

isolved Perform - Performance Reviews (For Employees)

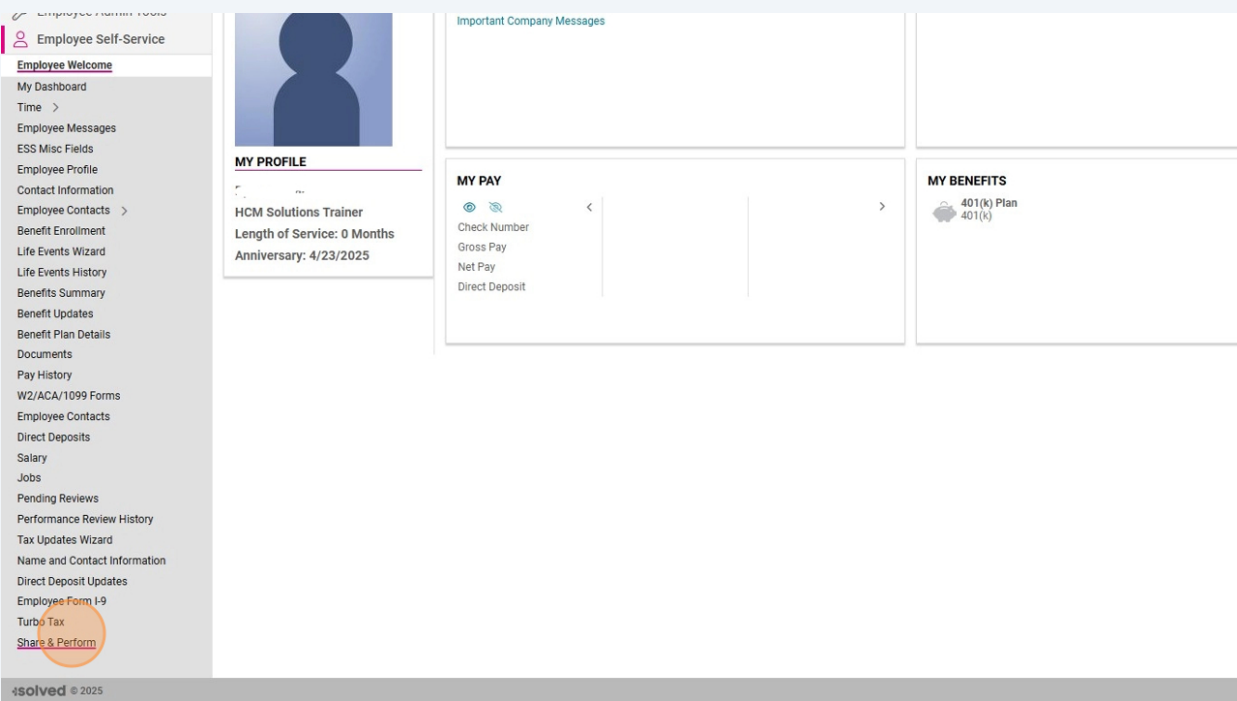


This guide will walk you through performance reviews using the isolated Perform platform. It also touches on adding goals if your performance reviews require them.

1

To Start, you will log into your isolated account at <https://connect.threadhcm.com/>

In the left hand menu, navigate to and click "Share & Perform"
This will bring you into Share and Perform, where you can complete reviews, set goals



2

To add your Goals, Click "Performance"
(Your company may not be using this piece)

The screenshot shows the user interface of a company portal. On the left sidebar, the 'Performance' menu item is highlighted with a red circle. The main content area displays a feed of 'Work Anniversary' posts for Don T Cheadle and Carla M Employee6. The right sidebar contains a 'TASKS' section with two items: 'Find location for fun run' and 'Order matching t-shirts', both due by 08/30/20. Below the tasks is a 'LIBRARY' section with links to 'Employee Handbook', 'Policies and Procedures', and 'Important Company Information'.

3

Click "Goals"

The screenshot shows the user interface of a company portal. On the left sidebar, the 'Goals' menu item is highlighted with a red circle. The main content area displays a feed of 'Work Anniversary' posts for Don T Cheadle and Carla M Employee6. The right sidebar contains a 'TASKS' section with two items: 'Find location for fun run' and 'Order matching t-shirts', both due by 08/30/20. Below the tasks is a 'LIBRARY' section with links to 'Employee Handbook', 'Policies and Procedures', and 'Important Company Information'.

4 Click "+ Create Goal"

The screenshot shows the 'Goals' dashboard for a user named 'Abigal A Employee3'. The top navigation bar includes a search bar, the user's name, and statistics: 'Reward Points: 6900', 'Points: 2000', and 'Ranked: 1'. A red circle highlights the '+ CREATE GOAL' button in the top right corner. The dashboard displays a list of goals under the 'My Goals' tab. The goals are:

- TEST 123456**: Ends on Jan 19, 2024. Progress: 25%. Buttons: CHECK-IN, ALIGN.
- Super Goal 2- Testing 12345678910**: Ends on Jan 19, 2024. Progress: 0%. Buttons: CHECK-IN, ALIGNED.
- Supervisor Goal- ADH1309 2**: Ends on Jun 16, 2022. Progress: 0%. Buttons: CHECK-IN, ALIGNED.

5 Fill in the Goal Description field.

The screenshot shows the 'GOAL' creation form. The form includes the following fields and sections:

- GOAL DESCRIPTION***: A large text area with a placeholder 'Write about your goal'. A red circle highlights this field.
- ADD NOTES**: A text area with a placeholder 'Add notes about your goal'.
- ATTACH FILES**: A section for attaching files.
- SETTINGS**: A section for configuring goal settings.
- START DATE**: A date picker set to 'May 01, 2025'.
- END DATE***: A date picker.
- NOTIFY**: A dropdown menu set to 'Never'.
- CHECK-IN TYPE**: A dropdown menu set to 'Percentage Check-In'.
- ASSIGN / CASCADE**: A section for assigning or cascading the goal.

6

Add Notes about your goal.
(Optional: You can also attach a related file if there is one)

The screenshot shows the 'GOAL' form in a performance management system. The left sidebar contains navigation options: Home, Workspace, Engagement, Performance, Goals (highlighted), Reviews, 360 Reviews, Rewards, Organization, Leaderboard, Bulletins, Values, Org. Chart, Suggestions, Support, and Learn and Grow. The top header shows the user 'Abigail A Employee3' with 'Reward Points: 6900', 'Points: 2000', and 'Ranked: 1'. The form sections are:

- GOAL DESCRIPTION***: A text area with the placeholder 'New Goal - Enter your goal description here'.
- ADD NOTES**: A text area with the placeholder 'Add notes about your goal'. An orange circle highlights this section.
- ATTACH FILES**: A section with a plus icon for attaching files.
- SETTINGS**: A section containing:
 - START DATE**: A date picker set to 'May 01, 2025'.
 - END DATE***: A date picker.
 - NOTIFY**: A dropdown menu set to 'Never'.
 - CHECK-IN TYPE**: A dropdown menu set to 'Percentage Check-In'.
- ASSIGN / CASCADE**: A section with a plus icon.

7

Pick your Start and End dates for this goal.
(Optional: you can pick a notification schedule from the 'Notify' drop down)

The screenshot shows the 'GOAL' form in a performance management system, similar to the previous one. The left sidebar and top header are the same. The form sections are:

- GOAL DESCRIPTION***: A text area with the placeholder 'New Goal - Enter your goal description here'.
- ADD NOTES**: A text area with the placeholder 'Add notes for your goal'.
- ATTACH FILES**: A section with a plus icon for attaching files.
- SETTINGS**: A section containing:
 - START DATE**: A date picker set to 'May 01, 2025'. An orange circle highlights this field.
 - END DATE***: A date picker. An orange circle highlights this field.
 - NOTIFY**: A dropdown menu set to 'Never'.
 - CHECK-IN TYPE**: A dropdown menu set to 'Percentage Check-In'.
- ASSIGN / CASCADE**: A section with a plus icon and a dropdown menu labeled 'Select an option*'.

At the bottom of the form, there are two buttons: 'CANCEL' and 'SAVE'.

8

Choose the Check-In Type.

Percentage Check-In is the default type for every goal you create, allowing you to check in the goal progress in percentages from 1-100%.

Quantity Check-In allows you to set a target quantity to fulfill as a goal, and you add the target quantity fulfilled by you at each check-in

Performance

Goals

Reviews 2

360 Reviews

Rewards

Organization

Leaderboard

Bulletins

Values

Org. Chart

Suggestions

Support

Learn and Grow

GOAL DESCRIPTION*

New Goal - Enter your goal description here

ADD NOTES

Add notes for your goal

ATTACH FILES

SETTINGS

START DATE

May 01, 2025

END DATE*

May 31, 2025

NOTIFY

Monthly - 1st of every month

CHECK-IN TYPE

Percentage Check-In

ASSIGN / CASCADE

Select an option*

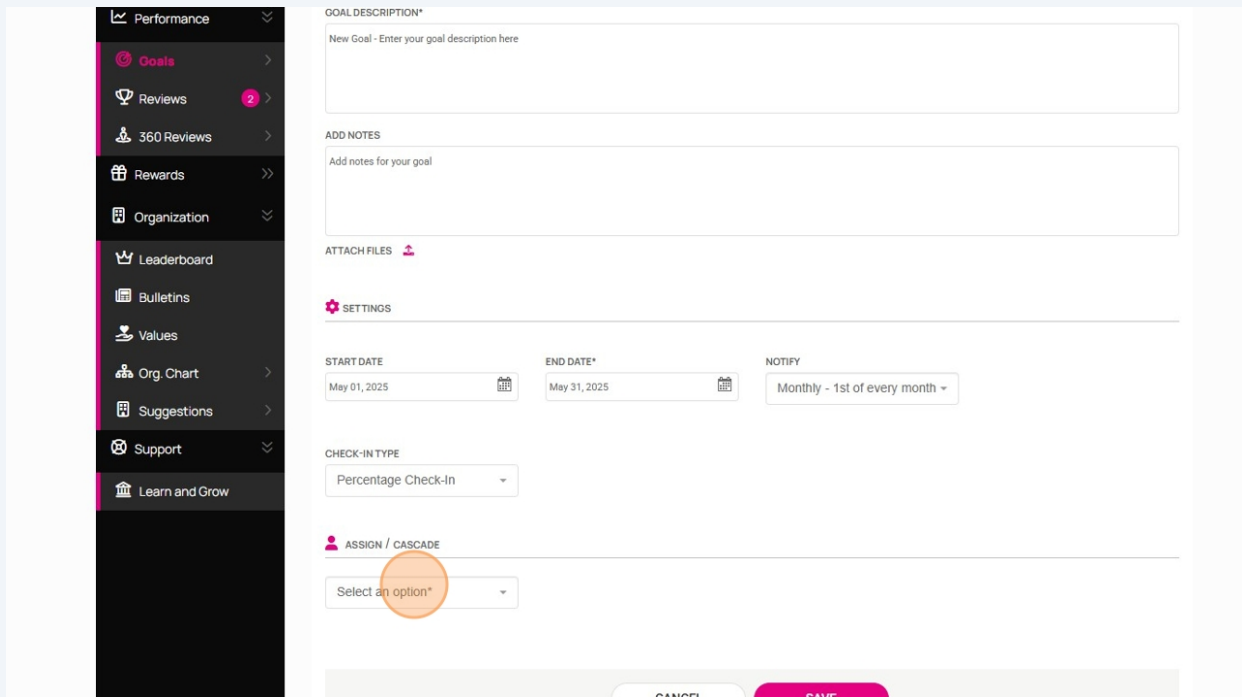
CANCEL

SAVE

9

Assign/Cascade

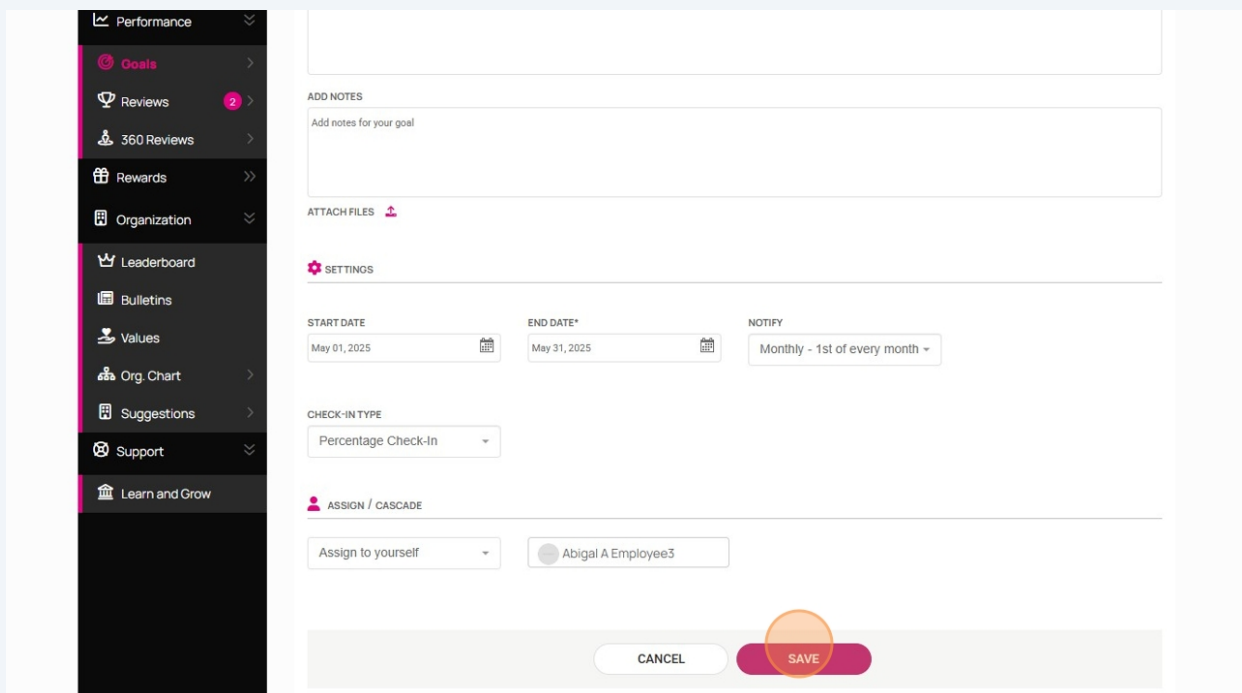
You can assign a goal to yourself, someone else, or cascade it. If assigning a goal to someone else, you may only assign it to your direct report, such as a manager or an employee. If choosing Cascade from the dropdown, you can assign a goal to multiple people in your organization.



The screenshot shows the 'Performance' app interface. On the left is a dark sidebar with a menu including 'Performance', 'Goals', 'Reviews', '360 Reviews', 'Rewards', 'Organization', 'Leaderboard', 'Bulletins', 'Values', 'Org. Chart', 'Suggestions', 'Support', and 'Learn and Grow'. The 'Goals' item is highlighted with a pink circle and a '2' badge. The main content area is titled 'GOAL DESCRIPTION*' and contains a text input field with the placeholder 'New Goal - Enter your goal description here'. Below this is an 'ADD NOTES' section with a text input field and the placeholder 'Add notes for your goal'. Further down is an 'ATTACH FILES' section with a file upload icon. The 'SETTINGS' section includes 'START DATE' (May 01, 2025), 'END DATE*' (May 31, 2025), and 'NOTIFY' (Monthly - 1st of every month). Below these is a 'CHECK-IN TYPE' dropdown set to 'Percentage Check-In'. At the bottom, the 'ASSIGN / CASCADE' section features a dropdown menu with the text 'Select an option*', which is highlighted by an orange circle. At the very bottom of the screen are 'CANCEL' and 'SAVE' buttons.

10

Once you've completed everything on this screen click "Save"



This screenshot is identical to the one above, showing the 'Performance' app interface. The 'ASSIGN / CASCADE' dropdown menu is now open, showing two options: 'Assign to yourself' and 'Abigail A Employee3'. The 'Assign to yourself' option is selected and highlighted by an orange circle. The 'SAVE' button at the bottom right is also highlighted by an orange circle. The rest of the interface, including the sidebar and the 'GOAL DESCRIPTION' and 'SETTINGS' sections, remains the same.

11

You do also have the ability to Align these goals. If you go into your Goals after you've created one. Click on "Goals"

You are currently impersonating Abigal A Employee3 [Exit](#)

Home Workspace Engagement Performance **Goals** Reviews 360 Reviews Rewards Organization Support

Search

Abigal A Employee3 Reward Points: 7400 Points: 2000 Ranked: 1 132

Dashboard **Goals** Org. Goals + CREATE GOAL EXPORT

My Goals Search

OWNER ABIGAL A EMPLOYEE3
New Goal - Enter your goal description here
Ends on May 31, 2025
0% CHECK-IN ALIGN

OWNER ABIGAL A EMPLOYEE3
TEST 123456
Ends on Jan 19, 2024
25% CHECK-IN ALIGN

OWNER ABIGAL A EMPLOYEE3
ttt
Ends on Jan 19, 2024
0% CHECK-IN ALIGNED

OWNER ABIGAL A EMPLOYEE3
Super Goal 2- Testing 12345678910
Ends on Jan 19, 2024
0% CHECK-IN ALIGNED

OWNER ABIGAL A EMPLOYEE3
Supervisor Goal- ADH1309 2
Ends on Jun 16, 2022
0% CHECK-IN ALIGNED

12

Click "Align" for the goal you would like to align.

Workspace Engagement Performance **Goals** Reviews 360 Reviews Rewards Organization Support

Dashboard **Goals** Org. Goals + CREATE GOAL EXPORT

My Goals Search

OWNER ABIGAL A EMPLOYEE3
New Goal - Enter your goal description here
Ends on May 31, 2025
0% CHECK-IN ALIGN

OWNER ABIGAL A EMPLOYEE3
TEST 123456
Ends on Jan 19, 2024
25% CHECK-IN **ALIGN**

OWNER ABIGAL A EMPLOYEE3
ttt
Ends on Jan 19, 2024
0% CHECK-IN ALIGNED

OWNER ABIGAL A EMPLOYEE3
Super Goal 2- Testing 12345678910
Ends on Jan 19, 2024
0% CHECK-IN ALIGNED

OWNER ABIGAL A EMPLOYEE3
Supervisor Goal- ADH1309 2
Ends on Jun 16, 2022
0% CHECK-IN ALIGNED

13 Then choose the goal you would like to align your personal goal to.

The screenshot shows a modal window titled 'ORG. GOALS' with a sidebar containing 'DEPT. GOALS' and 'Implementation'. The main area displays a table of goals with columns: OWNER, GOAL DETAILS, START DATE, END DATE, and PROGRESS. An orange circle highlights the first row.

OWNER	GOAL DETAILS	START DATE	END DATE	PROGRESS
Thread HCM Mojo Demo	Increase profit 18% year over year	Feb 15, 2024	Feb 15, 2025	35%
Thread HCM Mojo Demo	Employee Retention at 93%	Feb 15, 2024	Feb 15, 2025	0%
Thread HCM Mojo Demo	Goal 2 Day 3 TESTING	Jan 17, 2024	Jan 21, 2024	50%
Thread HCM Mojo Demo	Goal 1 Day 3 TESTING	Jan 17, 2024	Jan 20, 2024	23.33%
Thread HCM Mojo Demo	TEST 123456	Jan 17, 2024	Jan 19, 2024	0%
Thread HCM Mojo Demo	Org goal 1- ADH1309	Dec 25, 2023	Dec 31, 2023	89.17%
Thread HCM Mojo Demo	Org goal 2- ADH1309	Jan 01, 2020	Dec 31, 2020	75%

Buttons: CANCEL, ALIGN

14 And Click "ALIGN"

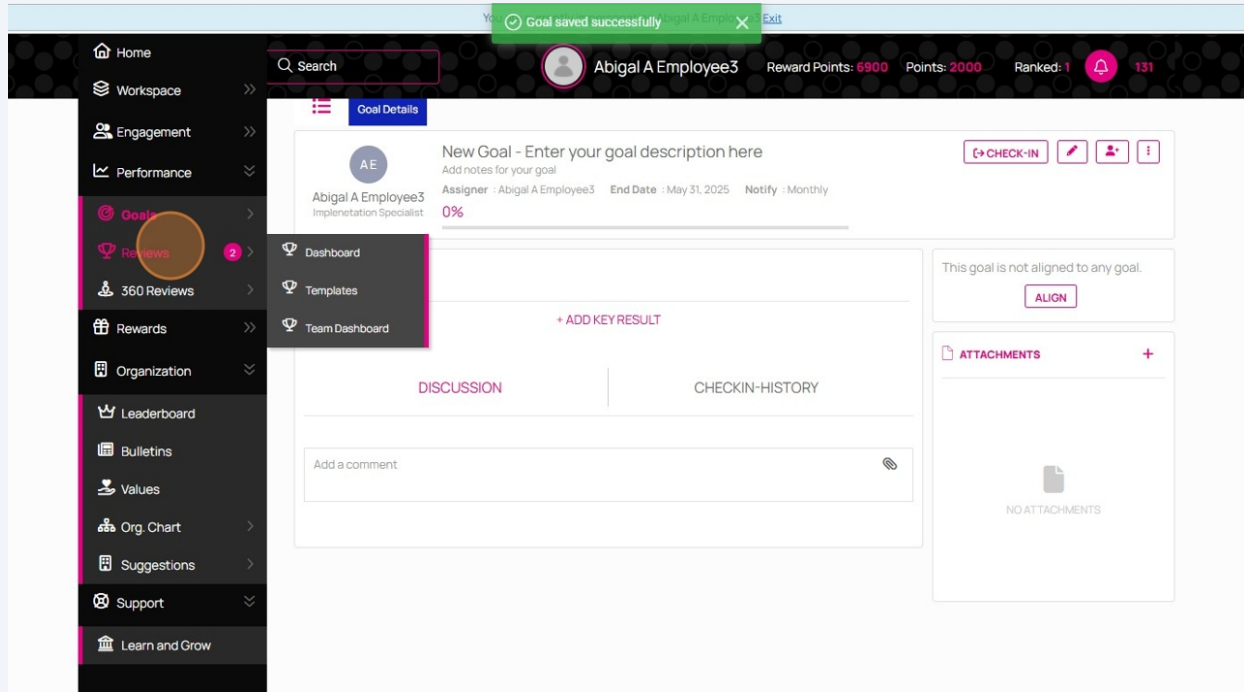
This screenshot is similar to the previous one, showing the same list of goals. An orange circle now highlights the 'ALIGN' button at the bottom right of the modal.

OWNER	GOAL DETAILS	START DATE	END DATE	PROGRESS
Thread HCM Mojo Demo	Employee Retention at 93%	Feb 15, 2024	Feb 15, 2025	0%
Thread HCM Mojo Demo	Goal 2 Day 3 TESTING	Jan 17, 2024	Jan 21, 2024	50%
Thread HCM Mojo Demo	Goal 1 Day 3 TESTING	Jan 17, 2024	Jan 20, 2024	23.33%
Thread HCM Mojo Demo	TEST 123456	Jan 17, 2024	Jan 19, 2024	0%
Thread HCM Mojo Demo	Org goal 1- ADH1309	Dec 25, 2023	Dec 31, 2023	89.17%
Thread HCM Mojo Demo	Org goal 2- ADH1309	Jan 01, 2020	Dec 31, 2020	75%

Buttons: CANCEL, ALIGN

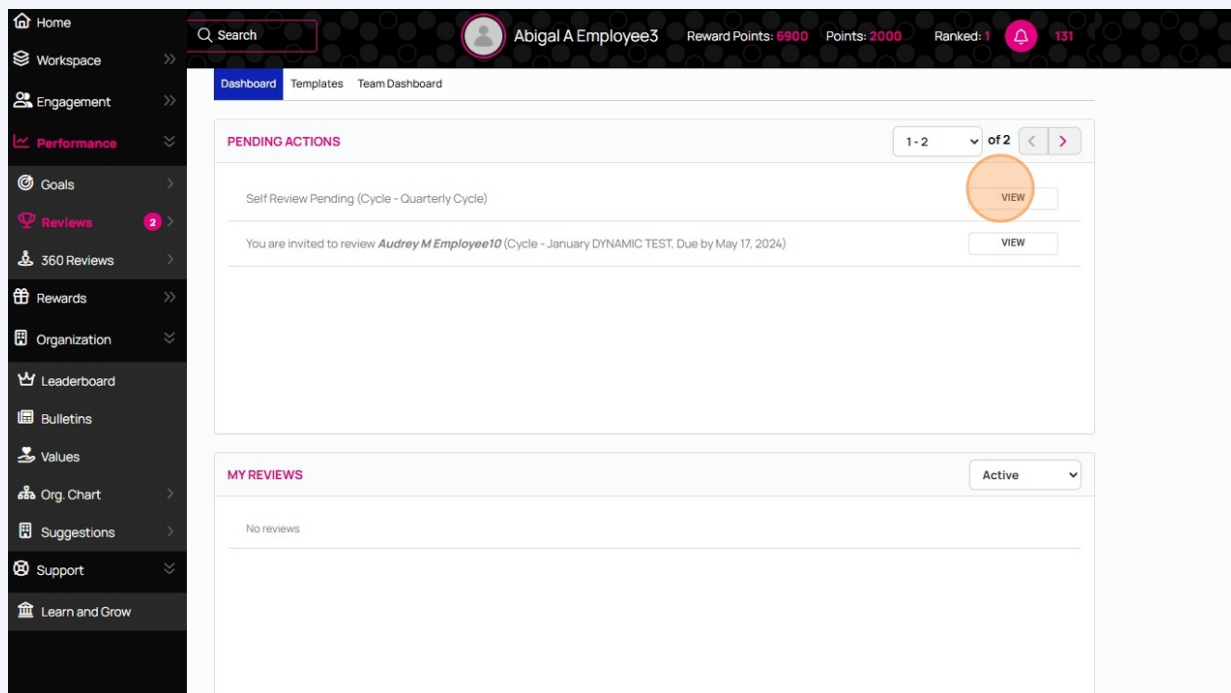
15

Next we'll navigate to the Reviews Section to complete the review. If you see a number next to Reviews, then there is something assigned to you, to complete. Click "Reviews"



16

On the Review Dashboard, you will see all reviews that are currently assigned to you.



17

Here you will go through and complete your review as an Employee, or as a Supervisor. You can click the drop down for ratings and add comments. If at any point you need to Save your work, you can click "Save" in the top right.

Abigail A Employee3

1 Not Adequate 2 Below Expectation 3 Meets Expectation 4 Exceeds Expectation 5 Distinguished Performance

1. CORE COMPETENCIES

N/A (Employee Rating)
N/A (Supervisor Rating)

EMPLOYEE SUPERVISOR

1. Customer Focus

Select

Write your comment

> 2. Discipline

N/A

Understanding there is a time to work and a time to play. Ensuring work is completed prior to playing. Making good use of down time to proactively reach out to clients on task that are due later in the day or week.

> 2. Manages Complexity

N/A

Making sense of complex, high quantity, and sometimes contradictory information to

18

Click "ADD FROM GOALS MODULE"

3. AREAS FOR DEVELOPMENT

N/A (Employee Rating)
N/A (Supervisor Rating)

EMPLOYEE SUPERVISOR

1. What were shortfall areas for you in 2023 and therefore targeted areas for your personal development in 2024

Could have gotten things done faster

4. GOALS

N/A (Employee Rating)
N/A (Supervisor Rating)

No goals to show ADD FROM GOALS MODULE

EMPLOYEE REMARKS

Please provide your overall ratings

Write your comment


Job Description Goals Feedback Notes Documents Past Reviews 360° Feedback

- 19 Here you can add the goal you'd like by clicking the checkbox next to it.

You are currently impersonating Abigal A Employee3 [Exit](#)

Goals Selection

Goals for Abigal A Employee3

ALL ▾ FILTER BY END DATE  ADD»

☐

New Goal - Enter your goal description here
End Date: May 31, 2025 0%

☐

ttt
End Date: Jan 19, 2024 0%

☐

Super Goal 2- Testing 12345678910
End Date: Jan 19, 2024 0%

☐


TEST123456
End Date: Jan 19, 2024 25%

☐

Supervisor Goal- ADHI309 2
End Date: Jun 16, 2022 0%

Selected Goals

«REMOVE



No Goals Selected

- 20 Click "ADD" and it will move over to the Selected Goals section.

You are currently impersonating Abigal A Employee3 [Exit](#)

Goals Selection

Goals for Abigal A Employee3

ALL ▾ FILTER BY END DATE  ADD»

☐

New Goal - Enter your goal description here
End Date: May 31, 2025 0%

☐

ttt
End Date: Jan 19, 2024 0%

☐

Super Goal 2- Testing 12345678910
End Date: Jan 19, 2024 0%

☐

TEST123456
End Date: Jan 19, 2024 25%

☐

Supervisor Goal- ADHI309 2
End Date: Jun 16, 2022 0%

Selected Goals

«REMOVE

☐

New Goal - Enter your goal description here
End Date: May 31, 2025 0%

21 Click "SAVE" and this goal will be added to the review

FILTER BY END DATE

ADD»

New Goal - Enter your goal description here

End Date: May 31, 20250%

ttt

End Date: Jan 19, 20240%

Super Goal 2- Testing 12345678910

End Date: Jan 19, 20240%

TEST 123456

End Date: Jan 19, 202425%

Supervisor Goal- ADH1309 2

End Date: Jun 16, 20220%

«REMOVE

CANCEL

SAVE

+

22

Fill out or add the remaining sections at the bottom of the review. These options can include:

- Development Plans
- Review Notes
- Training Recommendations

You are currently impersonating Abigail A Employee3 [Exit](#)

Home Workspace Engagement Performance Goals **Reviews** 2 360 Reviews Rewards Organization Leaderboard Bulletins Values Org. Chart Suggestions Support Learn and Grow

Search Abigail A Employee3 Reward Points: 6900 Points: 2000 Ranked: 1 131

Abigail A Employee3 **SAVE** **SUBMIT**

EMPLOYEE REMARKS

Please provide your overall ratings

Write your comment

DEVELOPMENT PLANS **+ADD**

No development plans have been added

REVIEW NOTES **+ADD**

Use this section to write notes about this review, such as post review, individual development plans, one to one meeting notes, follow up items etc. Employee notes are always visible to the employee's supervisor

No notes have been added.

TRAINING RECOMMENDATIONS **+ADD**

23

Once you have filled out the entire form, you can click "Submit" up top. If you missed any sections it will alert you that you need to go back and complete them.

You are currently impersonating Abigail A Employee3 [Exit](#)

Home Workspace Engagement Performance Goals **Reviews** 2 360 Reviews Rewards Organization Leaderboard Bulletins Values Org. Chart Suggestions Support Learn and Grow

Search Abigail A Employee3 Reward Points: 6900 Points: 2000 Ranked: 1 131

Abigail A Employee3 **SAVE** **SUBMIT**

Write your comment

EMPLOYEE REMARKS

Please provide your overall ratings

Write your comment

DEVELOPMENT PLANS

REVIEW NOTES **+ADD**

Use this section to write notes about this review, such as post review, individual development plans, one to one meeting notes, follow up items etc. Employee notes are always visible to the employee's supervisor

No notes have been added.

24

This concludes the training for completing your performance review. If you have other reviews to complete, you can go back to the Dashboard and View the next review.