Macorva

Getting Started with Performance Management

For questions, contact:
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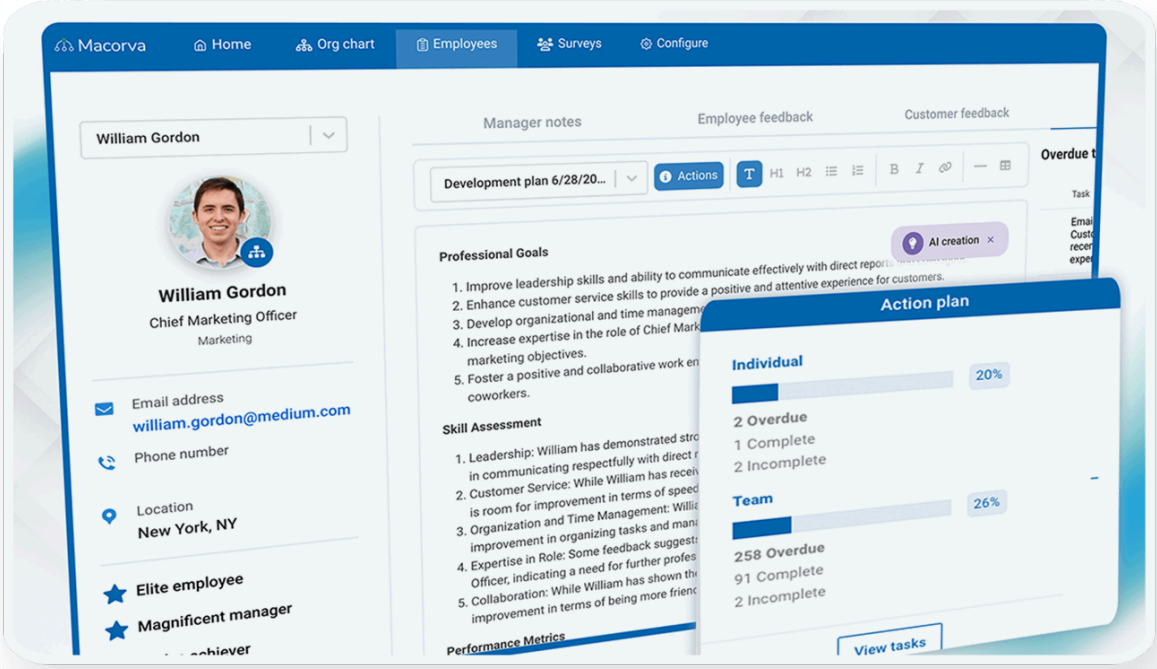
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Welcome to Performance Management

This guide provides an overview of the platform's key features and how they work together to create an effective and efficient review process. We will focus on the core concepts of notes, AI document creation, and performance review cycles, incorporating best practices for each.

A quick tip on access: Macorva uses a "magic link" system, so you don't need to remember a password. Just enter your email, and you'll receive a sign-in link in your inbox.



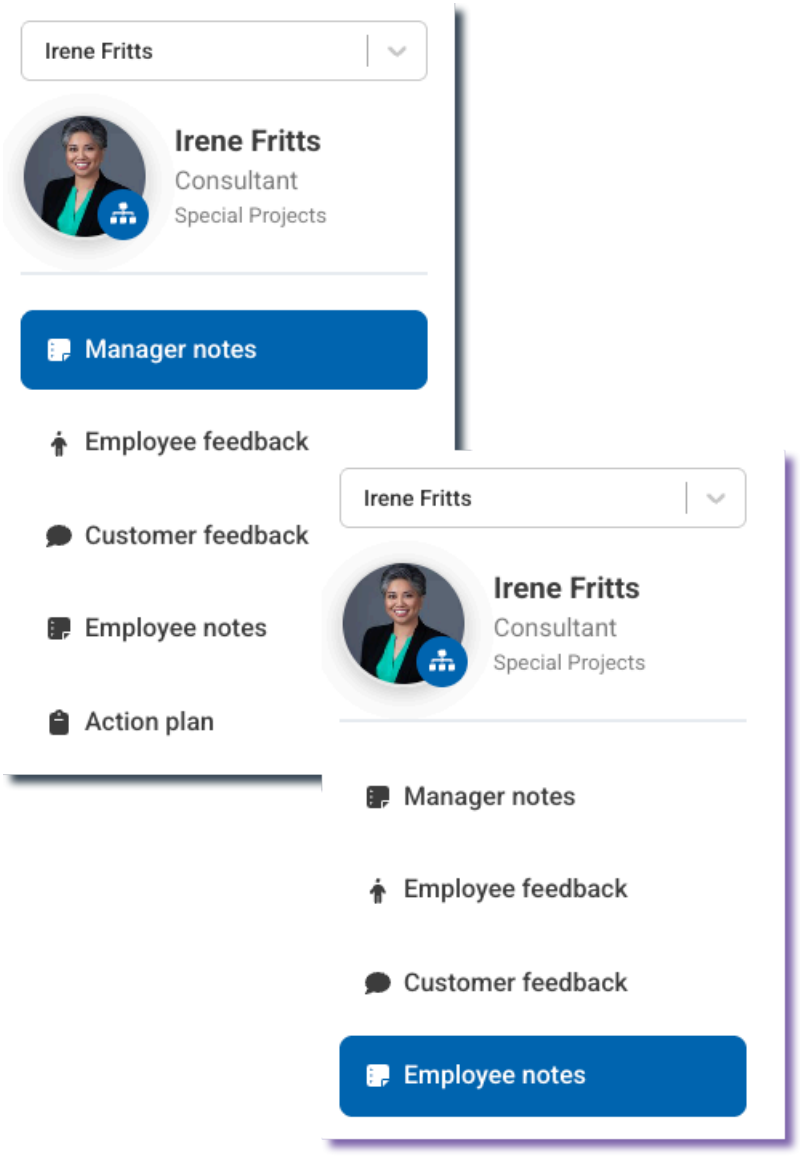
The Manager's Toolkit

This section is for managers and employees using the platform for feedback and reviews.

Notes Are Your Performance “Source of Truth”

The entire performance process is built on high-quality, continuous feedback. Macorva facilitates this through a robust notes system.

Manager Notes vs. Employee Notes (Who Sees What?)

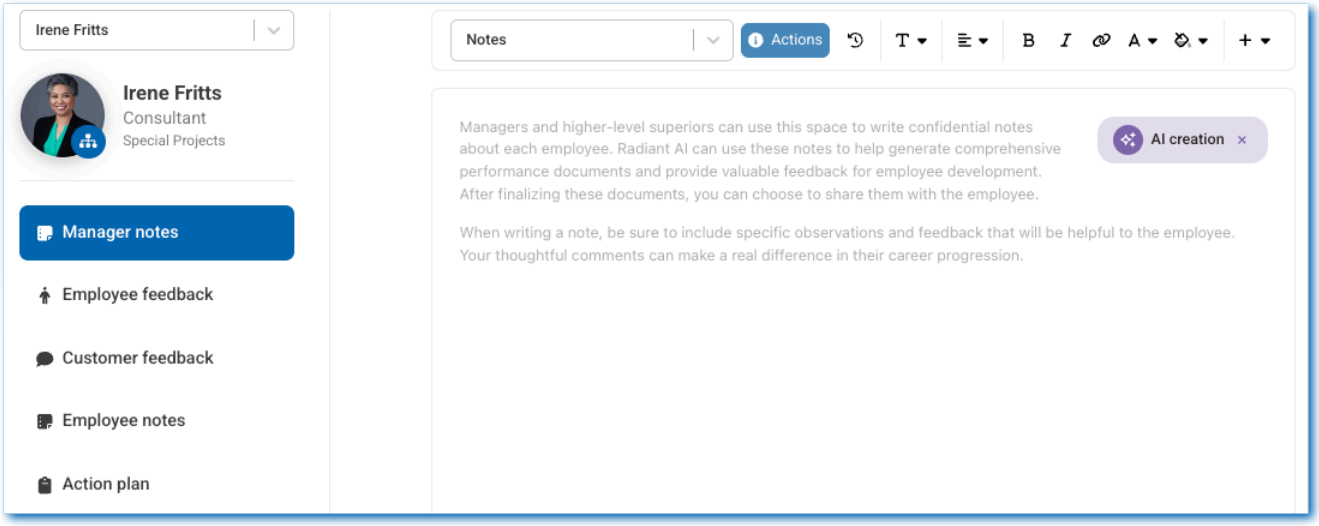


- **Manager Notes:** These are private to managers by default. They are ideal for ongoing feedback, coaching observations, or drafting language you’re not yet

ready to share. They can be released or transferred to employees later, such as when they are finalized. You can even make them read-only to lock in their integrity after approval.

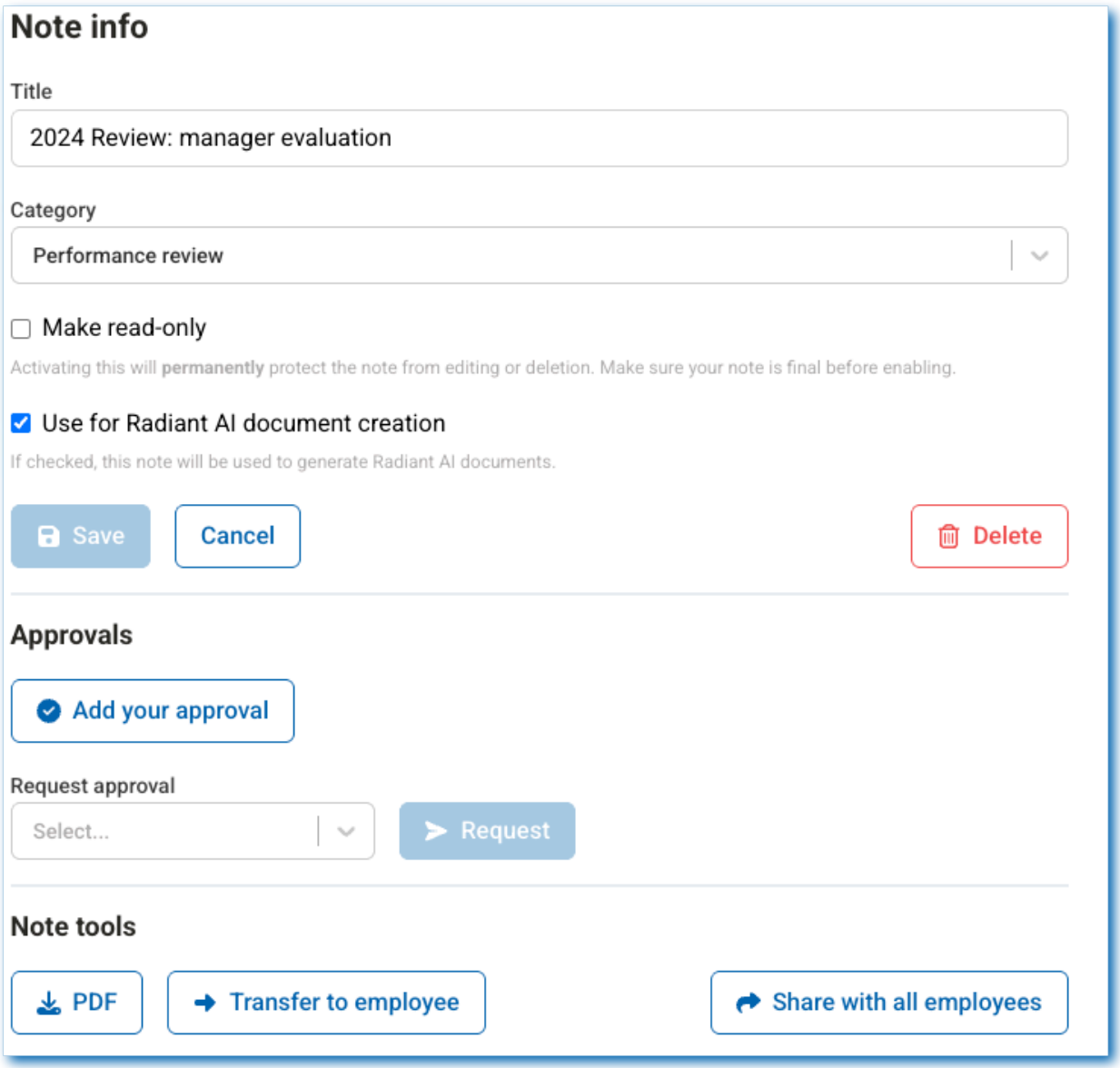
- **Employee Notes:** These are visible to the manager and employee. Both the manager and the employee can write in them. Use these when you want shared visibility and a running dialogue.
- **Employee Feedback (e.g., 360):** If your organization uses the 360° Feedback feature in Macorva, results are visible to both the manager and the employee. However, this only happens *after* an anonymity threshold (typically 5 responses) is met, which protects rater privacy. Feedback is aggregated on attributes (e.g., "communication"), not on named raters or specific groups.
- **Action Plans (Tasks):** These tasks are visible to both the manager and the employee. You can also use AI to help generate structured follow-through tasks.
- **Customer Feedback:** If your organization uses the Customer Feedback feature, both managers and employees can see the results.

Best Practices for Notes



- **Capture Little & Often:** Short, frequent notes beat long quarterly write-ups. Many clients set a weekly reminder to jot down quick bullets; others draft notes elsewhere and paste them into Macorva. **Do whatever keeps you consistent.**
- **Finalize When Ready:** Use the read-only option only when a note is truly final. **This action is permanent**; the note cannot be edited or deleted afterward. Pair this with the **Approvals** feature if HR or leadership should sign off first.
- **Use Categories Wisely:** When the Radiant AI generates a document (e.g., SMART goals), the saved note is automatically categorized (e.g., SMART Goals, Development Plan).
- **Visibility Matters:** Access levels differ by role. Managers typically only see the employees on their own teams; Only specific administrators with designated access (like HR) can review notes beyond their direct reports by using the Org Chart.

- **Transferring vs. Sharing:** The "Transfer to employee" action moves a specific note to that employee. The "Share with all employees" option is an admin-only feature. It should be used rarely, and only for widely relevant examples. Examples include official company-wide goals, corporate objectives, or OKRs.
- Combine the **Approvals** feature with the **Make read-only** option on sensitive notes to lock in final language.
- **Use for Radiant AI document creation:** By default, a note's content will be included as a data source for the Radiant AI. Since this content may influence future documents for this employee (though it is unlikely to be displayed directly), we recommend using professional and objective language. Unselect this box if you do not want the document included in Radiant AI document creation.



Formatting That Helps Later

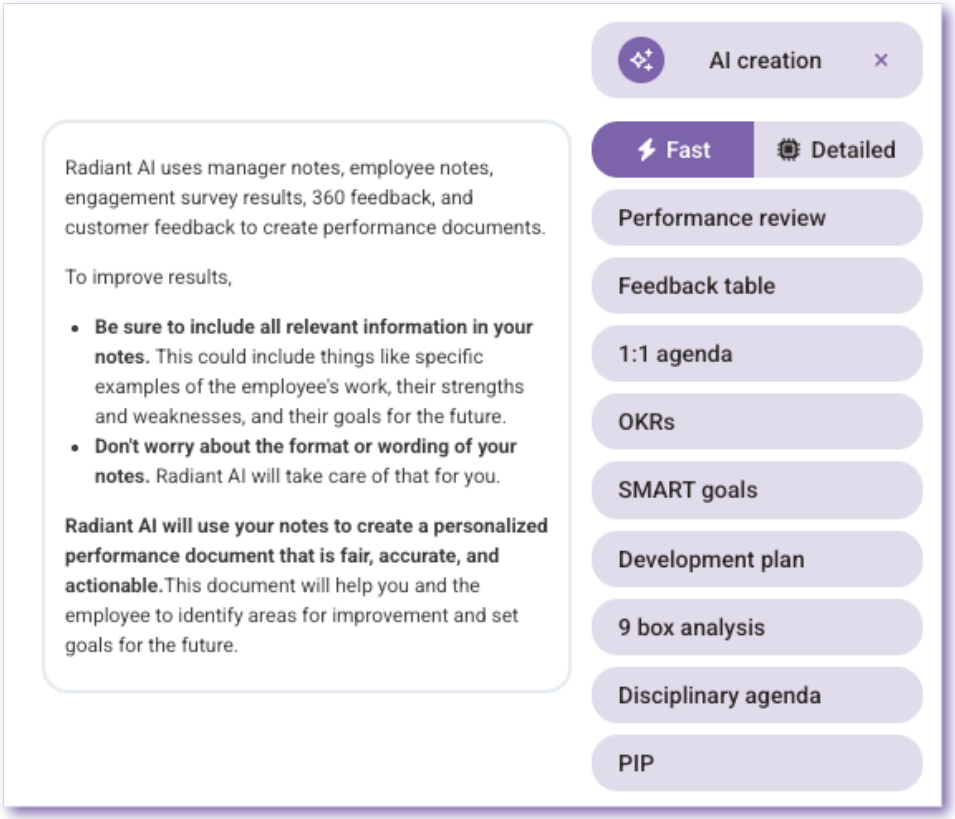


The note formatting toolbar supports headings, font styles, bullets, tables, links and photos. Use these formatting tools to keep your notes scannable and easy to read.

Turn Notes into High-Quality Documents with Radiant AI

Macorva's Radiant AI tool is designed to save managers valuable time by transforming raw notes into professional, ready-to-use documents.

What Radiant AI Creates (Fast vs. Detailed)



Radiant AI can produce a wide range of materials. You can choose between **Fast** (a quick draft) or **Detailed** (a richer analysis). Document types include:

- Performance Reviews
- Feedback Tables
- 1:1 Agendas
- OKRs and SMART Goals
- Development Plans
- 9-Box Analyses
- Disciplinary Agendas
- Performance Improvement Plans (PIPs)

Important: This list represents the **complete set of documents** Radiant AI can generate; new document *types* cannot be added.

However, you have full flexibility to **customize the templates** for any of these existing document types to perfectly align with your organization's specific needs, language, and workflows.

Where Radiant AI Pulls From

Radiant AI uses data stored within Macorva to draft its documents. It pulls from your **Manager Notes**, **Employee Notes**, **360/Employee feedback**[1], **Customer feedback**[2] and **Engagement survey data**.

Quality Tips

- **Better Inputs → Better Outputs:** The more specific and relevant your notes are (e.g., results, behaviors, context), the stronger the AI-generated draft will be.
- **No Note is Too Small:** Radiant AI is designed to use notes of any size. Even if you only write a few sentences about an observation or a project update, Radiant AI can use that information to help generate a document.

Quick Recap for New Managers

- Write short, structured notes weekly or bi-weekly.
- Use AI to turn those notes into polished reviews, goals, and agendas—then personalize the output if necessary.
- Protect the integrity of final records using Approvals and the read-only function.

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[1] Please note that this feature is only included in Radiant AI if it is enabled for your organization.
[2] See above note.

The Admin's Guide (Configuration & Setup)

This section is for HR Leaders, Admins, or anyone responsible for setting up and managing performance cycles.

Working with Your Customer Success Manager (CSM)

Your CSM is your partner in configuring Macorva. While you control many settings, some items are set up by your CSM on the back end.

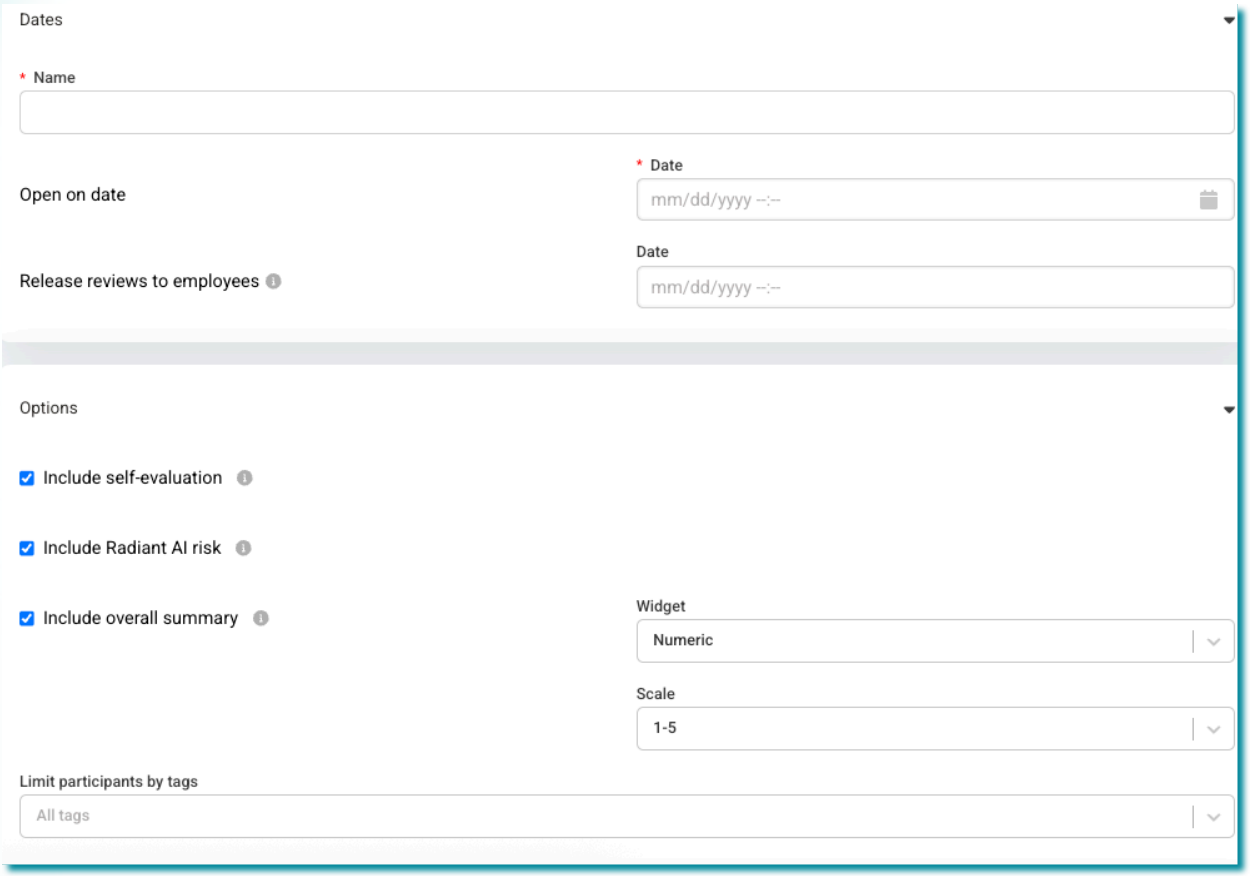
Contact Your CSM For:

- **Custom Templates:** If you already have a corporate template for documents like a PIP, development plan, or 1:1 agenda, share it with your CSM. They can configure these templates on the backend so Radiant AI drafts align with your preferred layout and areas of focus.
- **Cycle-Specific Templates:** To create different performance review templates for specific positions or departments. Templates can be customized for manager reviews and self evaluations.
- **Communication Dates:** To set specific dates for review generation, legal risk reviews and notifications for each of these stages (these are not configurable in the UI).

Review Cycle Configuration: What Each Setting Controls

The performance review cycle is the engine that schedules and manages the formal performance review process. You can create a new cycle by navigating to **Configure > Performance**.

Core Settings & Why They Matter

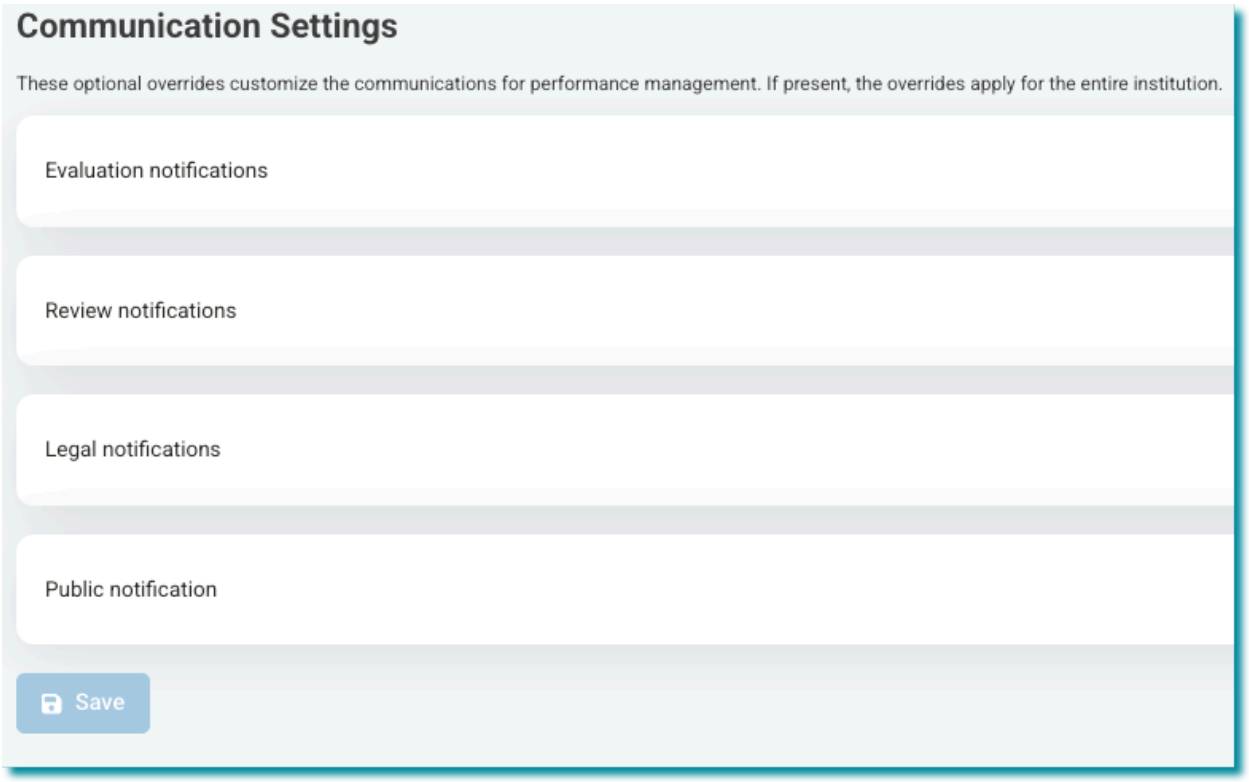


- **Open on date:** This is when employees and managers can start their work.
    - **Why it matters:** It controls the launch timing and triggers the initial evaluation notification. On the start date, employees in the organization can begin performance reviews.
- **Release reviews to employees:** This setting is critical for controlling when employees see their final reviews.
    - **Blank = Manual Release:** Managers can release reviews individually when there is not a date set.
    - **Date = Mass Release:** The system releases all reviews on this date. Managers are *prevented* from releasing reviews early.
    - **Why it matters:** Using a set date allows HR/Legal to hold all reviews until audits are complete. It also ensures consistent timing across the organization.
- **Include self-evaluation:** This assures the employee's self-assessment is included in the review.
- **Include Radiant AI risk:** This feature flags potentially biased or non-compliant phrasing, allowing you to correct it before reviews are released. Radiant AI checks for potential legal risks and assigns a risk score. It is strongly recommended to enable this feature.
- **Include overall summary:** This prompts managers for a final holistic assessment (which can be free text, numeric, or use custom categories). This is useful for downstream reporting and compensation planning.

- **Limit participants by tags:** This allows you to target a cycle to a specific group (e.g., "Sales Team"). It's perfect for pilots or phased rollouts.

Templates & Communications

- **Templates:** You can customize performance note templates for managers and employees for each cycle. If needed, Macorva has the flexibility to create different templates for specific positions or departments. As a reminder, please contact your CSM to collaborate on this for you.
- **Cycle Communications (Institution-Wide Overrides):** Admins can go to **Configure > Performance > Communication** to override the default email and SMS language for notifications. These overrides apply to all cycles, org-wide once enabled and can be used for evaluation, review, legal risk, and/or public announcement messages.



Here is a breakdown of the core notifications you can manage:

- **Evaluation Notifications:** Sent when performance evaluations open and as reminders before they close. These messages prompt employees to complete their assigned evaluations and ensure timely participation. If self evaluation is enabled, this notification is sent to all employees.
- **Review Notifications:** Sent when the performance review phase begins, alerting managers that feedback and evaluations are ready for action. Follow-up reminders help ensure all reviews are completed before deadlines. This is a manager/supervisor only notification.

- **Legal Notifications:** If there is a date restriction on the legal (Radiant AI Risk) stage of the performance management process, these notifications inform managers when Radiant AI legal risk reviews are ready for review and approval.This is a manager/supervisor only notification.
- **Public Notifications:** Sent when performance reviews are finalized. These notifications let employees know their completed reviews are available for viewing in Macorva. This notification is sent to all employees.

Important Note:

- **Configuring Review & Legal Dates:** To set specific dates for review or legal risk notifications, please contact your CSM to have these set up for you. These settings are not available in the platform and require back-end setup.

Managing Timing

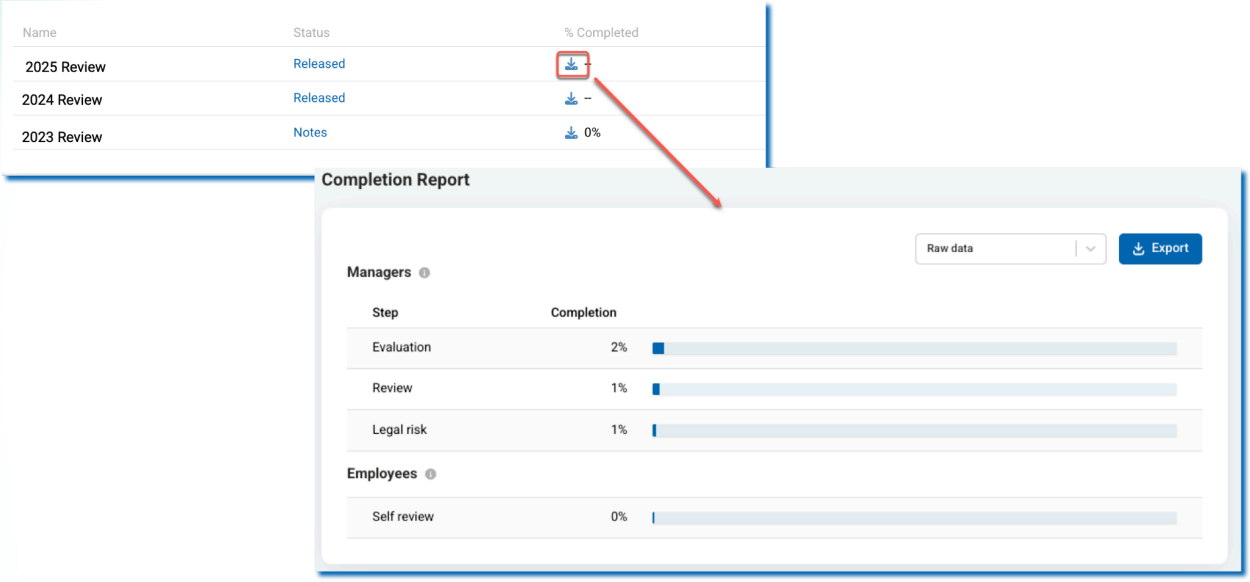
Here are a few best practices for managing your review cycle timing:

- **Plan a Buffer:** Open employee evaluations first, then open manager reviews. Schedule a dedicated buffer for legal/HR audits *between* the manager completion deadline and the employee release date.
- Keep the **Release to employees** field blank (for manual control) or set a future mass-release date to ensure no reviews are public until the designated date.
- **Use Mass-Release for Fairness:** If you expect scrutiny or appeals, setting a future **Release date** is wise. It prevents accidental early publication and ensures all employees see their results at the same time.
- **Automate Nudges:** Configure the **Evaluation Reminder** notifications so the system, not you, is responsible for reminders.
- **Leverage Radiant AI Risk:** Treat the bias-check feature as a mandatory pre-legal quality gate for tone and compliance.

Monitoring with the Completion Report

Once the performance review cycle is initiated, admins can use the Completion Report to track progress**.** This report breaks down completion percentages by Manager, steps (Evaluation, Review, Legal risk) and Employee steps (Self review), and provides an option to export Raw data as a CSV.

To access this report go to **Configure> Performance**. Under the “% Completed” tab, there is a download button that when clicked, will take you to the Competition Report page.



General Reference (For All Users)

- **Who Can See What?** Managers generally see only their own teams. Admins have broader visibility and can navigate to other employees via the Org Chart. This admin access must be requested and configured by your CSM.
- **Org Changes:** When the org chart updates (e.g., a manager change), the associated employee notes should follow the employee. It's good practice to validate this with your CSM during transitions.
- **Retention:** Notes can be kept indefinitely or deleted as needed. You should define your own retention policy (e.g., keep at least the current and prior cycle).
- **Systems Data:** Radiant AI composes documents from data *inside* Macorva (notes, surveys, feedback). It does not pull from your external HRIS.



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