

Create and Customize a Performance Review Template - Share and Perform



Learn how to create a new performance review template from scratch. This guide covers setting up the template name, sections, questions, and overall settings for effective performance evaluations.

1

Navigate to

<https://thcm100.shareandperform.myisolved.com/performance#cycles>

The screenshot shows a web application interface for managing performance review cycles. On the left is a navigation sidebar with items like Home, Workspace, Engagement, Performance, Goals, Reviews (with a red notification badge), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area has a top navigation bar with 'Cycles' selected. Below this is a dropdown menu set to 'Active' and a '+ Create Cycle' button. The dashboard displays three cycle cards: '2026 Annual Cycle', 'Dynamic Cycle - RC2', and '2026 Annual Performance Review'. Each card includes a 'Go To Org. Dashboard' button, a table of cycle details (Review Period, Cycle Visibility, Participation, Cycle Type), and three progress gauges for 'Self Completed', 'Supervisor Completed', and 'HR Completed'. All gauges show 0% completion.

| Cycle Name | Review Period | Cycle Visibility | Participation | Cycle Type | Self Completed | Supervisor Completed | HR Completed |
|--------------------------------|-----------------------------|------------------|---------------|------------|----------------|----------------------|--------------|
| 2026 Annual Cycle | Jan 01, 2026 - Dec 31, 2026 | All | 0 / 91 (0%) | Normal | 0% | 0% | 0% |
| Dynamic Cycle - RC2 | Not Available | All | 0 / 91 (0%) | Dynamic | 0% | 0% | 0% |
| 2026 Annual Performance Review | Jun 01, 2025 - May 31, 2026 | All | 2 / 91 (2%) | Normal | 0% | 0% | 0% |

2 Click "Templates"

You are logged in as a partner user. Exit

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

Active + Create Cycle

2026 Annual Cycle

Go To Org. Dashboard >

| | | | | |
|---|--|----------------------|----------------------------|--------------------|
| Review Period Jan 01, 2026 - Dec 31, 2026 Cycle Visibility All | Participation 0 / 91 (0%) Cycle Type Normal | 0% Self Completed | 0% Supervisor Completed | 0% HR Completed |
|---|--|----------------------|----------------------------|--------------------|

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 |
|---|---|----------------------|----------------------------|--------------------|

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 |
|---|--|----------------------|----------------------------|--------------------|

3 Click "Create Template"

You are logged in as a partner user. Exit

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

All Selected + Create Template Search

| Name | Public | Created By | Created On | Actions |
|--|--------|--------------------|--------------|---------|
| Goals Review | | DA Dannie S Admin7 | Oct 16, 2025 | |
| RYANTEST | | DA Dannie S Admin7 | Sep 10, 2025 | |
| Review with Goals | | DA Dannie S Admin7 | Aug 20, 2025 | |
| test | | DA Dannie S Admin7 | Aug 20, 2025 | |
| Annual Service Review | | DA Dannie S Admin7 | May 02, 2025 | |
| Service and Implementation Management Team | ✓ | PA Phill J Admin4 | Feb 16, 2024 | |
| Service and Implementation | ✓ | TA Teri M Admin2 | Feb 16, 2024 | |
| Employee Self Review - w/o supervisor | ✓ | TA Teri M Admin2 | Dec 04, 2023 | |
| Quarterly Review | | | | |

4 Click this text field.

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

[←](#) **New Template**

Title*

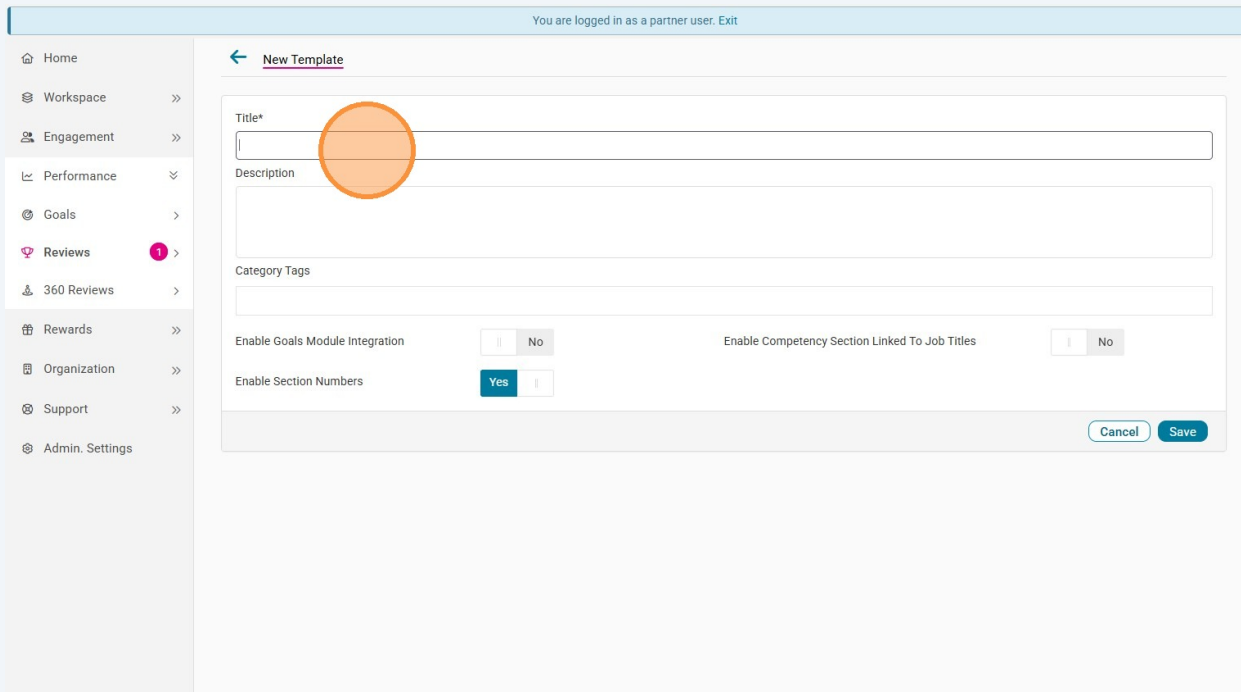
Description

Category Tags

Enable Goals Module Integration No Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

[Cancel](#) [Save](#)



5 Type "Annual Review"

6 Click this text field.

You are logged in as a partner user. Exit

← New Template

Title*
Annual Review

Description

Category Tags

Enable Goals Module Integration No Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save

7 Type "Full Time Review left left left left left left Annual"

8 Click this field.

You are logged in as a partner user. Exit

← New Template

Title*
Full Time Annual Review

Description

Category Tags

Enable Goals Module Integration No

Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save

9 Type "test"

10 Double-click this field.

You are logged in as a partner user. Exit

← **New Template**

Title*
Full Time Annual Review

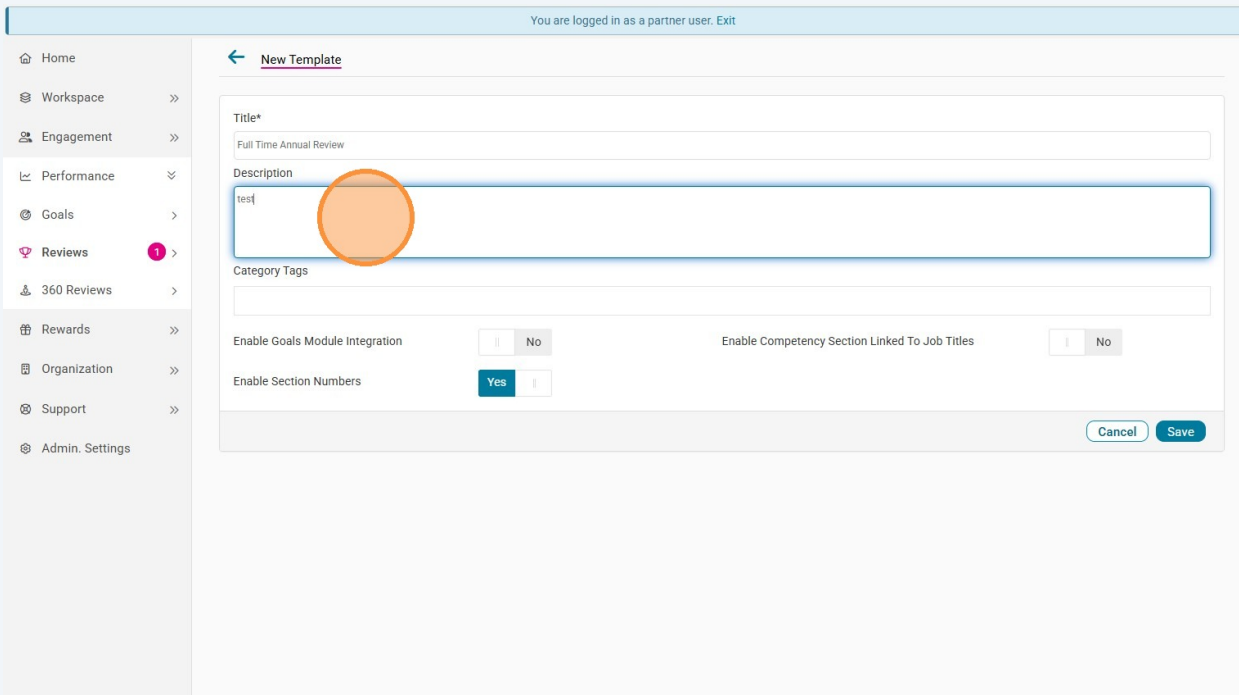
Description
test

Category Tags

Enable Goals Module Integration No Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save

The image shows a web application interface for creating a new template. On the left is a sidebar with navigation items: Home, Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and a '1' notification), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'New Template' and contains a form. The form has a 'Title*' field with the text 'Full Time Annual Review'. Below it is a 'Description' field containing the text 'test', which is highlighted with a blue border and an orange circle. Underneath is a 'Category Tags' field. At the bottom of the form are three toggle switches: 'Enable Goals Module Integration' (set to 'No'), 'Enable Competency Section Linked To Job Titles' (set to 'No'), and 'Enable Section Numbers' (set to 'Yes'). At the very bottom right of the form are 'Cancel' and 'Save' buttons.

11 Type "Scribe Build"

12 Click "No"

You are logged in as a partner user. Exit

← **New Template**

Title*
Full Time Annual Review

Description
Scribe Build

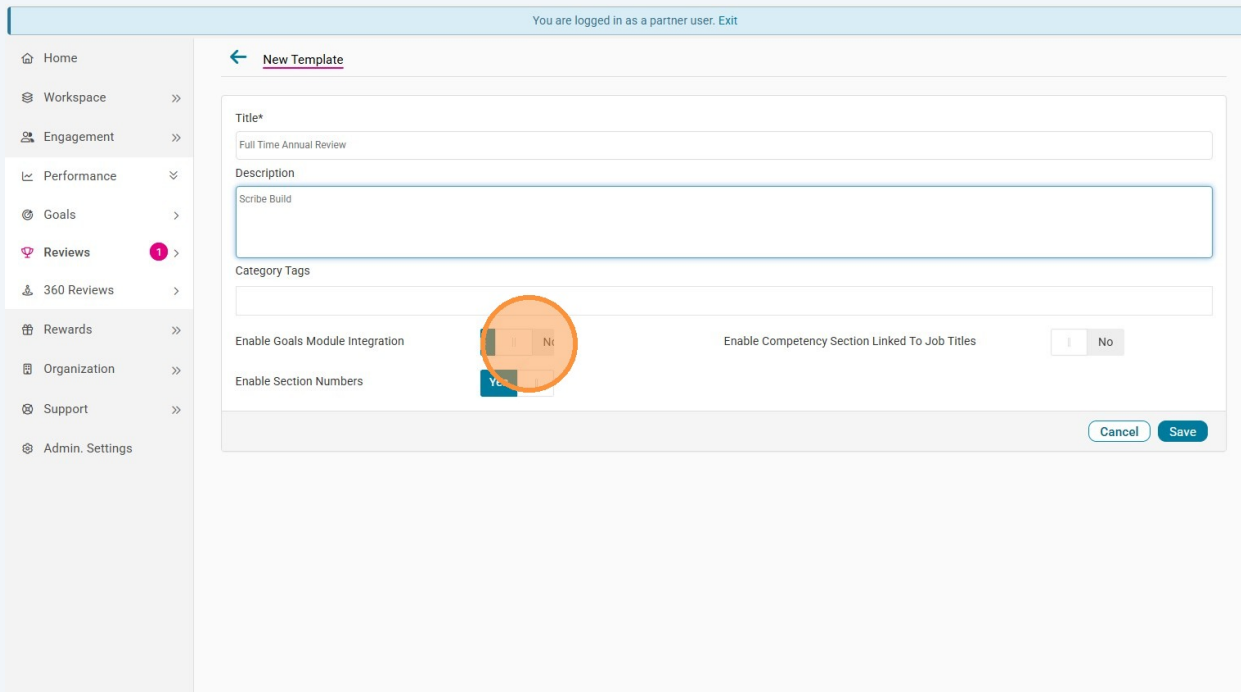
Category Tags

Enable Goals Module Integration No

Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save



13 Click "Enable Section Numbers Yes No"

← **New Template**

Title*
Full Time Annual Review

Description
Scribe Build

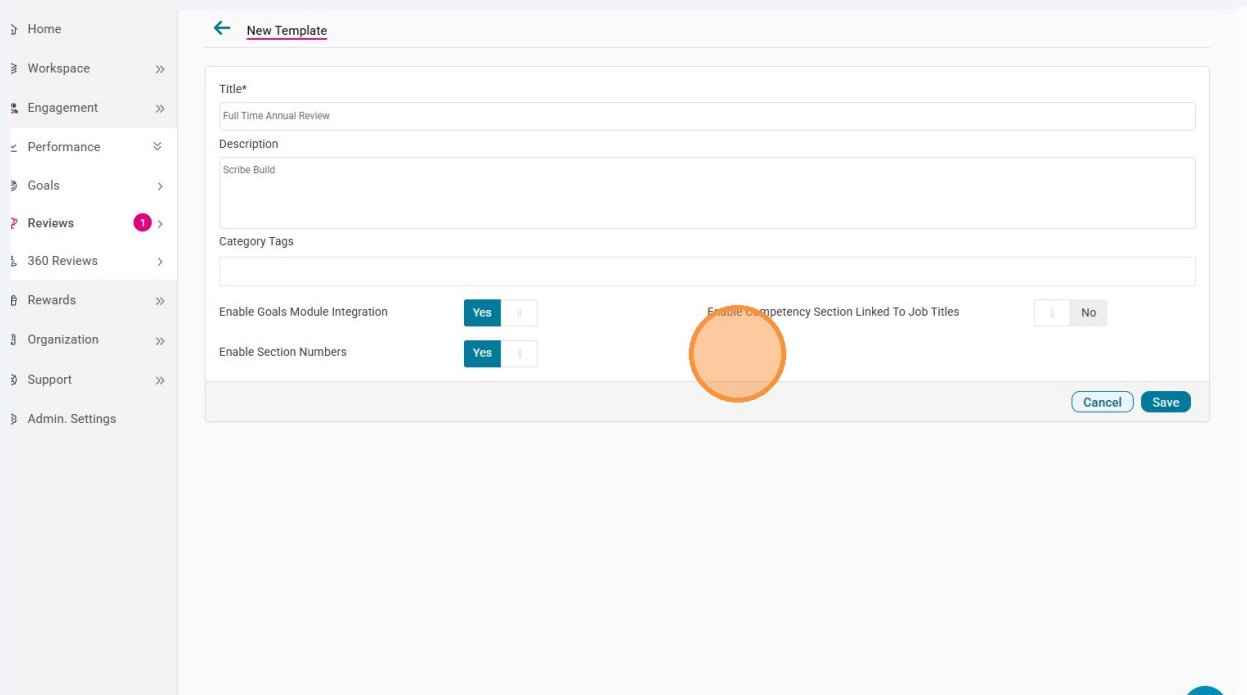
Category Tags

Enable Goals Module Integration Yes

Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save



14 Click "Save"

The screenshot shows a sidebar on the left with the following menu items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and a '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is a form for configuring a review template. It includes a 'Title*' field with the value 'Full Time Annual Review', a 'Description' field with the value 'Scribe Build', and a 'Category Tags' field with a loading spinner. Below these are three toggle switches: 'Enable Goals Module Integration' (set to 'Yes'), 'Enable Competency Section Linked To Job Titles' (set to 'No'), and 'Enable Section Numbers' (set to 'Yes'). At the bottom right of the form, the 'Save' button is highlighted with an orange circle. A blue '+' button is visible in the bottom right corner of the page.

15 Click "Who can comment Both Supervisor & Employee Only Supervisor Only Employee None"

The screenshot shows the same sidebar as in the previous image. The main content area is a form for configuring a review template. It includes a 'Title' field with the value 'Goals', a 'Category Tags' field, and three toggle switches: 'Enable Goals Module Integration' (set to 'Yes'), 'Enable Competency Section Linked To Job Titles' (set to 'No'), and 'Enable Section Numbers' (set to 'Yes'). Below these are two radio button options for 'Who can comment' and 'Who can rate'. The 'Who can comment' option is highlighted with an orange circle and has the radio button selected. The options are: 'Both Supervisor & Employee' (selected), 'Only Supervisor', 'Only Employee', and 'None'. Below these are two 'Save' buttons and a '+ Add Section' button. A blue '+' button is visible in the bottom right corner of the page.

16 Click the "Only Supervisor" field.

The screenshot shows the 'Reviews' configuration page. On the left sidebar, 'Reviews' is highlighted with a red circle and the number '1'. The main content area includes a 'Category Tags' field, two toggle switches for 'Enable Goals Module Integration' and 'Enable Competency Section Linked To Job Titles' (both set to 'Yes'), and another 'Enable Section Numbers' toggle (set to 'Yes'). Below these are 'Cancel' and 'Save' buttons. The 'Title' section contains a 'Goals' field and a paragraph of explanatory text. Underneath, there are two rows of radio button options: 'Who can comment' and 'Who can rate'. In the 'Who can comment' row, the 'Only Supervisor' option is selected and highlighted with an orange circle. In the 'Who can rate' row, the 'Both Supervisor & Employee' option is selected. At the bottom of the form, there is an '+ Add Section' button and a blue circular '+' icon in the bottom right corner.

17 Click "Save"

This screenshot is identical to the previous one, showing the 'Reviews' configuration page. However, in this step, the 'Save' button located at the bottom right of the main content area is highlighted with an orange circle. The 'Who can comment' radio button remains selected and highlighted with an orange circle. The 'Who can rate' radio button is now 'Only Supervisor', which is also highlighted with an orange circle. The '+ Add Section' button and the blue circular '+' icon in the bottom right corner are still visible.

18 Click "Add Section"

The screenshot shows the 'Reviews' configuration page. On the left is a sidebar 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 has the following fields and controls:

- Title***: Full Time Annual Review
- Description**: Scribe Build
- Category Tags**: (empty field)
- Enable Goals Module Integration**: Yes (selected)
- Enable Competency Section Linked To Job Titles**: No
- Enable Section Numbers**: Yes (selected)
- Buttons**: Cancel, Save

Below these fields is a section titled **1. Goals** with an **Edit** button. The text in this section reads: "Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form." Below the text is a button labeled **+ Add Section**, which is highlighted with an orange circle. A blue plus icon is visible in the bottom right corner of the main content area.

19 Click this text field.

This screenshot shows the same 'Reviews' configuration page as above, but with a new section form open. The 'Add Section' button from the previous step is now a blue plus icon in the bottom right corner. The new section form has the following fields:

- Title**: (empty text field, highlighted with an orange circle)
- Description**: (empty text field)

The sidebar and other configuration options remain the same as in the previous screenshot.

20 Type "Core Competenciestest"

21 Click this field.

The screenshot shows a configuration page for a review template. On the left is a sidebar with navigation items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and a '1' icon), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Scribe Build' and contains several sections:

- Category Tags:** A text input field.
- Enable Goals Module Integration:** A toggle switch set to 'Yes'.
- Enable Competency Section Linked To Job Titles:** A toggle switch set to 'No'.
- Enable Section Numbers:** A toggle switch set to 'Yes'.
- Buttons:** 'Cancel' and 'Save' buttons.
- 1. Goals:** A section with an 'Edit' button. Below the title is a paragraph: "Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form."
- Title:** A text input field containing 'Core Competencies'.
- Description:** A text input field containing 'test', highlighted with an orange circle.
- Who can comment:** Radio buttons for 'Both Supervisor & Employee' (selected), 'Only Supervisor', 'Only Employee', and 'None'.
- Who can rate:** Radio buttons for 'Both Supervisor & Employee' (selected), 'Only Supervisor', 'Only Employee', and 'None'.
- Bottom Right:** A blue circular button with a white plus sign.

22 Click "Save"

The screenshot shows the 'Reviews' configuration page. On the left is a sidebar 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 '1. Goals' and contains a text box with the following text: 'Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.' Below this text are two sections: 'Title' with a text input field containing 'Core Competencies', and 'Description' with a text input field containing 'test'. Underneath are two rows of radio button options: 'Who can comment' and 'Who can rate', each with four options: 'Both Supervisor & Employee' (selected), 'Only Supervisor', 'Only Employee', and 'None'. At the bottom right of the 'Goals' section, the 'Save' button is highlighted with an orange circle. There are also 'Cancel' and 'Edit' buttons. At the bottom of the page, there is a '+ Add Section' button and a blue circular '+' button in the bottom right corner.

23 Click the "Enter title" field.

The screenshot shows the 'Reviews' configuration page. On the left is a sidebar 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 has a settings section at the top with three toggle switches: 'Enable Goals Module Integration' (Yes), 'Enable Competency Section Linked To Job Titles' (No), and 'Enable Section Numbers' (Yes). Below this is the '1. Goals' section, which is identical to the previous screenshot. Below the 'Goals' section is the '2. Core Competencies' section. It has a title '2. Core Competencies' and a subtitle 'Test'. Below the subtitle is a list of items. The first item is '1. Enter title', which is highlighted with an orange circle. To the right of this item are a checkmark icon and an 'x' icon. Below the list is a '+ Search and add' button. At the bottom of the page, there is a '+ Add Section' button and a blue circular '+' button in the bottom right corner.

24 Type "Communication"

25 Click this button.

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following menu items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and a '1' in a pink circle), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is divided into several sections. At the top, there are two toggle switches: 'Enable Goals Module Integration' (set to 'Yes') and 'Enable Competency Section Linked To Job Titles' (set to 'No'). Below these is another toggle switch for 'Enable Section Numbers' (set to 'Yes'). A 'Cancel' button and a 'Save' button are located at the bottom right of this section. The next section is titled '1. Goals' and has an 'Edit' button. Below this is a paragraph of text: 'Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.' The following section is titled '2. Core Competencies' and has an 'Edit' button and a trash icon. Below this is a list item '1. Communication' with a checkmark icon and a trash icon. A blue highlight is around the 'Communication' text, and an orange circle highlights the checkmark icon. Below the list item is a '+ Search and add' button. At the bottom of the main content area is a '+ Add Section' button. A blue circle with a white plus sign is located at the bottom right corner of the interface.

26 Click here.

The screenshot shows the 'Reviews' configuration page. The left sidebar contains a navigation menu with 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 has a top section with toggle switches for 'Enable Goals Module Integration' (Yes), 'Enable Competency Section Linked To Job Titles' (No), and 'Enable Section Numbers' (Yes). Below this are two sections: '1. Goals' and '2. Core Competencies'. The '2. Core Competencies' section has a title 'Test' and a list of items. The first item is '1. Communication'. An orange circle highlights the '+ Add Section' button at the bottom of the '2. Core Competencies' section. At the bottom right of the page is a blue circular button with a white plus sign.

27 Click the "Enter title" field.

The screenshot shows the 'Reviews' configuration page, similar to the previous one. The '2. Core Competencies' section now has two items: '1. Communication' and '2. Enter title'. An orange circle highlights the 'Enter title' field. The '2. Core Competencies' section also has an 'Edit' button and a trash icon. At the bottom right of the page is a blue circular button with a white plus sign.

28 Type "Teamwork"

29 Click this button.

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains the following menu items: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a red circle and the number '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is divided into several sections. At the top, there are two toggle switches: 'Enable Goals Module Integration' (set to 'Yes') and 'Enable Competency Section Linked To Job Titles' (set to 'No'). Below these is another toggle switch for 'Enable Section Numbers' (set to 'Yes'). A 'Cancel' button and a 'Save' button are located at the bottom right of this section. The next section is titled '1. Goals' and includes an 'Edit' button. Below this is a paragraph of text explaining the 'Enable Goals' feature. The following section is titled '2. Core Competencies' and includes an 'Edit' button and a trash icon. Underneath, there is a list of competencies: '1. Communication' and '2. Teamwork'. A blue circle highlights a checkmark icon next to 'Teamwork'. Below the list is a '+ Search and add' button. At the bottom of the main content area, there is a '+ Add Section' button and a blue circular button with a white plus sign in the bottom right corner.

30 Click here.

The screenshot shows the 'Reviews' settings page. The left sidebar has 'Reviews' highlighted with a red circle and a '1' icon. The main content area has a top section with toggle switches for 'Enable Goals Module Integration' (Yes), 'Enable Competency Section Linked To Job Titles' (No), and 'Enable Section Numbers' (Yes). Below this are two sections: '1. Goals' and '2. Core Competencies'. The '2. Core Competencies' section has a 'Test' label and an 'Add' icon circled in red. It contains a list of competencies: '1. Communication' and '2. Teamwork'. A '+ Search and add' button is at the bottom left of the list, and a '+ Add Section' button is at the bottom right of the section. A blue '+ Add' button is in the bottom right corner of the page.

31 Click here.

The screenshot shows the 'Reviews' settings page, similar to the previous one. The '2. Core Competencies' section now has three items: '1. Communication', '2. Teamwork', and '3. Enter title'. A red circle highlights the 'Add' icon in the top right of the list. A blue checkmark and 'X' icon are visible next to the third item. The '+ Search and add' button is at the bottom left of the list, and the '+ Add Section' button is at the bottom right of the section. The blue '+ Add' button is in the bottom right corner of the page.

32 Click the "Enter title" field.

The screenshot shows the 'Reviews' settings page. On the left is a navigation menu with 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 has a top section with toggle switches for 'Enable Goals Module Integration' (Yes), 'Enable Competency Section Linked To Job Titles' (No), and 'Enable Section Numbers' (Yes). Below this are two sections: '1. Goals' and '2. Core Competencies'. The '2. Core Competencies' section is titled 'Test' and contains a list of three items: '1. Communication', '2. Teamwork', and '3. Enter title'. An orange circle highlights the 'Enter title' input field. To the right of the list are icons for adding, editing, and deleting items. At the bottom of the list is a '+ Search and add' button. Below the list is a '+ Add Section' button. A blue circle with a white plus sign is in the bottom right corner.

33 Click here.

The screenshot shows the 'Reviews' settings page, similar to the previous one. The '2. Core Competencies' section is titled 'Test' and contains a list of two items: '1. Communication' and '2. Teamwork'. An orange circle highlights the 'Add' icon (a plus sign) in the list. To the right of the list are icons for adding, editing, and deleting items. At the bottom of the list is a '+ Search and add' button. Below the list is a '+ Add Section' button. A blue circle with a white plus sign is in the bottom right corner.

34 Switch to tab "Share & Perform"

35 Click the "Enter title" field.

Workspace >>

Engagement >>

Performance >>

Goals >

Reviews **1** >

360 Reviews >

Rewards >>

Organization >>

Support >>

Admin. Settings >>

Enable Goals Module Integration Yes

Enable Competency Section Linked To Job Titles No

Enable Section Numbers Yes

Cancel Save

1. Goals Edit

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies Edit

Test

1. Communication
2. Teamwork
3. Enter title

+ Search and add

+ Add Section

36 Type "Follow Through"

37 Click this button.

The screenshot shows the 'Reviews' settings page. The left sidebar includes 'Workspace', 'Engagement', 'Performance', 'Goals', 'Reviews' (highlighted with a pink circle and '1'), '360 Reviews', 'Rewards', 'Organization', 'Support', and 'Admin. Settings'. The main content area has a top section with toggle switches for 'Enable Goals Module Integration' (Yes), 'Enable Competency Section Linked To Job Titles' (No), and 'Enable Section Numbers' (Yes). Below this are two sections: '1. Goals' and '2. Core Competencies'. The 'Core Competencies' section is titled 'Test' and contains a list of three items: '1. Communication', '2. Teamwork', and '3. Follow Through'. Each item has a '+ Search and add' button to its right. An orange circle highlights a checkmark icon next to the '3. Follow Through' item. At the bottom of the 'Core Competencies' section is a '+ Add Section' button. A blue '+' button is located in the bottom right corner of the main content area.

38 Click "Add Section"

This screenshot is identical to the one above, showing the 'Reviews' settings page. However, the orange circle now highlights the '+ Add Section' button at the bottom of the 'Core Competencies' section. The checkmark icon next to '3. Follow Through' is no longer highlighted.

39 Click this text field.

Workspace »

Engagement »

Performance »

Goals »

Reviews **1** »

360 Reviews »

Rewards »

Organization »

Support »

Admin. Settings »

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies


Test Edit 🗑️

1. Communication + 📄 🗑️

2. Teamwork + 📄 🗑️

3. Follow Through + 📄 🗑️

+ Search and add

Title 

Description

Who can comment Both Supervisor & Employee Only Supervisor Only Employee None

Who can rate Both Supervisor & Employee Only Supervisor Only Employee None

Cancel Save +

40 Type "How am I going to improve?"

41 Click the "None" field.

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies

Test

1. Communication

2. Teamwork

3. Follow Through

+ Search and add

Title

How am I going to improve?

Description

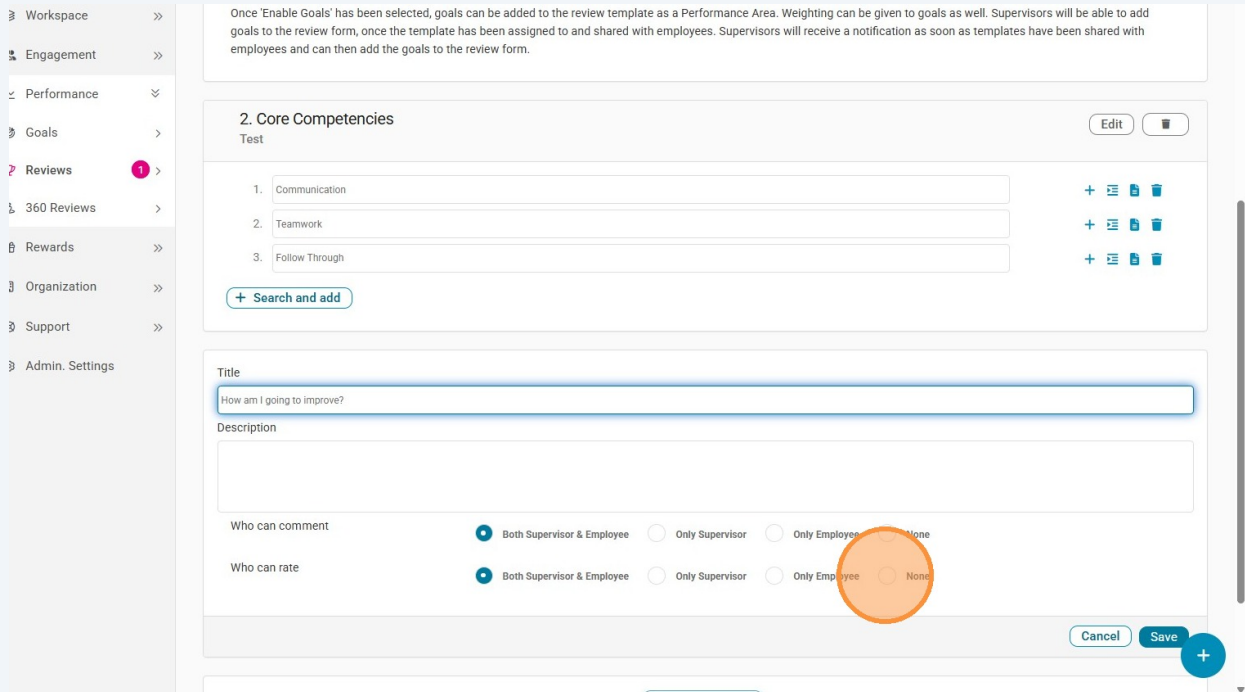
Who can comment

Both Supervisor & Employee Only Supervisor Only Employee None

Who can rate

Both Supervisor & Employee Only Supervisor Only Employee None

Cancel Save



42 Double-click this text field.

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies

Test

1. Communication

2. Teamwork

3. Follow Through

+ Search and add

Title

How am I going to improve?

Description

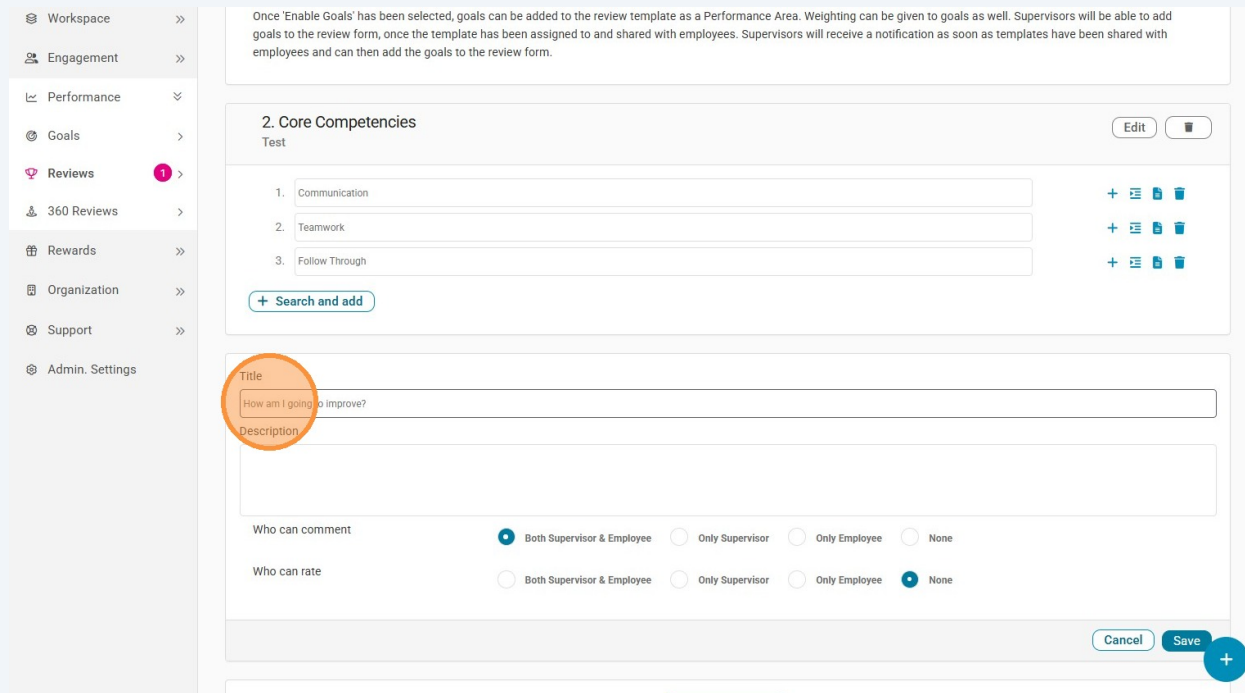
Who can comment

Both Supervisor & Employee Only Supervisor Only Employee None

Who can rate

Both Supervisor & Employee Only Supervisor Only Employee None

Cancel Save



45 Click "Template Settings Weighting Assign"

The screenshot shows the 'Design Template' interface. At the top, a status bar indicates 'You are logged in as a partner user. Exit'. The left sidebar contains navigation options: Home, Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and a '1'), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Design Template' and includes a 'Template Settings' section with 'Weighting' and 'Assign' buttons circled in orange. Below this is the 'Full Time Annual Review' section, created by 'Dannie S Admin7' on 'Mar 05, 2026', with an 'Edit' button. The 'Scribe Build' section follows. The '1. Goals' section has an 'Edit' button and a descriptive paragraph. The '2. Core Competencies' section, labeled as a 'Test', has 'Edit' and 'Trash' buttons. It lists three items: '1. Communication', '2. Teamwork', and '3. Follow Through', each with a '+', a list icon, a document icon, and a trash icon. A '+ Search and add' button is at the bottom.

46 Click here.

This screenshot is identical to the one above, showing the 'Design Template' interface. The 'Weighting' and 'Assign' buttons in the 'Template Settings' section are circled in orange. Additionally, the menu icon (three vertical dots) to the right of the 'Assign' button is also circled in orange.

47 Click "Preview"

You are logged in as a partner user. Exit

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

Design Template

Template Settings Weighting Assign

Full Time Annual Review
Created By Dannie S Admin7 On Mar 05, 2026 Edit

Scribe Build

1. Goals Edit

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies Edit

Test

1. Communication + [Icons]
2. Teamwork + [Icons]
3. Follow Through + [Icons]

+ Search and add

48 Click "Close"

Employee Information

Name Designation Due by (due date) Review Status

Employee Rating (4.5/5)
Supervisor Rating (4.5/5)

1. Goals

2. Core Competencies


Test

| | EMPLOYEE | SUPERVISOR |
|------------------|-------------------------------------|-------------------------------------|
| 1. Communication | Select Rating Write your comment | Select Rating Write your comment |

Close

49 Click "Close"

Employee information

 **Name**
Designation
Due by (due date)
[Review Status](#)

Employee Rating (4.5/5)
Supervisor Rating (4.5/5)

1. Goals

2. Core Competencies

Test

| | EMPLOYEE | SUPERVISOR |
|------------------|---|---|
| 1. Communication | Select Rating <input type="text"/> Write your comment | Select Rating <input type="text"/> Write your comment |

[Close](#)

50 Click this button.

Workspace »
Engagement »
Performance <
Goals >
Reviews 1 >
360 Reviews >
Rewards »
Organization »
Support »
Admin. Settings

Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form.

2. Core Competencies

Test

1. Communication [+](#) [≡](#) [🗑️](#)

2. Teamwork [+](#) [≡](#) [🗑️](#)

3. Follow Through [+](#) [≡](#) [🗑️](#)

[+ Search and add](#)

3. How Will The Employee Improve?

1. Enter title [✓](#) [✕](#)

[+ Search and add](#)

[+ Add Section](#)

51 Click the "Enter title" field.

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2. Core Competencies Edit 🗑️
Test

1. + 📄 🗑️

2. + 📄 🗑️

3. + 📄 🗑️

+ Search and add

3. How Will The Employee Improve? Edit 🗑️

1. ✓ ✕

+ Search and add

+ Add Section

+

52 Type "test"

53

Click this button.

The screenshot displays a software interface for managing reviews. On the left is a sidebar with a menu containing: Workspace, Engagement, Performance, Goals, Reviews (highlighted with a pink circle and a '1' notification), 360 Reviews, Rewards, Organization, Support, and Admin. Settings. The main content area is titled 'Full Time Annual Review' and includes the following sections:

- Full Time Annual Review**: Created By Dannie S Admin7 On Mar 05, 2026. Includes an 'Edit' button and a 'Scribe Build' button.
- 1. Goals**: Includes an 'Edit' button and a text block: "Once 'Enable Goals' has been selected, goals can be added to the review template as a Performance Area. Weighting can be given to goals as well. Supervisors will be able to add goals to the review form, once the template has been assigned to and shared with employees. Supervisors will receive a notification as soon as templates have been shared with employees and can then add the goals to the review form."
- 2. Core Competencies**: Labeled as a 'Test', it includes an 'Edit' button and a trash icon. It features a list of three items: '1. Communication', '2. Teamwork', and '3. Follow Through'. Each item has a '+ Search and add' button, a list icon, a trash icon, and a blue checkmark icon. An orange circle highlights the blue checkmark icon for the 'Communication' item.
- 3. How Will The Employee Improve?**: Includes an 'Edit' button and a trash icon. It features a list with one item: '1. test'. It has a '+ Search and add' button, a blue checkmark icon, an 'X' icon, a refresh icon, and a blue '+' icon.