

How to Create a Cumulative Scorecard with an Attached Scoring Guide

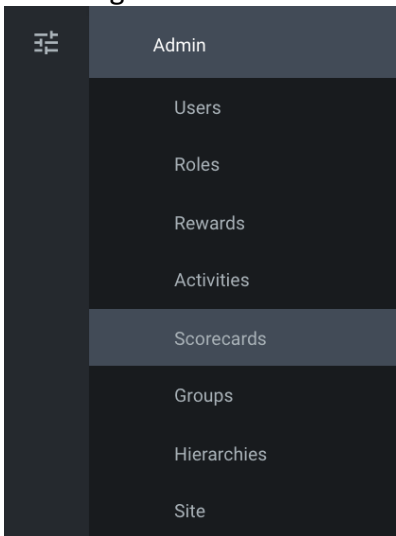
A cumulative scorecard can be created with an attached Scoring Guidance PDF. These steps will walk through creating this type of scorecard. *Note: This is functionality that can be enabled upon request, if you do not have access and would like this feature turned on please reach out to your Customer Success Manager.*

Steps to create a cumulative scorecard with an attached scoring guide:

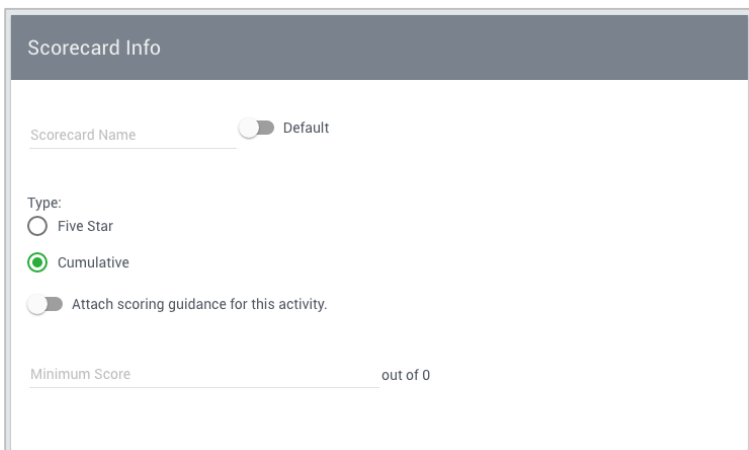
1. Navigate to the **Admin menu** from the left side navigation bar and select **Scorecards**
2. Enter a **Scorecard Name** and select **Cumulative** scorecard
3. Toggle on **Attach scoring guidance for this activity**
4. Click **SELECT FILE** and locate the saved Scoring Guidance PDF
5. Add any additional criteria by clicking **+ADD CRITERIA**
6. Give any criteria a name, description is optional
 - a. Decide if you want your criteria to have a Range or Fixed value. Assign the criteria point value.
7. Choose a minimum score (required for Cumulative scorecards)
8. 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 select **Cumulative** scorecard

A screenshot of a form titled "Scorecard Info". It contains the following fields and controls:

- Scorecard Name: A text input field with a "Default" toggle switch to its right.
- Type: A section with two radio button options: "Five Star" (unselected) and "Cumulative" (selected).
- Attach scoring guidance for this activity: A toggle switch that is currently turned off.
- Minimum Score: A text input field followed by "out of 0".

3. Toggle on **Attach scoring guidance for this activity**

Scorecard Info

Scorecard Name Default

Type:

Five Star

Cumulative

Attach scoring guidance for this activity.

Scoring Guidance

Attach a single PDF that explains what the scores in your scale mean for all the criteria you specify as part of your cumulative scorecard. Reviewers will be able to download this PDF for guidance while scoring activities.

SELECT FILE

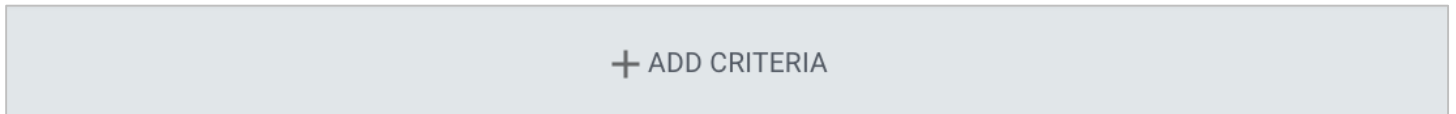
Maximum upload file size: 30 MB.

Minimum Score out of 0

4. Click **SELECT FILE** and locate the saved Scoring Guidance PDF



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



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

- a. 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

7. Choose a minimum score (required for Cumulative scorecards)

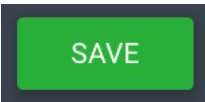
Scorecard Info

Scorecard Name
New Scorecard Default

Type:
 Five Star
 Cumulative

Minimum Score _____ out of 20

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



From the coaching perspective – For an activity that contains a scorecard with an attached scoring guidance PDF populates as such:

- Clicking on the RUBRIC button opens a pop up containing the attached pdf

Scorecard

MY SCORE ALL SCORES

Criteria 1
• Key Point 1 • Key Point 2 • Key Point 3

Leave Feedback

Min: 1, Max: 5

Criteria 2
• Key Point 1 • Key Point 2 • Key Point 3

Leave Feedback

Min: 1, Max: 5

Criteria 3
• Key Point 1 • Key Point 2

Leave Feedback

Min: 1 Max: 5

✕ Cumulative Total: 0 of 25
Minimum Passing Score: 20

Scorecard for Example Activity

Max Score = 25 out of 25
Min Passing Score = 20 out of 25

| Criteria 1: | Referenced all key points, i.e. xxx + yyy | Referenced all of the Key Points | Referenced only some of the Key Points | Referenced only one of the Key Points | Did not cover |
|---|---|----------------------------------|--|---------------------------------------|---------------|
| Criteria Description | | | | | |
| • Key Point 1 • Key Point 2 • Key Point 3 | 5 | 4 | 3 | 2 | 1 |

| Criteria 2: | Referenced all key points, i.e. xxx + yyy | Referenced all of the Key Points | Referenced only some of the Key Points | Referenced only one of the Key Points | Did not cover |
|---|---|----------------------------------|--|---------------------------------------|---------------|
| Criteria Description | | | | | |
| • Key Point 1 • Key Point 2 • Key Point 3 | 5 | 4 | 3 | 2 | 1 |

| Criteria 3: | Referenced all key points, i.e. xxx + yyy | Referenced all of the Key Points | Referenced only some of the Key Points | Referenced only one of the Key Points | Did not cover |
|--------------------------------|---|----------------------------------|--|---------------------------------------|---------------|
| Criteria Description | | | | | |
| • Key Point 1 • Key Point 2 | 5 | 4 | 3 | 2 | 1 |

| Criteria 4: | Referenced all key points, i.e. xxx + yyy | Referenced all of the Key Points | Referenced only some of the Key Points | Referenced only one of the Key Points | Did not cover |
|---|---|----------------------------------|--|---------------------------------------|---------------|
| Criteria Description | | | | | |
| • Key Point 1 • Key Point 2 • Key Point 3 | 5 | 4 | 3 | 2 | 1 |

| Criteria 5: | Referenced all key points, i.e. xxx + yyy | Referenced all of the Key Points | Referenced only some of the Key Points | Referenced only one of the Key Points | Did not cover |
|--------------------------------|---|----------------------------------|--|---------------------------------------|---------------|
| Criteria Description | | | | | |
| • Key Point 1 • Key Point 2 | 5 | 4 | 3 | 2 | 1 |