Revised 8/20/26

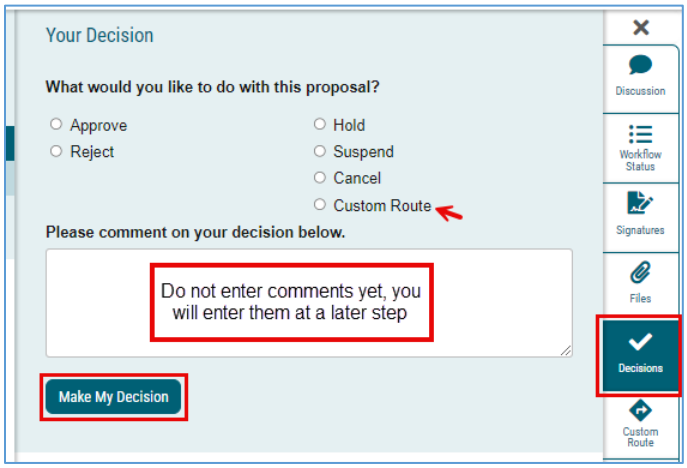
How to Custom-Route Your Proposal

For a visual version of this guide, watch this video.

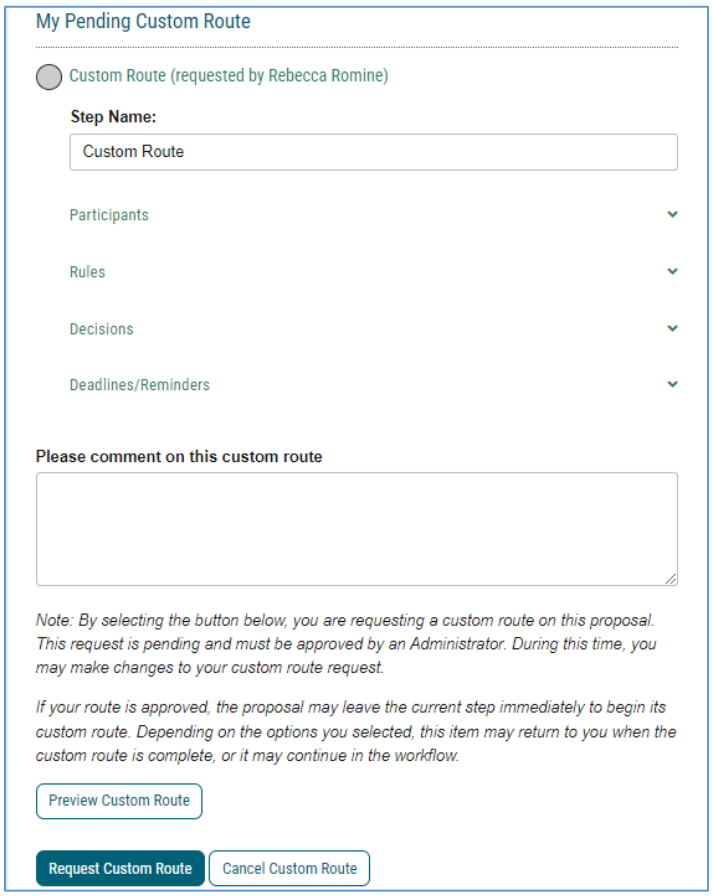
A custom route allows a reviewer within the workflow to send the proposal directly to one or more participants and create an additional step that is not already part of the approval process.

For example, if you require a support memo, or when a committee chair needs to return a proposal to the originator for revisions.

1. While in your proposal, from the Toolbox, click on the "Decision" checkmark and choose "Custom Route"



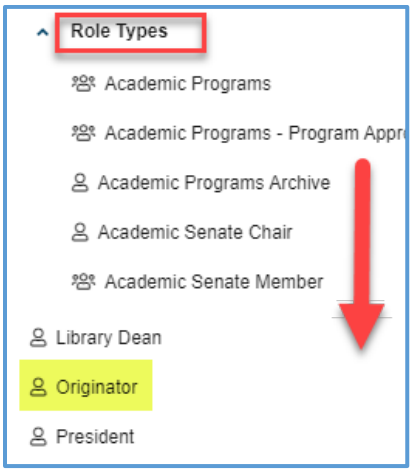
2. Click on "Make My Decision." This window appears:



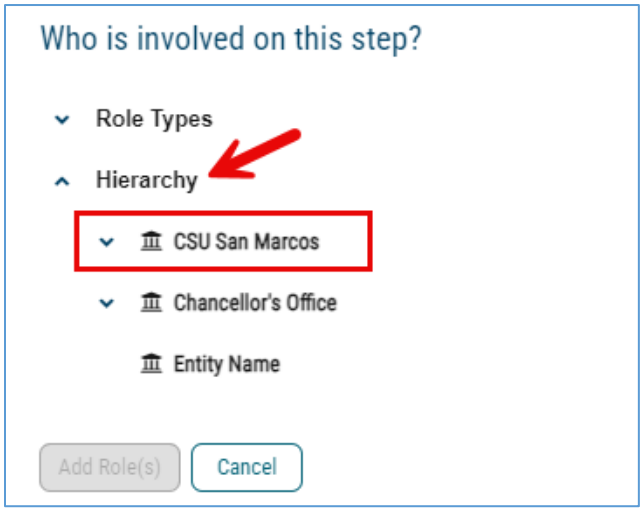
3. Choose to whom you are routing the proposal:



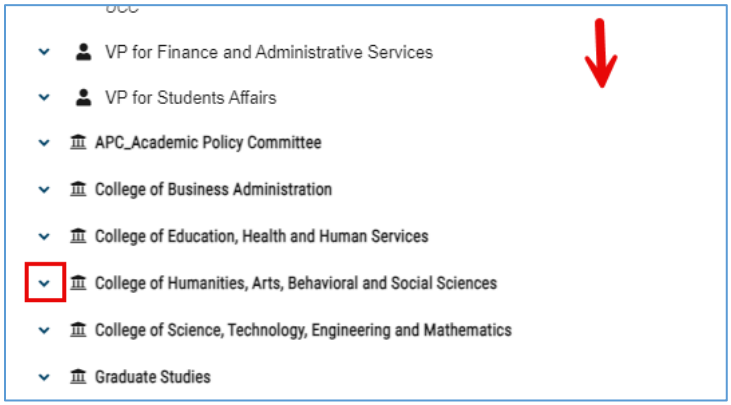
   a. ***NOTE**: To return the proposal to the proposer, choose "Role Types" scroll down to "Originator" and **skip to #7**.*



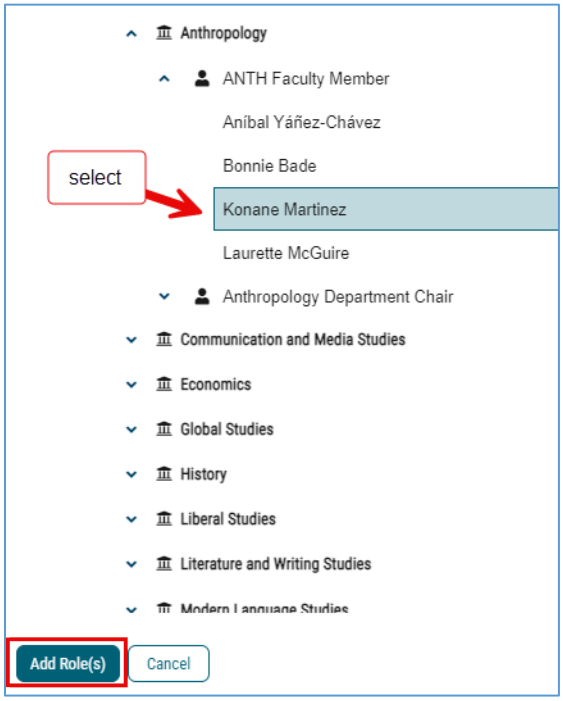
4. For any other participant, choose "Hierarchy" and select from the "CSU San Marcos" dropdown



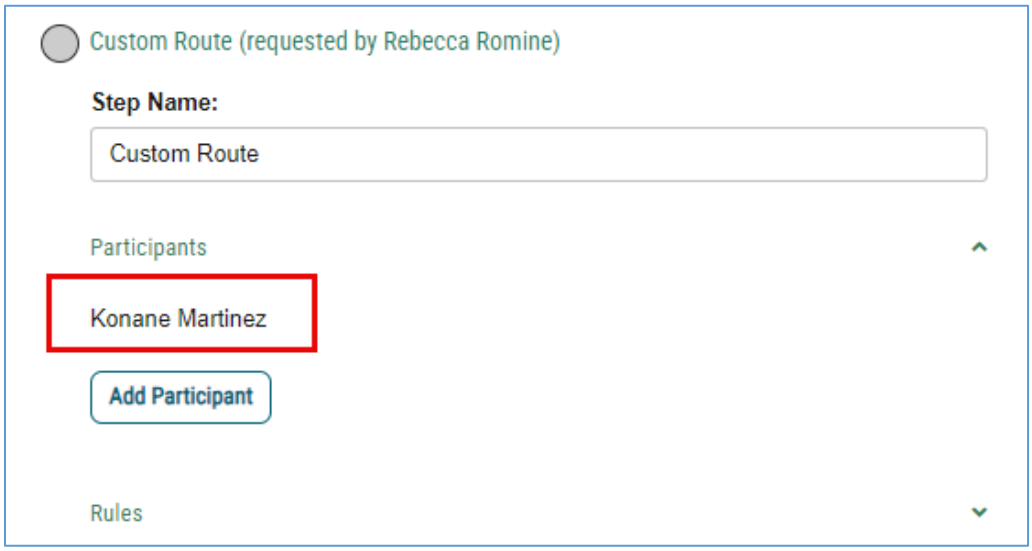
5. Scroll down to the list of colleges: click on the college dropdown to find the department



6. Then click on the faculty member or Dept Chair within that department to assign the custom route:



7. After you select the individual(s), click “Add Roles”, then their name appears under “Participants”

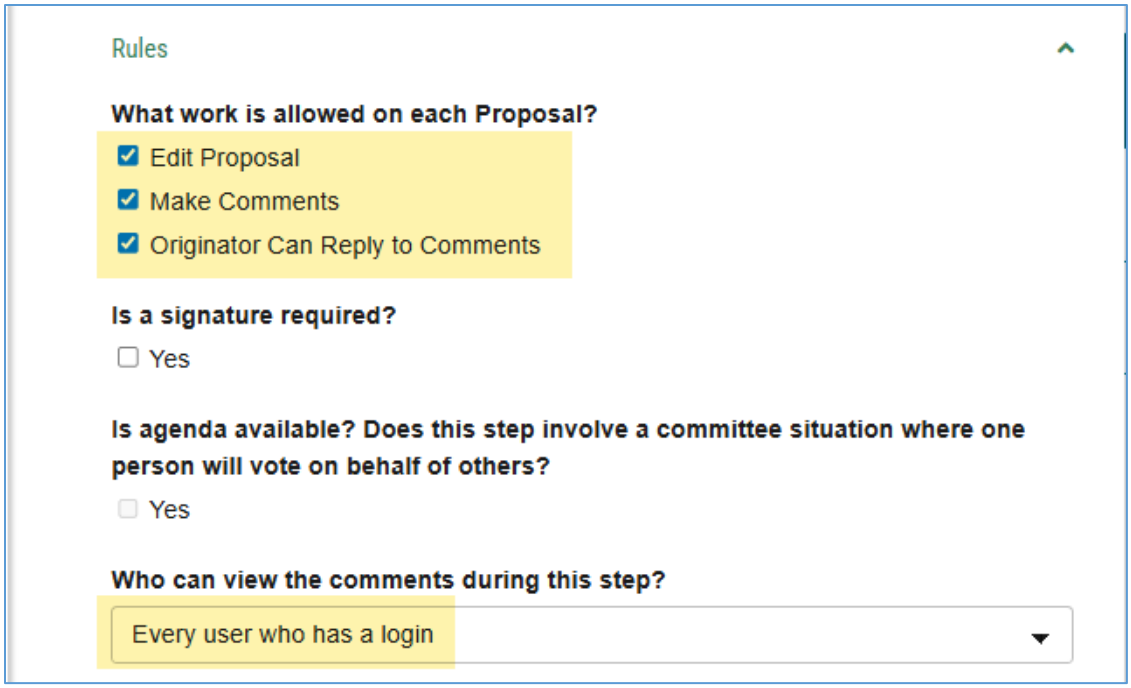


You can select *multiple* faculty members from multiple departments.

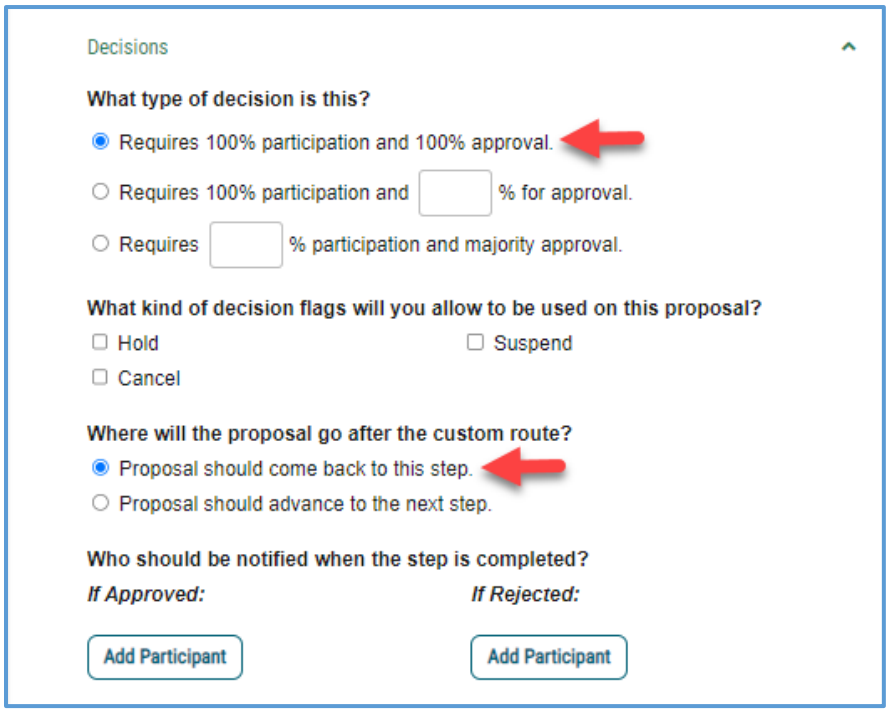
NOTE: If you accidentally select someone and want to delete them before you send the custom route:
1. Click the "Add Participant" link for the Custom Route.
2. De-select the user you wish to remove by clicking the name/Role/Role Type to remove the highlight.
3. Click the "Add Participant(s)" button.

This will remove the user selected in error from the Custom Route step and then you can complete the Custom Route request.

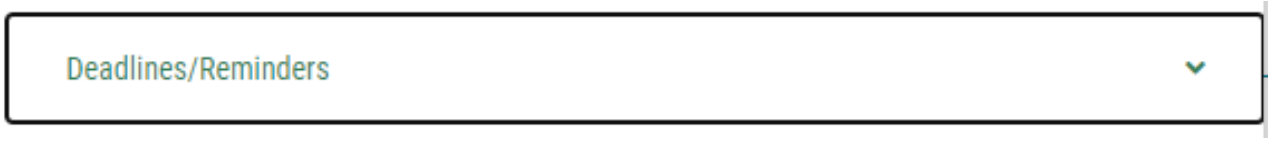
8. Next: Choose Rules:
Allow comments, and you might choose to uncheck the “Edit Proposal” option.



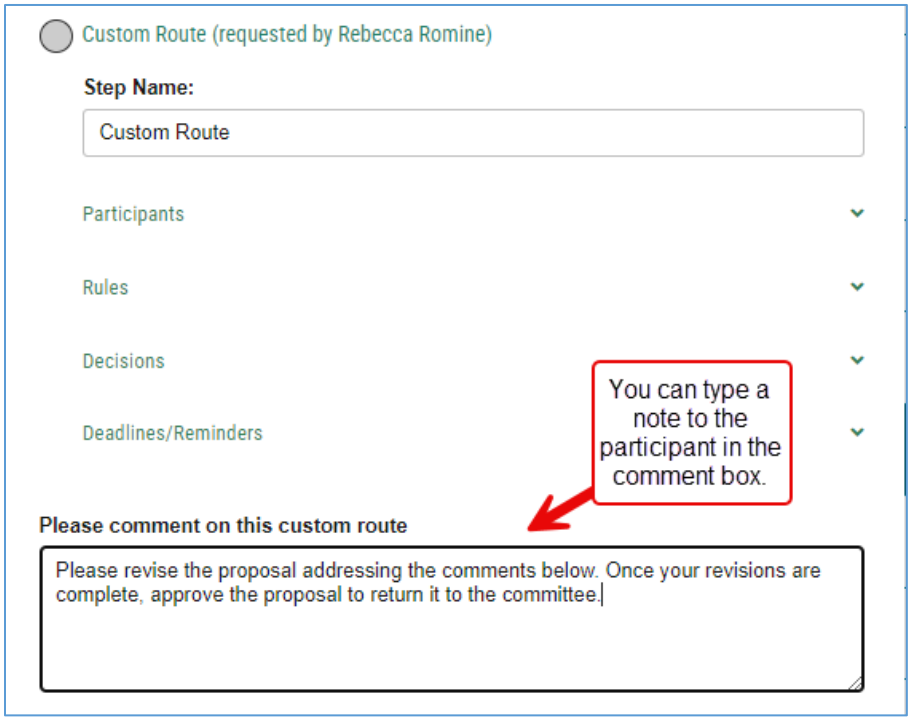
9. Choose Decisions:
   "Require 100% participation and unanimous approval"
   AND
   "Proposal should come back to this step"



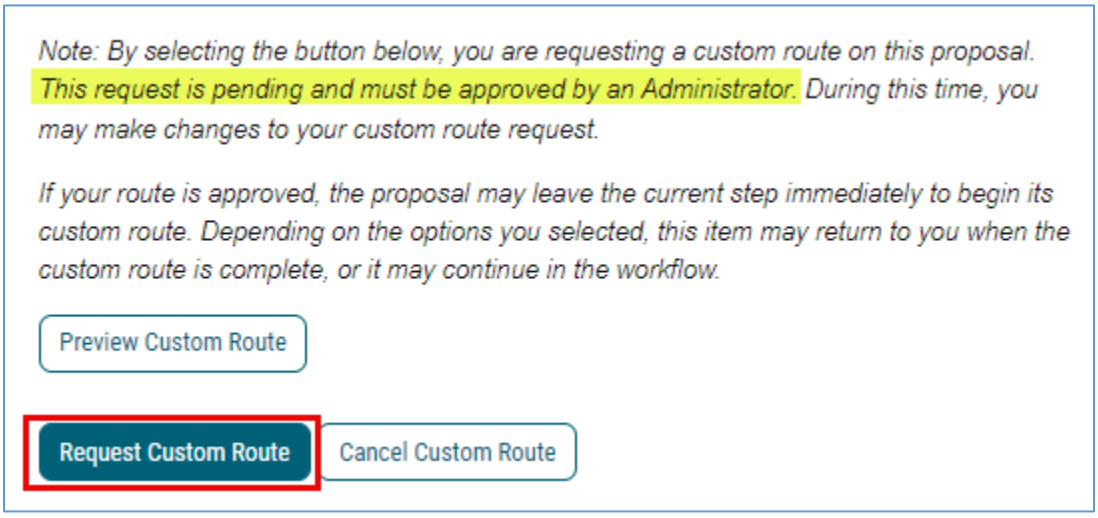
   (No need to set Deadlines/Reminders unless you wish)



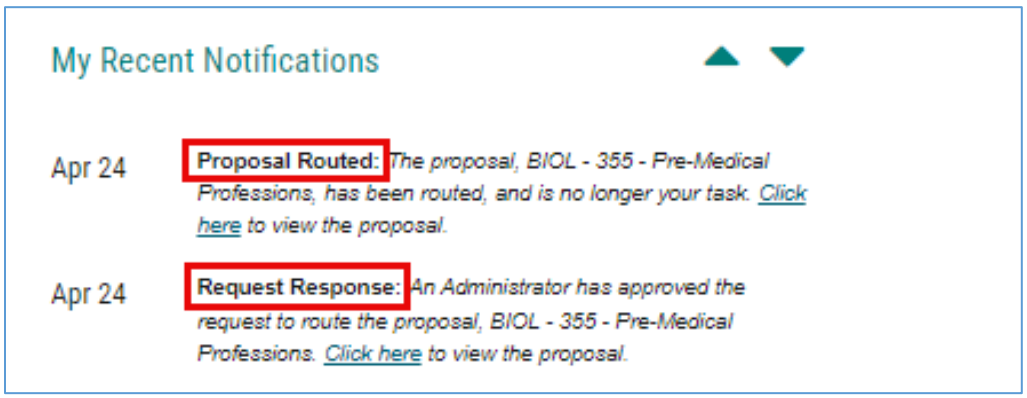
10. Enter any comments you wish to send to the participant in the comments field



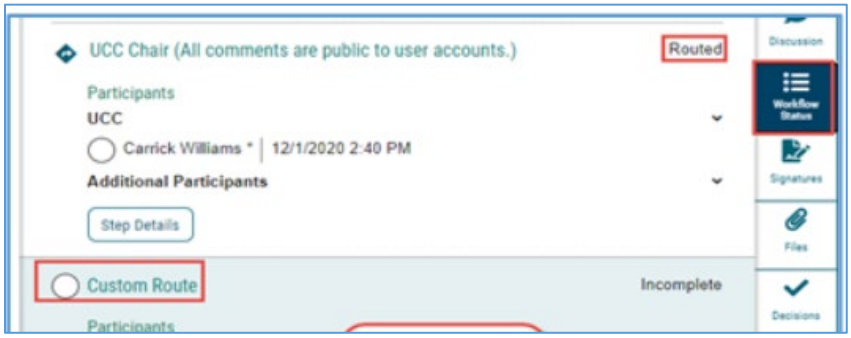
11. **NOTE: Once you click on "Request Custom Route"** it will not immediately be sent to your recipient. It first must be "approved" by Academic Programs.



12. After Academic Programs "approves" your request, the notice will appear in your Dashboard:



a. When you click back on your proposal and view the Workflow Status, it will indicate your custom route:



b. If you choose multiple recipients, the proposal will move onto your department chair only after every participant has “approved.

Summary

After following the steps above, your request should match the following:

