



Feedback | Ask Questions

FACE

Conversation | Explore Options

— *Helping U Succeed*

FACE of Performance Model

Supervisor Guide *Volume 2:* *Performance Reviews*

Human Resources
— *Helping U Succeed*

www.pinellascounty.org/hr/face

Introduction

Welcome to the Pinellas County Government's FACE system, your interactive online portal for managing employee performance. This guide is Volume 2 of a six-part series; intended to serve as a reference tool for supervisors to complete the following element of the performance model:

Summarizing Performance Conversations



In this guide:

- Page 2 Assigning a Performance Review
- Page 5 Making Comments on a Performance Review
- Page 8 e-Sign
- Page 9 Manager Access to Employee Website

Subsequent supervisor guides will accompany future workshops offered on each component of the FACE of Performance Model.

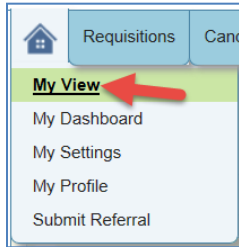


TIP: Additional information is provided on the FACE of Performance website:
www.pinellascounty.org/hr/face

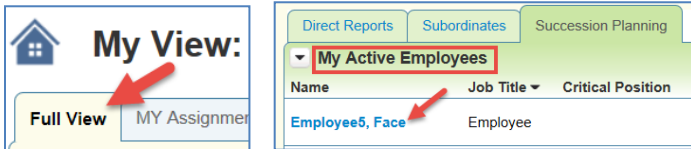
Take advantage of the videos, conversation tips, frequently asked questions, and more.

Assigning a Performance Review

Hover over the “Home” icon and select/click “My View”.

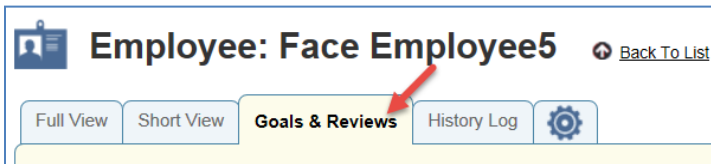


From the “Full View” tab scroll down to the “My Active Employees” section.

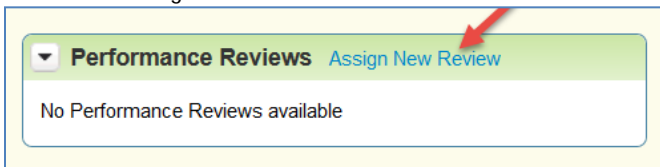


Select/click the employee name you wish to view. In this example, the employee name is: Employee5, Face.

Select/click the “Goals & Reviews” tab.

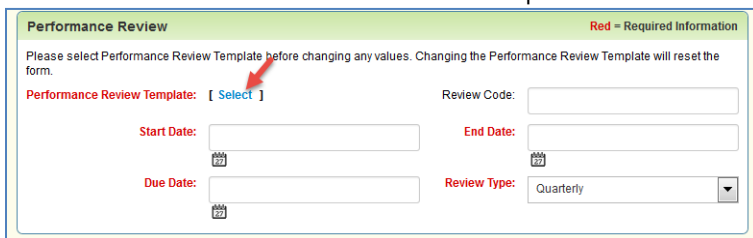


Select/click “Assign New Review”.



The “Associate Employee to Performance Review” page will open.

Under the Performance Review header; select/click the blue “Select” text next to “Performance Review Template”.



Performance Review Red = Required Information

Please select Performance Review Template before changing any values. Changing the Performance Review Template will reset the form.

Performance Review Template: [Select] Review Code:

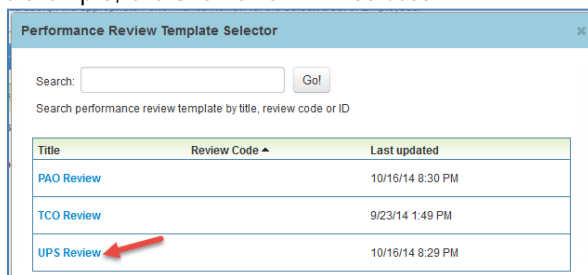
Start Date: **End Date:**

Due Date: **Review Type:** Quarterly ▼

The Performance Review Template Selector will open. Select/click on the appropriate review.

- PAO Review = Property Appraiser Office Review
- TCO Review = Tax Collector Office Review
- UPS Review = Unified Personnel System Review

In this example, the UPS Review will be used.



Performance Review Template Selector

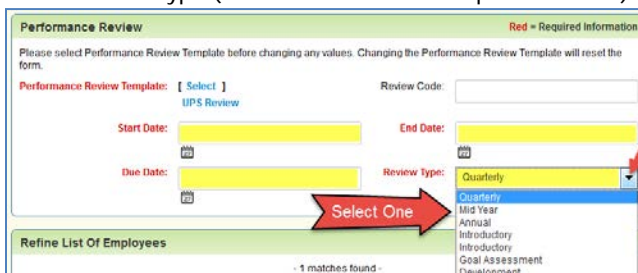
Search: Go!

Search performance review template by title, review code or ID

Title	Review Code ▲	Last updated
PAO Review		10/16/14 8:30 PM
TCO Review		9/23/14 1:49 PM
UPS Review		10/16/14 8:29 PM

Complete the following:

- Start Date (date this review period began)
- End Date (date this review period will end)
- Due Date (date this review is due from employee for approval)
- Review Type (select one from the drop down menu)



Performance Review Red = Required Information

Please select Performance Review Template before changing any values. Changing the Performance Review Template will reset the form.

Performance Review Template: [Select] Review Code:

UPS Review

Start Date: **End Date:**

Due Date: **Review Type:** Quarterly ▼

Refine List Of Employees - 1 matches found -

Select One Quarterly
Mid Year
Annual
Introductory
Introductory
Goal Assessment
Development

Under the Refine List of Employees header; the employee's name is shown. (Additional information will be provided for assigning the same review to multiple employees)

Refine List Of Employees

- 1 matches found -

Will not be assigned to review

Will be assigned to review

Employee5, Face

Under the Review Manager header; the default is that the review manager is already associated to the employee's record. The ability to select a different review manager is available by selecting/clicking "Select User".

Review Manager

Assign the "Review Manager" to this performance review. This would represent the Manager that will be conducting the review with the employee. Only the review manager will be able to score the Employee.

☒ Assign the Review Manager associated to the Employee Records

☐ Assign Review Manager: [Select User]

Under the Performance Review Contributors header; the ability to assign contributors is available by selecting/clicking "add/edit".

Performance Review Contributors

Assign contributors to review - contributors will be able to view the performance review and provide feedback by adding comments.

Assigned Contributors: [add/edit]

Under the Performance Review Approver header; there is no action required.

Performance Review Approvers

Approvers can be automatically assigned to Employee Performance Reviews based on where the Employee resides in the organization. Design the approval pattern to be applied to the Employee Reviews and used to dynamically assign the appropriate approvers. The order in which you sort the approvers can be used to force the approval sequence.

Reviewer's Manager ?

Once all items have been completed, select/click "Save".

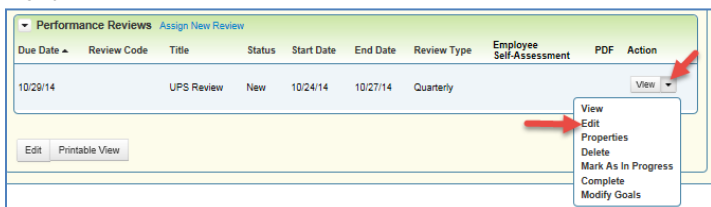
Save Cancel

Making Comments on a Performance Review

The Performance Review is now visible under the “Goals & Reviews” tab for Employee 5.



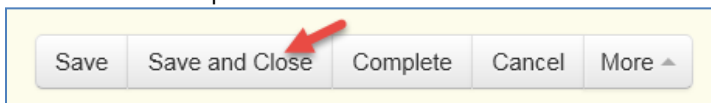
Additional options are now available under the “View” dropdown menu.



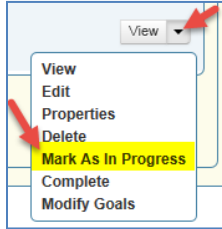
By selecting/clicking on “Edit”, the ability to enter comments on the following is available:

- Current Responsibilities
- Performance Assessment
 - Competencies selection
- Expectations and Goals
- Professional Development
- Overall Comments

Once edits are completed select/click “Save and Close”



By selecting/clicking on “Mark As In Progress”, the Employee has the ability to view and enter their own comments:



TIP: *Managers/Supervisors are only able to ‘Edit’ their own comments. Employees are only able to ‘Edit’ their own comments.*

A confirmation screen will appear. Select/Click “Yes” to continue.

A confirmation screen with a yellow background. At the top are 'Yes' and 'No' buttons. Below is a green header bar with the text 'Change Performance Review to In Progress ?'. The main text asks: 'Would you like to change status of performance review **UPS Review** from **New** to **In Progress** ?'. Below this is a prompt: 'Please add explanatory text for record-keeping purposes:' followed by 'Comments:' and a large text input box. At the bottom are 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.



TIP: After the conversation between Manager/Supervisor and Employee, the Manager/Supervisor should allow the Employee a specified number of days in which to capture any further comments on their review.

Once an Employee has completed their comments, they should select “Submit for Approval”.

By selecting/clicking on “Edit”, the ability to see the Employees comments is available.

Due Date	Review Code	Title	Status	Start Date	End Date	Review Type	Employee Self-Assessment	PDF	Action
10/29/14		UPS Review	New	10/24/14	10/27/14	Quarterly			View

Buttons: Edit, Printable View

Dropdown menu options: View, Edit, Properties, Delete, Mark As In Progress, Complete, Modify Goals

After the conversation between Manager/Supervisor and Employee has taken place and all comments have been captured, select/click “Complete”

Buttons: Save, Save and Close, Complete, Cancel, More



TIP: Managers/Supervisors can select the “Complete” action even if the Employee does not select the “Submit for Approval”.

A confirmation screen will appear. Select/Click “Yes” to continue.

Yes No

Complete Performance Review

Are you sure that you want to complete the review **UPS Review** for **Employee5, Face** ?

You may add comments for record-keeping purposes:

Comments:

Yes No

eSign

Once a performance review is Complete, the electronic signature (eSign) process begins.

1. The Employee will receive an email stating that their review is awaiting their eSignature.
2. The Employee sees a 'Sign Here' flag next to the review on the Employee Website.
3. Once the Employee has completed their eSign portion the Manager/Supervisor completes theirs.
4. The Manager/Supervisor selects/clicks the eSign link from the Action menu.
5. Select/Click "eSign Review" at the bottom of the screen.
6. Completely fill in all fields then select/click "eSign it!"
7. The Employee is now able to View the fully signed Review from their portal access under the Past Reviews tab.
8. The Manager/Supervisor is able to View the fully signed Review from the Employee Goals & Review tab.

Employee Portal View of review awaiting e-Sign.

Active Reviews		Past Reviews			
Reviews					
Due Date ▲	Review Code	Review Manager	Review Type	Employee Self-Assessment	Employee Review Actions
11/28/14		Manager5, Face	Quarterly		View/Sign Sign Here

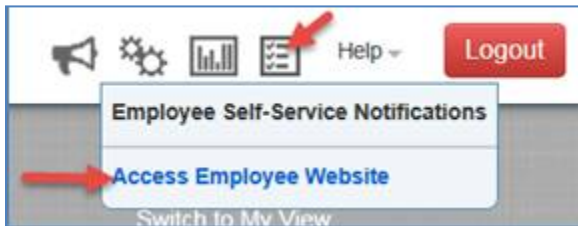


TIP: Use Chrome or Firefox to access FACE, instead of Internet Explorer. Some users have had issues trying to eSign a performance review when using Internet Explorer 8.

Manager Access to Employee Website

Managers/Supervisors, in order to complete your personal Performance Reviews created by your Manager/Supervisor, you will need to access the Employee Website as shown here.

1. Login to the FACE Manager Access as normal
2. On the top right; Select “Employee Self-Service Notifications”
3. Select “Access Employee Website”



4. On the Warning Pop-Up; Select “Yes-take me to the Employee Website”



Managers/Supervisors will now follow the same instructions for Employees (see [Employee Guide Volume 2](#)).



TIP: For technical assistance with the FACE system, contact the BTS Customer Support Center at 453-HELP (453-4357). For general questions, email Human Resources at face@pinellascounty.org.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no text or other markings on the paper.