

Create a New Performance Review Cycle in isolved - Share & Perform



Learn how to set up a new performance review cycle within the isolved system. This guide walks you through the necessary steps to define review periods and parameters.

1

Navigate to

https://thcm100.shareandperform.myisolved.com/intranet_dashboard


The screenshot displays the intranet dashboard interface. On the left is a navigation sidebar with the following items: Home, Workspace, Engagement, Performance, Rewards, Organization, Support, and Admin. Settings. The main content area features a top navigation bar with 'Bulletins', 'Feed', 'Actions', 'Values', 'Praise Wall', and 'Leaderboard', along with a '+ Create Card' button. Three bulletin items are visible: 'International Day of Peace' (Cultivating a Culture of Peace), '2025 Best Places To Work' (with the Thread logo), and 'TRUTH IN NATURE | REACHING THE FATHERLESS- Volunteer Opportunity'. The right sidebar contains sections for 'Pending Items' (empty), 'Recent Activities' (listing work anniversaries and birthdays), and 'Library' (listing Employee Handbook and Policies and Procedures).

2 Click "Performance"

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement **Performance** Rewards Organization Support Admin. Settings


Bulletins Feed Actions Values Praise Wall Leaderboard [+ Create Card](#)



International Day of Peace

Cultivating a Culture of Peace [Click here](#)


[TA](#) last updated by [Teri M Admin2](#)



2025 Best Places To Work

[thread](#) theadhcm.com

[Keanu Charles Reeves](#) last updated by [Keanu Charles Reeves](#)



TRUTH IN NATURE | REACHING THE FATHERLESS- Volunteer Opportunity

[Click here](#)

Truth in Nature is an outdoor ministry that exists to Reach, Inspire, Support, and Engage young men from fatherless, single-parent homes. Our goal is to help boys understand their purpose as Christian men and to help break the fatherless cycle in local communities across our nation.

Pending Items
You have no pending items

Recent Activities

- [Scott A Admin3, Dylan People](#) having work anniversary on 2026-03-02
[Saturday](#)
- [Muhammad A Employee8](#) having birthday on 2026-03-02
[Saturday](#)
- [Dan A Manager6](#) having birthday

Library [+](#)

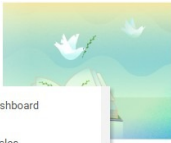
- Employee Handbook
- Policies and Procedures

3 Click "Reviews"

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance **Goals** **Reviews** **30** Reviews &O Reviews Rewards Organization Support Admin. Settings

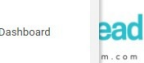
Bulletins Feed Actions Values Praise Wall Leaderboard [+ Create Card](#)



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Recent Activities

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[Saturday](#)
- [Dan A Manager6](#) having birthday

Library [+](#)

- Employee Handbook
- Policies and Procedures

- [Dashboard](#)
- [Cycles](#)
- [Templates](#)
- [Team Dashboard](#)
- [Org. Dashboard](#)
- [Reports](#)
- [Exports](#)

4 Click "Cycles"

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance Goals Reviews 360 Reviews Rewards Organization Support Admin. Settings

Dashboard **Cycles** Templates Team Dashboard Org. Dashboard Reports Exports

Pending Actions 1 - 1 of 1 View

HR review for *Amber Demo Test* is pending (Cycle - New Cycle, Due by Feb 29, 2024)

My Reviews Active

No reviews

5 Click "Dynamic Cycle - RC2"

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance Goals Reviews 360 Reviews Rewards Organization Support Admin. Settings

Dashboard **Cycles** Templates Team Dashboard Org. Dashboard Reports Exports

Active + Create Cycle

Dynamic Cycle - RC2 Go To Org. Dashboard

Review Period Not Available	Participation 0 / 91 (0%)	0%	0%	0%
Cycle Visibility All	Cycle Type Dynamic	Self Completed	Supervisor Completed	HR Completed

2026 Annual Performance Review Go To Org. Dashboard

Review Period Jun 01, 2025 - May 31, 2026	Participation 2 / 91 (2%)	0%	0%	0%
Cycle Visibility All	Cycle Type Normal	Self Completed	Supervisor Completed	HR Completed

Quarterly Cycle Go To Org. Dashboard

Review Period Sep 23, 2024 - Oct 11, 2024	Participation 3 / 91 (3%)	0%	33%	0%
Cycle Visibility All	Cycle Type Normal	Self Completed	Supervisor Completed	HR Completed

6 Click "Create Cycle"

You are logged in as a partner user. Exit

Dashboard **Cycles** Templates Team Dashboard Org. Dashboard Reports Exports

Active

+ Create Cycle

Dynamic Cycle - RC2 [Go To Org. Dashboard >](#)

Review Period Not Available Cycle Visibility All	Participation 0 / 91 (0%) Cycle Type Dynamic	0% Self Completed	0% Supervisor Completed	0% HR Completed
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2026 Annual Performance Review [Go To Org. Dashboard >](#)

Review Period Jun 01, 2025 - May 31, 2026 Cycle Visibility All	Participation 2 / 91 (2%) Cycle Type Normal	0% Self Completed	0% Supervisor Completed	0% HR Completed
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Quarterly Cycle [Go To Org. Dashboard >](#)

Review Period Sep 23, 2024 - Oct 11, 2024 Cycle Visibility All	Participation 3 / 91 (3%) Cycle Type Normal	0% Self Completed	33% Supervisor Completed	0% HR Completed
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7 Click the "write the name of your cycle" field.

You are logged in as a partner user. Exit

[← Create Cycle](#)

Cycle Information

Title*
write the name of your cycle

Description
write short description of your cycle

Cycle Type*
A NORMAL cycle allows for a company wide Start and End review period. A DYNAMIC cycle will anchor off of an employee's anniversary date for the review period.
 Normal Dynamic

Performance review period*
This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 - December 31st 2016.
From To

[Cancel](#) [Create](#)

8 Type "Annual Cycle"

9 Click "Performance review period*" This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. Fo..."

Home

Workspace >>

Engagement >>

Performance >>

Goals >

Reviews 1 >

360 Reviews >

Rewards >>

Organization >>

Support >>

Admin. Settings

← Create Cycle

Cycle Information

Title*

Annual Cycle

Description

write short description of your cycle

Cycle Type*

A NORMAL cycle allows for a company wide Start and End review period. A DYNAMIC cycle will anchor off of an employee's anniversary date for the review period.

Normal Dynamic

Performance review period*

This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.

From To

Cancel Create

10 Click the "Enter start date" field.

The screenshot shows a sidebar on the left with navigation items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and a '1' badge), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Cycle Information' and contains the following fields:

- Title***: A text input field containing 'Annual Cycle'.
- Description**: A text area with the placeholder text 'write short description of your cycle'.
- Cycle Type***: Two radio buttons, 'Normal' (selected) and 'Dynamic'.
- Performance review period***: A section with explanatory text: 'This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 - December 31st 2016.'
- From**: A date input field with the placeholder 'Enter start date' and a calendar icon. This field is circled in orange.
- To**: A date input field with the placeholder 'Enter end date' and a calendar icon.

At the bottom of the form are 'Cancel' and 'Create' buttons. A blue '+' button is located in the bottom right corner of the page.

11 Click the "write the name of your cycle" field.

This screenshot shows the same 'Cycle Information' form as in step 10, but with a calendar widget open for the 'From' field. The calendar is for 'March 2026' and shows dates from 1 to 31. The 'Title*' field is circled in orange. The 'Create Cycle' breadcrumb is visible at the top of the form area.

The calendar data is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
	7	8	9	10	11	12
	13	14	15	16	17	18
	19	20	21	22	23	24
	25	26	27	28	29	30
	31	1	2	3	4	

12 Type "2026"

13 Click the "Enter start date" field.

The screenshot shows the 'Cycle Information' form with the following fields and options:

- Title***: 2026 Annual Cycle
- Description**: write short description of your cycle
- Cycle Type***: Normal Dynamic
- Performance review period***: This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.
- From**: Enter start date (highlighted with an orange circle) **To**: Enter end date

The calendar for March 2026 is displayed below the 'Enter start date' field:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Buttons: Cancel, Create

14 Type "1/1/2026"

15 Click the "Enter end date" field.

The screenshot shows a sidebar on the left with navigation items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Cycle Information' and contains the following fields:

- Title***: 2026 Annual Cycle
- Description**: write short description of your cycle
- Cycle Type***: Normal Dynamic
- Performance review period***: This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.
- From**: 1/1/2026
- To**: Enter end date

A calendar is open for March 2026, showing days from 1 to 31. The 'Enter end date' field is highlighted with an orange circle. At the bottom of the form are 'Cancel' and 'Create' buttons. A blue '+' button is visible in the bottom right corner of the interface.

16 Type "12/31/2026"

17 Click "From To"

The screenshot shows a sidebar on the left with navigation items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Cycle Information' and contains the following fields:

- Title***: 2026 Annual Cycle
- Description**: write short description of your cycle
- Cycle Type***: Normal (selected), Dynamic
- Performance review period***: From 1/1/2026 To 12/31/2026. An orange circle highlights the date range.

At the bottom of the form are 'Cancel' and 'Create' buttons. A blue '+' button is located in the bottom right corner of the main content area.

18 Click "Create"

This screenshot is identical to the previous one, showing the 'Cycle Information' form with the 'From To' date range highlighted. In this step, an orange circle highlights the 'Create' button at the bottom of the form.

19 Click the "write short description of your cycle" field.

You are logged in as a partner user. [Exit](#)

[← Create Cycle](#)

There was an error while submitting the form. Please fix it and try again

Cycle Information

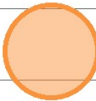
Title*
2026 Annual Cycle

Description
write short description of your cycle

Cycle Type*
 Normal Dynamic

Performance review period*
This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.
From 1/1/2026 To 12/31/2026

* Mandatory attribute missing



20 Click "Create"

Workspace Engagement Performance Goals **Reviews** 360 Reviews Rewards Organization Support Admin. Settings

There was an error while submitting the form. Please fix it and try again

Cycle Information

Title*
2026 Annual Cycle


Description
2026 Company Wide Review Cycle

Cycle Type*
 Normal Dynamic

Performance review period*
This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.
From 1/1/2026 To 12/31/2026

* Mandatory attribute missing

[Cancel](#) [Create](#)



21

Click "2026 Annual Cycle Go To Org. Dashboard Review Period Jan 01, 2026 - Dec 31, 2026 Cycle Visibility All Participation 0 / 91 (0%) Cycle Type Norma..."

The screenshot shows a dashboard titled "Cycles" with a sidebar on the left containing navigation items like Home, Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area displays three review cycles, each with a "Go To Org. Dashboard" button and three progress indicators for Self Completed, Supervisor Completed, and HR Completed, all showing 0% completion. The cycles are: 1) "2026 Annual Cycle" (Review Period: Jan 01, 2026 - Dec 31, 2026; Cycle Visibility: All; Participation: 0 / 91 (0%); Cycle Type: Normal); 2) "Dynamic Cycle - RC2" (Review Period: Not Available; Cycle Visibility: All; Participation: 0 / 91 (0%); Cycle Type: Dynamic); 3) "2026 Annual Performance Review" (Review Period: Jun 01, 2025 - May 31, 2026; Cycle Visibility: All; Participation: 2 / 91 (2%); Cycle Type: Normal). An orange circle highlights the "Go To Org. Dashboard" button for the first cycle.

22

Click "Title* Description 2026 Company Wide Review Cycle Performance review period* This information will be used in all notifications to employees and..."

The screenshot shows the "Edit Cycle" form with a sidebar on the left containing navigation items like Home, Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area displays the "Cycle Information" section with fields for Title* (2026 Annual Cycle), Description (2026 Company Wide Review Cycle), and Performance review period* (From: Jan 01, 2026, To: Dec 31, 2026). Below this are sections for "Process Configuration" (Configure The Review Process) and "Cycle Timeline" (Configure The Timeline For The Review Process). An orange circle highlights the "Performance review period*" section.

23 Click "Process configuration"

You are logged in as a partner user. [Exit](#)

Home
Workspace »
Engagement »
Performance ▾
Goals >
Reviews **1** >
360 Reviews >
Rewards »
Organization »
Support »
Admin. Settings

Performance review period*
This information will be used in all notifications to employees and will help them give feedback accordingly. E.g. For the 2016 Annual Review the period of review could be Jan 1st 2016 – December 31st 2016.
From To

Process Configuration
Configure The Review Process

Cycle Timeline
Configure The Timeline For The Review Process

Configure Review Inputs

Performance Rating Scale
Define The Rating Scale

Leadership Potential Rating Scale
Define The Rating Scale For Evaluating Employee Leadership Potential

24 Click "Should employees review themselves?"

You are logged in as a partner user. [Exit](#)

Home
Workspace »
Engagement »
Performance ▾
Goals >
Reviews **1** >
360 Reviews >
Rewards »
Organization »
Support »
Admin. Settings

Process Configuration

Is manual sharing of assigned templates required?
 Yes No, employees will immediately see it

Who can share templates?
 HR Managers Both HR & Supervisor

Who can Assign/Recall templates?
 HR Managers Both HR & Supervisor

Ability to invite additional reviewers
Only HR and supervisors can invite others to share their reviews.
 Yes No

Should employees review themselves?
 Yes No

Who can rollback employee reviews for editing?
 HR Managers Both HR & Supervisor

Can supervisors begin their reviews before employees submit their reviews?
 Yes No

Is sign-off required?
 Yes No

Enable post-review feedback questionnaire
This is a feedback questionnaire about the review process to be filled in only by employees after the review.
 Yes No

Cycle Timeline
Configure The Timeline For The Review Process

25

Click "Configure the timeline for the review process"

You are logged in as a partner user. [Exit](#)

- Home
- Workspace >>
- Engagement >>
- Performance >>
- Goals >
- Reviews **1** >
- 360 Reviews >
- Rewards >>
- Organization >>
- Support >>
- Admin. Settings

Is sign-off required? Yes No

Enable post-review feedback questionnaire
This is a feedback questionnaire about the review process to be filled in only by employees after the review. Yes No

Cycle Timeline
Configure The Timeline For The Review Process

Configure Review Inputs

Performance Rating Scale
Define The Rating Scale

Leadership Potential Rating Scale
Define The Rating Scale For Evaluating Employee Leadership Potential

Supervisor Recommendation Questionnaire
Add Or Modify The Questions To Be Filled By Supervisors

HR Recommendation Questionnaire

26

Click "A reminder email is sent to all employees prior to this date. However even after this date employees will still be able to submit self-reviews."

HOME

- Workspace >>
- Engagement >>
- Performance >>
- Goals >
- Reviews **1** >
- 360 Reviews >
- Rewards >>
- Organization >>
- Support >>
- Admin. Settings

Cycle Timeline

Performance template should be assigned to employees by

Assigning templates is the process by which relevant templates are matched with employees. This refers to the date by which the HR or the supervisor should have created templates and assigned them to all employees. A reminder notification is sent to HR, 4 days prior to this date. However, HR can continue assigning templates beyond this date too.

Template should be shared with employee by

Sharing templates lets employees know that their review templates are ready to be viewed. This is the date by which HR should have shared templates to all relevant employees. A reminder notification is sent to HR, 3 days prior to this date. However, HR can continue sharing templates beyond this date too.

Employees should start their self reviews on

Employees can start entering their comments and ratings on this date and after. On this date, a reminder email is sent to all relevant employees who have templates assigned to them.

Employees should submit their self reviews by

A reminder email is sent to all employees prior to this date. However even after this date employees will still be able to submit self-reviews.

Send weekly reminders from start date to due until employee review is complete. After due date reminders switch to daily until review is complete.

Supervisors should finish reviewing their direct reports by

A reminder email is sent to all supervisors prior to this date. However even after this date supervisors will still be able to submit reviews.

Send weekly reminders from start date to due until supervisor review is complete. After due date reminders switch to daily until review is complete.

HR managers should finish reviewing and lock all reviews by

A reminder email is sent to all HR managers prior to this date. However even after this date managers will still be able to manage reviews.

Initiate Sign-off process on

27 Click "Performance rating scale"

reviews.

Send weekly reminders from start date to due until supervisor review is complete. After due date reminders switch to daily until review is complete.

HR managers should finish reviewing and lock all reviews by

A reminder email is sent to all HR managers prior to this date. However even after this date managers will still be able to manage reviews.

Initiate Sign-off process on

Employees can start signing-off their reviews from this date. A reminder will be sent on this date.

Configure Review Inputs

Performance Rating Scale

Define The Rating Scale

Leadership Potential Rating Scale

Define The Rating Scale For Evaluating Employee Leadership Potential

Supervisor Recommendation Questionnaire

Add Or Modify The Questions To Be Filled By Supervisors

HR Recommendation Questionnaire

Post-Review Feedback Questionnaire

Add Or Modify The Questions To Be Filled For Post-Review Feedback

28 Click "Rating Scale MANAGE RATINGS"

You are logged in as a partner user. [Exit](#)

Performance Rating Scale

Show rating scale in review form Yes No

Custom label for rating

This text appeared in rating column heading, review form and exports

Include N/A in rating Yes No

N/A will not appear as an option if weighting is enabled in the relevant template.

Use verbal codes Yes No

Rating Scale [MANAGE RATINGS](#)

RATING	SHORT CODE	DESCRIPTION	NOTE
1	NA	Not Adequate	
2	BE	Below Expectation	
3	ME	Meets Expectation	
4	EE	Exceeds Expectation	
5	DP	Distinguished Performance	

Grading Scale [MANAGE GRADES](#)

No results found

9 Box Grading Scale

29

Click "Cycle information Title* Description 2026 Company Wide Review Cycle Performance review period* This information will be used in all notification..."

- Workspace >>
- Engagement >>
- Performance >>
- Goals >
- Reviews **1** >
- 360 Reviews >
- Rewards >>
- Organization >>
- Support >>
- Admin. Settings >>

5 DP Distinguished Performance

Grading Scale MANAGE GRADES

No results found

9 Box Grading Scale

Low (1 - 1.6) Medium (1.61 - 3.5) High (3.51 - 5)

1 2 3 4 5

Leadership Potential Rating Scale

Supervisor Recommendation Questionnaire
Add Or Modify The Questions To Be Filled By Supervisors

HR Recommendation Questionnaire

Post-Review Feedback Questionnaire
Add Or Modify The Questions To Be Filled For Post-Review Feedback

Cancel Save +