USER GUIDE

Managing COVID-19 communications via Flare

How to best respond to COVID-19 related HR issues in your Flare platform

What is the COVID-19 Guide?

This is a step-by-step guide designed to help Flare users respond and manage HR compliance, employee communications and changes related to COVID-19.

In this guide:

1. Distribute policy updates using Info Requests
2. Create an info center for your employees
3. Manage employee lifecycle & offboarding

PART 1 | INFO REQUESTS

Distribute new policies and company updates

PART 1 | INFO REQUESTS

Distribute policy updates using Info Requests

Keep your workforce up-to-date with policy and procedure changes related to COVID-19 and your business.

If you need employees to acknowledge new company-wide changes or sign policies, you can manage that using Info Requests.

Use cases:

- Share a Work from Home policy update
- Complete a Health Declaration form
- Issue contract variations

USE CASE

PART 1 | INFO REQUESTS

How to: Distribute policy updates using Info Requests

1. *Setup* the Info Request workflow
2. *Distribute* the Info Request to employees
3. *Track* employee completion

Let’s use an example of issuing a Work From Home Policy update.

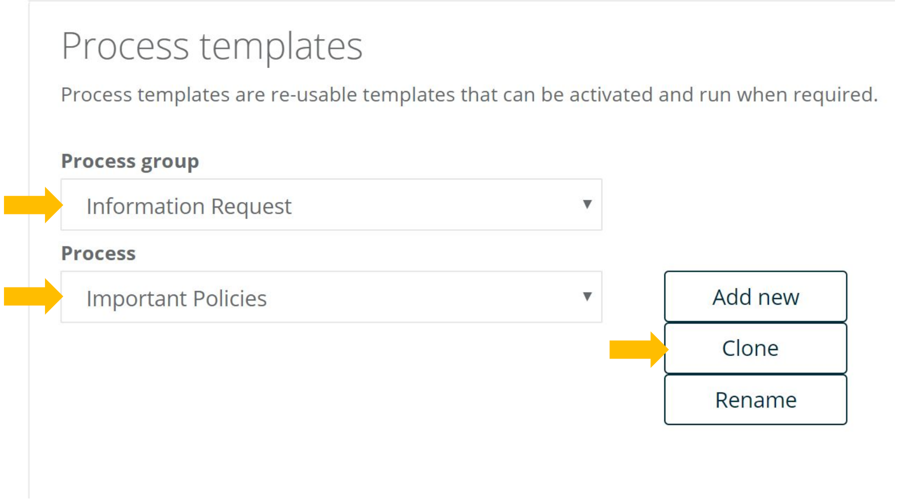
PART 1 | INFO REQUESTS

1) Setup the Info Request workflow

1A) Create the Info request

Once you're in the Flare platform,

1. Go to Settings > Rules > Process Templates
2. Under *Process Group*, select Information Request
3. Under *Process*, select Important Policies, click *Clone*
4. Select Rename, update the info request name to "WFH Policy"
5. Select Save

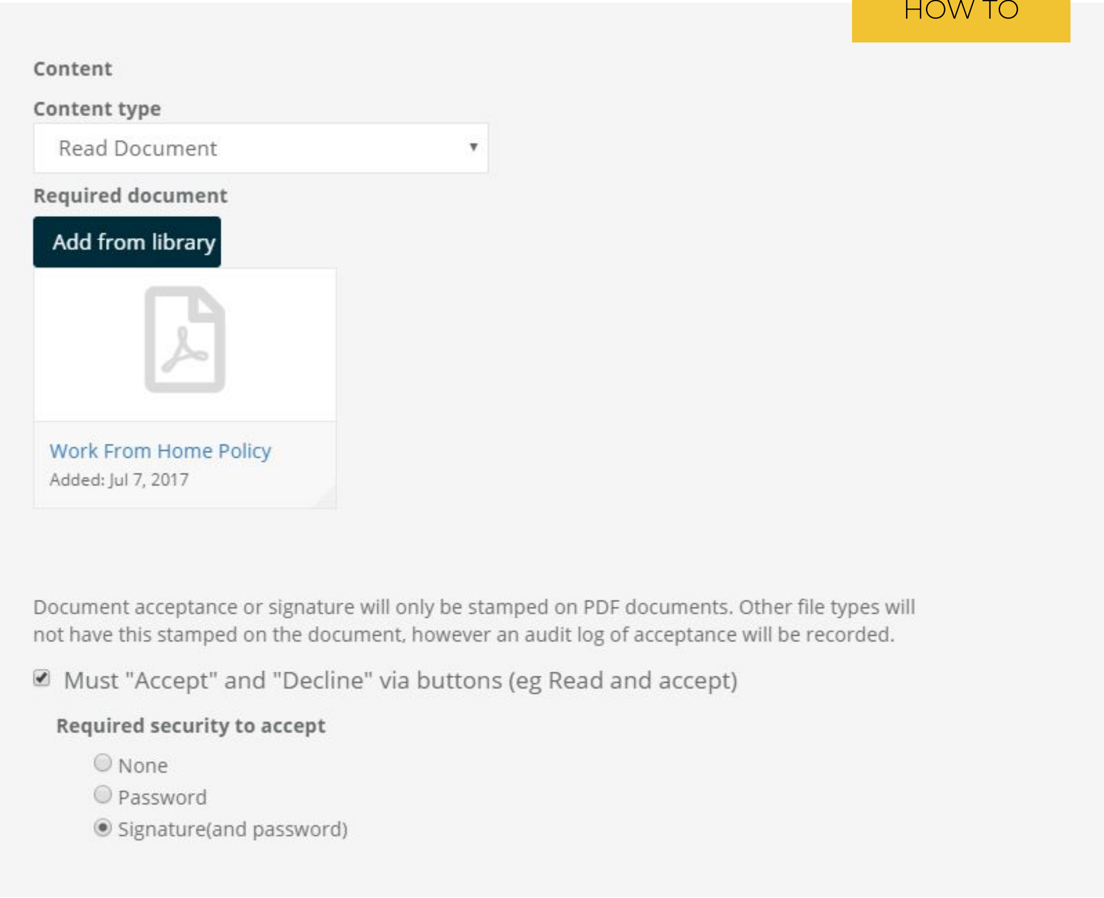


Knowledge Base:
[Create and Activate an Info Request]

PART 1 | INFO REQUESTS

1B) Add the policy

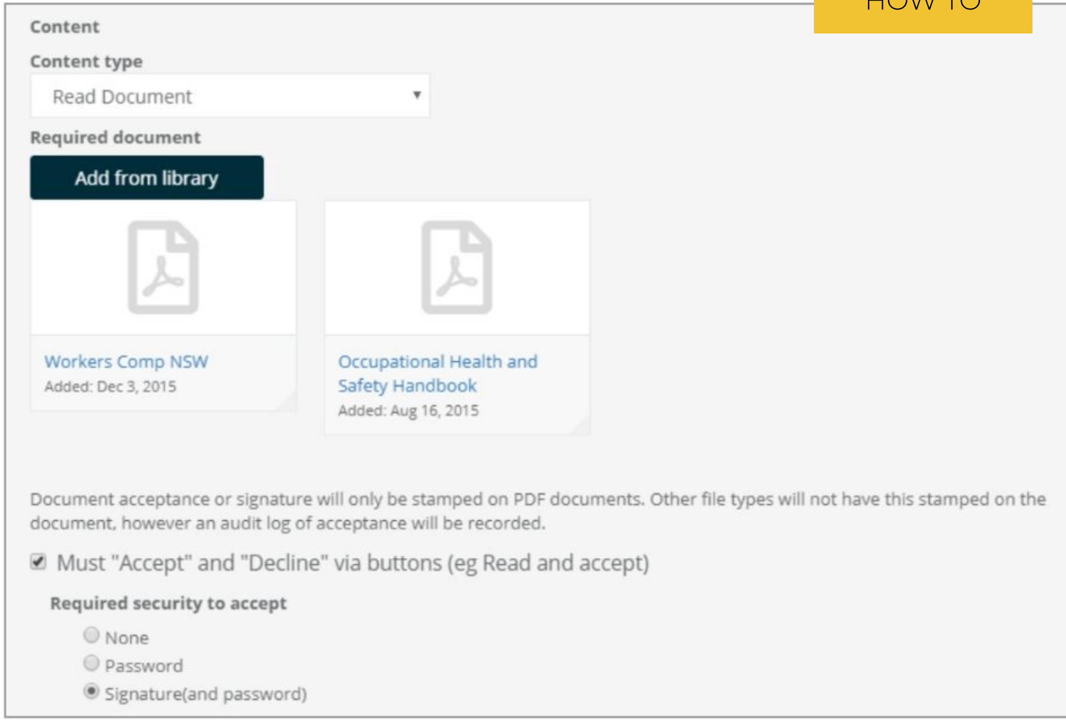
1. Within the WFH Policy, scroll down to *Process Steps Setup*
2. Update the *Instruction* text to match your business tone of voice
3. Under *Content*, select Add from Library and add the appropriate policy to the step. **Please ensure the document is available to all staff (right click and update 'Properties')*
4. Determine the level of acceptance required by selecting Must *"Accept" or "Decline"* and whether the employee must sign, enter their password or neither (more detail here)
5. Select Save to complete your info request setup.



1B) Add the policy, continued

To issue a policy, the Content Type needs to be set to *Read Document*. There are three document acknowledgement & acceptance methods.

- *None*: User clicks accept. Date stamp added to document stating “Accepted” with name, time and date
- *Password*: User prompted for username & password. Watermark added to document stating “Authorised” with name, date & time
- *Signature*: User prompted for username, password and electronic signature. Date stamp added to document stating “Signed” with name, time and date



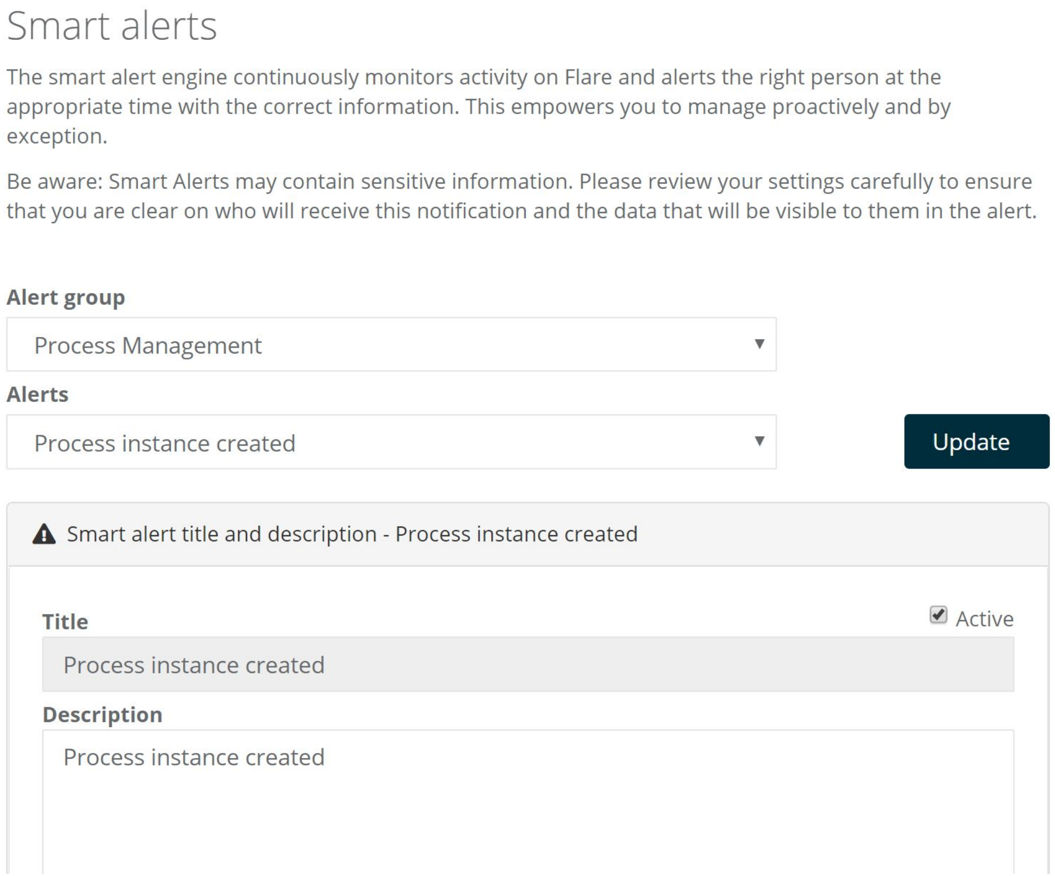
Knowledge Base: [How to add date timestamps to documents]

PART 1 | INFO REQUESTS

1C) Enable Smart Alert Reminder

With the Info Request created, ensure your employees are notified to review, sign and acknowledge the new policies

1. Navigate to *Settings > Rules > Smart Alerts*, select *Process Management > Process instance created*
2. Ensure the Alert delivery method *Email* is ticked
3. Select recipients and tick *'Send to person'* to involve the employee
4. Amend the Message to send to reflect what the employee is required to do. Note that this is a generic email and will trigger for all Info Requests
5. Click Update

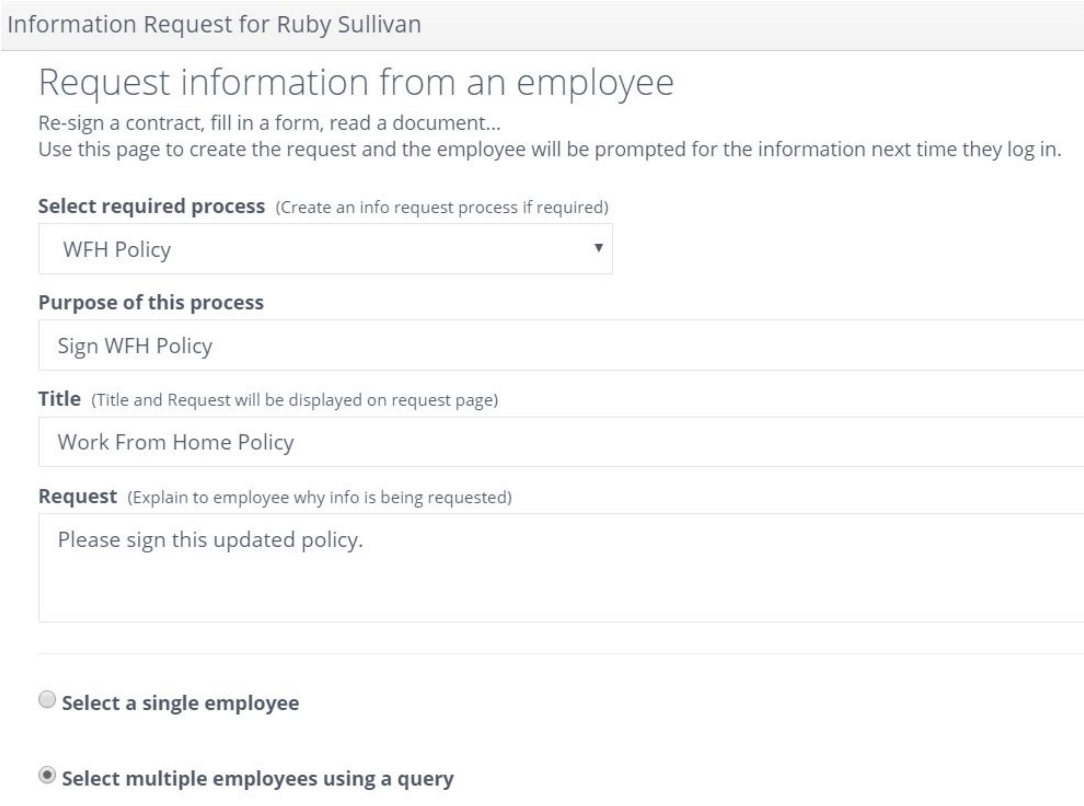


2) Issuing the Info Request workflow

Now that the info request is set up, we can assign it to employees.

1. Navigate to *Employees > Role* and select Info Request and select *WFH Policy* (or the name of the Info Request you wish to send)
2. Complete the details in the pop-up screen
3. Tick *Select a single employee* or using a query
4. Select an existing filter query or create a new one*
5. Select Submit

* Click *Result* to view which employees fall into the filter query

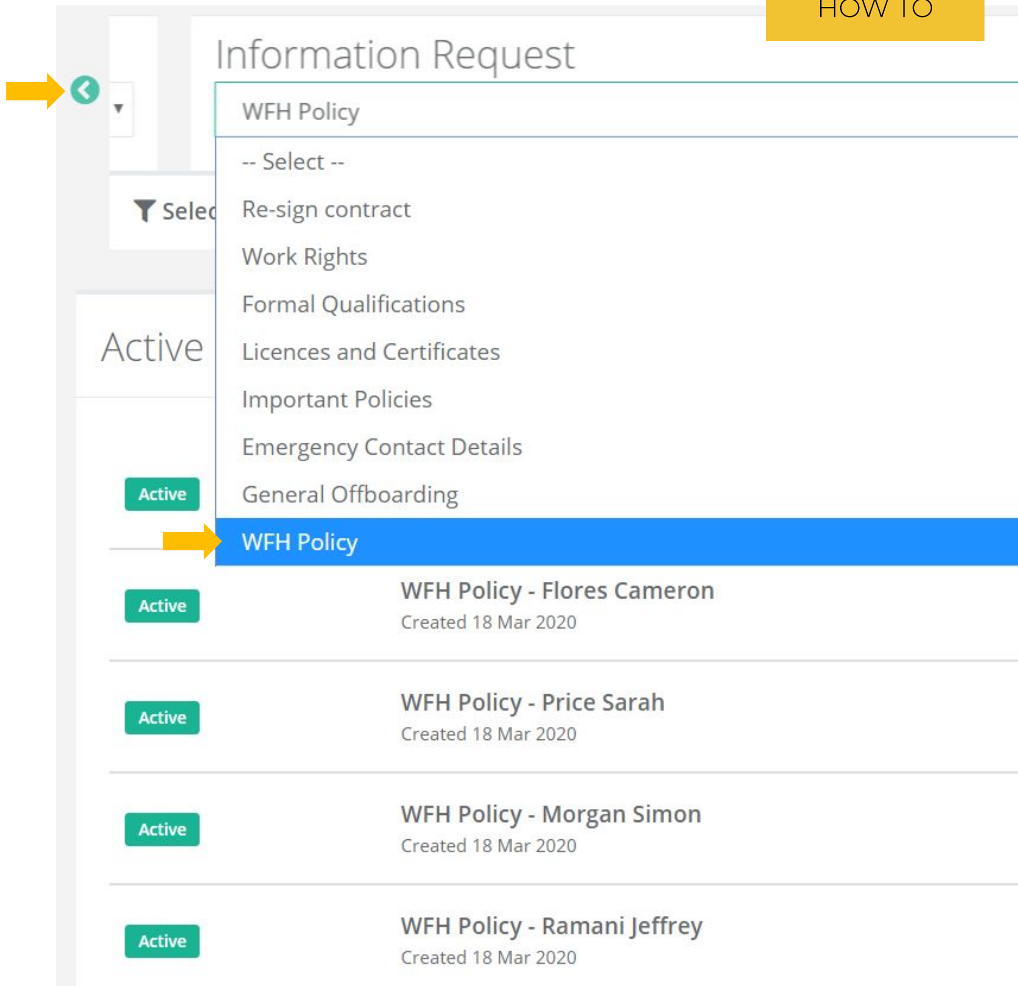


PART 1 | INFO REQUESTS

3) Tracking the Info Request workflow completion

To review a User’s progress:

1. Navigate to *Organisation > Process*
2. Use the green arrows to navigate the which process type you want to view
3. Select the relevant workflow from the dropdown list



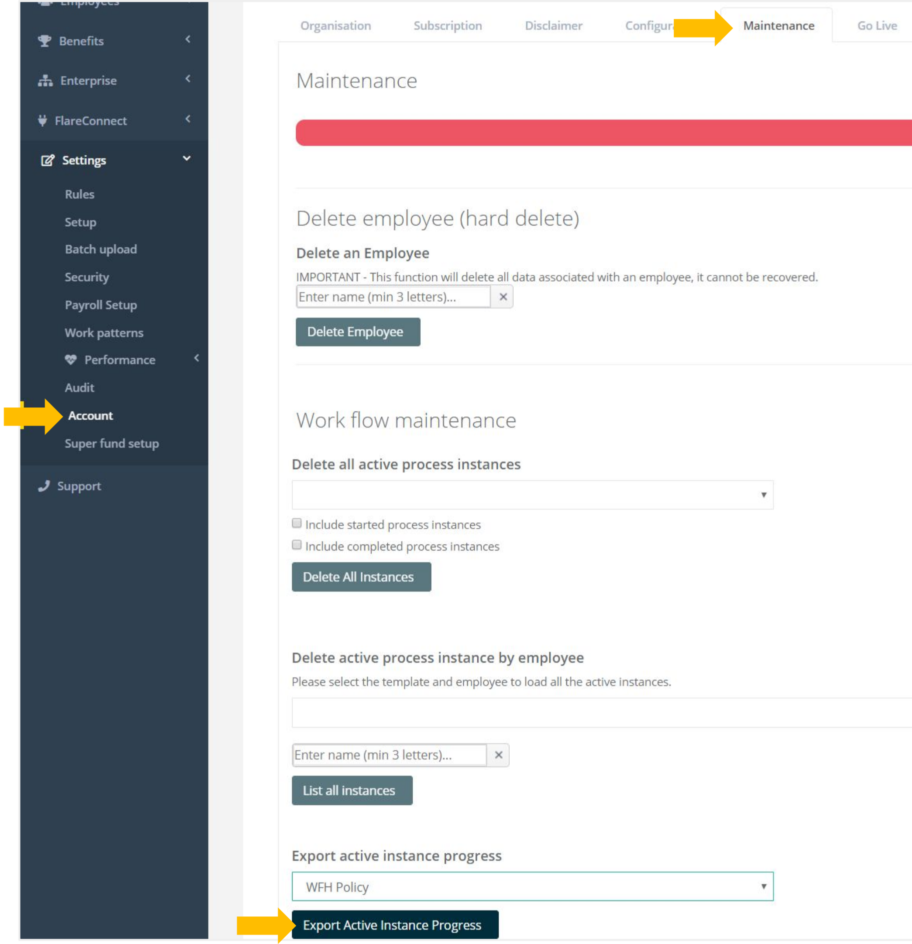
USE CASE

HOW TO

PART 1 | INFO REQUESTS

3) Tracking the Info Request workflow completion

1. Navigate to *Settings > Account*
2. Select the *Maintenance* tab
3. Choose a workflow and click *Export active instance progress*



Resources

Free Policy Templates

BY HARMERS LAW

- Work From Home Policy
- Parental Leave Policy
- Attendance & Absenteeism Policy
- Redundancy Policy
- Workplace Grievance Policy

WFH Templates

BY FAIR WORK

- Flexible work arrangements
- Parental leave
- Parental leave extension: Approval or Refusal

Download the zip file

PART 2 | ORGANISATION LIBRARY

Create an info center for your employees

USE CASE

PART 2 | ORGANISATION LIBRARY

Create an info center for your employees

Creating one place for employees to get updates on Covid-19 makes it easy for staff to know where to go for information.

You can store updates, policies, procedures and resources in the *Organisation Library*, a place that all your employees already have access to.

Use case: Covid-19 Folder

- Store policies and procedures
- Share resources

PART 2 | ORGANISATION LIBRARY

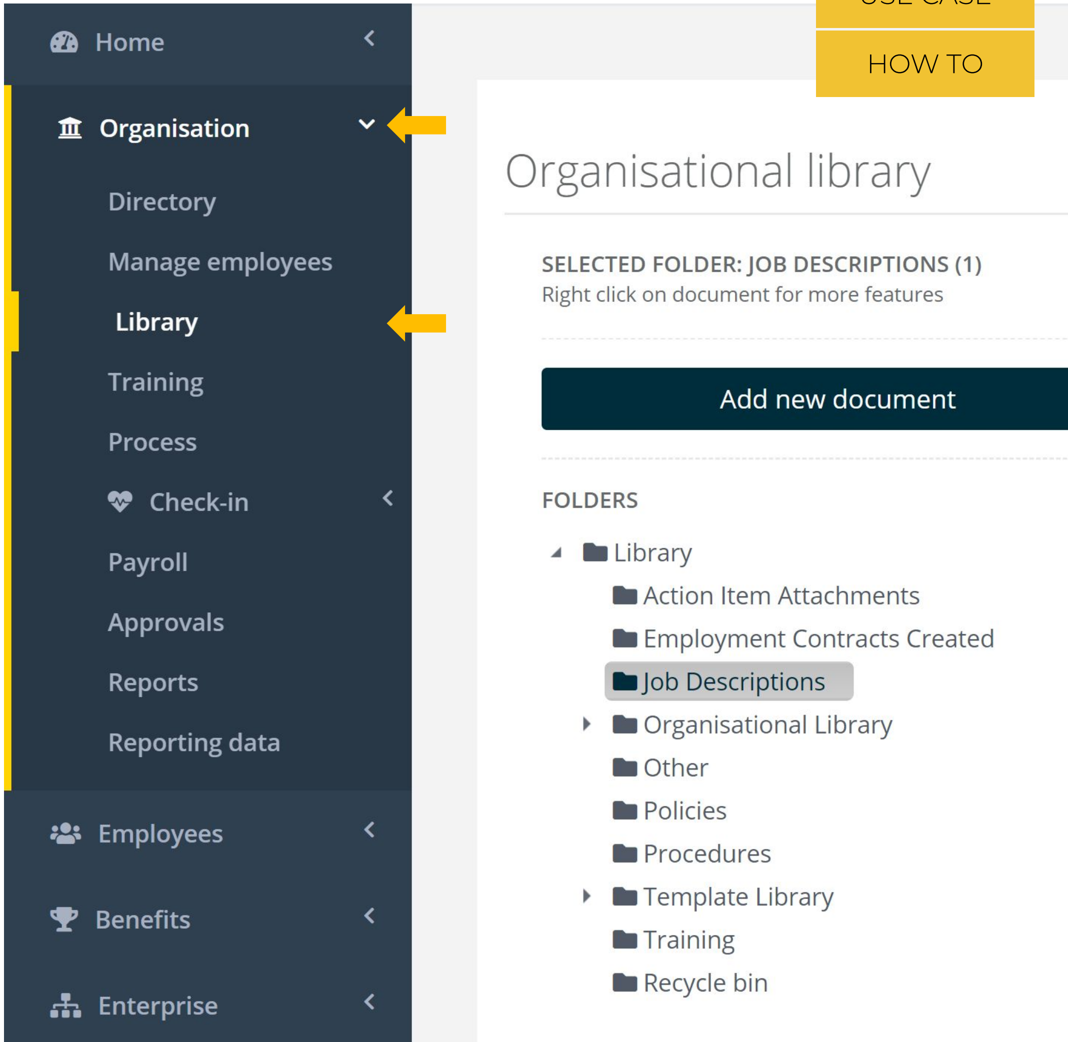
How to: Create an info center for your employees

The organisation library allows you to store, organise and edit documents.

The organisation library functionality includes:

1. Adding new folders
2. Sharing business policies with employees

To access the organisation library navigate to *Organisation > Library.*

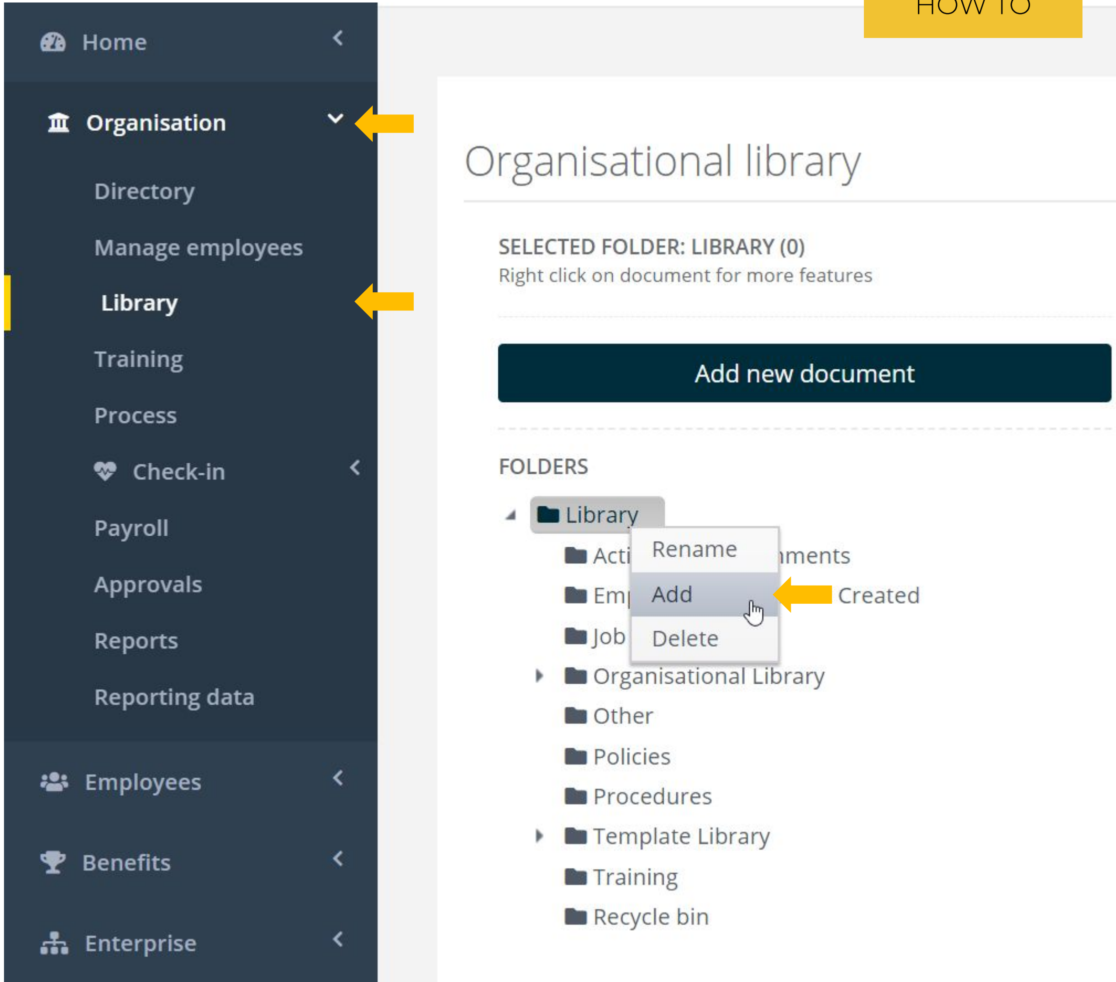


PART 2 | ORGANISATION LIBRARY

1) Adding a folder

Folders can be created and added within the Organisation Library.

1. Navigate to *Organisation > Library*
2. Right click on *Library* and selecting *Add*
3. Type in the folder name (e.g. *Employee information - COVID19*)
4. Click *Save*

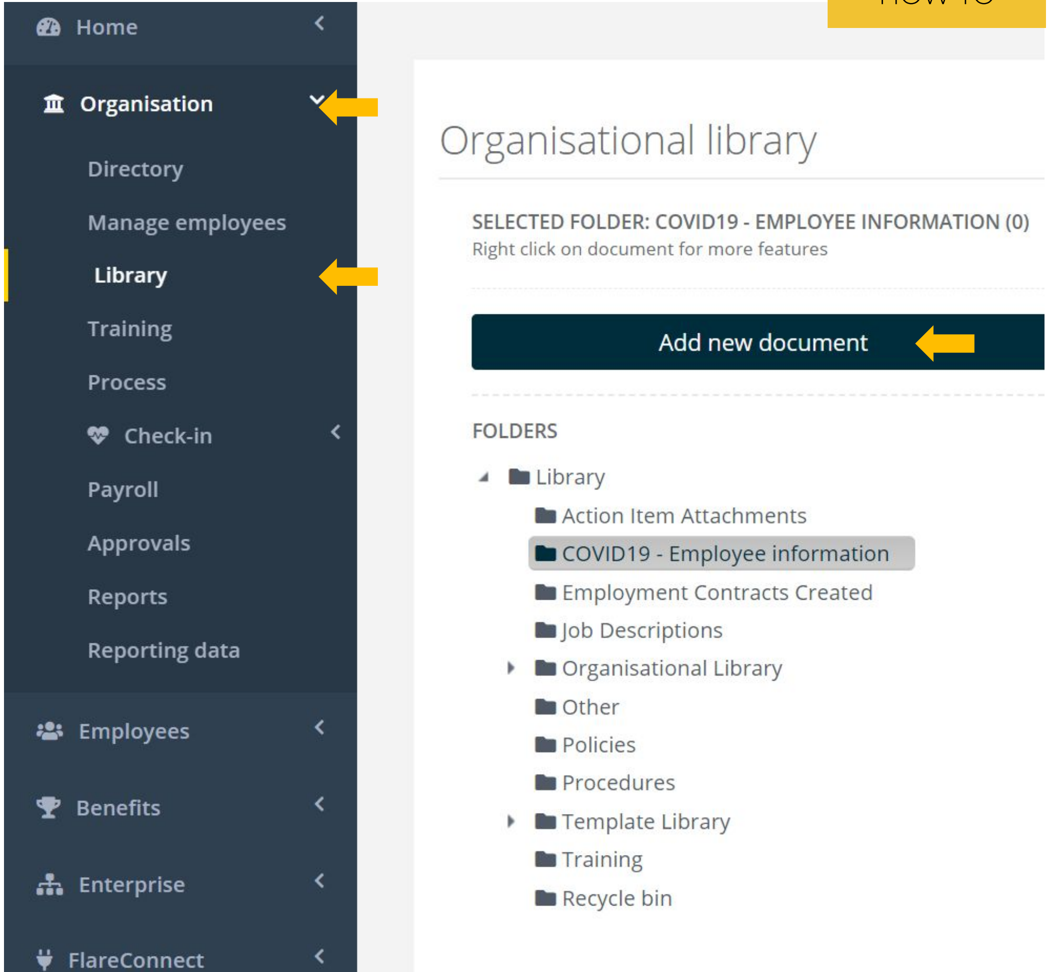


PART 2 | ORGANISATION LIBRARY

2) Adding a document

Documents can be created and added within the Organisation Library.

1. Navigate to *Organisation > Library*
2. Select the folder that you would like to add a document to
3. Click *Add new document*, type in a title and select a document from your computer's files
4. *Right click* on the document and select *Properties*
5. Click into the Security tab
6. Set the people or groups who can access the document (e.g. *Everyone*) and click *Update*
7. To review who can view the document select *Show Access*



Resources

COVID-19 Information for Employees

World Health Organization

Getting your workplace ready for COVID-19

Mythbusters - Coronavirus Facts

Department of Health

Coronavirus Information Center

Coronavirus Information Line: 1800 020 080

Johns Hopkins | University of Medicine

What is Social Distancing?

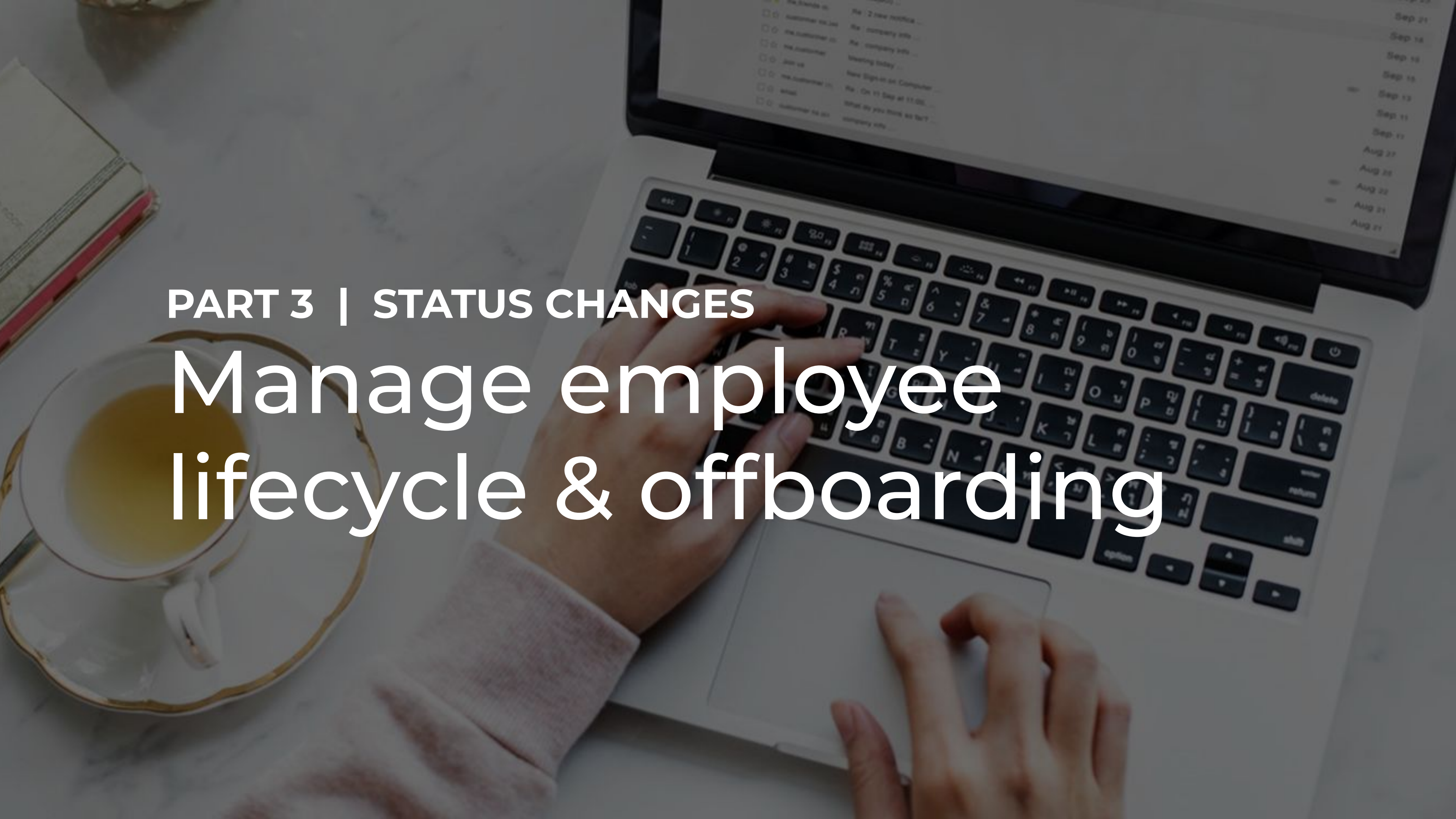
How to protect yourself from the virus

Johns Hopkins' Podcast Series: Coronavirus

Center of Disease Control and Prevention

How to protect yourself

If you think you are sick



PART 3 | STATUS CHANGES

Manage employee lifecycle & offboarding

USE CASE

PART 3 | STATUS CHANGES

Manage employee lifecycle & offboarding

Many businesses will be faced with terminations, and HR is responsible for processing them.

An employee's status within Flare can be updated to reflect when they finish with your business. In doing so, your employment records will be maintained and accurate within the Flare Platform.

USE CASE

HOW TO

PART 3 | STATUS CHANGES

How to: Manage employee lifecycle & offboarding

To terminate employees immediately or at a future date, you can use Flare Status changes.

You can also terminate users in batch, simply reach out to us.

Status changes in Flare allow you to:

1. Set termination dates, reasons and comments
2. Issue termination workflows via Info Request
3. Access terminated users' details

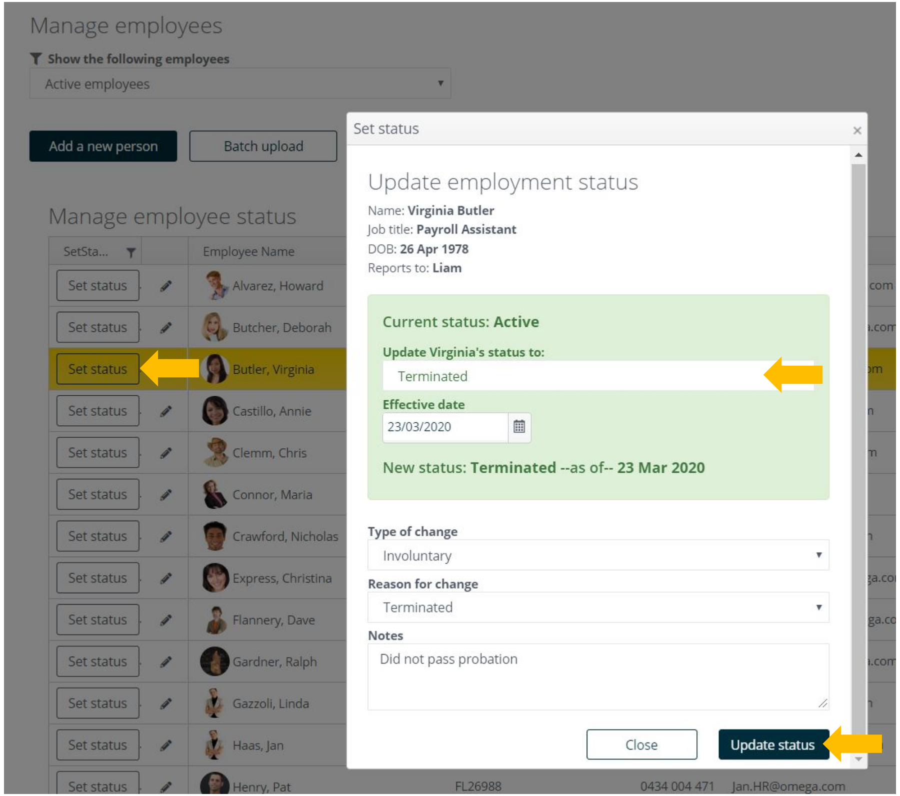
2A) Terminate an employee

An employee’s status can be updated to reflect when they finish with your business. In doing so, you will be able to maintain their records within the Flare Platform.
To terminate an employee:

1. Navigate to Organisation > Manage employees
2. Select Set status and change an employee’s status to Terminated
3. Set the effective date to their last day

Depending on your setup, the termination will need to be approved before the status changes.

Note: At 8pm AEST each night, Flare processes terminations. Terminated employees will no longer be able to access Flare

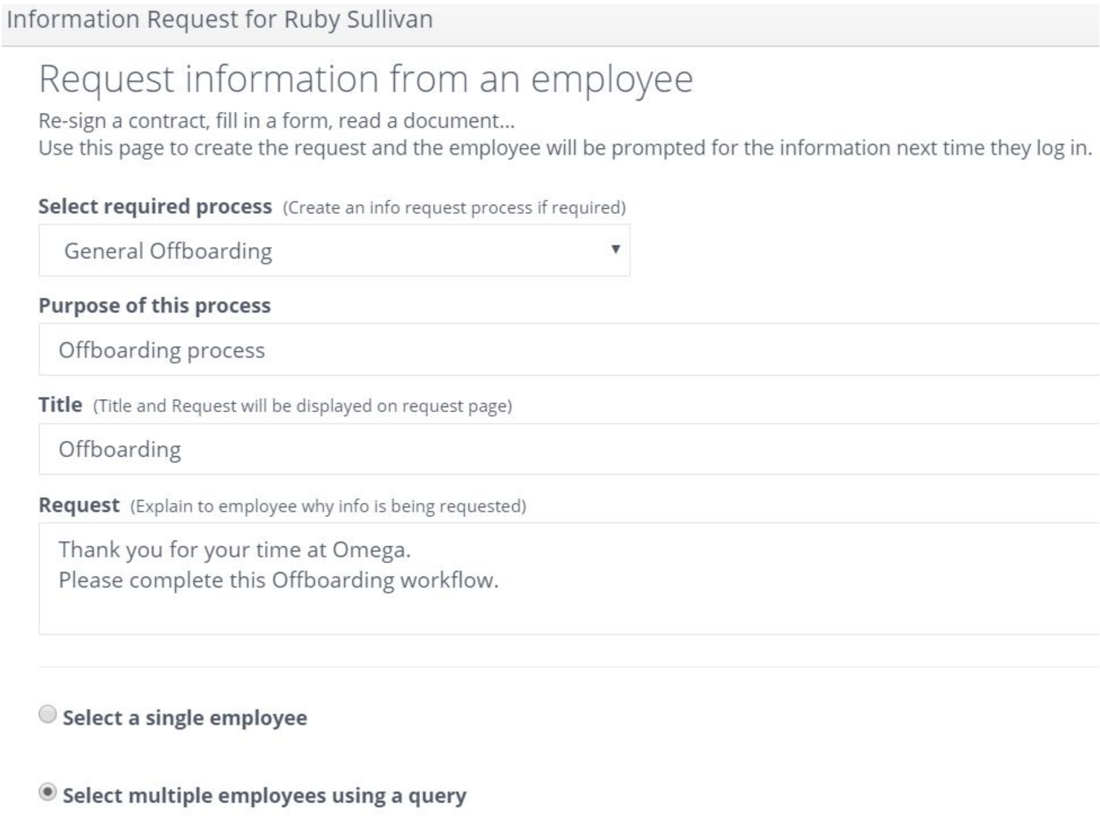


2B) Issue termination workflows via Info Request

Once the Termination request has been submitted, assign an info request to employees to complete Offboarding.

1. Navigate to *Employees > Role* and select Info Request and select *General Offboarding* (or the name of the Info Request you wish to send)
2. Complete the details in the pop-up screen
3. Tick *Select a single employee* or using a query
4. Select an existing filter query or create a new one*
5. Select Submit

* Click *Result* to view which employees fall into the filter query



USE CASE

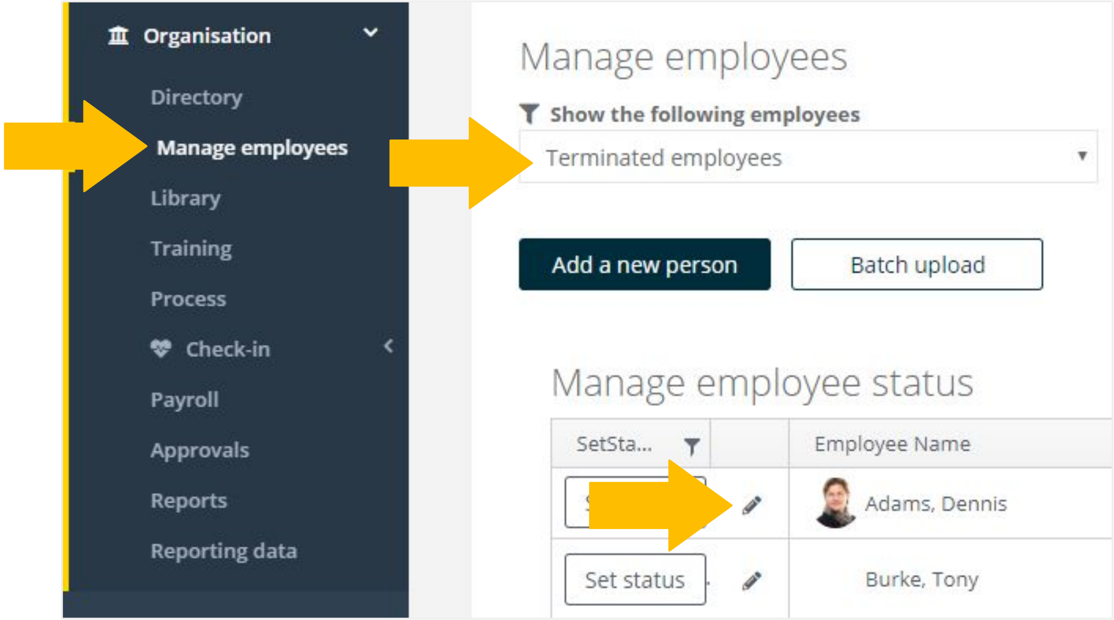
HOW TO

PART 3 | STATUS CHANGES

2C) Access a terminated employee’s records

When you need to access a terminated employee’s records, such as their contract or signed policies, you can easily do so, simply:

1. Navigate to Organisation > Manage employees
2. Select the Terminated employees status
3. Click on the pencil icon next to the former employee’s name to see their employee details
4. Navigate to Employees > Library to view their employment documents



Knowledge Base:
[How to terminate a user on Flare]
[Finding a terminated record]

Resources

Fair Work Templates, related to Employee Status Changes

- Leave application form
- Hours of work agreement or variation
- Termination of Employment
- Direction to take excessive leave
- Notice of requirement to take annual leave for close down

Download the zip file of these templates

Visit Fair Work Templates Library

Flare Support Knowledge Base

The Flare Support Knowledge Base is a library of hundreds of 'how to' and support articles for Flare users.
Access it here

Contact Support:
Submit a request

Support Hours of Operation:
8:30 AM – 6:00 PM AEST

At a glance

For new employees, including additional policies or videos during onboarding to help communicate your plan or policies around leave and remote working.
Adding new policies article

Using info requests or the comms centre to ensure employees are aware of your policies and procedures. This could also be used for video content from your management team. Info request knowledge article and Comms Centre Knowledge base

Adding a new folder in the organisational library with your Coronavirus content so it's centralised in one manageable location Adding documents to org library knowledge article

Thank you.

Was this Guide helpful?
If you are using Flare to manage Covid-19 communications and are open to sharing your use cases with other users, email the Community Team at community@flarehr.com