# Executive Performance & Appraisal Tool (EPAT)
# Performance Plan Creation Stage

## EPAT Quick Guide for Members



## Performance Plan

Your Performance Plan derives from a template built by the DoD and Component Administrators. They determine which Performance Elements (PE) and Performance Requirements (PR) are included in the plan, whether those elements are mandatory or optional, and what weights are associated with each PE. They also determine whether or not the Member can adjust the PE weights when creating the plan.

### *How do I create a performance plan?*

1. Click on **Edit Plan** on the Actions List.
2. Enter your Mission Statement in the text box.
3. Click the checkbox that says **I'm a Supervisor or Rater** if you are a Member who supervises employees.
4. Click the blue **Save Mission Statement** button.
5. Click on the link for **Performance Requirement 1.a.**
    a. The PE, highlighted in red, is the higher-level category.
    b. PRs are indicated by three different icons, depending on whether the requirement is required or optional, and whether or not you have begun editing the requirement in your plan.
    c. When you click on a PR, the right side of the screen changes, displaying more information about the requirement, as well as the text boxes, where you enter your job requirements and strategic references.
6. Enter your specific job requirement in the **Member Requirement Statement** box to define PR 1.a.
7. Enter your **Member Reference Statement** by clicking on the **Select Reference** link above the text box.
    a. A pop-up window will appear which will enable you to select from the list of strategic references included by your Component Administrator. When you click the **Select** link, the corresponding text will automatically populate the Member Reference Statement box.
    b. You may also manually enter additional reference statements that support organizational objectives. You must identify the name of the reference document and the objective number.
8. Click the blue **Save Statements** button if you are not quite ready to complete your entry.
9. Click the green **Complete PR** button to indicate that you have finished editing the Performance Requirement.
10. Repeat steps 5-9 for all remaining PRs. You cannot submit your plan to your Rater until you have completed all required PRs under each required PE.

### *How do I adjust weights in EPAT?*

The title for each Performance Element includes the corresponding weight. Depending on how the Component Administrator created the template, you may be able to adjust the weights of your PEs. The weight distribution may only be adjusted by Members during the Plan Creation stage. Once the Rater approves the plan, contact the Component Administrator if the weights require further adjustments.

1. Click on the **Weight Distribution** link located on the left side of the Member Performance Plan screen.
2. Weights that allow optional editing will appear enabled. You can adjust these by entering the new numbers in the text boxes and clicking the blue **Update Weights** button. The sum of the weights for all PEs must equal 100%.
3. Click on the **Update Weights** button to save your finished weight distribution.

### *How do I submit my plan?*

Once submitted, your plan is locked from editing until your Rater reviews and returns it to you. EPAT automatically sends an e-mail notifying your Rater that your Performance Plan is ready for review.

1. Click on the green **Submit Plan** button in the Member Category section of the screen when you are ready to submit your plan to your Rater.
2. Click on the link "**(here)**" in the statement contained in the Signature Required section of the screen to review the Derivation Formula Coversheet to understand how your rating, score, and shares will be calculated at the end of the performance appraisal cycle.
3. Enter your user name and password or use your CAC pin to digitally sign and submit your plan.

### *How do I acknowledge my plan?*

1. Click on **Acknowledge Plan** on the Actions List on the **Member Home Page**.
2. Click the **Acknowledge Plan** button in the **Member Category** box.
3. Digitally sign the plan by either entering your Username and Password or using your CAC pin.

### *How do I print my plan?*

4. Click either **Print Plan** or **Print Extended Plan** (this option prints a more detailed version of your plan) in the Member Category section of the screen.
5. You also have the option of exporting the template you worked on and saving it as a Microsoft Word document.

## Other Tasks

### *How do I update my profile?*

1. Upon logging into EPAT, click the **Profile** tab. There are five tabs within the Profile tab: *User Details, Office Info, Account Info, Document Folder,* and *Password.* Each tab contains the user information corresponding to its respective title.
2. After making changes to any of them, click the **Update Profile** button to save the changes.