

Executive Performance & Appraisal Tool (EPAT)

Performance Plan Creation Stage

EPAT Quick Guide for Raters

Performance Plan

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Performance Plan Creation Stage

How do I review a Performance Plan?

When one of your assigned Members submits a Performance Plan, you will receive an e-mail alert that the plan is ready for your review, and a notice will appear in your **Required Actions** list when you login to EPAT.

1. Click on the **Review Plan** link in the **Actions** Column from your **Member Home** page.
2. Review the plan and determine which combination of the following actions you would like to execute:
 - a. Submit comments to the Member.
 - b. Approve Performance Requirements individually.
 - c. Approve all Performance Requirements at one time.

Follow the steps below depending on which action you have chosen.

How do I submit comments to the Member?

You can provide overall comments on the Member's plan or you can specifically comment on individual performance requirements.

1. Enter your overall comments about the plan in the white box labeled **Rater Comments**.
2. Save your comments by clicking the blue **Save Comments** button below the text box.
3. Enter comments on a specific Performance Requirement by clicking on its corresponding link, entering comments, and clicking the **Save Comments** button.

How do I approve Performance Requirements individually?

Each Performance Requirement must be approved before you can approve the overall Performance Plan. When Performance Requirements are approved, the icon next to the requirement becomes a green checkmark.

1. Click the link corresponding to the Performance Requirement 1.a.
2. *Optional:* Enter comments in the **Rater Comments** section.
3. Click the green **Approve** button below the text box.
4. Repeat steps 1-3 for the remaining Performance Requirements.

How do I approve all Performance Requirements at once?

Each Performance Requirement for all Performance Elements can be approved at one time.

Note: Use this Approve All feature ONLY if you plan to approve the plan without sending it back to the Member for revision.

1. Click the link corresponding to the Performance Requirement 1.a.
2. Click the green **Approve All** button at the bottom of the page.
3. The icons next to all of the Performance Requirements become green checkmarks.

How do I return the Performance Plan to the assigned member for revision?

If you need more information from the Member on the Performance Requirements or would like him/her to modify them, submit the Performance Plan for revision rather than approving it. An e-mail notification will be sent to the Member, and Edit Plan will appear in the Member's Required Actions upon the next login to EPAT.

1. Enter comments for the Member, and then click the blue **Send Back** button in the **Member Category** section at the top of the screen.
2. Select **OK** when asked if you are sure.

How do I approve the Performance Plan?

1. Click the green **Approve Plan** button in the **Member Category** section at the top of the screen.
2. Digitally Sign the Performance Plan by entering your Username and Password or by using your CAC pin.

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.