

Create and Configure Performance Reviews in Performance Management



Learn how to effectively set up rating scales, customize review templates, and assign employees to evaluation cycles in isolved's new Performance Management Tool

1 Navigate to <https://connect.threadhcm.com/default.aspx#/default.aspx>

Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management
- Client Management
- Benefits >
- ACA Setup Options >
- HR Management >
- Attendance Management >
- Time Management >
- Workflow Setup >
- Company ACH Files
- ACH On-Demand Utility
- Mass Email Utility
- TimeForce Login
- Performance Management**
- COBRA Link
- Payroll
- Reports
- Production Utilities
- Security
- Conversion Management
- System Management
- Custom Self-Service

Welcome Ryan

MY PROFILE
 Ryan Cynkar
 HCM Solutions Trainer
 rcynkar@threadhcm.com

ZayZoon
 Your employees have access to on-demand pay via our partner ZayZoon. This service is free to employers.

CALENDAR
 APRIL 2026
 Legend: Payroll Due (Blue), Pay Date (Red), Run Date - Off Cycle Run (Black)

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
Bi-Weekly	Bi-Weekly	04/22/2026	04/24/2026	04/05/2026	04/18/2026	03	Regular Payroll	View
Semi-Monthly	Semi-Monthly	04/10/2026	04/15/2026	03/26/2026	04/10/2026	01	Regular Payroll	View

ANNOUNCEMENTS
 NEW! Thread is closing at 1 PM on Thursday, 4/30/2026 for our quarterly all hands meeting. We are asking all our clients to please have their payroll processed by 1:00pm EST. Please reach out to your account manager with any questions or concerns!

2 Click "Performance Management"

The screenshot shows the user interface for Ryan Cynkar. The left sidebar contains a search bar and a menu with categories like Customer Service, Employee Admin Tools, Employee Management, and Client Management. Under Client Management, 'Performance Management' is highlighted with an orange circle. The main dashboard area is titled 'Welcome Ryan' and includes a profile card for Ryan Cynkar (HCM Solutions Trainer, rcynkar@threadhcm.com), a calendar for April 2026, and a table of next scheduled payroll runs.

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
Bi-Weekly	Bi-Weekly	04/22/2026	04/24/2026	04/05/2026	04/18/2026	03	Regular Payroll	View
Semi-Monthly	Semi-Monthly	04/10/2026	04/15/2026	03/26/2026	04/10/2026	01	Regular Payroll	View

3 Here is your review dashboard. You can view all of your Reviews and Create a new one. If you click Set up a Review, you can create the whole review, ratings scales and templates on the fly. Otherwise, follow the steps below.

The screenshot displays the 'Performance Management' section for Client: CYN22 - CynTech. The left sidebar is identical to the previous screenshot, with 'Performance Management' circled in orange. The main content area has tabs for 'Reviews', 'Rating Scales', and 'Templates'. Under the 'Reviews' tab, there are filters for 'View all', 'Active', 'Pending', and 'Ended'. A 'Set up a review' button is located in the top right. The 'Active Reviews' section lists several review items, each with a 'Go to dashboard' link and an employee assignment count.

Review Item	Type	Employees Assigned
90 Day Introductory	Introductory Period	0
90 Day Check In	Introductory Period	5
2026 Review (January 1st, 2026 - December 31st, 2026)	Annual	0
Review Template	Introductory Period	3
30 Days	Introductory Period	0

4 Click "Rating Scales" to build your ratings

Client: CYN22 - CynTech

Performance Management

Reviews Rating Scales Templates

View all Active Pending Ended

Set up a review

Active Reviews

90 Day Introductory Type: Introductory Period

90 Day Check In 5 Employees Assigned

2026 Review (January 1st, 2026 - December 31st, 2026) Type: Annual

Review Template 3 Employees Assigned

30 Days Type: Introductory Period

5 Click "Create a Rating Scale"

Client: CYN22 - CynTech

Performance Management

Reviews Rating Scales Templates

View all View active View archived

Create a rating scale

Active Rating Scales

Standard 5 Score Rating Used for scoring in 90 Day introductory

Ratings with Unsatisfactory to Exceptional

Review Rating Scale Used for scoring

Example 1-5 Rating Scale Used for scoring in 2 reviews

This is an example of what a 1-5 rating scale looks like for questions that you go within a template.

6

Fill out all the details for your rating scale
Name
Description
How many 'Levels' you'd like to your Rating Scale

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Client: CYN22 - CynTech

Performance Management

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Search the menu

Customer Service
Employee Admin Tools
Employee Management
Client Management

Rating Scale Name (required) Review Rating Scale Levels 5 Use in scoring

Description
Enter a rating scale description here

1 (rating value used in scoring)

Rating Name (required) Unsatisfactory Abbreviated Rating Name U

Description
This employee is performing at the bare minimum and below our standards

7

Then fill out the Rating level for each number including name, abbreviation and description

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Client: CYN22 - CynTech

Performance Management

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Search the menu

Customer Service
Employee Admin Tools
Employee Management
Client Management

Rating Scale Name (required) Review Rating Scale Levels 5 Use in scoring

Description
Enter a rating scale description here

1 (rating value used in scoring)

Rating Name (required) Unsatisfactory Abbreviated Rating Name U

Description
This employee is performing at the bare minimum and below our standards

2 (rating value used in scoring)

Rating Name (required) Below Expectations Abbreviated Rating Name BE

Description
Enter a rating description here

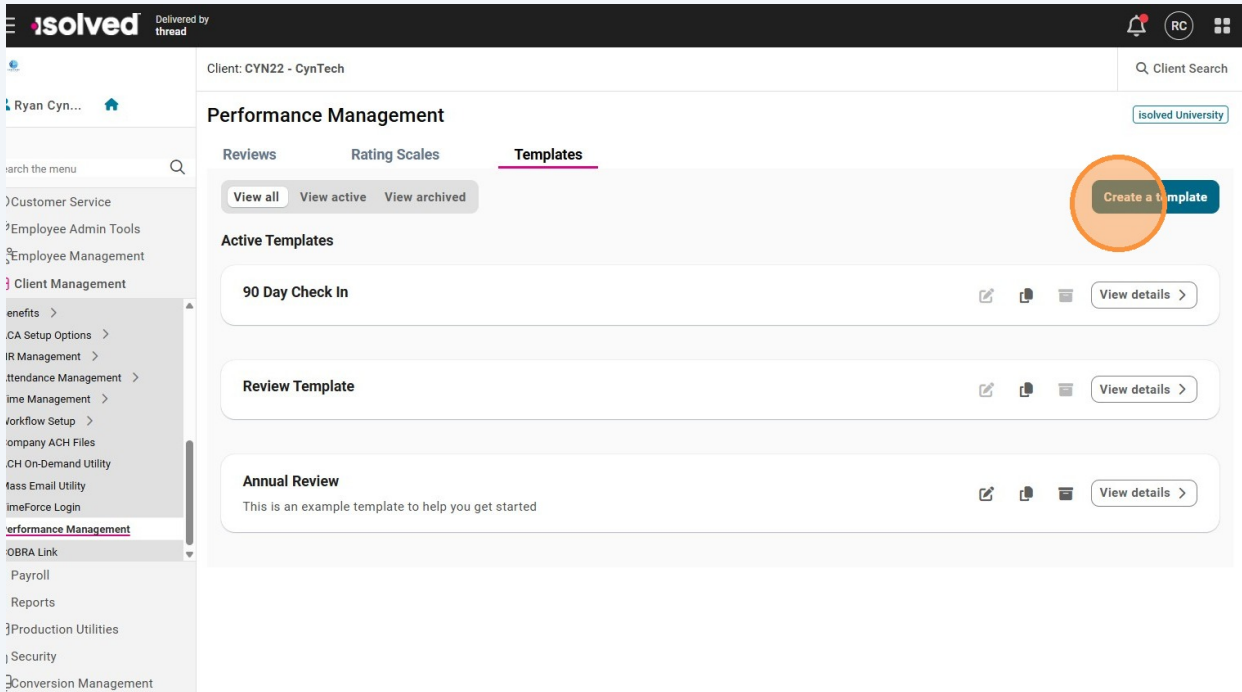
8 Click "Save and exit"

The screenshot shows a web interface for configuring rating scales. It features two main sections for rating values 4 and 5. Each section includes a 'Rating Name (required)' field, an 'Abbreviated Rating Name' field, and a 'Description' text area. The 'Rating Name' field for value 4 contains 'Above Expectations' and the 'Abbreviated Rating Name' field contains 'AE'. For value 5, the 'Rating Name' field contains 'Exceeding Expectations' and the 'Abbreviated Rating Name' field contains 'EE'. At the bottom right, there are three buttons: 'Back', 'Save and exit' (highlighted with an orange circle), and 'Save'. A search bar is visible at the top left, and a sidebar menu is on the left side of the page.

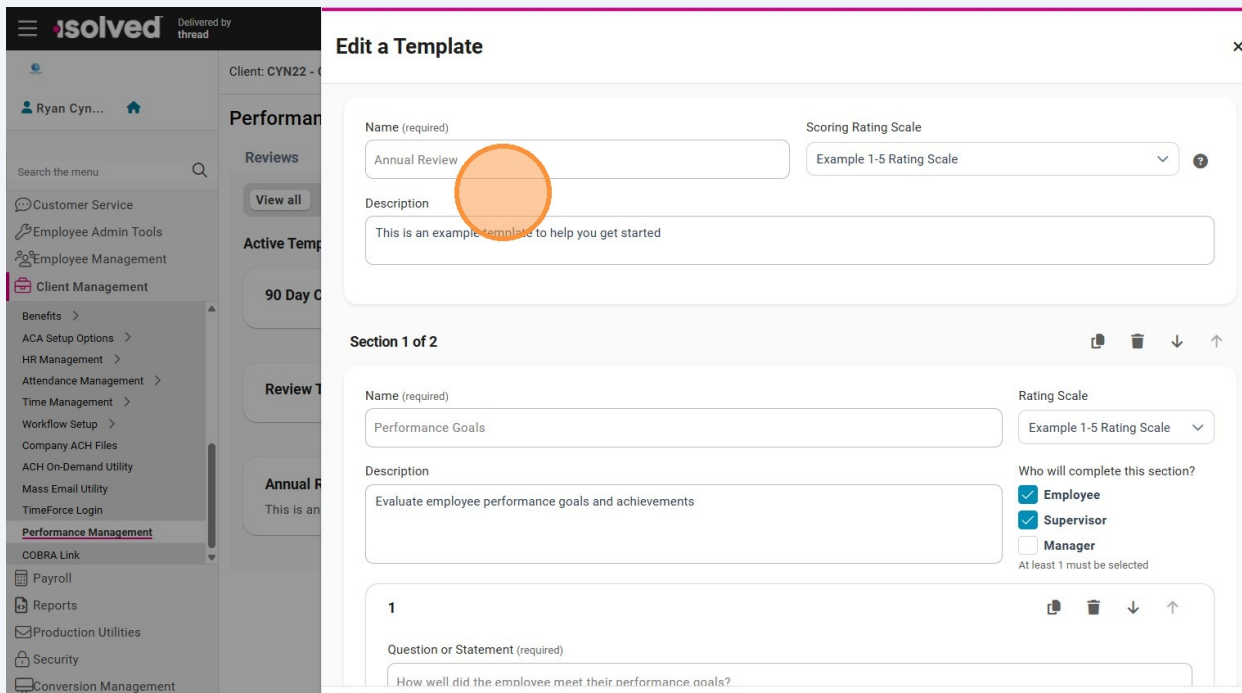
9 Click "Templates" to build out your questions and review access

The screenshot displays the 'Performance Management' dashboard for a client named 'CYN22 - CynTech'. The dashboard has a navigation menu on the left with categories like 'Customer Service', 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The main content area is divided into tabs: 'Reviews', 'Rating Scales', and 'Templates' (highlighted with an orange circle). Below the 'Rating Scales' tab, there are three active rating scales listed: 'Standard 5 Score Rating' (used for scoring in 90 Day Introductory), 'Review Rating Scale' (used for scoring), and 'Example 1-5 Rating Scale' (used for scoring in 2 reviews). A green notification banner at the top right states 'Rating scale updated' and 'Your rating scale has been successfully updated.' A 'Create a rating scale' button is located at the top right of the main content area.

10 Click "Create a template" or copy an existing one

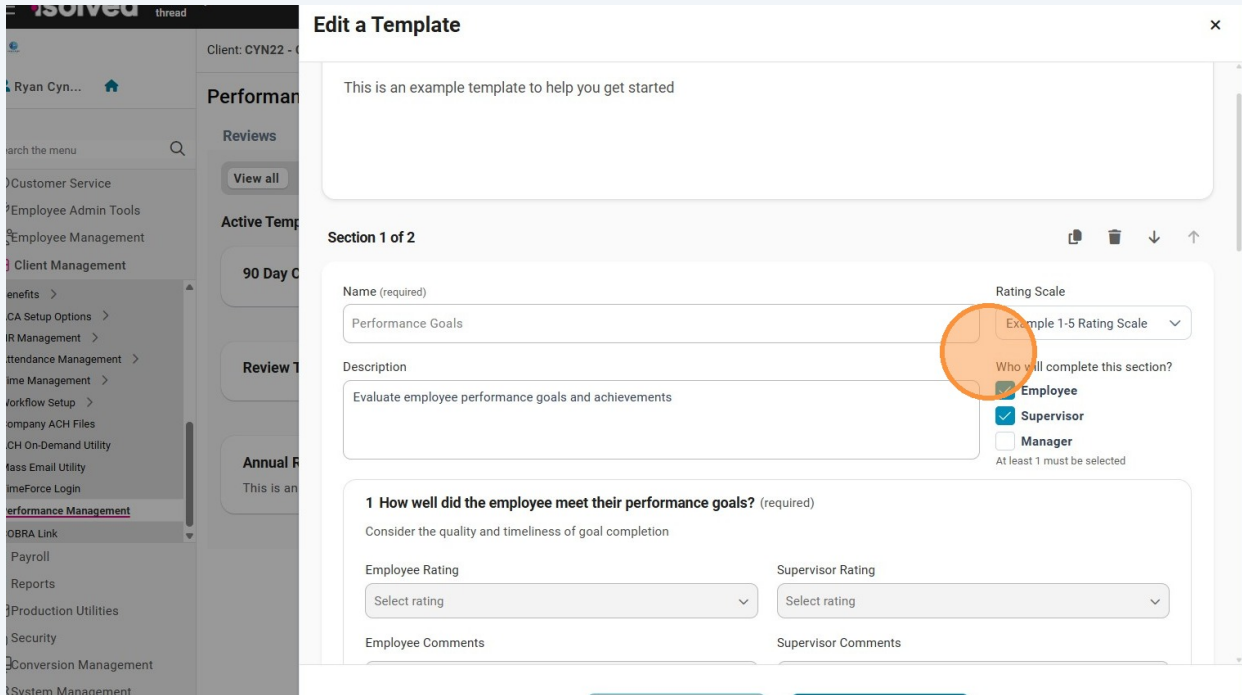


11 Here you'll build out the review.



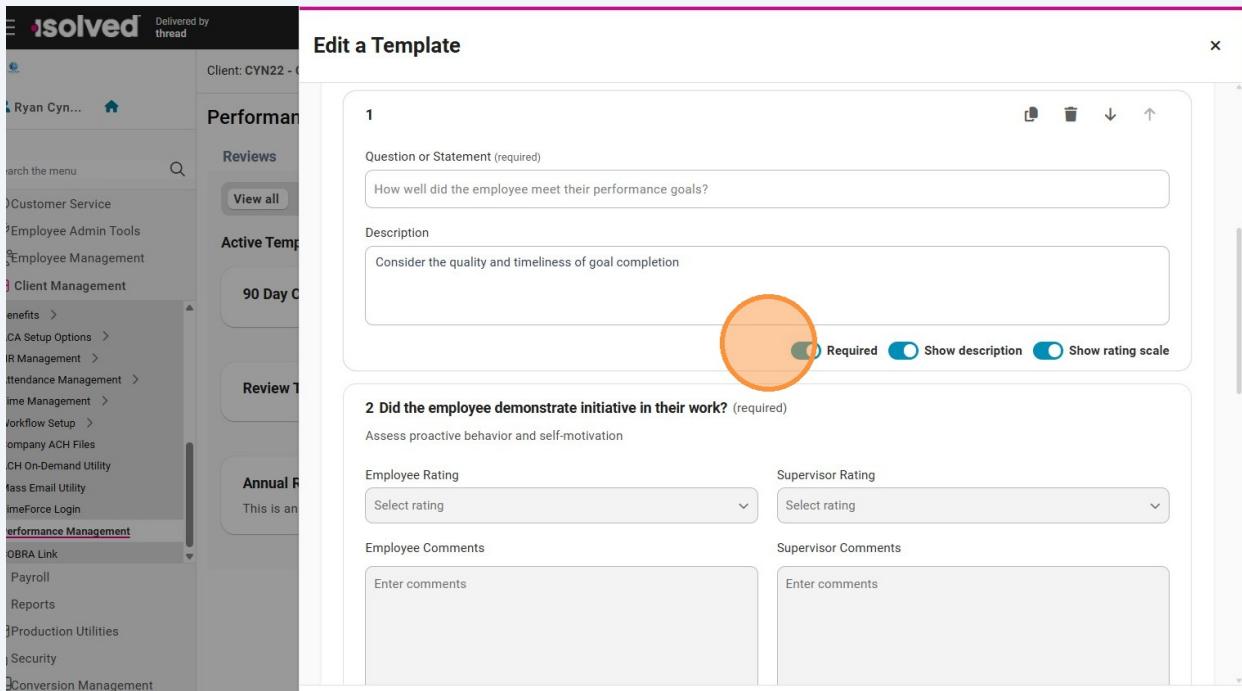
12

Here you can edit who has access to review each sections.
Employee, Manager and Supervisor
These will be based off of the employee's assigned manager or supervisor.



13

You can choose a couple settings here, including if this section is required to complete.



14

As you build your reviews, you can Add another question, or Add another section.

The screenshot shows the 'Performance Management' interface. On the left is a navigation menu with 'Performance Management' highlighted. The main area displays a review template with a question: '1 How effectively does the employee communicate with team members? (required)'. Below the question are three columns for 'Employee Rating', 'Supervisor Rating', and 'Manager Rating', each with a 'Select rating' dropdown and a corresponding 'Enter comments' text area. At the bottom of the question editor, there are two buttons: '+ Add another question' (circled in orange) and '+ Add another section'. At the very bottom of the interface are 'Discard changes' and 'Update template' buttons.

15

Click "Create template"

The screenshot shows the 'Performance Management' interface for creating a new review section. It features a 'Section title' field, a 'Description' field, and a 'Who will complete this section?' section with checkboxes for 'Employee', 'Supervisor', and 'Manager'. Below this is a 'Question or Statement (required)' field and a 'Description' field. At the bottom of the question editor, there are three toggle switches: 'Required' (checked), 'Show description' (checked), and 'Show rating scale' (unchecked). At the bottom of the interface, there are 'Discard changes' and 'Create template' buttons, with the 'Create template' button circled in orange.

16

Next you'll build the actual review. This is where you'll assign the employees to the review.
Click "Reviews"

The screenshot shows the 'Performance Management' interface for client CYN22 - CynTech. The 'Reviews' tab is selected and highlighted with an orange circle. Below the tabs, there are buttons for 'View all', 'View active', and 'View archived'. A 'Create a template' button is visible in the top right. The main content area is titled 'Active Templates' and lists three items: '90 Day Check In', 'Review Template', and 'Annual Review'. Each item has a 'View details' button.

17

Click "Set Up a Review"

The screenshot shows the 'Performance Management' interface for client CYN22 - CynTech. The 'Reviews' tab is selected. Below the tabs, there are buttons for 'View all', 'Active', 'Pending', and 'Ended'. A 'Set up a review' button is highlighted with an orange circle. The main content area is titled 'Active Reviews' and lists three items: '90 Day Introductory' (Type: Introductory Period), '90 Day Check In' (5 Employees Assigned), and '2026 Review (January 1st, 2026 - December 31st, 2026)' (Type: Annual). Each item has a 'Go to dashboard' button. The 'Review Template' item also shows '3 Employees Assigned'.

18

Fill out the details for the review and then choose the Review Type.

Your options are as follows:

Annual - This will allow to choose the year and the template will be based off of that calendar year

Custom - Here you can set any date range you'd like for the review period

Introductory - This allows for intro reviews for 30/60/90 day reviews. There is also a custom option within this for other introductory periods.

Performance Management isolved University

Set Up Performance Review

1 Basic Information — 2 Timeline — 3 Templates — 4 Employees — 5 Final Check

New Feature: Introductory Period Reviews
Reviews now start on hire date—great for probationary periods!

Review Name (required)
2026 Annual Review

Review Description
Enter a review description

Review Type (required)

- Annual ?
- Custom ?
- Introductory Period ?

Save and exit Save and continue

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19 Click "Save and continue"

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Set Up Performance Review

1 Basic Information — 2 Timeline — 3 Templates — 4 Employees — 5 Final Check

New Feature: Introductory Period Reviews
Reviews now start on hire date—great for probationary periods!

Review Name (required)
2026 Annual Review

Review Description
Enter a review description

Review Type (required)
 Annual ?
 Custom ?
 Introductory Period ?

Save and exit **Save and continue**

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20 Click "Timeline for Annual Review" The evaluation timeframe determines when performance is assessed. We've set an annual period, but you can adjust it as..."

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[Back to all reviews](#)

Set Up Performance Review

Basic Information — 2 **Timeline** — 3 Templates — 4 Employees — 5 Final Check

Timeline for Annual Review

The evaluation timeframe determines when performance is assessed. We've set an annual period, but you can adjust it as needed.

Evaluation Year (required)
2026

Back Save and exit **Save and continue**

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21

Choose your Evaluation Timeline Click "Save and continue"

The screenshot shows the 'Performance Management' interface for 'Isolved University'. The user is logged in as 'Ryan Cyn...'. The left sidebar contains a search bar and a menu with categories like 'Customer Service', 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The 'Performance Management' section is expanded, showing options like 'Benefits', 'ACA Setup Options', 'HR Management', 'Attendance Management', 'Time Management', 'Workflow Setup', 'Company ACH Files', 'ACH On-Demand Utility', 'Mass Email Utility', 'TimeForce Login', 'Performance Management', 'COBRA Link', 'Payroll', 'Reports', 'Production Utilities', 'Security', 'Conversion Management', 'System Management', and 'Employee Self-Service'. The main content area is titled 'Set Up Performance Review' and features a progress bar with five steps: 1. Basic Information (checked), 2. Timeline (active), 3. Templates, 4. Employees, and 5. Final Check. Below the progress bar, the section is titled 'Timeline for Annual Review' with a sub-header: 'The evaluation timeframe determines when performance is assessed. We've set an annual period, but you can adjust it as needed.' There is a dropdown menu for 'Evaluation Year (required)' set to '2026'. At the bottom, there are three buttons: 'Back', 'Save and exit', and 'Save and continue' (circled in orange).

22

Choose your template you built or Create a New Template from right here

The screenshot shows the 'Performance Management' interface for 'Isolved University'. The user is logged in as 'Ryan Cyn...'. The left sidebar is identical to the previous screenshot. The main content area is titled 'Set Up Performance Review' and features a progress bar with five steps: 1. Basic Information (checked), 2. Timeline (checked), 3. Templates (active), 4. Employees, and 5. Final Check. Below the progress bar, the section is titled 'Select Templates' with a sub-header: 'Templates contain evaluation questions. Create custom or use existing ones.' There is a 'Create a new template' button. Below this, there are three template cards: '90 Day Check In', 'Review Template', and 'Annual Review'. The 'Annual Review' card is circled in orange and has a sub-header: 'This is an example template to help you get started'. At the bottom, there are three buttons: 'Back', 'Save and exit', and 'Save and continue'.

23 Click "Save and continue"

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[Back to all reviews](#)

Set Up Performance Review

✓ Basic Information — Timeline — **3 Templates** — 4 Employees — 5 Final Check

Select Templates

Templates contain evaluation questions. Create custom or use existing ones. [Create a new template](#)

- 90 Day Check In [Edit](#)
- Review Template [Edit](#)
- Annual Review
This is an example template to help you get started [Edit](#)

[Back](#) [Save and exit](#) [Save and continue](#)

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24 Click "Assign employees"

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[Back to all reviews](#)

Set Up Performance Review

✓ Basic Information — Timeline — ✓ Templates — **4 Employees** — 5 Final Check

Assign Employees

To assign templates to employees, first select the template you want to use. Then, choose the employees to whom you'd like to assign that template. If you need to add more templates or create a new one, simply go back to the previous step to make any changes.

- Annual Review
This is an example template to help you get started [Assign employees](#)

[Back](#) [Save and exit](#) [Save and continue](#)

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25 Choose the employees from this list

Assign Employees to Annual Review

Select from the list of employees below that should be assigned this template.

Employee Name	Employee ID	Template Assigned	Job Title	Hire Date	Department	Employment Category
<input type="checkbox"/> Ryan Reynolds	213686	None	07 - Finance Manager	04/09/2025		Full Time
<input type="checkbox"/> Sandra Stanley	214061	None	02 - Area Director	10/26/1998		Full Time
<input checked="" type="checkbox"/> Guy R Fieri	214062	None	1M - 1M	10/19/1998		Full Time
<input type="checkbox"/> Christopher Bailey	214065	None	02 - Area Director	01/30/2023		Full Time
<input type="checkbox"/> Daniel Miller	214066	None	1 - 1	02/21/1999		Full Time
<input type="checkbox"/> Joseph Smith	214067	None	1 - 1	01/26/1998		Full Time
<input type="checkbox"/> Nicholas Terrone	214069	None	2 - 2	01/26/1999		Full Time
<input type="checkbox"/> David Dooly IV	214072	None	2 - 2	01/05/1999		Full Time
<input type="checkbox"/> Ryan Zimmer	214073	None		02/01/1999		Full Time
<input type="checkbox"/> Larry TestEmployee	214076	None	09 - Implementation Manager	06/01/2006		Full Time

Showing 1 to 25 of 86 entries

26 Click "Assign employees"

Assign Employees to Annual Review

Select from the list of employees below that should be assigned this template.

Employee Name	Employee ID	Template Assigned	Job Title	Hire Date	Department	Employment Category
<input type="checkbox"/> Ryan Reynolds	213686	None	07 - Finance Manager	04/09/2025		Full Time
<input type="checkbox"/> Sandra Stanley	214061	None	02 - Area Director	10/26/1998		Full Time
<input checked="" type="checkbox"/> Guy R Fieri	214062	None	1M - 1M	10/19/1998		Full Time
<input type="checkbox"/> Christopher Bailey	214065	None	02 - Area Director	01/30/2023		Full Time
<input type="checkbox"/> Daniel Miller	214066	None	1 - 1	02/21/1999		Full Time
<input type="checkbox"/> Joseph Smith	214067	None	1 - 1	01/26/1998		Full Time
<input type="checkbox"/> Nicholas Terrone	214069	None	2 - 2	01/26/1999		Full Time
<input type="checkbox"/> David Dooly IV	214072	None	2 - 2	01/05/1999		Full Time
<input type="checkbox"/> Ryan Zimmer	214073	None		02/01/1999		Full Time
<input type="checkbox"/> Larry TestEmployee	214076	None	09 - Implementation Manager	06/01/2006		Full Time

Showing 1 to 25 of 86 entries

Cancel Assign employees

27 Here you'll see the employees who are listed

Performance Management Isolved University

Set Up Performance Review

Basic Information —
 Timeline —
 Templates —
 4 Employees —
 5 Final Check

Assign Employees

To assign templates to employees, first select the template you want to use. Then, choose the employees to whom you'd like to assign that template. If you need to add more templates or create a new one, simply go back to the previous step to make any changes.

Annual Review Assigned to: 1 Employees Update employee assignments

This is an example template to help you get started

Employee Name ↑↓	Employee ID ↑↓	Job Title ↑↓	Department ↑↓
<input type="text"/>	<input type="text"/>	<input type="text"/> Filter Job Titles	<input type="text"/> Filter Departments
Guy R Fieri	214062	1111 - 11M	

Showing 1 to 1 of 1 entries << < 1 > >>

Back Save and exit Save and continue

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28 On the Final Checks screen you can review the whole setup.

Performance Management Isolved University

Set Up Performance Review

Basic Information —
 Timeline —
 Templates —
 Employees —
 5 Final Check

Review the details below, then launch to start the review process.

Basic Information

Annual Review (January 1st, 2026 - December 31st, 2026) Type: Annual Update Basic Information

Timeline

Review Period: 1/1/2026 - 12/31/2026 Update timeline

Review covers performance from 01/01/2026 to 12/31/2026. All evaluations based on work during this timeframe.

Templates Used

Review Template Assigned to: 1 Employees View Employees Assigned

Client: CYNZZ - Cyn Tech Client Search

29

Then Click 'Launch Review' If you are ready to send it to everyone.

You can always add employees after the fact.

The screenshot displays the 'Performance Management' interface for 'Isolved University'. The navigation menu on the left includes options like 'Customer Service', 'Employee Admin Tools', 'Employee Management', 'Client Management', 'Performance Management', 'Payroll', 'Reports', 'Production Utilities', 'Security', 'Conversion Management', 'System Management', and 'Employee Self-Service'. The main content area shows a progress bar with five steps: 'Basic Information', 'Timeline', 'Templates', 'Employees', and 'Final Check' (the current step). Below the progress bar, there are three sections: 'Basic Information' with a card for 'Annual Review (January 1st, 2026 - December 31st, 2026)' and a 'Type: Annual' dropdown, with an 'Update Basic Information' button; 'Timeline' with a card for 'Review Period: 1/1/2026 - 12/31/2026' and a note that the review covers performance from 01/01/2026 to 12/31/2026, with an 'Update timeline' button; and 'Templates Used' with a card for 'Review Template' and a blue badge indicating 'Assigned to: 1 Employees', with a 'View Employees Assigned' button. At the bottom right, a 'Launch review' button is circled in orange. A 'Back' button is located at the bottom left of the main content area. The footer shows 'olived © 2026' and 'Demo'.