Preparation Needed Prior to Using PAT

If you are considering using PAT, ensure your "reports to" relationships in PeopleSoft are accurate. To see the current set-up you will want to review the UMReport "Position Management Organization Charts" and communicate needed changes to your local HR representative.

You will also want to designate one or multiple PAT administrators for your area. For a better understanding of this role, please see the PAT Administrator's Guide.

Items You Will Want to Determine and Communicate to Supervisors

Prior to getting your unit going on appraisals in PAT you will want to determine the following and communicate this to supervisors in your area:

- What timeframe and “year” will be evaluated?
- Who is responsible for adding and initiating appraisals (PAT admin or supervisors)?
- Who will be the ‘Designated Approver’? (This can be a PAT admin, a higher level supervisor, or in the situation where none is needed the supervisor themselves).
- Who is responsible for adding ‘Major Responsibilities’ and ‘Expected Results’ (PAT admin, supervisors, or employees)?
- When are the self-assessments due? When are the supervisor assessments due?
- If applicable, when can the employees and supervisors expect the appraisals to be approved by the 'Designated Approver'?
- What should the employee/supervisor meeting structure look like? Should they meet after the self-assessment, after the supervisor assessment, or both?
- Do you want the supervisors to print a paper copy of the completed review to turn into HR or will the PAT admin be responsible for printing? (OHR requires paper copies.)
- If applicable, what will the ‘Designated Approver’ be looking for (X,Y, and Z)? The Designated Approver will need to return the appraisal to the supervisor if revisions are necessary.