

How to Create a Scorecard

Scorecards have a high degree of flexibility, ranging from a simple five star scale, to a robust point-based scorecard with various criteria. These steps will walk through creating a scorecard.

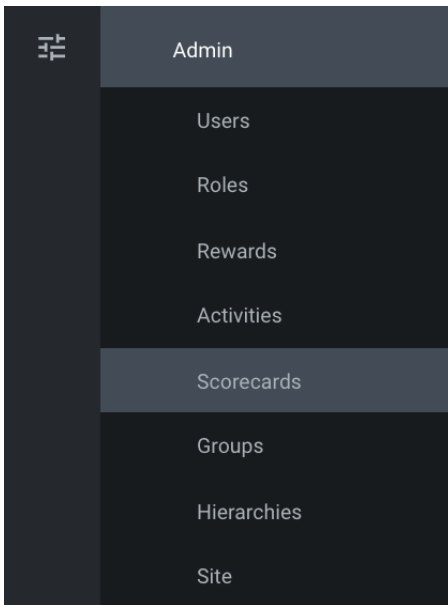
For more information on Scorecards, please see the **Scorecards Explained** guide.

Steps to create a scorecard:

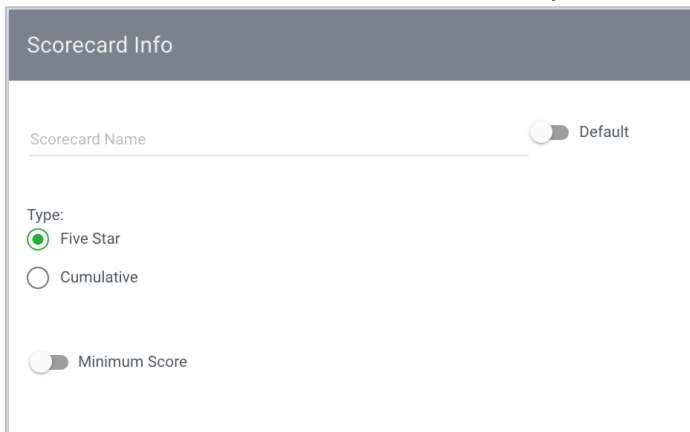
1. Navigate to the **Admin menu** from the left side navigation bar and select **Scorecards**
2. Enter a **Scorecard Name** and decide if you want a **Five Star** or **Cumulative** scorecard
3. Add any additional criteria by clicking **+ADD CRITERIA**
4. Give any criteria a name, description is optional
 - a. For Cumulative scorecards, decide if you want your criteria to have a Range or Fixed value.
Assign the criteria point value.
5. Choose a minimum score (required for Cumulative scorecards, optional for Five Star)
6. Click **Save** in the upper right corner once you are done

For more detail on these steps, see below.

1. Navigate to the **Admin menu** from the left side navigation bar and select **Scorecards**



2. Enter a **Scorecard Name** and decide if you want a **Five Star** or **Cumulative** scorecard

A screenshot of a form titled "Scorecard Info". It contains a text input field for "Scorecard Name" with a "Default" toggle switch to its right. Below this, under the heading "Type:", there are two radio button options: "Five Star" (which is selected) and "Cumulative". At the bottom, there is a "Minimum Score" toggle switch.

3. Add any additional criteria by clicking **+ADD CRITERIA**

+ ADD CRITERIA

4. Give any criteria a name (description is optional)

- a. For Cumulative scorecards, decide if you want your criteria to have a Range or Fixed value. Assign the criteria point value.

1. New Criterion

Criterion Name Required

Criterion Description

Criterion Score Type:

Range

Fixed

Minimum Points Maximum Points

5. Choose a minimum score (required for Cumulative scorecards, optional for Five Star)

Scorecard Info

Scorecard Name Default

New Scorecard

Type:

Five Star

Cumulative

Minimum Score out of 20

6. Click **Save** in the upper right corner once you are done

SAVE