

# 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	<a href="#">View</a>
Semi-Monthly	Semi-Monthly	04/10/2026	04/15/2026	03/26/2026	04/10/2026	01	Regular Payroll	<a href="#">View</a>

**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"

Welcome Ryan

Client Management

Performance Management

MY PROFILE

Ryan Cynkar  
HCM Solutions Trainer  
rcynkar@threadhcm.com

MY REMINDERS

MY ACCOUNT REPS

QUICK LINKS

ANNOUNCEMENTS

CALENDAR

NEXT SCHEDULED PAYROLL

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.

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

## 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.

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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  
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

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  
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  
Employee Self-Service

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

Description  
Enter a rating scale description here

2 (rating value used in scoring)

Rating Name (required) Below Expectations Abbreviated Rating Name BE

Description  
Enter a rating description here

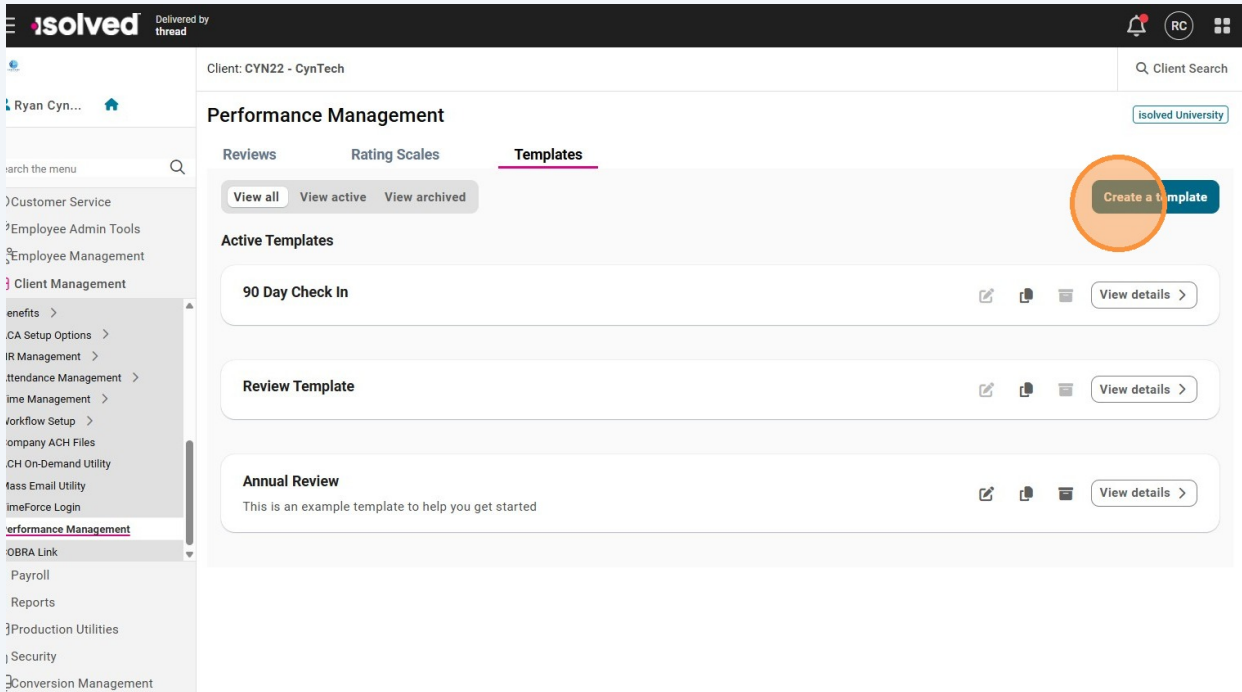
## 8 Click "Save and exit"

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' for value 4 is 'Above Expectations' and for value 5 is 'Exceeding Expectations'. The 'Abbreviated Rating Name' for value 4 is 'AE' and for value 5 is 'EE'. At the bottom right, there are three buttons: 'Back', 'Save and exit' (highlighted with an orange circle), and 'Save'. A 'Demo' label is visible in the bottom right corner.

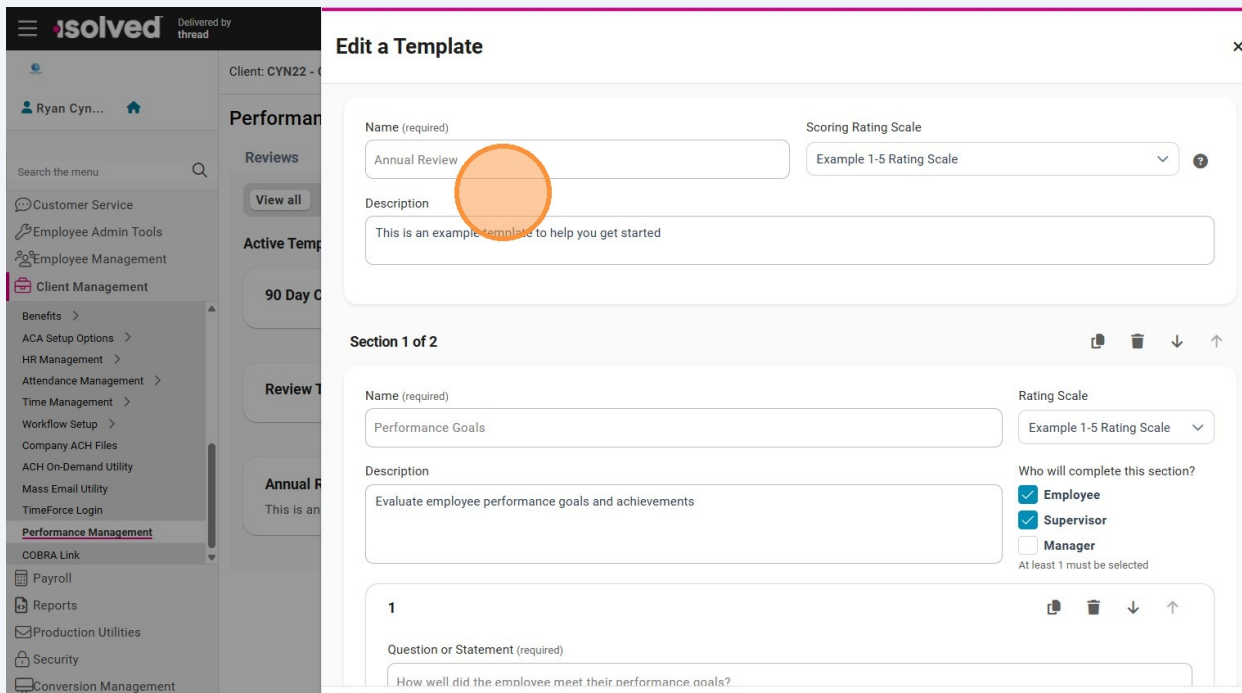
## 9 Click "Templates" to build out your questions and review access

The screenshot displays the 'Performance Management' dashboard for client 'CYN22 - CynTech'. The dashboard includes a navigation menu on the left with categories like 'Customer Service', 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The main content area has tabs for 'Reviews', 'Rating Scales', and 'Templates', with 'Templates' highlighted by an orange circle. A 'Create a rating scale' button is located in the top right. A green notification box states 'Rating scale updated' and 'Your rating scale has been successfully updated.' Below the tabs, 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). Each scale has a 'View details' button.

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

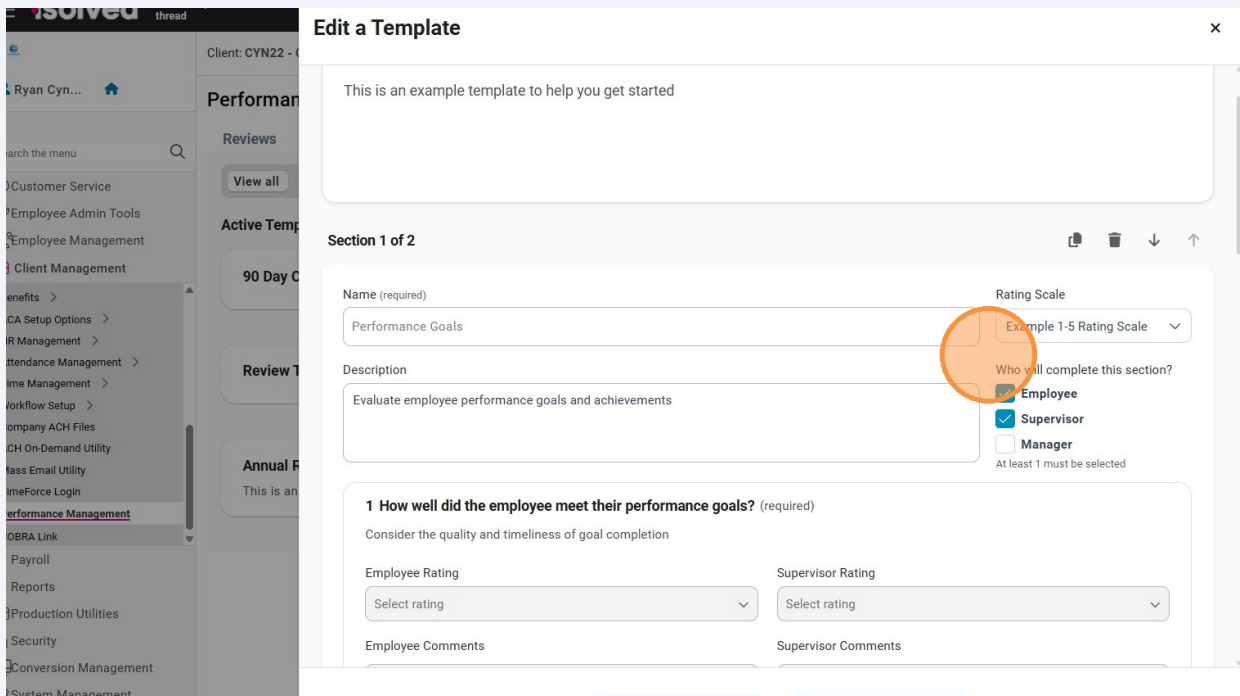


11 Here you'll build out the review.



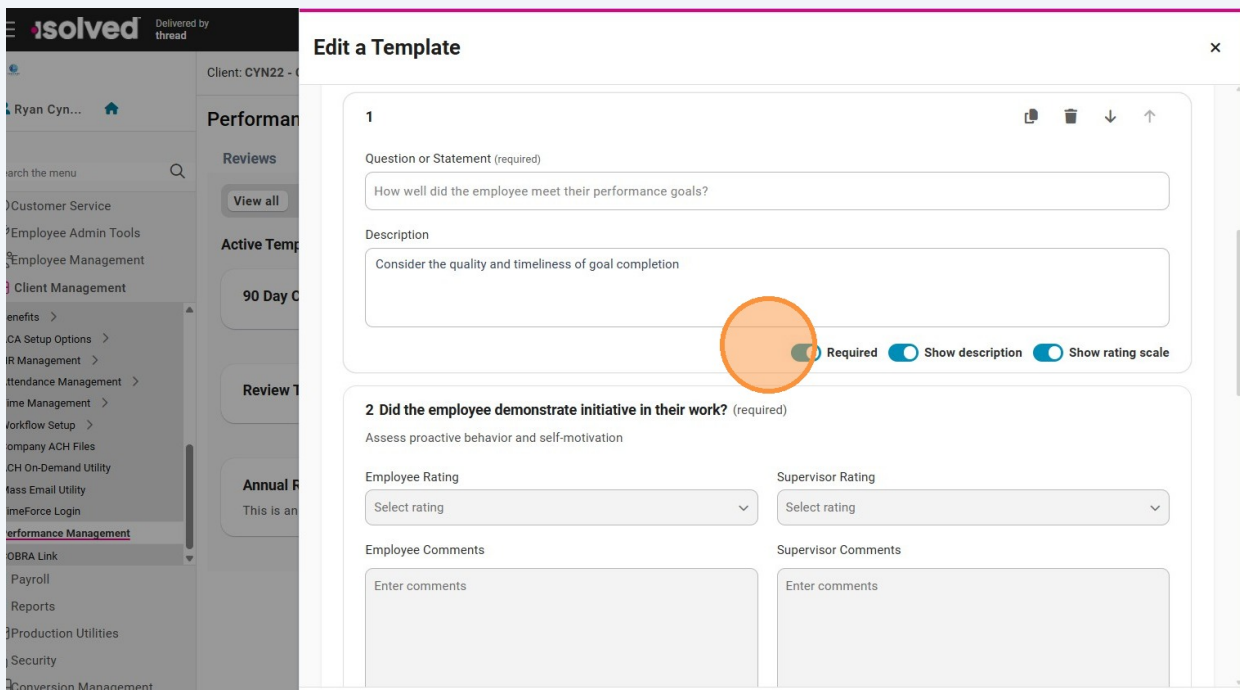
12

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.



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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'. Below the question editor are 'Discard changes' and 'Update template' buttons.

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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). Below the question editor, there are two buttons: '+ Add another question' and '+ Add another section'. At the bottom of the interface are 'Discard changes' and 'Create template' buttons (circled in orange).

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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.

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Click "Set Up a Review"

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', 'Active', 'Pending', and 'Ended'. A 'Set up a review' button is visible in the top right, also 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 '90 Day Check In' item also has a '3 Employees Assigned' indicator.

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## 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.

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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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## 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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## Choose your Evaluation Timeline Click "Save and continue"

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

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### 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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## 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" value="Filter Job Titles"/>	<input type="text" value="Filter Departments"/>
Guy R Fieri	214062	1M : 1M	

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

### Templates Used

Review Template Assigned to: 1 Employees View Employees Assigned

Client: CYNZZ - Cyn Tech Client Search

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

If it is an introductory period review, you can always add employees. If it's an Annual or Custom Review, you cannot add employees.

The screenshot displays the 'Performance Management' interface for 'Isolved University'. The user is logged in as 'Ryan Cyn...'. The interface features a left-hand navigation menu with categories 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 is titled 'Performance Management' and shows a progress bar with five steps: 'Basic Information', 'Timeline', 'Templates', 'Employees', and 'Final Check' (which is highlighted with a '5'). Below the progress bar, there are three sections: 'Basic Information' showing 'Annual Review (January 1st, 2026 - December 31st, 2026)' with a 'Type: Annual' dropdown and an 'Update Basic Information' button; 'Timeline' showing 'Review Period: 1/1/2026 - 12/31/2026' and 'Review covers performance from 01/01/2026 to 12/31/2026. All evaluations based on work during this timeframe.' with an 'Update timeline' button; and 'Templates Used' showing 'Review Template' with a blue badge 'Assigned to: 1 Employees' and a 'View Employees Assigned' button. At the bottom right, there is a 'Launch review' button circled in orange, and a 'Back' button at the bottom left. The footer includes 'olived © 2026' and 'Demo'.