SAP SuccessFactors

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."

## 2. In the "manage forms by user" section, click "route form."
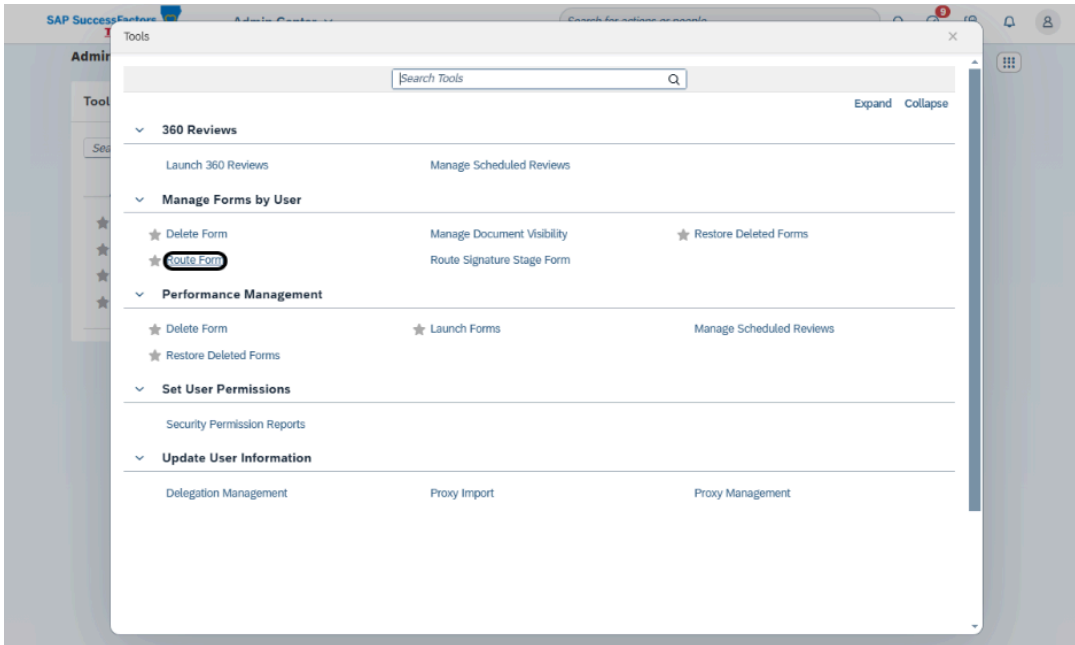
3. You have four options to search by:

- 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.

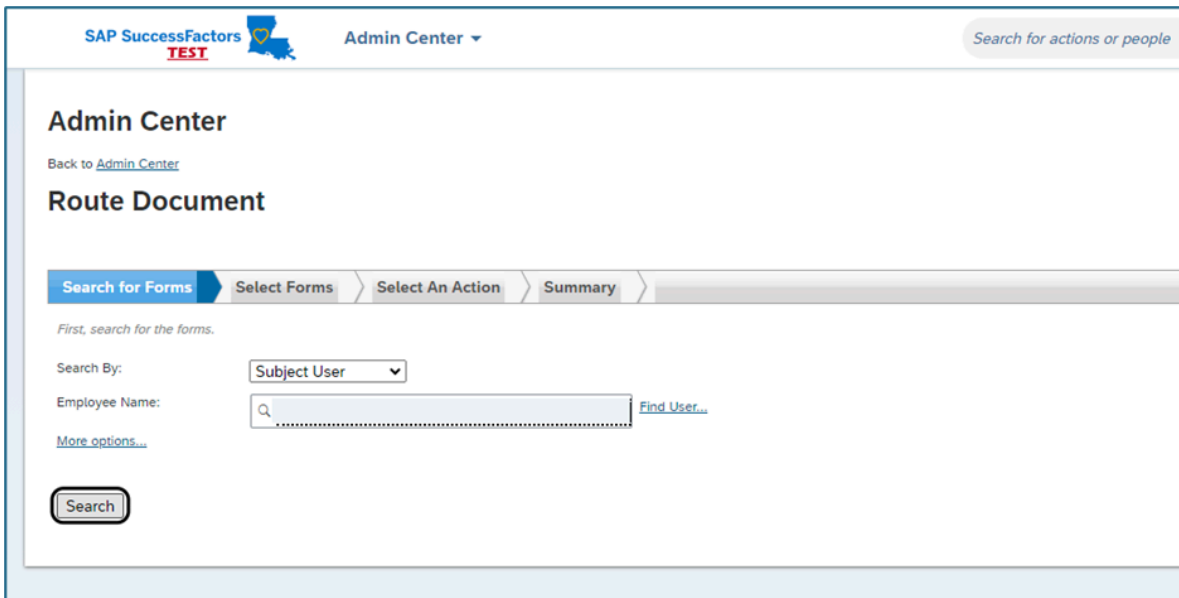Select your search option. For this example, we will use the "subject user" search option.
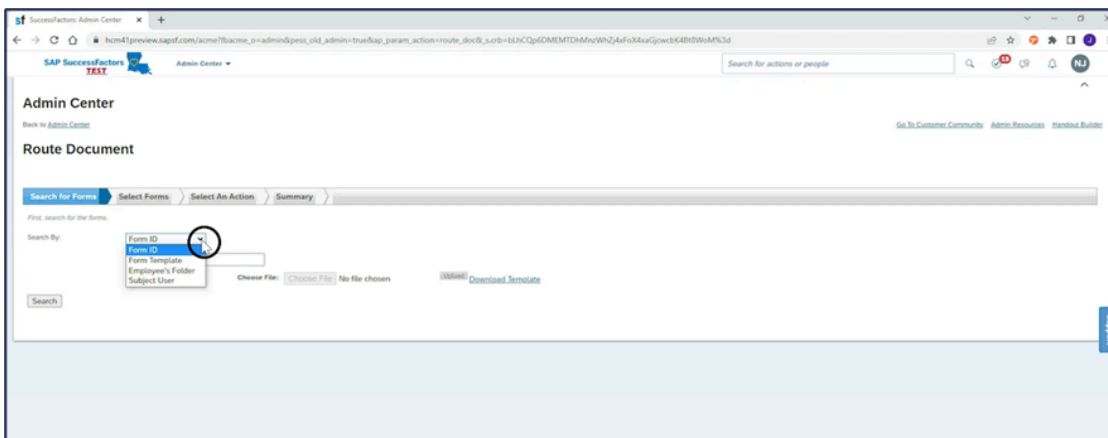
4. Click in the "employee name" text field.
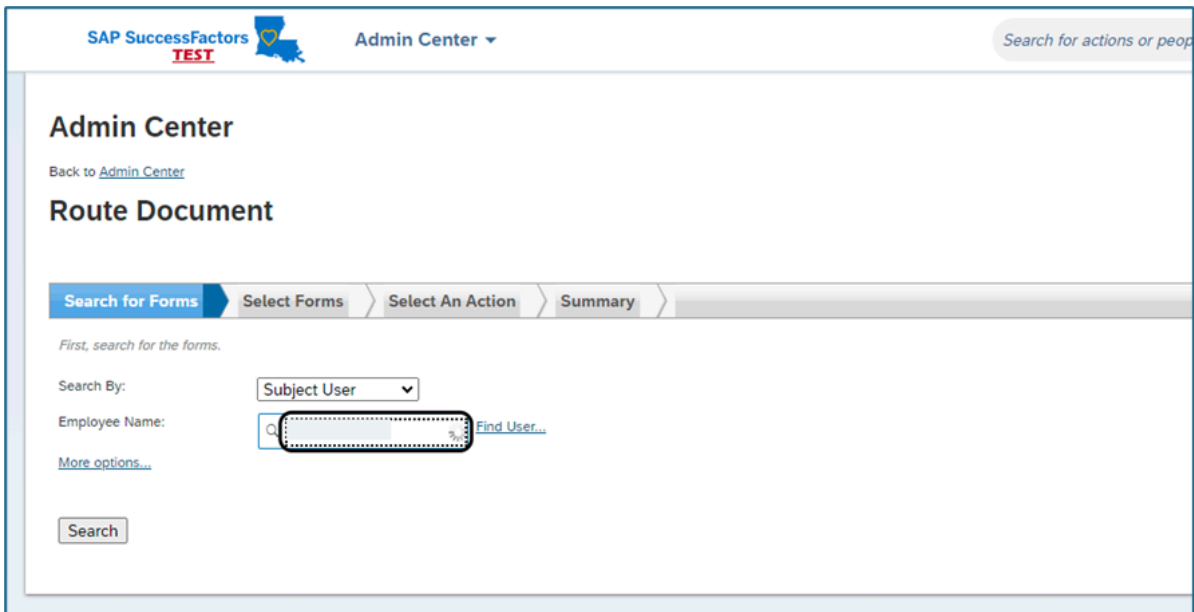
5. Type in the name of the employee and select the employee from the populated list.
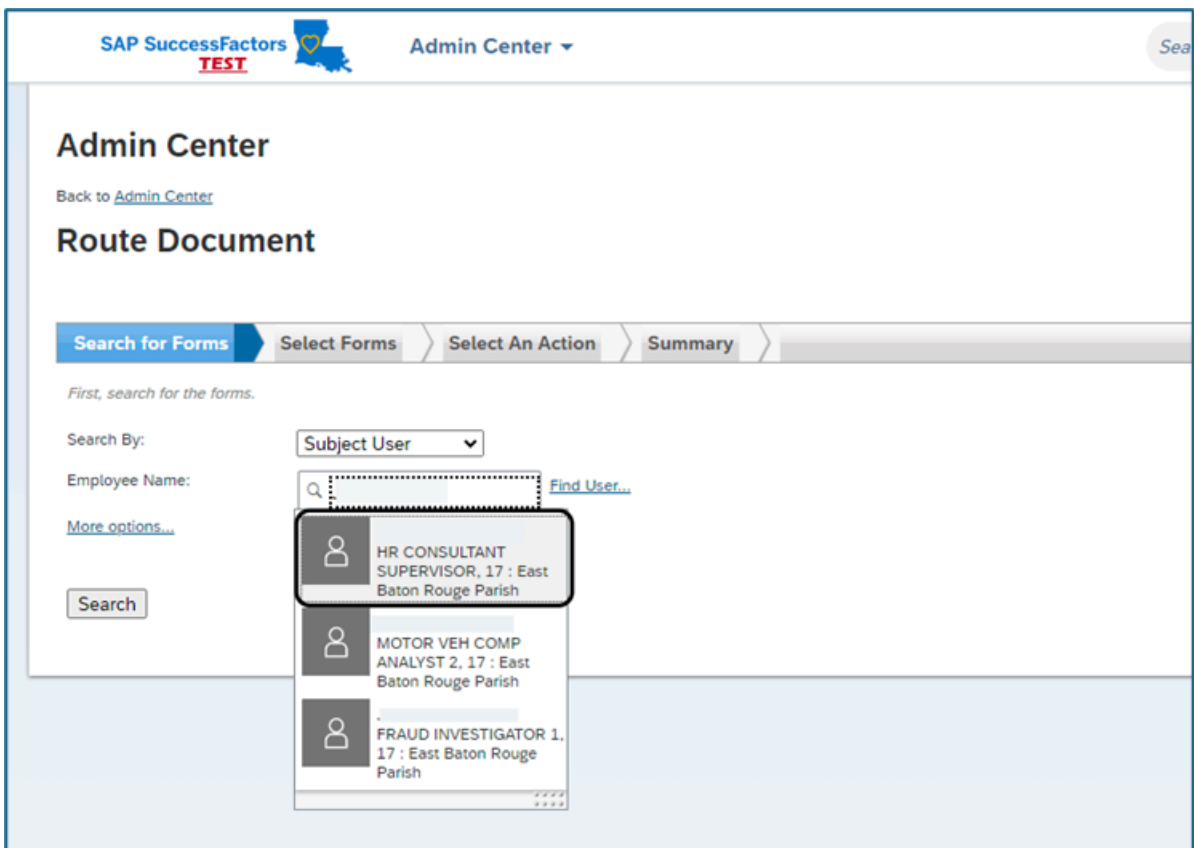
6. Click "search."
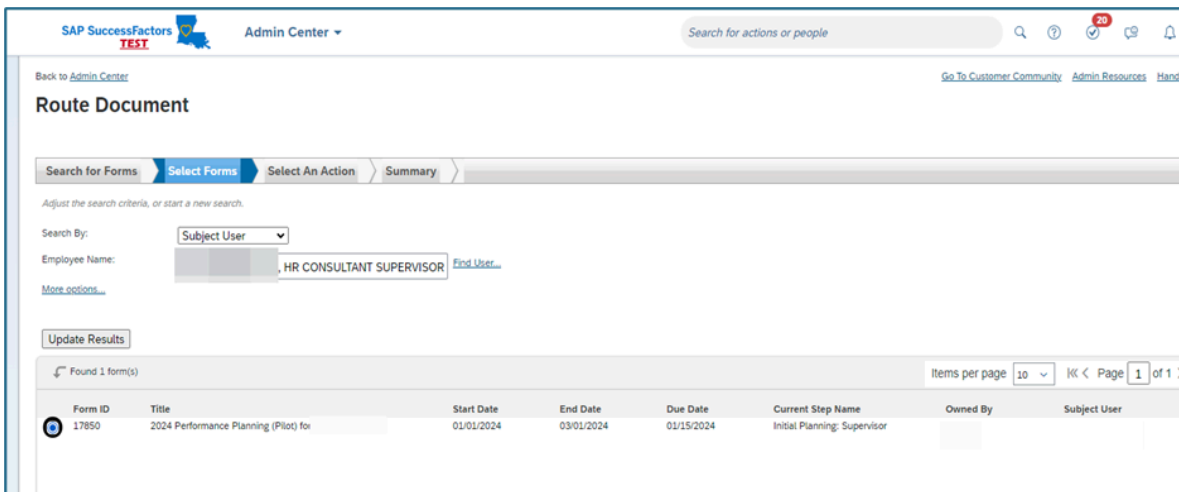
7. Select the form that needs changing.

8. Click "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.

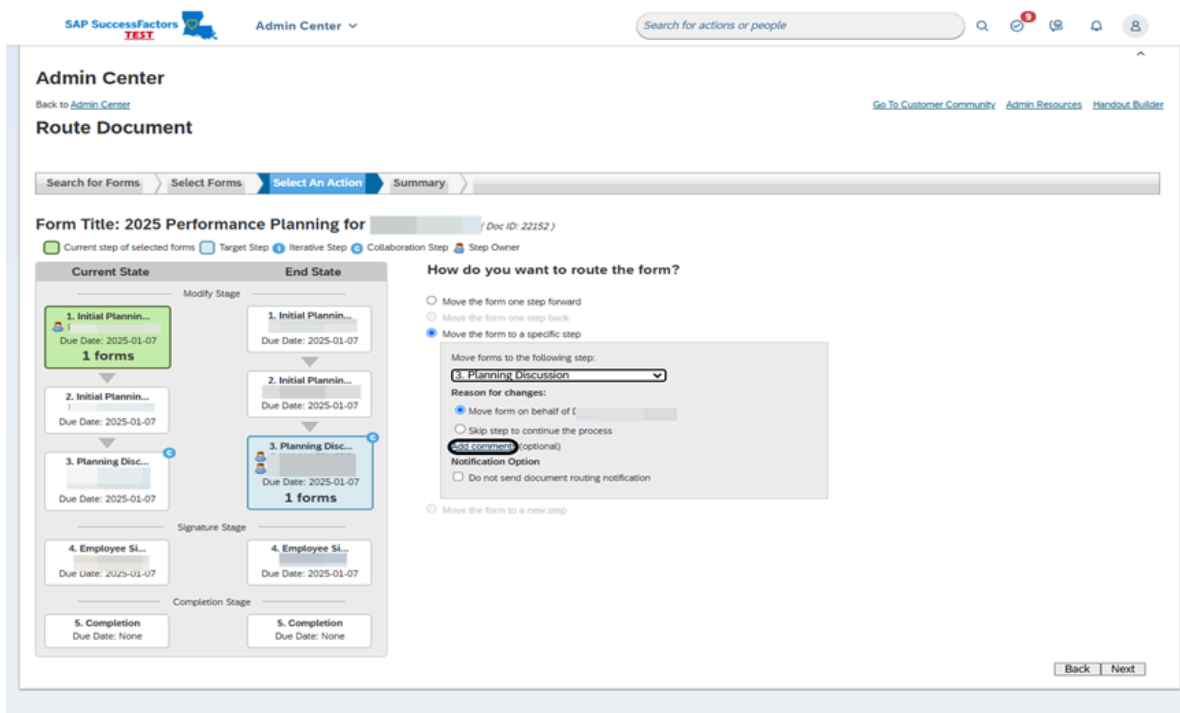**10. For this example, we will use option 2, move the form to a specific step. We will select to move the form to the Planning Discussion.**
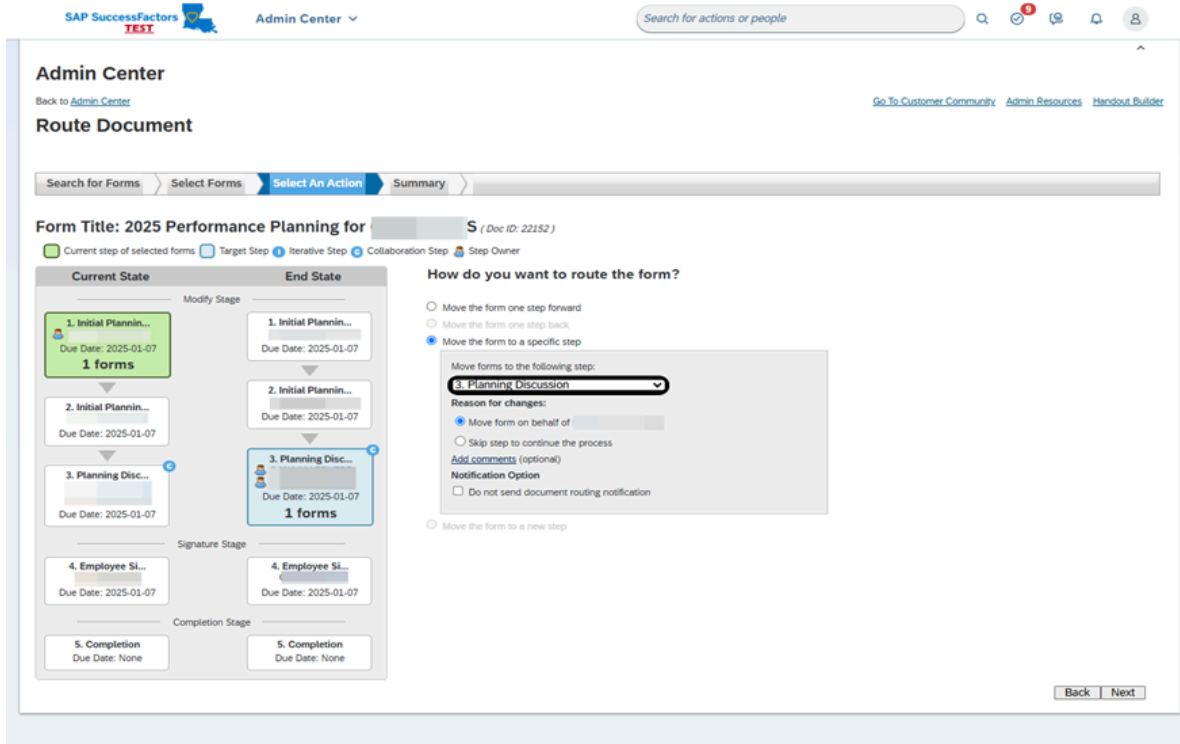
11. Note: The reason for change, form validation option, and notification option default to the settings shown below. Select "Add Comments".

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

13. Verify the form moved to the intended step.