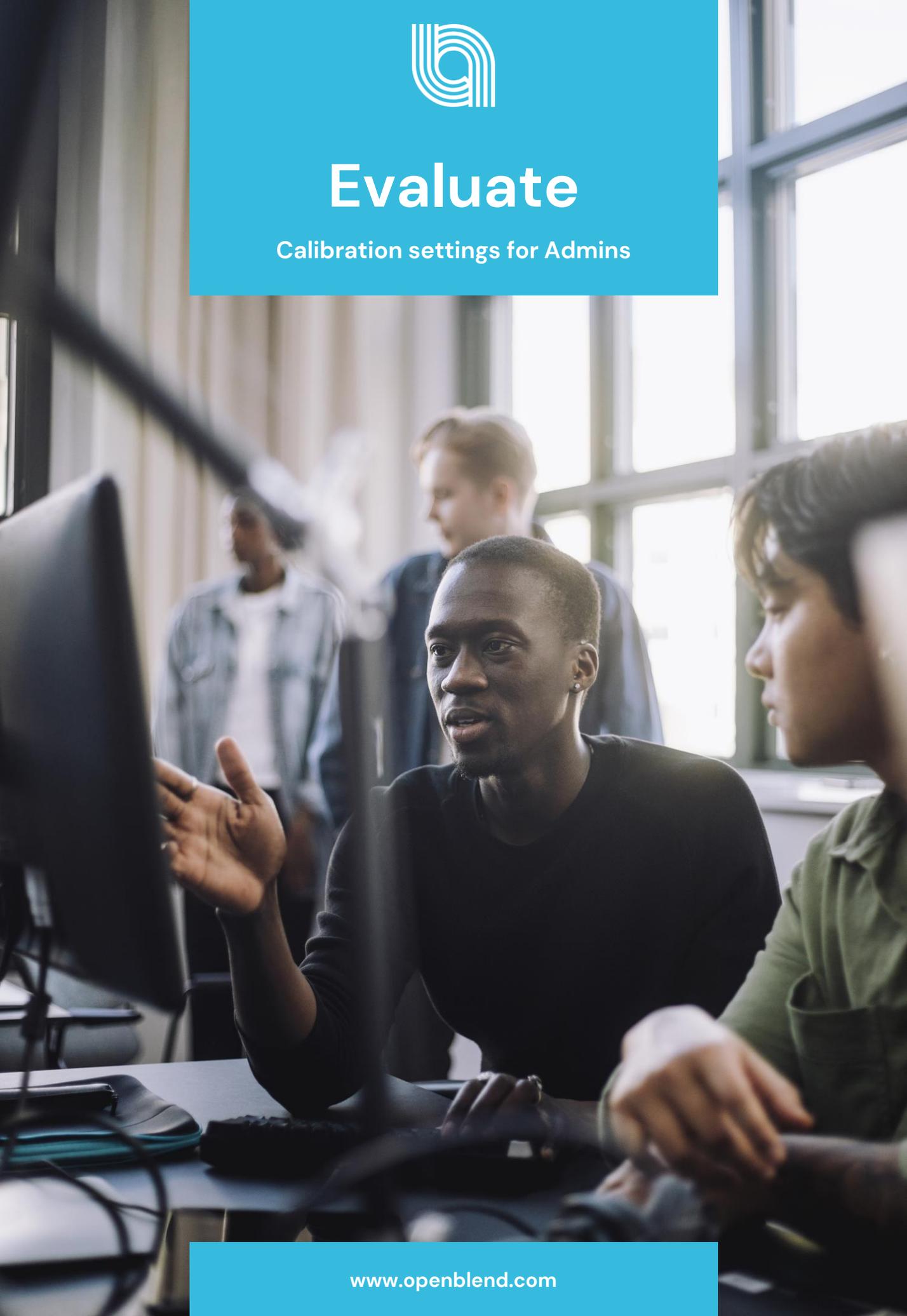




# Evaluate

Calibration settings for Admins



# Introduction

We are thrilled to introduce some exciting new settings to our Evaluate module. These new 'Calibration' settings have been developed to assist any organisation that undertakes a review process after Manager evaluations have been completed and before the 1:1 discussion.

This short document explores these new updates in more detail. Your Customer Success Manager (CSM) is on hand to answer any questions you may have about these new updates.

## Setting up an Evaluate cycle

### Details

When setting up a new evaluation cycle, you'll first notice a change to previous terminology. 'Manager evaluations need **calibration**' (formerly referred to as 'Manager evaluations needs **approval**').

Home / Admin / Evaluate / Edit Cycle Settings

Details | Form | Participants | Permissions | Summary

Evaluation Name  
Performance Review 2024 ✓

Evaluation description (optional)  
Type description here... 0 / 2000

By default, evaluations are conducted by a manager only.

- Do you want employees to complete a self evaluation? ⓘ
- Do you want this evaluation to be discussed with employees? ⓘ
- Employee Self Evaluation is hidden from managers until Discu...
- Manager evaluations need **calibration** (by a reviewer) before they can be discussed ⓘ

Anyone selected as a reviewer for this cycle will be able to calibrate evaluations (individually, or all-in-one-go). Select reviewers via the Permissions tab of this wizard.

- Send an email to inform managers and their reports that the cycle has started? ⓘ

Self evaluations due by: ⓘ 10/01/2025

Manager evaluations due by: ⓘ 17/01/2025

End date (discussions due by): ⓘ 20/01/2025

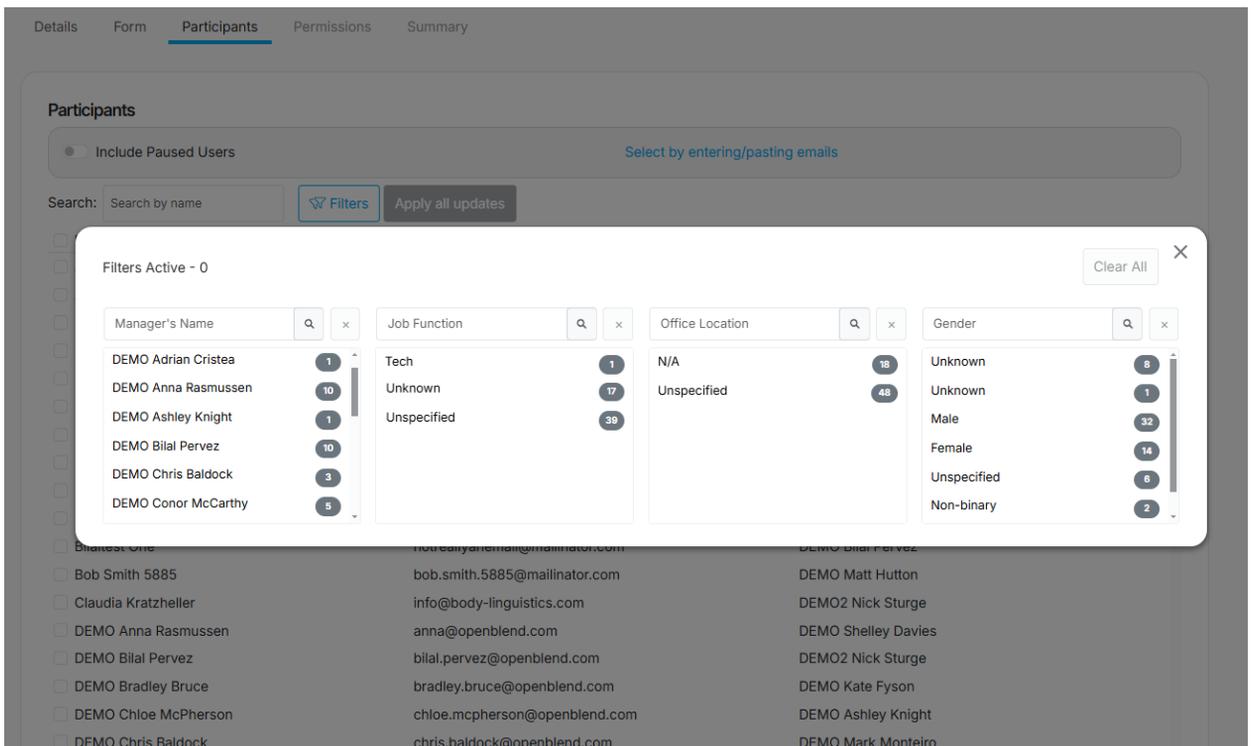
Save and close | Save and continue →

## SETTING UP AN EVALUATE CYCLE

### Choosing cycle participants

We have also updated the way you can select participants for a review, you can now:

1. Search by an individual using the search bar.
2. Filter by any existing filters you have, i.e., by manager, job function, etc.
3. Select **all** users using the selection check-box on the left-hand side.



The screenshot shows the 'Participants' tab in the OpenBlend interface. At the top, there are tabs for 'Details', 'Form', 'Participants', 'Permissions', and 'Summary'. Below the tabs, there is a 'Participants' section with a toggle for 'Include Paused Users' and a link 'Select by entering/pasting emails'. A search bar is present with the text 'Search by name'. Below the search bar, there are buttons for 'Filters' and 'Apply all updates'. A filter overlay is open, showing 'Filters Active - 0' and a 'Clear All' button. The overlay contains four filter categories: 'Manager's Name', 'Job Function', 'Office Location', and 'Gender'. Each category has a search bar and a list of options with counts. The 'Manager's Name' list includes DEMO Adrian Cristea (1), DEMO Anna Rasmussen (10), DEMO Ashley Knight (1), DEMO Bilal Pervez (10), DEMO Chris Baldock (3), and DEMO Conor McCarthy (5). The 'Job Function' list includes Tech (1), Unknown (17), and Unspecified (39). The 'Office Location' list includes N/A (18) and Unspecified (48). The 'Gender' list includes Unknown (8), Unknown (1), Male (32), Female (14), Unspecified (6), and Non-binary (2).

Please note: If you would like to provide visibility on certain Evaluate cycles to other leaders in your business who are not Admins, simply add them as participants to the cycle, and allow them to 'View Progress' on the permissions page.

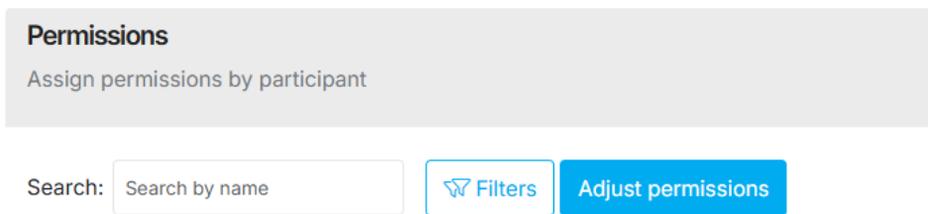
## SETTING UP AN EVALUATE CYCLE

### Adjusting permissions

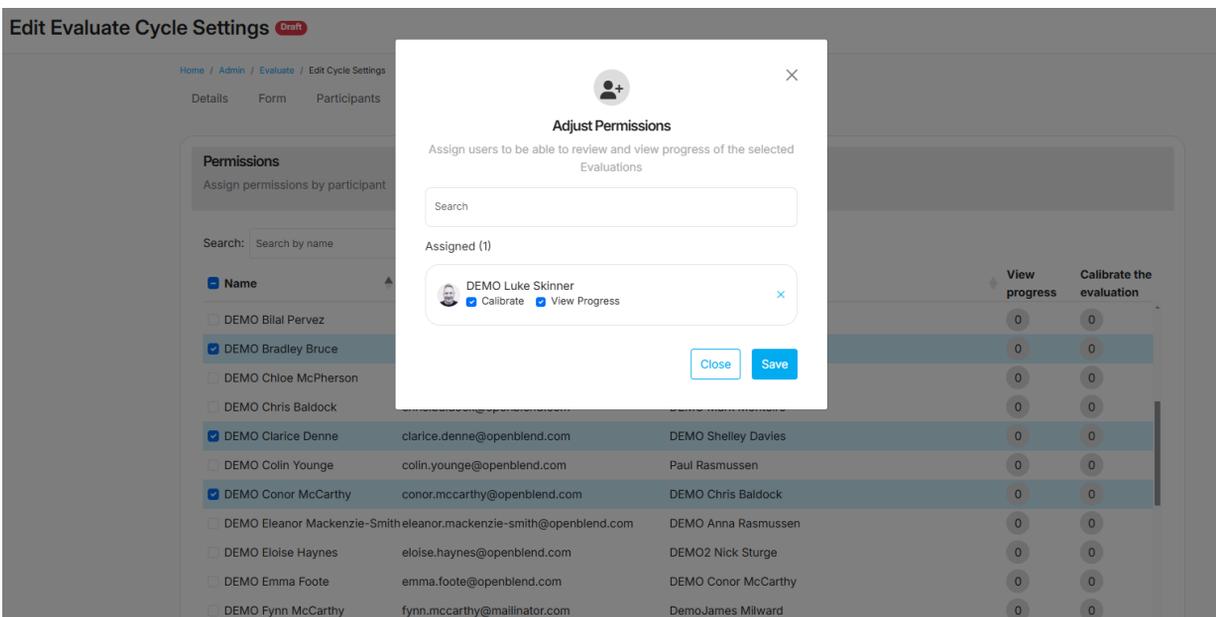
Once you have selected your cycle participants, you'll then be prompted to assign viewing and calibration permissions for each user.

Please note: It is **mandatory** that you do this for each user if you have selected 'Manager evaluations need **calibration**' on the details page. You can assign just one, or multiple users to have the permissions to complete Calibration.

1. Select the chosen individuals using the selection box on the left-hand side of the screen, then click 'Adjust permissions' at the top.

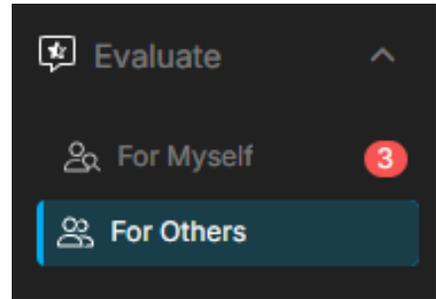


2. A pop-up will appear prompting you to search the user name for whom you would like to assign the 'View progress' and/ or 'Calibrate' permissions. Any user that you assign 'View Progress' rights to will be able to see the completed review (both manager and talent comments).



## Calibrating a review

1. Once you have been assigned to calibrate an evaluation, it will appear in the 'For Others' section in your Evaluate dropdown in the left-hand navigation.



2. You will be able to see that a calibration is in progress, then click on 'Start'.

To see the status of manager evaluations for each team member, and the status of their self-evaluations click on the cycle name.

Evaluation name	Start date	Evaluations due	Discussions due	Status
<a href="#">End of Year Performance Review</a>	15 Jan 2025	21 Feb 2025	07 Mar 2025	Not Started <span style="border: 2px solid red; padding: 2px;">Start</span>

3. On the Direct Reports tab, you will be able to see that an evaluation is awaiting calibration.

📅 Evaluation Started: 15 Jan 2025 | 
 📅 Manager evaluations due: 21 Feb 2025 | 
 📅 Cycle End: 07 Mar 2025

👤 Direct Reports | 
 🔍 Calibrate | 
 📊 Progress

### My Evaluations

These are the reviews that you are tasked to complete for your talents. Your deadline is 21/02/2025. You have **36 days** remaining.

Show all

- Prerna Kimble Not Started →
- Ahmed Javid Not Started →
- Jessie Palmer Not Started →
- Jenny Knight Not Started →
- Emma Mason Awaiting Calibration →

### My Team's Self-Evaluations

These are self-evaluation reviews that your talents need to fill in for themselves. They are due 07/02/2025. They have **22 days** left to fill in.

Show all

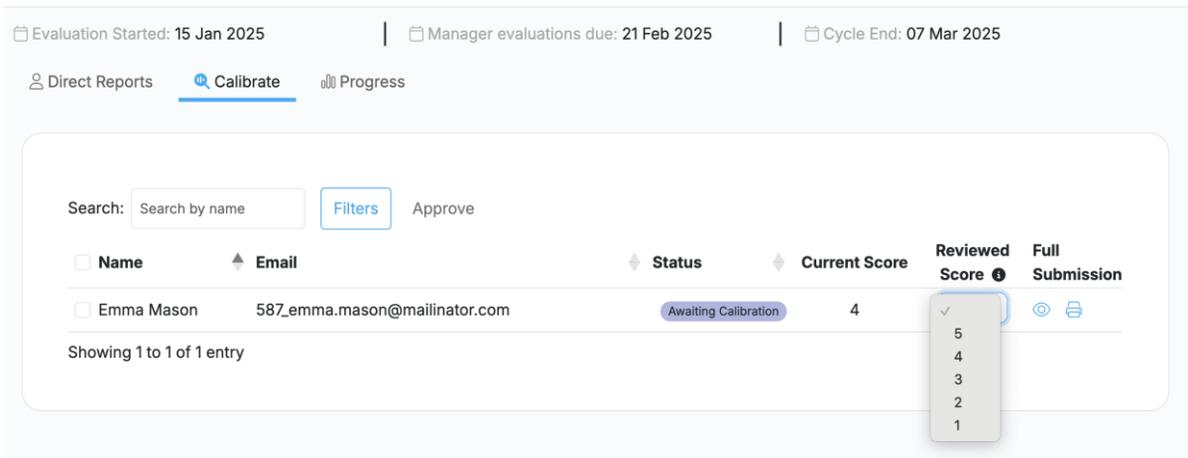
- Prerna Kimble Not Started
- Ahmed Javid Not Started
- Jessie Palmer Not Started
- Jenny Knight Not Started
- Emma Mason Completed →

## CALIBRATING A REVIEW

4. On the 'Calibrate' tab, you will be able to see the evaluations that have been assigned to you (as shown on the next page).

- **Awaiting Calibration:** A pending action to review the current score on an evaluation.
- **Calibrated for discussion:** You have submitted your calibration score, and the evaluation is now ready to be discussed. ***This will only be the case after the Admin has approved all reviews at the end of the Calibration process.***

5. Click on the score you need to review, and a drop-down will appear for you to insert your chosen score. If you want to review the full Evaluation, simply click on the eye icon on the right-hand side and the review will open as a pop-up.



Evaluation Started: 15 Jan 2025 | Manager evaluations due: 21 Feb 2025 | Cycle End: 07 Mar 2025

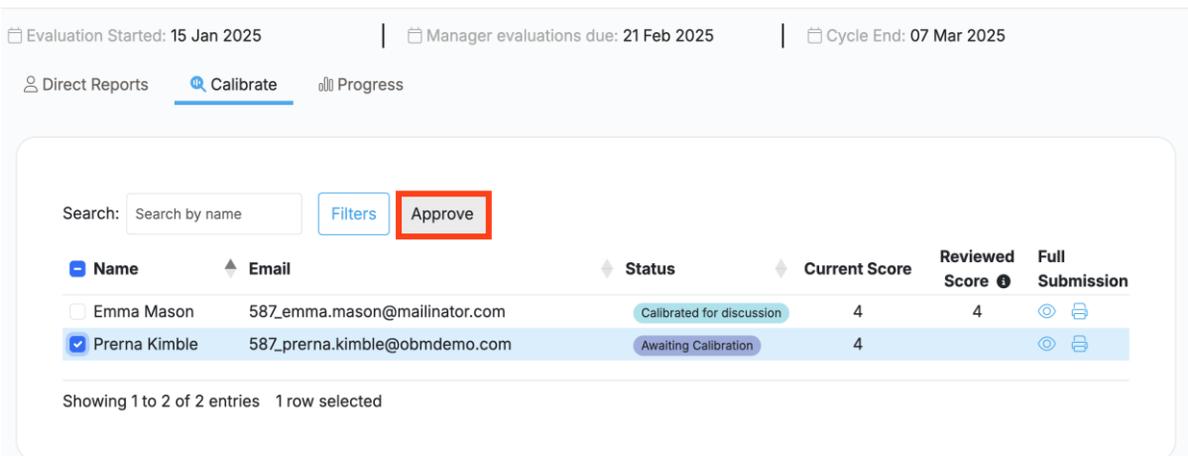
Direct Reports | **Calibrate** | Progress

Search:

<input type="checkbox"/> Name	<input type="checkbox"/> Email	<input type="checkbox"/> Status	<input type="checkbox"/> Current Score	<input type="checkbox"/> Reviewed Score	<input type="checkbox"/> Full Submission
<input type="checkbox"/> Emma Mason	587_emma.mason@mailinator.com	Awaiting Calibration	4	<div style="border: 1px solid #ccc; padding: 2px;"> <input checked="" type="checkbox"/> 5  <input type="checkbox"/> 4  <input type="checkbox"/> 3  <input type="checkbox"/> 2  <input type="checkbox"/> 1                 </div>	

Showing 1 to 1 of 1 entry

6. You can approve each individual score if required. As below, highlight the name of the individual for whom you have just calibrated scores, and then click 'Approve'. Alternatively, you can wait for the completion of the calibration process for all users and then approve all.



Evaluation Started: 15 Jan 2025 | Manager evaluations due: 21 Feb 2025 | Cycle End: 07 Mar 2025

Direct Reports | **Calibrate** | Progress

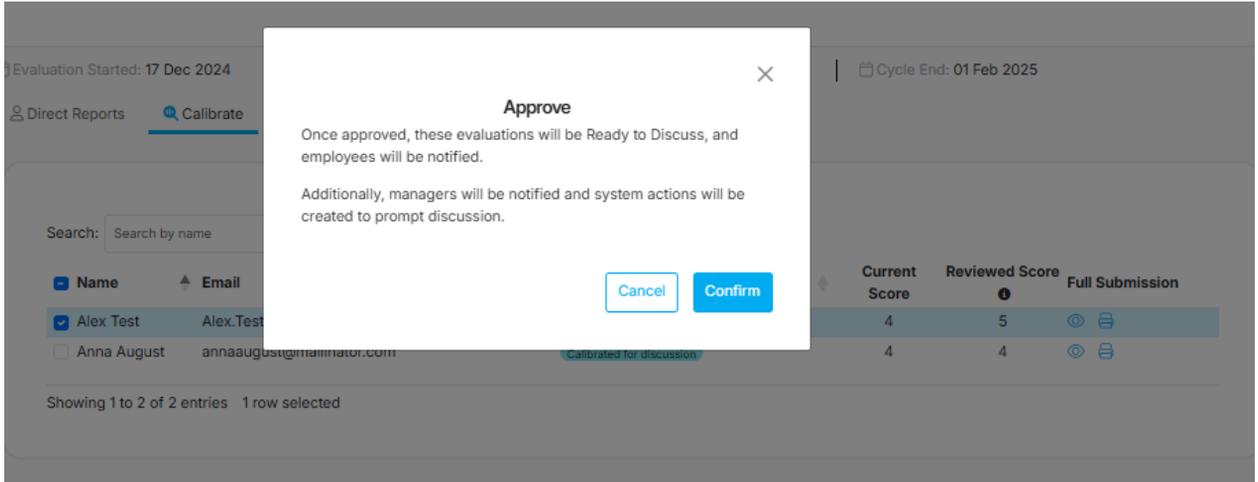
Search:

<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Email	<input type="checkbox"/> Status	<input type="checkbox"/> Current Score	<input type="checkbox"/> Reviewed Score	<input type="checkbox"/> Full Submission
<input type="checkbox"/> Emma Mason	587_emma.mason@mailinator.com	Calibrated for discussion	4	4	
<input checked="" type="checkbox"/> Prerna Kimble	587_prerna.kimble@obmdemo.com	Awaiting Calibration	4		

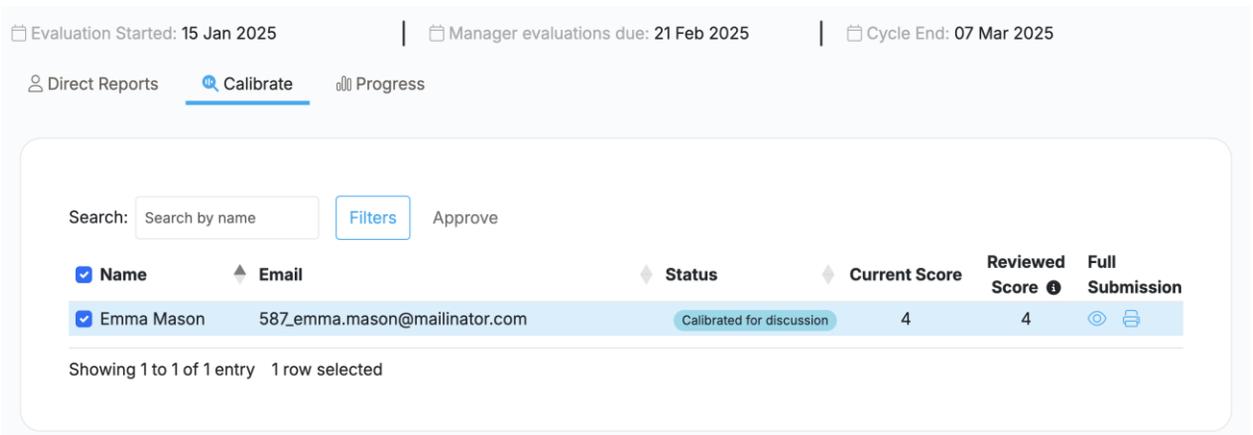
Showing 1 to 2 of 2 entries 1 row selected

## CALIBRATING A REVIEW

7. A pop up will appear to ask you to confirm your scores.



8. Once approved, the status will change to 'Calibrated for discussion'.



Please note: If scores change during the calibration process, only the calibrated score will show during the 1:1. However, outside of the 1:1, the manager will be able to see both scores (their original score and the new calibrated score).

## What happens next?

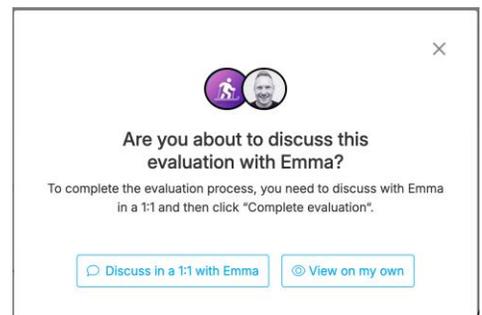
We know you are often the first port of call when it comes to supporting your managers and their direct reports to have the most effective 1:1 conversations, so here is a quick recap on what your managers need to do next, following the calibration process.

### 1. Book an Evaluate 1:1 –

- Your managers will have been prompted to do this upon submitting their review. To ensure managers don't impact any recurring 1:1s, we suggest that they book a 'One Off' 1:1 to discuss an Evaluate review.

### 2. Start 1:1 session

- When it is time to start the 1:1 to discuss the review, the correct process is for the **manager** to go to the 'Evaluate' tab in the left-hand navigation panel > *For Others* > *Click on the relevant Evaluate cycle* > *Under 'My Evaluations'* > *Click on the user who you want to hold the 1:1 with (their status will be 'Ready to Discuss')*
- They will then see a pop-up giving them two options. They should click on the 'Discuss in a 1:1' option (see screenshot below).
- This will immediately take them into the 1:1 session.



### 3. Select a Focus –

We recommend 'Evaluate 1:1' for this discussion.

### 4. Prepare for the conversation –

- Managers do not need to add anything to the agenda, as the completed cycle (to be discussed), will automatically be added.
- Remember that this will be their direct reports' first opportunity to review the manager's evaluation comments, alongside their own.

### 5. Make notes for later –

- Managers can do this using the 'Notes' section, which will save in 'Activity' and in 'My 1:1s' or in the 'Additional comments' section which will be saved within this evaluation only. Remember to click 'Save' on all notes.

### 6. Close the evaluation –

- When the discussion is complete, click 'Complete Evaluation' at the bottom of the page.