

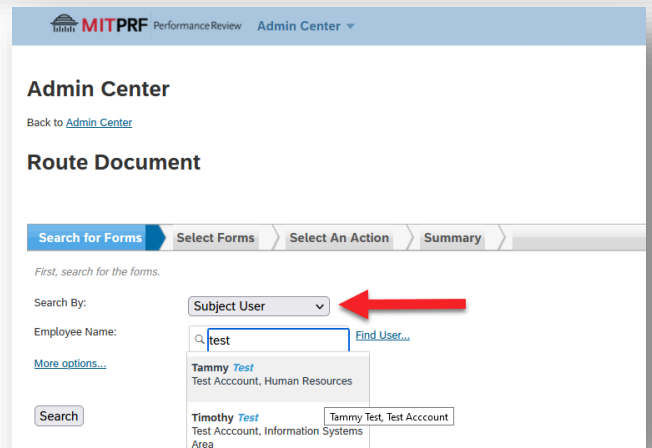
How do I change Route a Form in PRF?

PRF Leads and Admins have the ability to route PRF forms. This will allow you to move a form back to a previous step or advance it forward. Form routing is usually performed when a form is in a Year End step and employee or manager needs the form in the 1-Goal Setting or 2-Mid-Year Updates step so they can enter or edit a goal. Another common scenario is when a recent new hire needs their form advanced from the 1-Goal Setting or 2-Mid-Year Updates step to the 3-Employee Assessment step.

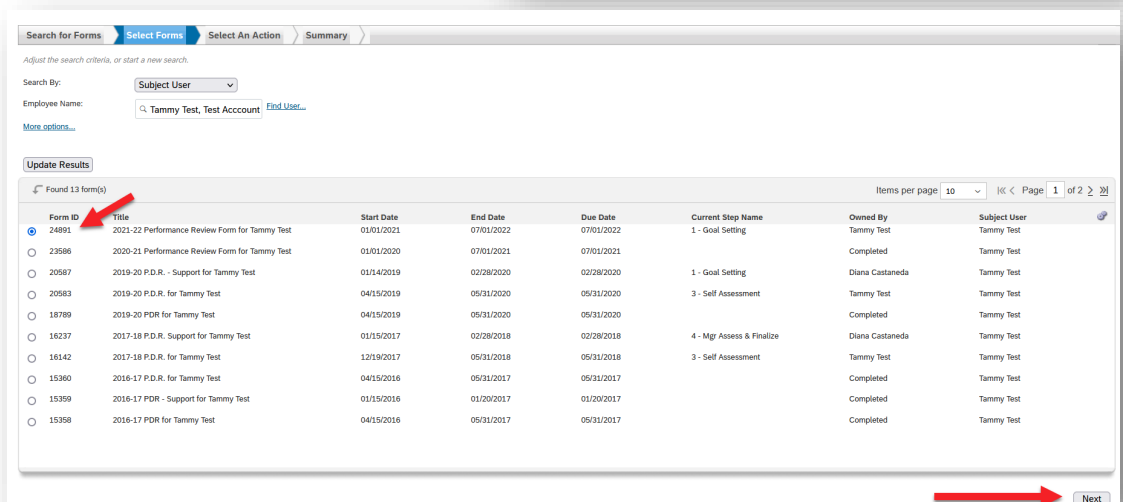
Step 1: From the PRF Home Page, type **Route Form** in the search box at the top right. **Route Form** should appear in the drop down list. Click on it.



Step 2: On the **Route Document** screen, search for the employee you wish to route a form for by choosing **Subject User** for **Search By:** and start typing the name of the employee. Choose the employee’s name once it appears in the drop-down list.



Step 3: Select the form you wish to route and click **Next**.



Step 4: Choose the step in which you want to route the form to.

- 1 Choose **Move the form to a specific step**
- 2 From the drop down menu, choose the step you want to route to. (You will now see this step represented in light blue under *End State*.)
- 3 Choose **Skip step to continue the process**
- 4 For audit purposes, click **Add Comments** and type in *Routed by an admin*.
- 5 Click **Next**

The screenshot shows the 'Route Document' interface for a form titled '2015-16 PDR for Tammy Test'. The workflow is divided into 'Current State' and 'End State' columns. The 'End State' column shows step '2. 2 - Mid-Year Updates' selected in light blue. A modal window titled 'How do you want to route the form?' is open, with the following options:

- Move the form one step forward
- Move the form one step back
- Move the form to a specific step (selected)
- Move forms to the following step: 2. 2 - Mid-Year Updates
- Reason for changes:
 - Move form on behalf of Tammy Test
 - Skip step to continue the process (selected)
- Comments: Routed by an admin
- Move the form to a new step

 A blue arrow points to the 'Next' button at the bottom right of the modal.

In this example, the form is being routed back to the “2 – Mid-Year Update” step from the “3 – Self Assessment” step.

You will see the following confirmation message confirming that you are done.

You have successfully routed the forms. See the summary below. Click Back to Search Forms if you wish to route another form.