



How to Route A Form

Note: Use this process to move a form forward or backward in the route map.

Route Form will mostly be used to correct simple mistakes, such as a Supervisor or Second Level Evaluator sending the form to the next route step before they were ready to do so. In this case, Agency Administrators can use the process below to route the form backwards or forwards one step as needed. No prior approval is needed to use Route Form for these purposes.

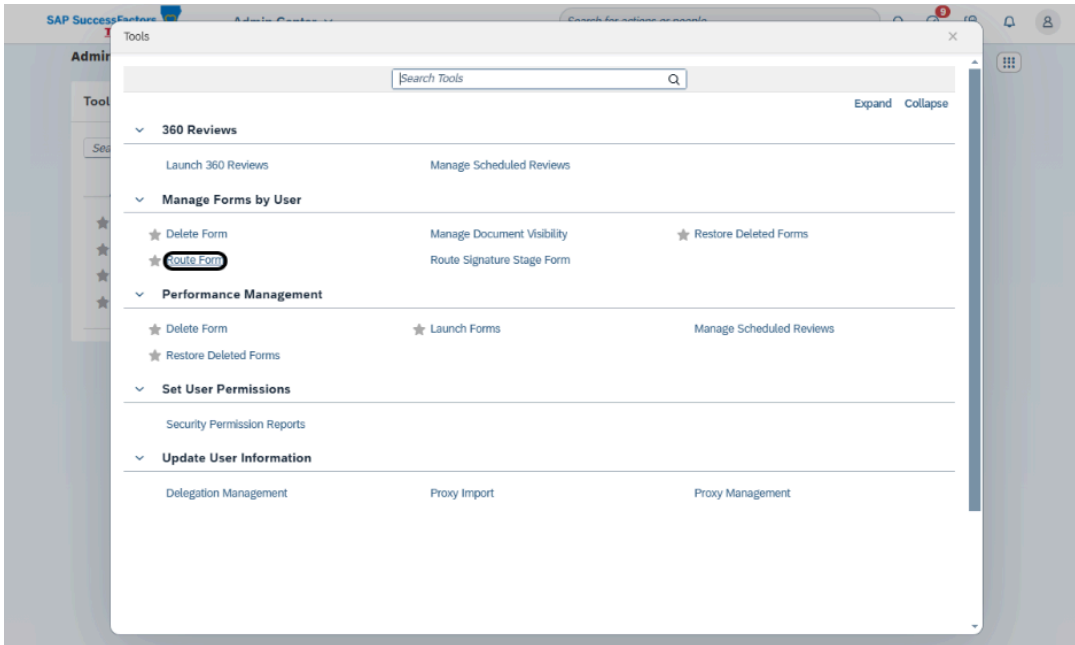
Less often, and by SCS Director-approved exception only, Route Form may be used to skip a route step entirely. Examples of when this exception might be approved include scenarios where a Supervisor or Second Level Evaluator is missing or is not the person indicated in org management.

If you would like to request an exception to skip a step in the route map using the Route Form command, please first contact State Civil Service Director Byron Decoteau.

1. Navigate to the "Admin Center."

The screenshot displays the SAP SuccessFactors Admin Center interface. At the top, there is a search bar and a navigation menu. The 'Admin Center' option is highlighted in the dropdown menu. The main content area features a 'Good morning! TEST' greeting, a 'Quick Actions' bar with various utility buttons, and a 'For You Today' section with a 'Learning Assignments' card for 'LA Code of Governmental Ethics' and an 'Organizational Updates' section with a 'CPM Help' card.

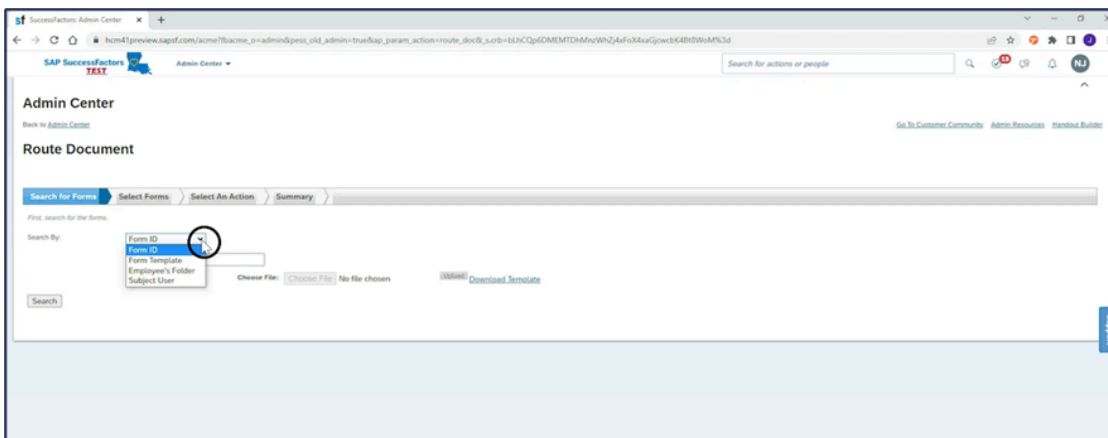
2. In the "manage forms by user" section, click "route form."



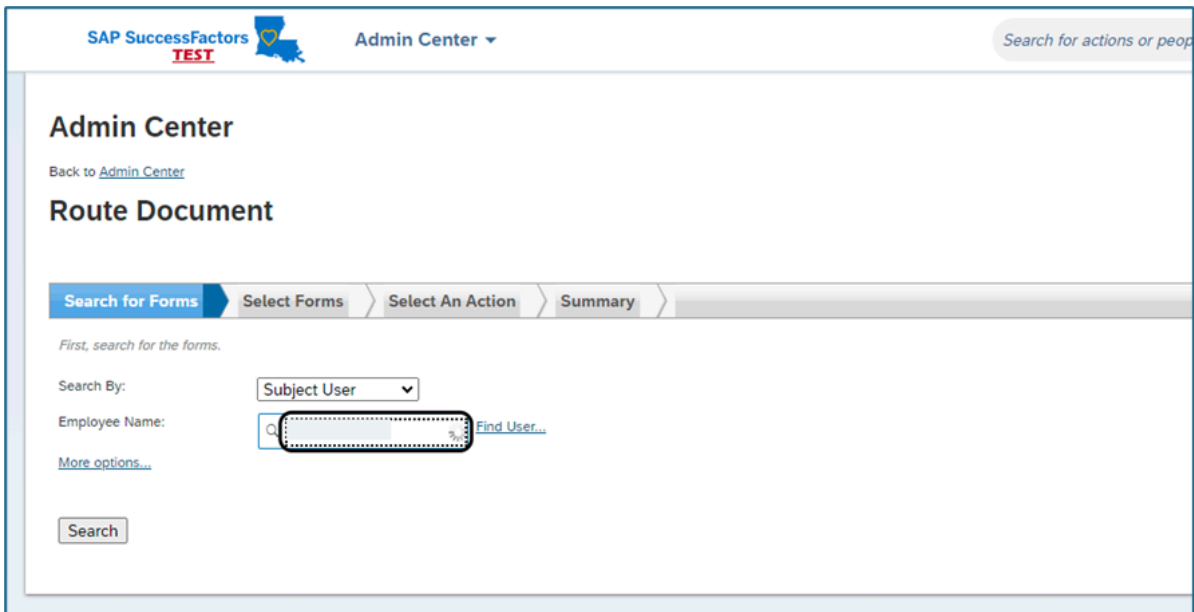
3. You have four options to search by:

- Form ID - Allows you to search for a specific form. You will need the ID of the form you are wanting to change.
- Form Template - Allows you to see all forms for the type selected. (Ex: 20XX Performance Planning, 20XX Performance Evaluation, 20XX Not Evaluated.)
- Employee's Folder - Allows you to see all forms in an individual's folder.
- Subject User - Allows you to search for all forms for one individual.

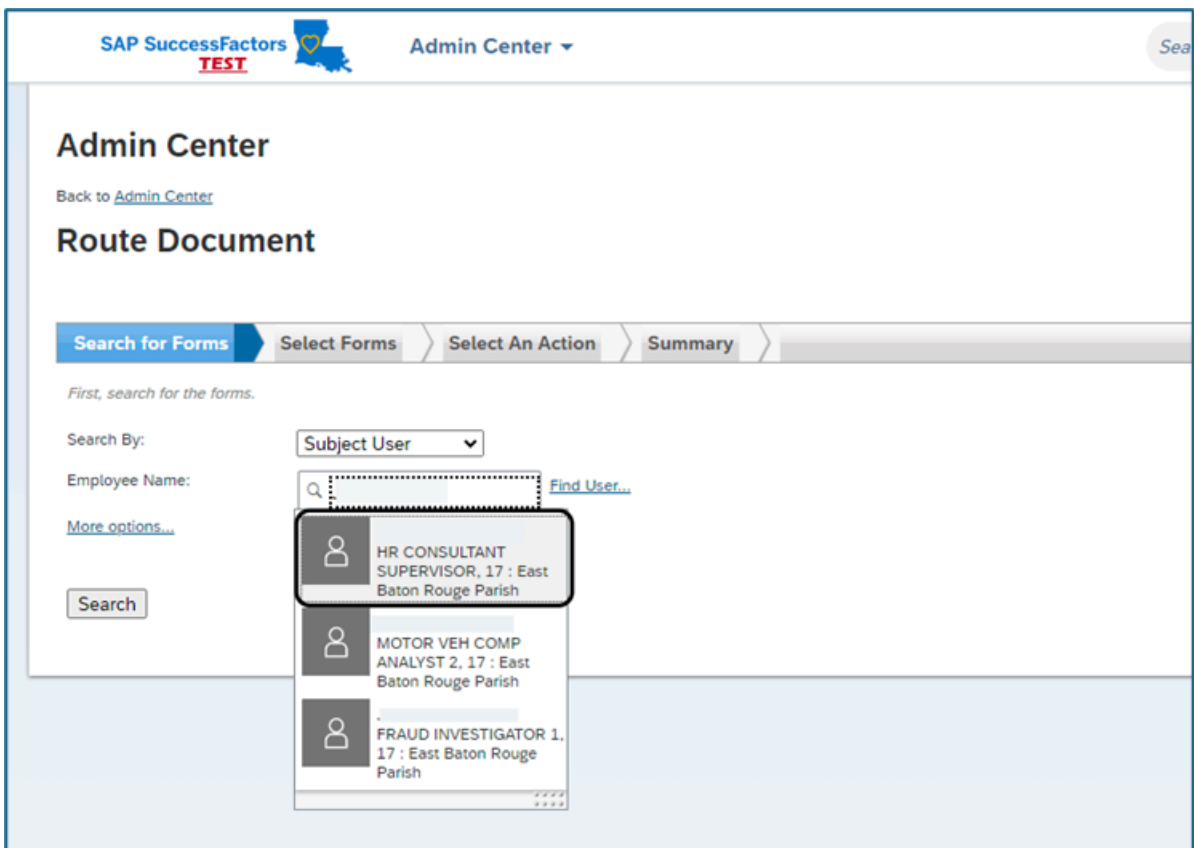
Select your search option. For this example, we will use the "subject user" search option.



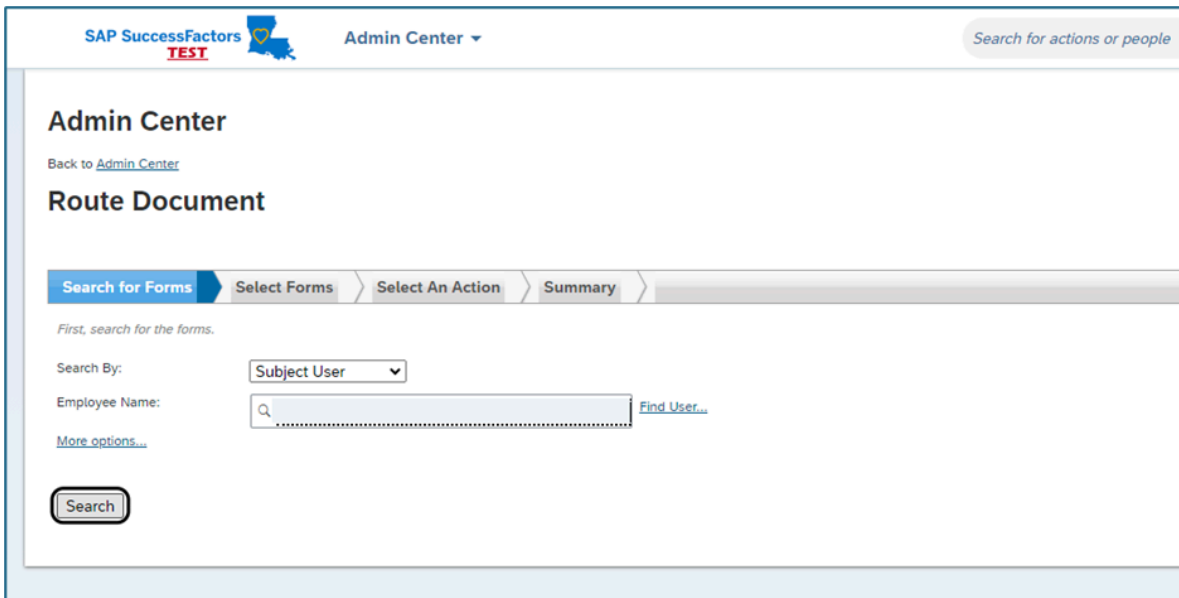
4. Click in the "employee name" text field.




5. Type in the name of the employee and select the employee from the populated list.



6. Click “search.”



SAP SuccessFactors  TEST Admin Center Search for actions or people

Admin Center
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Route Document

Search for Forms **Select Forms** Select An Action Summary

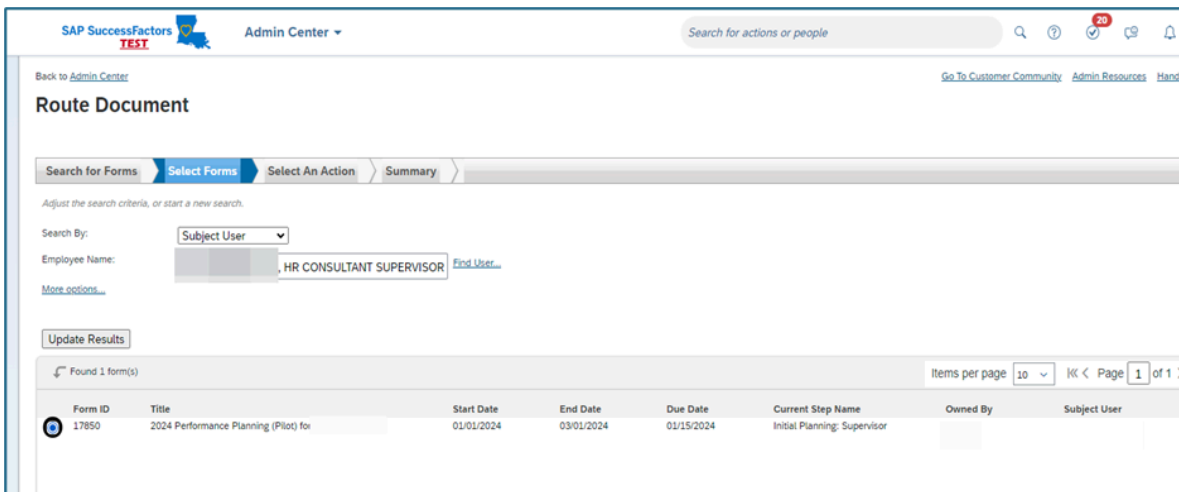
First, search for the forms.


Search By:

Employee Name: [Find User...](#)

[More options...](#)

7. Select the form that needs changing.



SAP SuccessFactors  TEST Admin Center Search for actions or people

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Route Document

Search for Forms **Select Forms** Select An Action Summary

Adjust the search criteria, or start a new search.

Search By:

Employee Name: [Find User...](#)

[More options...](#)

Found 1 form(s) Items per page 10 << Page 1 of 1 >>

Form ID	Title	Start Date	End Date	Due Date	Current Step Name	Owned By	Subject User
17850	2024 Performance Planning (Pilot) for	01/01/2024	03/01/2024	01/15/2024	Initial Planning: Supervisor		

8. Click “next.”

Update Results

Found 1 form(s) Items per page 10 Page 1 of 1 >>

Form ID	Title	Start Date	End Date	Due Date	Current Step Name	Owned By	Subject User
17850	2024 Performance Planning (Pilot) for [redacted]	01/01/2024	03/01/2024	01/15/2024	Initial Planning: Supervisor	[redacted]	Subject User

Next

9. Select how you would like to route the form. There are two options.

Note: The "current state" column is how the form is currently routed. Once you select your route option, the "end state" column will display the effects of the route selection.

Option 1: move the form one step forward. Option 2: move the form to a specific step.

SAP SuccessFactors **TEST** Admin Center Search for actions or people

Admin Center
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Route Document

Search for Forms | Select Forms | **Select An Action** | Summary

Form Title: 2025 Performance Planning for [redacted] (Doc ID: 22152)

Current step of selected forms Iterative Step Collaboration Step Step Owner

Current State	End State
<p>1. Initial Plannin... Due Date: 2025-01-07 1 Forms</p>	
<p>2. Initial Plannin... Due Date: 2025-01-07</p>	Select an action first
<p>3. Planning Disc... Due Date: 2025-01-07</p>	
<p>4. Employee SL... Due Date: 2025-01-07</p>	Select an action first
<p>5. Completion Due Date: None</p>	Select an action first

How do you want to route the form?

Move the form one step forward
 Move the form one step back
 Move the form to a specific step

Move forms to the following step:

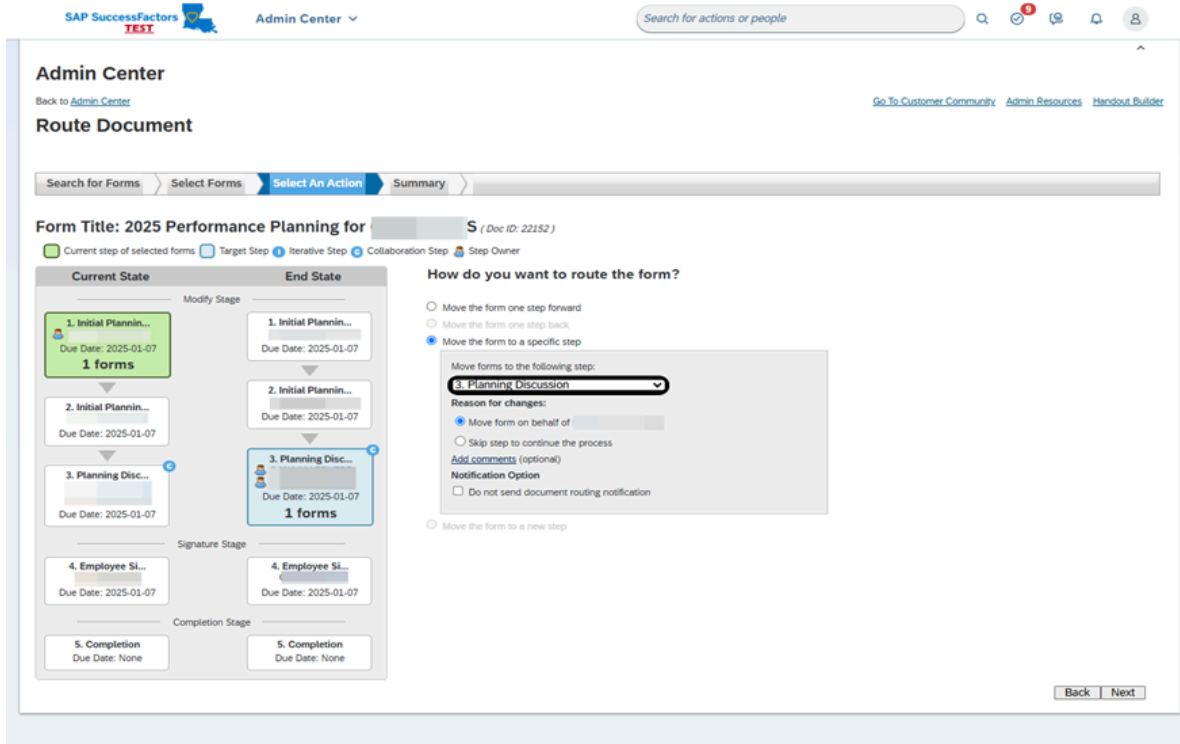
Reason for changes:
 Move form on behalf of DANA M LEBHERZ
 Skip step to continue the process
[Add comments](#) (optional)

Notification Option
 Do not send document routing notification

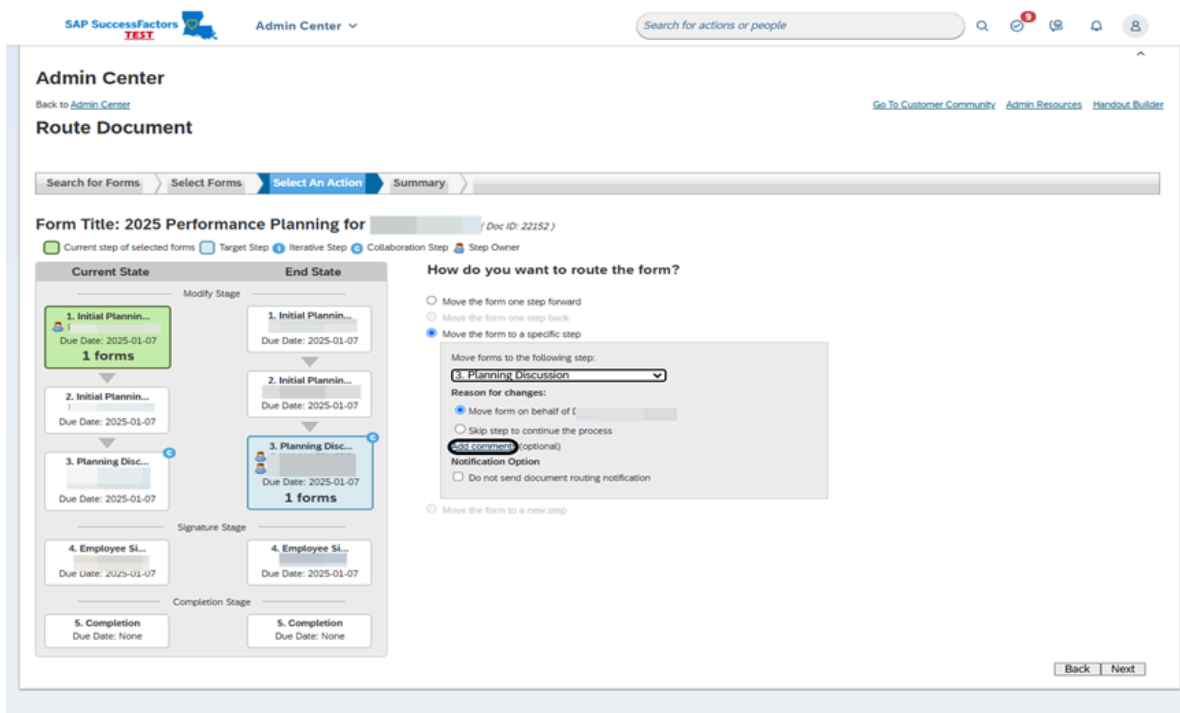
Move the forms to a new step

Back | Next

10. For this example, we will use option 2, move the form to a specific step. We will select to move the form to the Planning Discussion.



11. Note: The reason for change, form validation option, and notification option default to the settings shown below. Select "Add Comments".



12. Make sure you list why you did it. Once completed click next. Click “next.”

13. Verify the form moved to the intended step.