



Completed performance management forms will stay in the system for several years, as determined by your agency. You may organize your completed forms to suit your needs and preferences.

FINDING YOUR COMPLETED FORMS

1

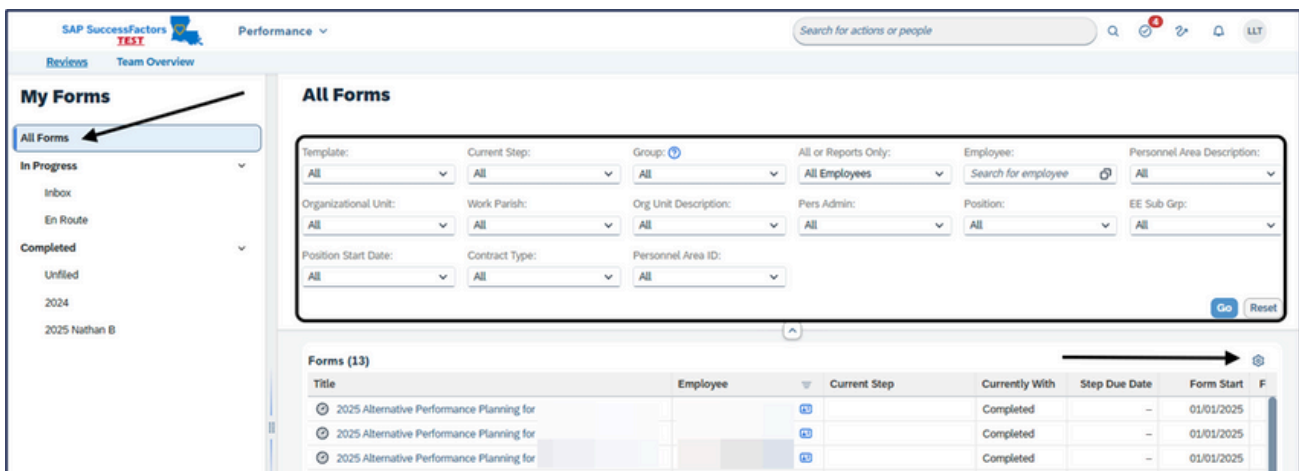
NAVIGATE TO YOUR MY FORMS PAGE

Click the "Performance" in the Home menu.

**2**

FINDING A SPECIFIC FORM

- To find a form, click on "All Forms." Then, use the filters to help you locate the form needed.
- You can click the gear next to the drop-down menu to change the "Column Visibility Settings" and customize your inbox.





ORGANIZING YOUR COMPLETED FORMS

You can organize your forms by creating folders and moving forms within your "My Forms" page. Before you begin, you may want to determine how you want to manage your files i.e. organized by performance year, employee, unit, etc.

1

ACCESS COMPLETED FORMS

- Your Planning Forms will be in the "Completed" Folder in "My Forms."
- If you haven't organized and moved the forms, you can locate them in the "Unfiled" folder.

The screenshot shows the SAP SuccessFactors interface. On the left, under 'My Forms', there is a sidebar with folders: 'All Forms', 'In Progress', 'Inbox', 'En Route', 'Completed' (highlighted with a blue bar and a downward arrow), 'Unfiled', and '2024'. On the right, the 'Unfiled' section is visible, containing filters for Template, Group, Work Parish, Org Unit Description, Contract Type, and Personnel Area ID. A black arrow points from the 'Completed' folder in the sidebar to the 'Unfiled' section.

2

CREATING AND MANAGING FOLDERS

- Click "Manage Folders."
- A new window opens.

The screenshot shows the SAP SuccessFactors interface. On the left, under 'My Forms', there is a sidebar with folders: 'All Forms', 'In Progress', 'Inbox', 'En Route', 'Completed', 'Unfiled', and '2024'. At the bottom of this sidebar, the 'Manage Folders' button is highlighted with a blue bar and a downward arrow. On the right, the 'Unfiled' section is visible, containing filters for Template, Group, Work Parish, Org Unit Description, Contract Type, and Personnel Area ID. Below the filters, there is a section titled 'Forms (2)' with a list of forms: '2025 Performance Evaluation for NATHAN' and '2025 Performance Planning for NATHAN'.





3

CREATE A FOLDER

- From this window, you can create, rename, or delete custom folders under the Completed category.
- Click “Create Folder.”

Manage Folders

You can create, rename, or delete custom folders under the Completed category.

Create Folder

Name	Actions
2024	

Close



You cannot delete a folder unless you move all of the forms in it.

4

NAMING FOLDERS

- Type in the name of the folder.
- Click “Save.”
- Click “Close” when you are finished creating folders.

Manage Folders

You can create, rename, or delete custom folders under the Completed category.

Create Folder

Name	Actions
2024	
2025 Nathan B	

Save Cancel

Close



You may want to create a separate folder for each of your employees or organize by years.



MOVING FORMS

5

- Click on "Unfiled" to see all forms that have not been organized.
- Select the form(s).

Contract Type:	Personnel Area ID:
All	All

Forms (2)	
Title	Employee
<input checked="" type="checkbox"/> 2025 Performance Evaluation for	2025 Nathan B
<input type="checkbox"/> 2025 Performance Planning for	2025 Nathan B

- Click the "Move to Folder:" drop-down menu.
- Select the correct folder.
- The selected files are moved into the selected folder.

Form Start	Form End Date	Form Due	Move to Folder	Action
01/01/2025	12/31/2025	08/29/2025	2024	
06/17/2024	12/31/2025	10/23/2025	2025 Nathan B	

VIEWING FORMS

6

Click on any folder to view its contents.

My Forms

Unfiled

Template: All Group: All All or Reports Only: All Employees Employee: Search for employee Personnel Area Description: All Organizational Unit: All

Work Parish: All Org Unit Description: All Pers Admin: All Position: All EE Sub Gp: All Position Start Date: All

Contract Type: All Personnel Area ID: All

Go Reset

