UNIVERSITY OF MINNESOTA

Performance Appraisal Tool – Employee Guide to System Navigation

The Performance Appraisal Tool (PAT) is the University of Minnesota tool designed to support the performance management best practices. PAT can be used to capture:

- Goals
- Ongoing check-in conversations
- Performance evaluations

PAT may be used with civil service, labor represented, P&A, graduate assistant, and some professionals-in-training positions.

Performance Management Stages in the PAT

The online tool is available year-round for employees and supervisors to set and maintain goals and breaks the performance management cycle into the following stages:

Ongoing Check-ins stage: This stage allows you to keep notes from ongoing check-in conversations, including progress towards goals, making it easier to write your employee input at the end of the year. The *Current Evaluation* page can be used for this purpose and you will be able to revise and submit them as your Employee Input later in the process.

Employee Input stage: Provides you an opportunity to share input on your performance. At this point you may take advantage of notes entered throughout the year to summarize and finalize your input. During this stage, only you can access the form. Your supervisor will not be able to access or view the form.

Supervisor Evaluation stage: This stage is intended for your supervisor to write the performance evaluation. During this stage, you cannot view or access the form.

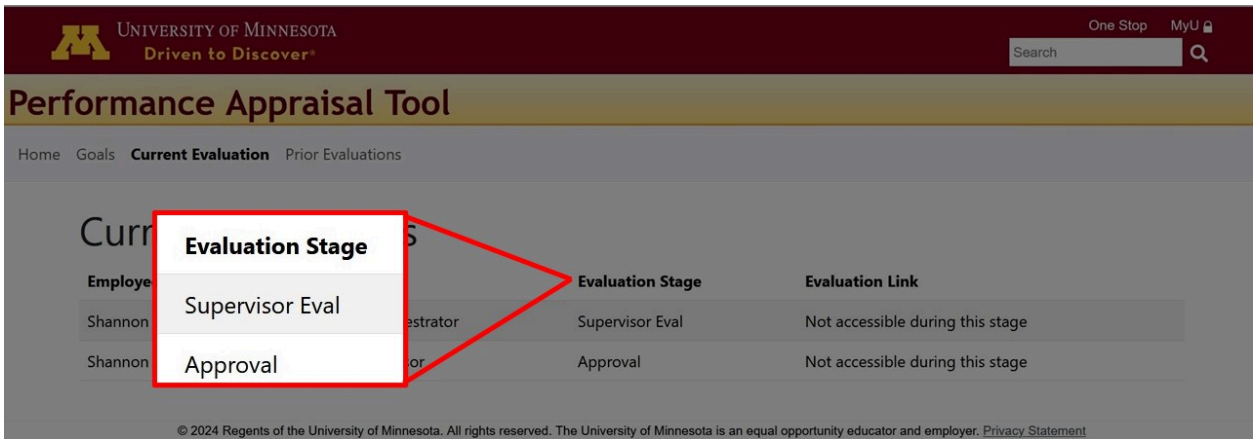
Approval stage: This stage is intended to provide either a one-up reports-to or a PAT Admin (e.g., HR representatives) an opportunity to review or approve the performance evaluation before it is released to you. This stage is also used to hold evaluations for calibration purposes. During this stage, you cannot view or access the form.

Employee Signature stage: This stage is intended to capture your acknowledgment that the supervisor discussed the performance evaluation with you.

Note:

- Emails will be generated along the way to provide instructions for each step and each user.

- You can check the status of your evaluation under the *Evaluation Stage* column on the *Current Evaluation* page.

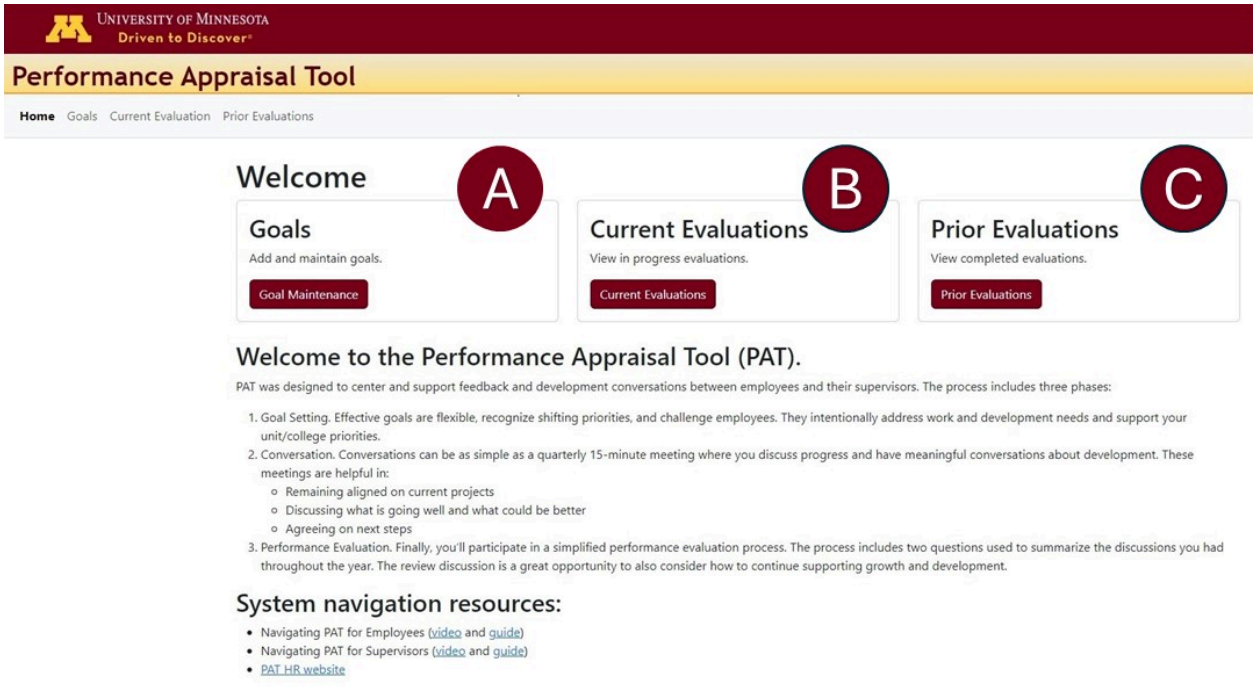


Accessing PAT

1. Navigate to: https://performanceappraisal.umn.edu/
2. Log in using your Internet ID and password.

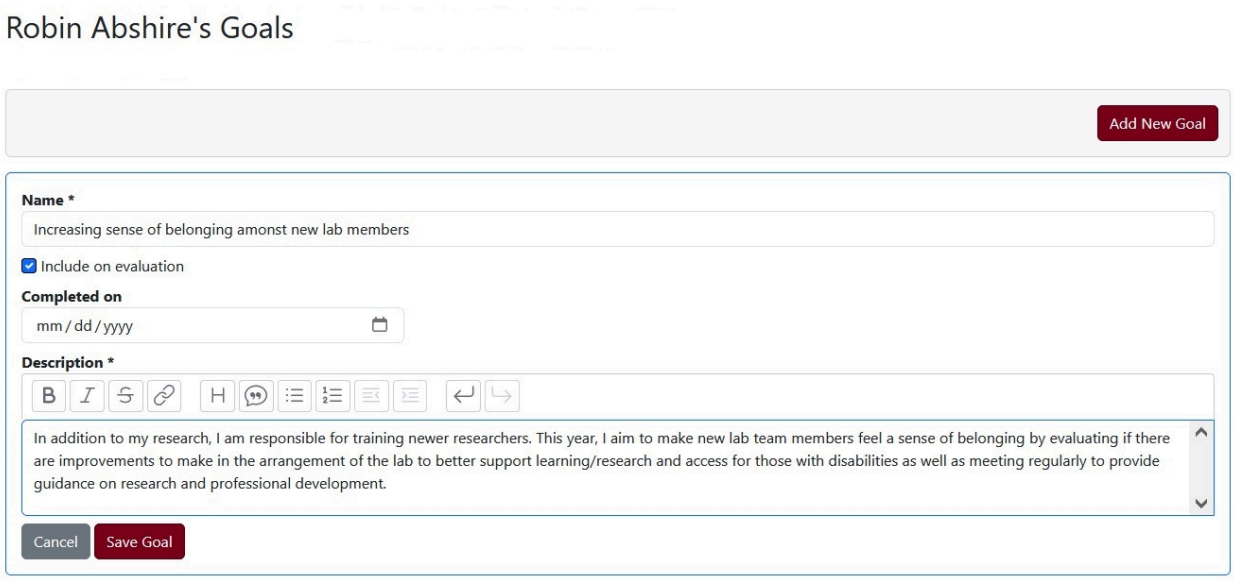
Using PAT

Once you have logged in, your PAT landing page displays. From this page, you can access goals **(A)**, your current evaluations **(B)** and prior evaluations **(C)**.

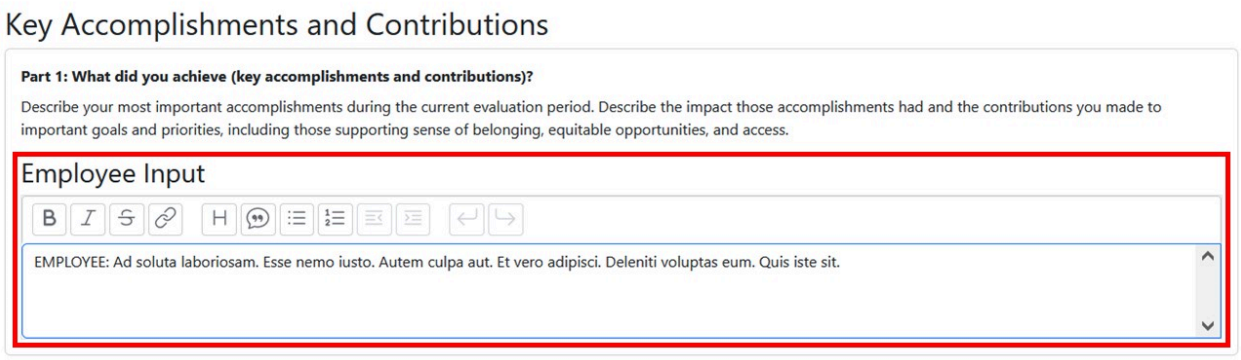


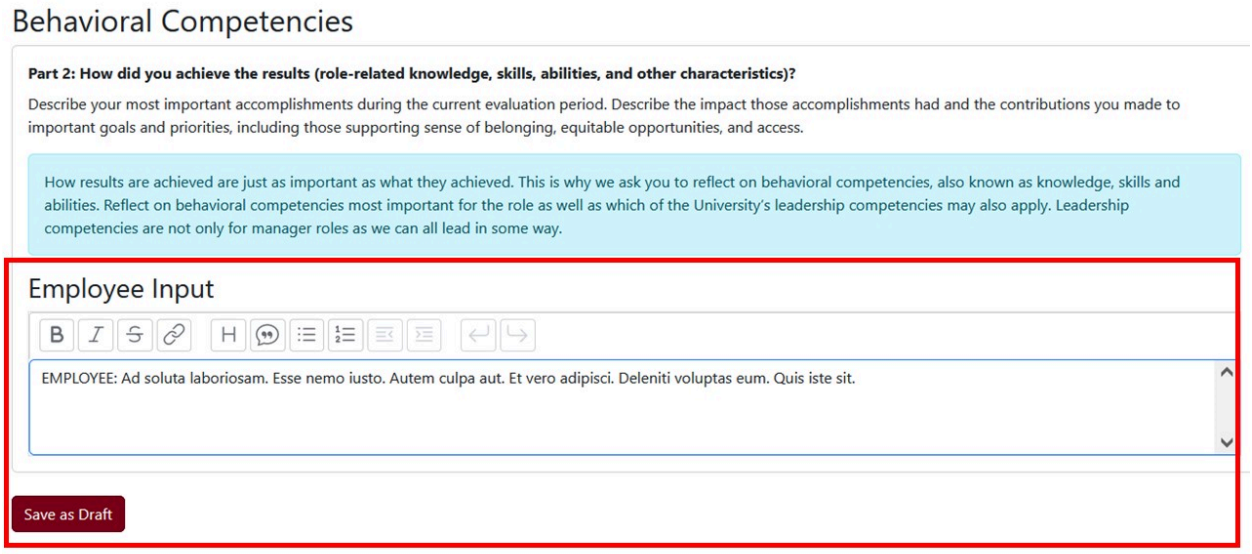
1. **Set and maintain goals.** Throughout the year, be sure you and/or your supervisor are keeping your goals up to date and reflective of current state. In the *Goals* page

(A), you are able to add new goals, edit as needed (including marking them complete), delete and indicate which ones should be discussed in your evaluation.

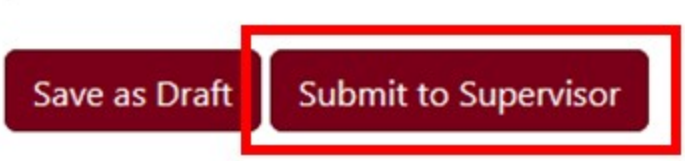


2. **Document ongoing check-ins and progress towards goals.** Also throughout the year, document progress towards goals and conversations you've had with your supervisor about what is going well and what could be better. Do this real-time in the *Key Accomplishments and Contributions* and *Behavioral Competencies* sections of the evaluation form itself and save as a draft, enabling you to simply revise and submit later in the process.



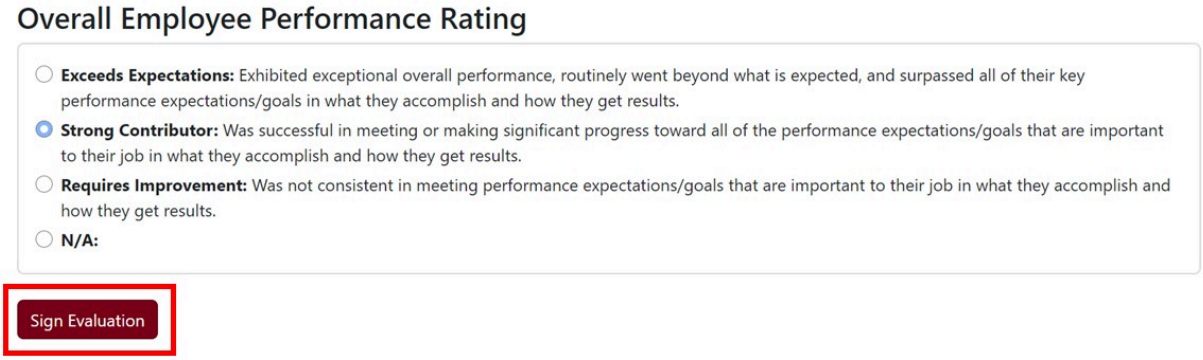


3. **Complete and submit your employee input.** Once you are prompted, revise the notes you took throughout the year and finalize your employee input. Ensure the correct goals are reflected at the top of the evaluation itself, revising these in the *Goals* page as needed. Once you have finalized your narrative, submit your input for your supervisor's consideration when writing your performance evaluation.



Upon submission, your supervisor will be prompted to complete the performance evaluation. From this point, you will not be able to access the current evaluation until it is finalized and you are prompted to sign electronically.

4. **Sign the Performance Evaluation.** Once prompted, sign to acknowledge the performance evaluation has been discussed with you. Log in and navigate to the *Current Evaluations* page, review and click *Sign Evaluation*.



   If needed, you can view your employee input in the *Prior Evaluations* page.

Questions and Resources

- **If you have any questions, please contact your local HR representative.**
- Performance management process overview and best practices: z.umn.edu/PerformanceManagement
- Performance Appraisal Tool (PAT) information: z.umn.edu/PATwebsite.