CORE Role Guide

Welcome to Operations Tools! This guide covers all features available to users with the CORE role.

🎯 Your Applications

As a CORE team member, you have access to **three applications**:

1. **User App** - Basic features
2. **QA App** - Quality assurance tools
3. **Core App** - Scoring and review tools ⭐

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Inherited Features

Core App Features (Your Primary Tools)

USER APP FEATURES

> 💡 ***Quick Summary***: *You inherit all USER features. See [USER_GUIDE.md] for details.*

Available in User App:

- ⏱ **Time Tracking** - Record work hours
- 🔗 **Links & Resources** - Access external documentation
- 👤 **Profile Management** - Update password and preferences
- 🐛 **Bug Reporting** - Report issues

QA APP FEATURES

> 💡 ***Quick Summary***: *You inherit all QA features. See [QA_GUIDE.md] for details.*

Available in QA App:

- 📊 **Records Management** - View and filter records
- 🔍 **Similarity Search** - Find semantically similar records
- 📈 **Top/Bottom 10 Review** - Quality assurance analysis
- 🏆 **Top Prompts Analysis** - Identify best-performing prompts
- 📋 **Alignment Comparison** - AI-powered guideline evaluation

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CORE APP FEATURES

> ⭐ ***Your Primary Workspace***: *The Core App contains your scoring and review tools.*

Likert Scoring

Rate records on multiple dimensions using standardized Likert scales to provide quantitative quality assessments.

What is Likert Scoring?

Likert scoring is a standardized rating method where you evaluate records on specific dimensions using numeric scales (typically 1-7). This creates quantitative data for analysis and comparison.

Common Dimensions:

- **Realism** (1-7): How realistic/believable is the content?
- **Quality** (1-7): Overall quality of the content
- **Helpfulness** (1-7): How helpful is this response?
- **Accuracy** (1-7): Factual correctness
- **Clarity** (1-7): How clear and understandable?

Accessing Likert Scoring

1. Navigate to **Core App**
2. Click **Likert Scoring** in the sidebar
3. You'll see the scoring dashboard

Scoring Interface

Record Display:

- Full record content displayed prominently
- Record metadata (type, category, project)
- Context information if available
- Previous scores (if already rated)

Rating Scales:

- Each dimension shows 1-7 scale
- Hover over numbers for descriptions
- Click number to assign score
- Visual indicators show current selection

Scale Interpretation:

- **1-2**: Very Poor/Strongly Disagree
- **3-4**: Poor to Fair/Disagree
- **5**: Neutral/Acceptable
- **6-7**: Good to Excellent/Agree

Scoring Workflow

Step-by-Step:

1. **Read Content Carefully**
    - Read the entire record
    - Understand context and intent
    - Consider project guidelines

2. **Evaluate Each Dimension**
    - Rate Realism: How believable?
    - Rate Quality: Overall assessment
    - Rate additional dimensions as shown

3. **Add Comments (Optional)**
    - Explain your ratings
    - Note specific issues or strengths
    - Provide context for extreme scores

4. **Submit Score**
    - Click **"Submit"** button
    - Score is saved permanently
    - Move to next record

5. **Review Next Record**
    - System automatically loads next record
    - Progress indicator shows completion

Scoring Best Practices

Be Consistent:

- Use the same criteria for all records
- Define what each number means to you
- Apply standards uniformly
- Re-calibrate periodically

Be Objective:

- Focus on content, not personal preference
- Follow project guidelines
- Remove bias from ratings
- Consider intended audience

Be Thorough:

- Read complete content before scoring
- Don't rush through records
- Take breaks to maintain focus
- Re-read if uncertain

Document Reasoning:

- Add comments for borderline scores
- Explain very high or very low ratings
- Note anything unusual
- Help future reviewers understand

Scoring Calibration

Why Calibrate?

- Ensures consistency across raters
- Aligns understanding of scale
- Reduces rater bias
- Improves data quality

Calibration Sessions:

1. Group of raters score same records independently
2. Compare scores and discuss differences
3. Align on criteria and scale interpretation
4. Adjust scoring approach based on feedback

Self-Calibration:

- Periodically re-score past records
- Check consistency with previous scores
- Identify drift in your ratings
- Recalibrate your mental scale

Batch Scoring

Efficient Workflow:

1. Filter records by project or category
2. Work through entire batch in one session
3. Maintain consistent mindset
4. Take short breaks every 20-30 records

Progress Tracking:

- Dashboard shows total records assigned
- Progress bar indicates completion
- Filters show scored vs. unscored

- Statistics update in real-time

Understanding Your Scores

View Your History:

- Access scoring history from dashboard
- Filter by date, project, dimension
- Export to CSV for analysis
- Review patterns in your ratings

Score Statistics:

- Average scores per dimension
- Distribution of your ratings
- Comparison to other raters
- Consistency metrics

Candidate Review

Review and evaluate candidate submissions or work products as part of assessment processes.

What is Candidate Review?

Candidate Review is used to assess work submitted by candidates (new hires, contractors, applicants) as part of evaluation or onboarding processes.

Review Types:

- **Technical Assessments** - Code, designs, technical writing
- **Content Creation** - Writing samples, prompts, responses
- **Problem-Solving** - Solutions to given problems
- **Portfolio Review** - Collection of past work

Accessing Candidate Review

1. Navigate to Core App → **Candidate Review**
2. View list of pending reviews
3. Click candidate name to start review

Review Interface

Candidate Information:

- Candidate name/ID
- Position applied for
- Submission date
- Background context

Submission Display:

- Full submission content
- Attachments (if any)
- Evaluation criteria
- Previous reviewer comments (if applicable)

Evaluation Forms:

- Structured criteria matching job requirements
- Rating scales or binary (pass/fail)
- Comment fields for detailed feedback
- Overall recommendation section

Review Process

1. Understand Context

- Read position requirements
- Review evaluation criteria
- Check any special instructions

- Note focus areas

2. Review Submission

- Read/examine entire submission
- Take notes as you go
- Compare to examples or standards
- Identify strengths and weaknesses

3. Evaluate Against Criteria Rate on each dimension:

- Technical skills
- Problem-solving ability
- Communication clarity
- Attention to detail
- Creativity/innovation
- Adherence to requirements

4. Provide Feedback

- Specific strengths observed
- Areas for improvement
- Examples from submission
- Actionable recommendations

5. Make Recommendation

- **Strong Yes** - Exceptional candidate
- **Yes** - Meets requirements well
- **Maybe** - Borderline, needs discussion
- **No** - Does not meet requirements
- **Strong No** - Significant deficiencies

6. Submit Review

- Save your evaluation
- Review may trigger next step in pipeline
- Candidate moves to next stage or is declined

Review Standards

Quality Criteria:

- Does work meet minimum requirements?
- Is quality above/below average?
- Are there critical issues?
- Would this person succeed in role?

Consistency:

- Use same standards for all candidates
- Don't compare candidates directly
- Evaluate against role requirements
- Remove personal bias

Thoroughness:

- Review entire submission
- Check all deliverables
- Verify completeness
- Test examples (if code/demos)

Writing Effective Feedback

Do's:

- ✅ Be specific: "Function lacks error handling on line 23"
- ✅ Be constructive: "Consider adding unit tests"
- ✅ Provide examples: "See lines 45-50 for good approach"
- ✅ Balance positive and negative: Note strengths too

Don'ts:

- ❌ Be vague: "Code needs work"
- ❌ Be harsh: "This is terrible"
- ❌ Compare to others: "Candidate 5 was better"

- ❌ Make personal comments: "Seems unmotivated"

Confidentiality

⚠️ **Important**: Candidate reviews are confidential.

- Don't discuss candidates with non-reviewers
- Don't share candidate work externally
- Keep feedback professional and private
- Follow company confidentiality policies

Review Conflicts

Conflict of Interest: If you know the candidate personally:

1. Disclose the relationship
2. Request to be removed from review
3. Let manager assign alternate reviewer

Disagreement with Other Reviewers:

- Document your reasoning clearly
- Stick to facts and criteria
- Don't change score to match others
- Discuss in calibration meeting if needed

My Assignments

View and manage work items assigned specifically to you.

What are Assignments?

Assignments are specific tasks assigned to you by administrators or managers:

- Records to score
- Candidates to review
- Quality audits to complete
- Special projects

Accessing Assignments

1. Navigate to Core App → **My Assignments**
2. See list of all your current assignments
3. Filter by type, status, or due date

Assignment Dashboard

Assignment Cards Show:

- Assignment title/description
- Type (Scoring, Review, Audit, etc.)
- Priority level (High, Medium, Low)
- Due date
- Current status
- Progress indicator

Status Types:

- **Not Started** - Haven't begun yet
- **In Progress** - Currently working on it
- **Blocked** - Waiting on something
- **Completed** - Finished and submitted
- **Overdue** - Past due date

Working on Assignments

Starting an Assignment:

1. Click the assignment card

2. Review instructions and requirements
3. Click **"Start"** to mark as in progress
4. Begin your work

Tracking Progress:

- Update status as you work
- Add notes or comments
- Mark milestones complete
- Request help if blocked

Completing Assignments:

1. Finish all required work
2. Review completeness
3. Click **"Submit"** or **"Mark Complete"**
4. Assignment moves to completed status

Managing Your Workload

Prioritization:

1. Sort by due date to see urgent items
2. Check priority flags
3. Address high-priority items first
4. Communicate if overloaded

Time Management:

- Estimate time needed for each assignment
- Schedule dedicated time blocks
- Don't let assignments go overdue
- Request deadline extensions early if needed

Getting Help:

- Click **"Request Help"** on assignment
- Add note describing your issue

- Manager or admin will respond
- Can also escalate via chat/email

Notifications

You'll be notified when:

- New assignment is added to your queue
- Assignment is approaching due date
- Assignment becomes overdue
- Manager adds comments or instructions
- Assignment is reassigned or cancelled

Review Decisions

Make final decisions on records, candidates, or work products after review processes.

What are Review Decisions?

Review Decisions is where you make official determinations after evaluation:

- **Approve/Reject** records for publication
- **Accept/Decline** candidates
- **Pass/Fail** quality gates
- **Escalate** edge cases

When to Use Review Decisions

After Review:

- Multiple people have evaluated an item
- Scores and feedback are collected
- You're designated as decision-maker

- Ready to make final determination

Edge Cases:

- Conflicting reviews from team
- Borderline scores needing judgment call
- Unusual situations requiring expertise
- Policy exceptions or special circumstances

Accessing Review Decisions

1. Navigate to Core App → **Review Decisions**
2. See queue of items awaiting decisions
3. Filter by type, priority, or age

Decision Interface

Item Information:

- Item being reviewed (record, candidate, etc.)
- All previous reviews and scores
- Comments from other reviewers
- Relevant context and guidelines

Review Summary:

- Average scores across dimensions
- Consensus vs. disagreement indicators
- Flagged issues or concerns
- Recommendation summary

Decision Options:

- **Approve** - Item meets standards
- **Reject** - Item fails to meet standards
- **Approve with Conditions** - Approve if changes made
- **Escalate** - Needs higher authority decision

- **Return for Re-review** - Needs more evaluation

Making Decisions

1. Review All Information

- Read the item carefully
- Review all scores and feedback
- Check guideline compliance
- Consider project context

2. Analyze Consensus

- Do reviewers agree?
- What's the average score?
- Are there outliers?
- What's the reasoning?

3. Apply Judgment

- Does item meet minimum standards?
- Are issues fixable or fundamental?
- What's the business impact?
- What's the right call?

4. Document Decision

- Select your decision
- Write rationale (required)
- Note any conditions
- Reference specific issues

5. Submit Decision

- Click **"Submit Decision"**
- Decision is final and recorded
- Stakeholders are notified
- Item moves to next stage

Decision Principles

Consistency:

- Apply same standards across all items
- Follow guidelines and policies
- Don't make exceptions without justification
- Document your reasoning

Fairness:

- Base decisions on merit, not bias
- Give benefit of doubt when reasonable
- Apply policies uniformly
- Consider extenuating circumstances

Transparency:

- Document your reasoning clearly
- Explain conditional approvals
- Note why you deviated from consensus
- Make process understandable

Handling Difficult Decisions

Conflicting Reviews:

- Weight based on reviewer expertise
- Look for specific, actionable feedback
- Make final judgment call
- Document why you chose your path

Borderline Cases:

- Review minimum requirements again
- Consider "spirit of the law" vs. "letter"
- Assess business impact of decision

- When in doubt, escalate

High-Stakes Decisions:

- Take extra time to review thoroughly
- Consult with manager if unsure
- Document reasoning extensively
- Escalate if consequences are severe

Appeals Process

If decisions are appealed:

1. Review appeal justification
2. Reconsider original decision
3. Check for new information
4. Either uphold or reverse decision
5. Document appeal outcome

CORE Role Workflow

Daily Routine

Morning (1-2 hours):

1. Check My Assignments for urgent items
2. Complete any overdue assignments
3. Review new Review Decisions
4. Start high-priority Likert scoring

Midday (2-3 hours):

- Continue Likert scoring batches
- Complete candidate reviews

- Make review decisions
- Document findings

Afternoon (1-2 hours):

- Use QA tools for quality checks
- Review top/bottom 10 records
- Update assignment status
- Plan tomorrow's priorities

End of Day:

- Log time in Time Tracking
- Update assignment progress
- Submit pending decisions
- Clear notifications

Weekly Tasks

- Complete all assigned scoring batches
- Finish all candidate reviews
- Clear review decision queue
- Participate in calibration sessions
- Update managers on progress
- Review personal metrics

Monthly Goals

- Maintain scoring consistency
- Complete assignments on time
- Provide quality feedback
- Identify improvement patterns
- Contribute to guideline updates
- Mentor junior reviewers (if applicable)

Performance & Quality Metrics

Scoring Metrics

Volume:

- Records scored per day/week
- Time per record (efficiency)
- Completion rate of assignments

Quality:

- Inter-rater reliability (consistency with peers)
- Score distribution (avoiding bias to high/low)
- Comments quality and helpfulness

Timeliness:

- On-time completion rate
- Average time to complete assignments
- Response time for urgent items

Review Metrics

Candidate Reviews:

- Reviews completed
- Time per review
- Quality of feedback
- Decision accuracy (if tracked)

Decision Quality:

- Decisions made per week
- Appeal/reversal rate
- Agreement with consensus

- Reasoning clarity

Continuous Improvement

Self-Assessment:

- Review your own metrics monthly
- Identify areas for improvement
- Seek feedback from managers
- Adjust approach based on data

Calibration:

- Participate in calibration sessions
- Compare scores with peers
- Align understanding of standards
- Improve consistency

Learning:

- Study top-performing scorers
- Learn from feedback on your reviews
- Stay updated on guideline changes
- Attend training sessions

Tips for CORE Success

Efficiency

1. **Batch similar work** - Score all records from one project together
2. **Use keyboard shortcuts** - Learn shortcuts for faster navigation
3. **Set time blocks** - Dedicate 60-90 min blocks for focused scoring
4. **Minimize distractions** - Turn off notifications during scoring

Quality

1. **Stay calibrated** - Regular calibration prevents drift
2. **Take breaks** - Fresh eyes maintain quality
3. **Document reasoning** - Future you will thank you
4. **Seek feedback** - Ask how to improve your evaluations

Consistency

1. **Define your scale** - Write down what each number means
2. **Review past scores** - Check for consistency patterns
3. **Use checklists** - Standard criteria for each evaluation
4. **Calibrate regularly** - Don't let standards drift

Communication

1. **Detailed feedback** - Specific, actionable, respectful
2. **Clear decisions** - Document your reasoning thoroughly
3. **Timely updates** - Respond to questions promptly
4. **Professional tone** - Always constructive, never harsh

Troubleshooting

"Cannot submit Likert score"

Solutions:

- Check all required dimensions are rated
- Verify comments are complete (if required)
- Refresh page and try again

- Report bug if persists

"Assignment not loading"

Solutions:

- Check internet connection
- Verify assignment still exists (may have been cancelled)
- Try different browser
- Contact admin if issue continues

"Review decision options grayed out"

Solutions:

- Verify you're assigned as decision-maker
- Check if decision was already made
- Ensure all reviews are complete
- Contact manager about permissions

Need More Access?

As a CORE team member, you may need FLEET tools for:

- Data ingestion and project management
- Analytics and reporting
- Bonus window management

Contact your manager to discuss a FLEET role upgrade.

Support & Resources

Technical Issues: Bug reporting feature **Questions**: Ask your CORE lead or manager **Training**: Request scoring/review training **Documentation**: See USER_GUIDE.md and QA_GUIDE.md

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