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*.

Contact [PRF-Tech@mit.edu](mailto:PRF-Tech@mit.edu) for assistance.
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**

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.

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