENVS 4432: ENVS 4432/BIOL 4403 Environmental Data Science	Field Courses	n/a	Shelley Clarke-Raftus	Registrar/Service Ce...	Apr 24, 2025	May 8, 2025	
GEOG 4110: South Korea Field Course	Field Courses	n/a	Shelley Clarke-Raftus	Registrar/Service Ce...	May 5, 2025	Jan 22, 2026	

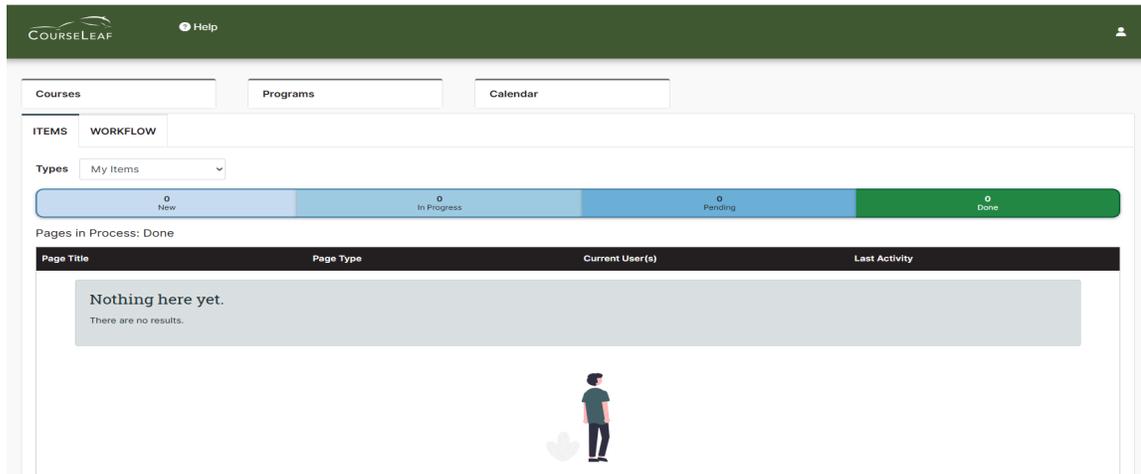
- Once you click on the proposal it will pop up to review.



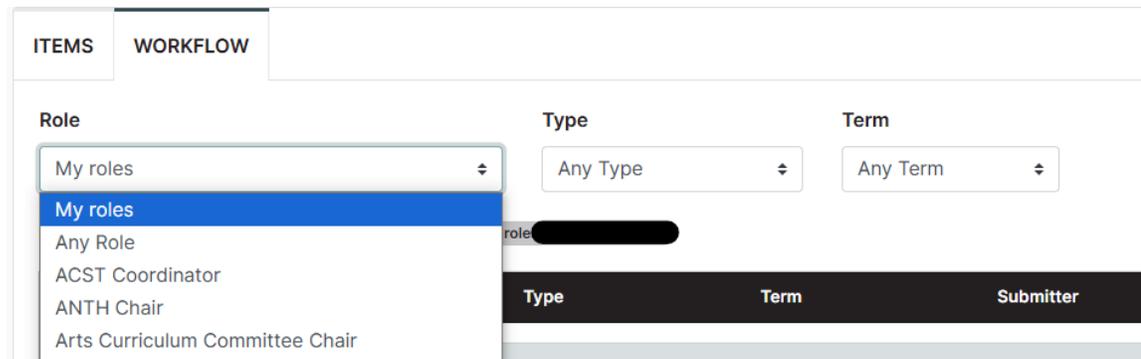
- Once you complete the section of the workflow. Click **SAVE** and then **APPROVE** to push to next step.

**NOT APPROVER (REVIEW ONLY)**

- If you are not an approver, you will need to select the proposals to review from the **Workflow** tab.



- Click on **Workflow** tab. Under **Role**, select from the drop down the list of the active approval roles. Click the role you want to review.



- Select the proposal from the list.

- Once you click on the proposal it will pop up to review.

## REVIEW PROPOSALS FROM TOPIC REQUEST LANDING PAGE

### Topic Request Management ONLY

You are logged in as  [Help](#) 

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Search  History - OR - Propose New Topic Course Quick Searches... ▼

Request Code	Effective Term	Title	Workflow	Status
ANCS 3610/3611	Summer 2026	Metaponto Archaeological Field Project	Service Centre	Added
ANTH 3275	Spring 2026	Archaeological Remote Sensing	Registrar/Service Cen...	Added
ANTH 3373	Spring 2025	Fieldwork in Archaeology Field Course		
BIOL 4448	Spring 2025	Biology Field Course		
BIOL 4448	Spring 2026	Biology Field Course	Registrar Post Trip	Added
BIOL 4460	Spring 2025	Marine Mammal Field Course		

- All the field courses are listed under the **Topic Request Management** module. It shows when there effective term and if they are currently in workflow. If you click on one you will be able to see the entire proposal.