

Schedule a Performance Review in isolved



This guide walks through scheduling a review in isolved

1

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

Ryan Cyn...

Search the menu

Customer Service

Employee Admin Tools

Employee Management

Employee Summary

Quick Hire

Quick Hire - Time Only

Employee Maintenance >

Employee Pay >

Employee Benefits >

Human Resources

>

Applicant Tracking

TimeWorksPlus

Client Management

Payroll

Reports

Production Utilities

Security

Client Summary | Client Total Active EE's: 62 (As of last payroll process)

Cynkar Technologies

FEIN

Address2604 Washington Rd
Augusta, GA 30904

Contacts

Name

Processing Information

Pay GroupBi-Weekly

FrequencyBi-Weekly

Activ62

Affiliate

-

Account Representatives

Account Rep Type

Payroll Processor

Other Services

Name

1099 Electronic Filing

1099 Print/ESS Display

ACA Electronic File

ACA Forms Print

Adaptive

Base Payroll Package

Base Reports - Conv Runs

Benefits Package

Conversion Tax Filing

Delivery

Direct Debit Billing

Employee Direct Deposit

Reports

Report Name

Client Profile Report

View

PDF

Excel

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2 Click "Human Resources"

Search the menu

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Quick Hire

Quick Hire - Time Only

Employee Maintenance >

Employee Pay >

Employee Benefits >

Human Resources >

Applicant Tracking

TimeWorksPlus

Client Management

Payroll


Reports

Production Utilities

Security

Conversion Management

System Management



Cynkar Technologies

FEIN

Address 2604 Washington Rd
Augusta, GA 30904

Contacts

	Name		Pr
Processing Information	Pay Group	Frequency	Activ
	Bi-Weekly	Bi-Weekly	62
Affiliate	-		
Account Representatives	Account Rep Type Payroll Processor		
Other Services	Name 1099 Electronic Filing 1099 Print/ESS Display ACA Electronic File ACA Forms Print Adaptive Base Payroll Package Base Reports - Conv Runs Benefits Package Conversion Tax Filing Delivery Direct Debit Billing Employee Direct Deposit		
Reports	Report Name	View	
	Client Profile Report	PDF Excel	
	Client Contact List	PDF Excel	
	Leave Accrual List	PDF Excel	
	Deduction List	PDF Excel	

3 Click "Performance"

Search the menu

Customer Service

Employee Admin Tools

Employee Management

Employee Assignments

Employee Contacts

Employee Documents

Employee Notes

Prior Employment

Performance

Awards

Add Review

Schedule Review

Client Management

Payroll


Reports

Production Utilities

Security

Conversion Management

System Management



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Address 2604 Washington Rd
Augusta, GA 30904

Contacts

	Name		Pr
Processing Information	Pay Group	Frequency	Activ
	Bi-Weekly	Bi-Weekly	62
Affiliate	-		
Account Representatives	Account Rep Type Payroll Processor		
Other Services	Name 1099 Electronic Filing 1099 Print/ESS Display ACA Electronic File ACA Forms Print Adaptive Base Payroll Package Base Reports - Conv Runs Benefits Package Conversion Tax Filing Delivery Direct Debit Billing Employee Direct Deposit		
Reports	Report Name	View	
	Client Profile Report	PDF Excel	
	Client Contact List	PDF Excel	
	Leave Accrual List	PDF Excel	

4 Click "Schedule Review"

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management**
 - Employee Notes
 - Prior Employment
 - Performance
 - Awards
 - Add Review
 - Schedule Review**
 - Review History
 - Regulatory
 - Training and Development
- Client Management
- Payroll
- Reports
- Production Utilities
- Security
- Conversion Management
- System Management

Cynkar Technologies

FEIN

Address 2604 Washington Rd
Augusta, GA 30904

Contacts

Name	Pay Group	Frequency	Activ
Processing Information	Bi-Weekly	Bi-Weekly	62

Affiliate

-

Account Representatives

Account Rep Type
Payroll Processor

Other Services

Name
1099 Electronic Filing
1099 Print/ESS Display
ACA Electronic File
ACA Forms Print
Adaptive
Base Payroll Package
Base Reports - Conv Runs
Benefits Package
Conversion Tax Filing
Delivery
Direct Debit Billing
Employee Direct Deposit

Reports

Report Name	View
Client Profile Report	PDF Excel
Client Contact List	PDF Excel
Leave Accrual List	PDF Excel

5 Click "Add New"

isolved Delivered by thread

Christopher (Chris) Bailey P H W D S H T L Employee #: 0006 Client: CYN22 - CynTech Company: Cynkar Technologies (Active)

Schedule Review

Review Date	Period Start Date	Period End Date	Is Complete	Review Type	Review
+ Add New Edit Delete Refresh Save Cancel Print					

Review

Use this screen to schedule a review that will be available on the ESS pending reviews screen for completion

* Review Date:

Next Review Date:

Period Start Date:

Period End Date:

* Review Type:

6 Type in the details for the review dates and choose the Type and Specific Review

The screenshot shows the 'Schedule Review' form in the Employee Management system. The left sidebar contains a navigation menu with options like Customer Service, Employee Admin Tools, Employee Management, Employee Notes, Prior Employment, Performance, Awards, Add Review, Schedule Review (highlighted), Review History, Regulatory, Training and Development, Client Management, Payroll, Reports, Production Utilities, Security, Conversion Management, System Management, and Employee Self-Service. The main content area has a toolbar with + Add New, Edit, Delete, Refresh, Save, Cancel, and Print. Below the toolbar, the 'Review' section contains a text box with instructions: 'Use this screen to schedule a review that will be available on the ESS pending reviews screen for completion'. The form fields are: * Review Date: 10/1/2025, Next Review Date: (empty), Period Start Date: 7/1/2025, Period End Date: 9/30/2025, * Review Type: Annual Review, and * Review: (empty). A red circle highlights the 'Annual Review' dropdown.

Customer Service
Employee Admin Tools
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Employee Notes
Prior Employment
Performance
Awards
Add Review
Schedule Review
Review History
Regulatory
Training and Development
Client Management
Payroll
Reports
Production Utilities
Security
Conversion Management
System Management
Employee Self-Service

+ Add New Edit Delete Refresh Save Cancel Print

Review

Use this screen to schedule a review that will be available on the ESS pending reviews screen for completion

* Review Date: 10/1/2025
Next Review Date:
Period Start Date: 7/1/2025
Period End Date: 9/30/2025
* Review Type: Annual Review
* Review:

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7 Choose the Assigned and Additional Reviewers

This will come from their Assigned and Organization Managers or Supervisors.

The screenshot shows the 'Schedule Review' form in the Employee Management system, specifically the 'Assigned Reviewers' and 'Additional Reviewers' sections. The left sidebar is the same as in the previous screenshot. The main content area has a toolbar with + Add New, Edit, Delete, Refresh, Save, Cancel, and Print. The 'Assigned Reviewers' section contains a text box with instructions: '! This employee does NOT have an assigned manager. A review will be created and once a manager is assigned, that manager will be able to complete the review.' Below this, there is a checkbox labeled '2382 - Amber Demo Test (assigned supervisor)' which is checked. The 'Additional Reviewers' section contains a text box with instructions: 'This review can be assigned to one or more additional managers or supervisors by making selections in the list below. Each manager or supervisor will have their own review to complete. NOTE: If multiple managers / supervisors will be completing 1 review, select 1 manager or supervisor. The review will start with the selected manager/supervisor and can be reassigned, as needed, to other managers/supervisors until it is completed.' Below this, there is a section labeled 'Managers:' with a checkbox labeled '1 - Ryan Reynolds' which is checked. A red circle highlights the '1 - Ryan Reynolds' checkbox.

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Conversion Management
System Management
Employee Self-Service

+ Add New Edit Delete Refresh Save Cancel Print

Period End Date: 9/30/2025
* Review Type: Annual Review
* Review: Review

Assigned Reviewers

! This employee does NOT have an assigned manager. A review will be created and once a manager is assigned, that manager will be able to complete the review.

☒ 2382 - Amber Demo Test (assigned supervisor)

Additional Reviewers

This review can be assigned to one or more additional managers or supervisors by making selections in the list below. Each manager or supervisor will have their own review to complete. NOTE: If multiple managers / supervisors will be completing 1 review, select 1 manager or supervisor. The review will start with the selected manager/supervisor and can be reassigned, as needed, to other managers/supervisors until it is completed.

Managers:
☒ 1 - Ryan Reynolds

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8 Click "Save"

Based on the setup of the review, and who was chosen to complete it, emails will go to the employees, managers or supervisors

The screenshot displays the 'Schedule Review' page for Christopher (Chris) Bailey, Employee #: 0006. The page is part of a system for Cynkar Technologies (Active), with Client: CYN22 - CynTech. The sidebar on the left shows the 'Employee Management' menu expanded, with 'Schedule Review' highlighted. The main content area features a table with columns: Review Date, Period Start Date, Period End Date, Is Complete, Review Type, and Review. Below the table is a toolbar with buttons: Add New, Edit, Delete, Refresh, Save (highlighted with a red circle), Cancel, and Print. The 'Assigned Reviewers' section indicates that the employee does not have an assigned manager and lists '2382 - Amber Demo Test (assigned supervisor)'. The 'Additional Reviewers' section is partially visible at the bottom.