



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



A person wearing a red sweater and a watch is sitting at a wooden desk, writing on a document. A brown leather bag is on the desk. The background is blurred, showing a computer monitor and some books.

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



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.



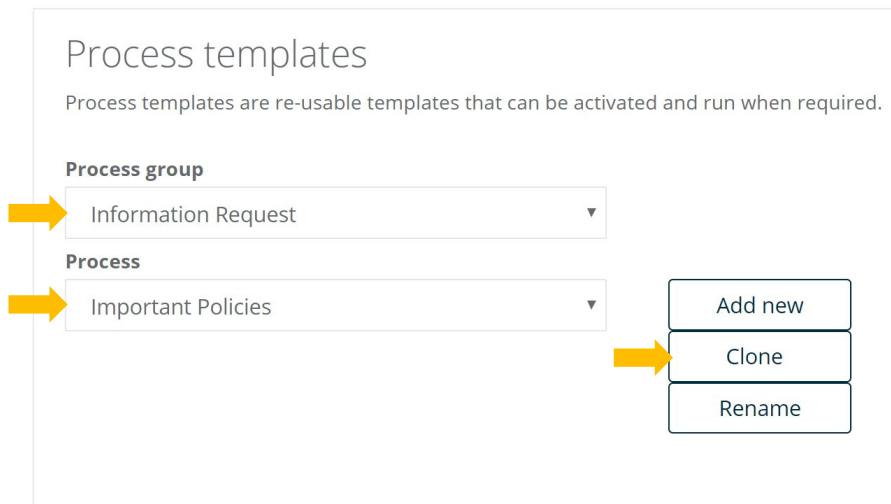
PART 1 | INFO REQUESTS

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.

Content

Content type

Read Document ▼

Required document

Add from library



Work From Home Policy

Added: Jul 7, 2017

Document acceptance or signature will only be stamped on PDF documents. Other file types will not have this stamped on the document, however an audit log of acceptance will be recorded.

- ☒ Must "Accept" and "Decline" via buttons (eg Read and accept)

Required security to accept

- ☐ None
☐ Password
☒ Signature(and password)

PART 1 | INFO REQUESTS

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


Content

Content type


Read Document

Required document

Add from library



Workers Comp NSW
Added: Dec 3, 2015



Occupational Health and
Safety Handbook
Added: Aug 16, 2015

Document acceptance or signature will only be stamped on PDF documents. Other file types will not have this stamped on the document, however an audit log of acceptance will be recorded.

☒ Must "Accept" and "Decline" via buttons (eg Read and accept)

Required security to accept

☐ None

☐ Password

☒ Signature(and password)

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

Smart alerts

The smart alert engine continuously monitors activity on Flare and alerts the right person at the appropriate time with the correct information. This empowers you to manage proactively and by exception.

Be aware: Smart Alerts may contain sensitive information. Please review your settings carefully to ensure that you are clear on who will receive this notification and the data that will be visible to them in the alert.

Alert group

Process Management ▼

Alerts

Process instance created ▼

Update

⚠ Smart alert title and description - Process instance created

Title

Process instance created

☒ Active

Description

Process instance created

PART 1 | INFO REQUESTS

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

Information Request for Ruby Sullivan

Request information from an employee

Re-sign a contract, fill in a form, read a document...

Use this page to create the request and the employee will be prompted for the information next time they log in.

Select required process (Create an info request process if required)

WFH Policy ▼

Purpose of this process

Sign WFH Policy

Title (Title and Request will be displayed on request page)

Work From Home Policy

Request (Explain to employee why info is being requested)

Please sign this updated policy.

☐ **Select a single employee**

☒ **Select multiple employees using a 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

The screenshot shows the 'Information Request' interface. A yellow arrow points to a green left-pointing arrow in a dropdown menu. The dropdown menu is open, showing a list of options: 'WFH Policy', '-- Select --', 'Re-sign contract', 'Work Rights', 'Formal Qualifications', 'Licences and Certificates', 'Important Policies', 'Emergency Contact Details', and 'General Offboarding'. The 'WFH Policy' option is highlighted in blue. Below the dropdown, the word 'Active' is visible. A yellow arrow points to the 'WFH Policy' option in the dropdown. Below the dropdown, there is a list of active requests, each with a green 'Active' button and a title: 'WFH Policy - Flores Cameron', 'WFH Policy - Price Sarah', 'WFH Policy - Morgan Simon', and 'WFH Policy - Ramani Jeffrey'. Each entry also shows the creation date: 'Created 18 Mar 2020'.

Active	WFH Policy
Active	WFH Policy - Flores Cameron Created 18 Mar 2020
Active	WFH Policy - Price Sarah Created 18 Mar 2020
Active	WFH Policy - Morgan Simon Created 18 Mar 2020
Active	WFH Policy - Ramani Jeffrey Created 18 Mar 2020

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*

The screenshot displays the software's user interface. On the left is a dark sidebar with a menu. The 'Settings' option is expanded, showing sub-items: Rules, Setup, Batch upload, Security, Payroll Setup, Work patterns, Performance, Audit, **Account** (highlighted with a yellow arrow), and Super fund setup. Below 'Account' is 'Support'. On the right, the main content area has a top navigation bar with tabs: Organisation, Subscription, Disclaimer, Configur (highlighted with a yellow arrow), Maintenance (highlighted with a yellow arrow), and Go Live. The 'Maintenance' section is active, showing a red progress bar. Below it, there are three main sections: 1. 'Delete employee (hard delete)' with a warning and a 'Delete Employee' button. 2. 'Work flow maintenance' with a dropdown for 'Delete all active process instances', checkboxes for 'Include started process instances' and 'Include completed process instances', and a 'Delete All Instances' button. 3. 'Delete active process instance by employee' with a text input, a 'List all instances' button, and an 'Export active instance progress' section with a dropdown menu showing 'WFH Policy' and an 'Export Active Instance Progress' button (highlighted with a yellow arrow).

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

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

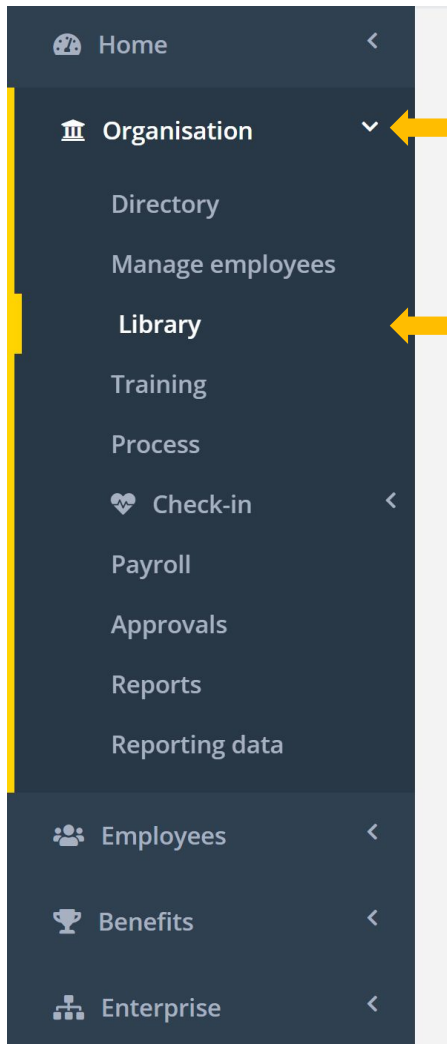
How to: Create an info center for your employees

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*.



Organisational library

SELECTED FOLDER: JOB DESCRIPTIONS (1)

Right click on document for more features

Add new document

FOLDERS

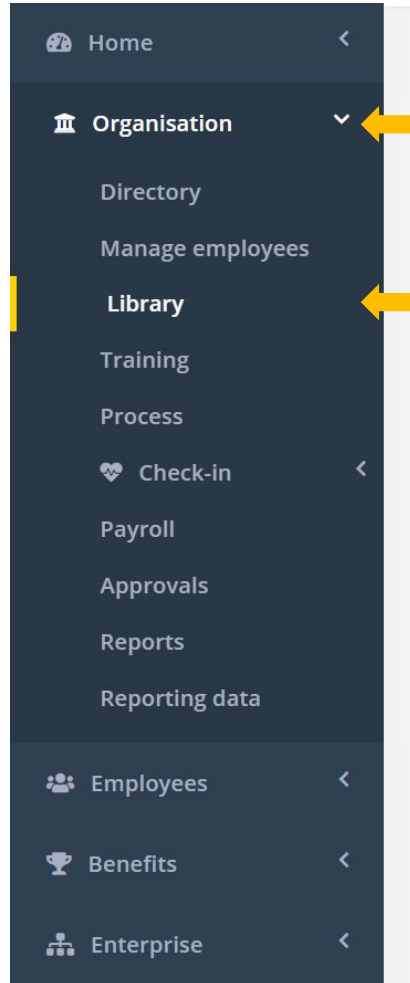
- Library
 - Action Item Attachments
 - Employment Contracts Created
 - Job Descriptions
 - Organisational Library
 - Other
 - Policies
 - Procedures
 - Template Library
 - Training
 - Recycle bin

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*



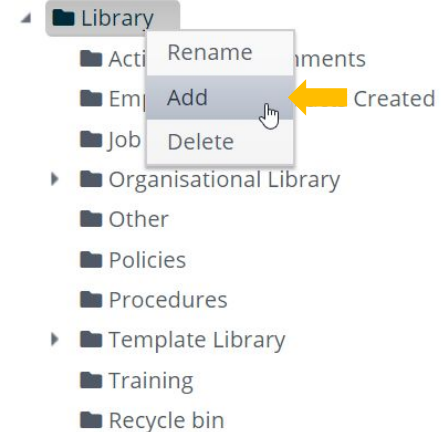
Organisational library

SELECTED FOLDER: LIBRARY (0)

Right click on document for more features

Add new document

FOLDERS

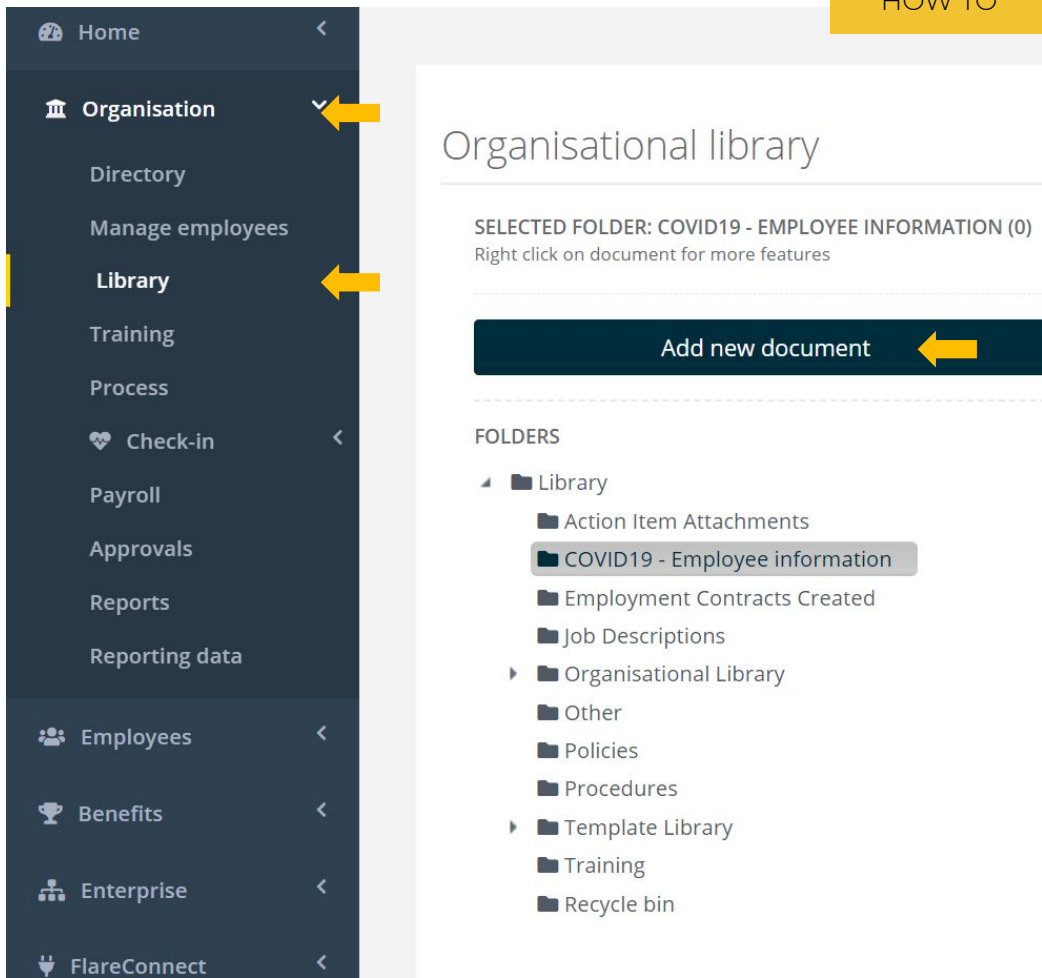


PART 2 | ORGANISATION LIBRARY

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](#)



USE CASE

HOW TO

RESOURCES

PART 3 | STATUS CHANGES

Manage employee lifecycle & offboarding

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.



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



PART 3 | STATUS CHANGES

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

The screenshot displays the 'Manage employees' interface. At the top, there's a 'Show the following employees' dropdown set to 'Active employees'. Below this are buttons for 'Add a new person' and 'Batch upload'. The main section is a table titled 'Manage employee status' with columns 'SetSta...' and 'Employee Name'. The table lists several employees, with 'Butler, Virginia' highlighted. A yellow arrow points to the 'Set status' button for Virginia Butler. To the right, a 'Set status' modal is open, titled 'Update employment status'. It shows details for Virginia Butler: Name: Virginia Butler, Job title: Payroll Assistant, DOB: 26 Apr 1978, Reports to: Liam. The modal indicates the 'Current status: Active' and prompts to 'Update Virginia's status to: Terminated'. It also shows the 'Effective date' as 23/03/2020 and the 'New status: Terminated --as of-- 23 Mar 2020'. Below this, there are dropdowns for 'Type of change' (set to Involuntary) and 'Reason for change' (set to Terminated). A 'Notes' field contains the text 'Did not pass probation'. At the bottom right of the modal, there are 'Close' and 'Update status' buttons, with a yellow arrow pointing to the 'Update status' button. The footer of the interface shows 'FL26988', '0434 004 471', and 'Jan.HR@omega.com'.

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

Information Request for Ruby Sullivan

Request information from an employee

Re-sign a contract, fill in a form, read a document...

Use this page to create the request and the employee will be prompted for the information next time they log in.

Select required process (Create an info request process if required)

General Offboarding ▼

Purpose of this process

Offboarding process

Title (Title and Request will be displayed on request page)

Offboarding

Request (Explain to employee why info is being requested)

Thank you for your time at Omega.
Please complete this Offboarding workflow.

☐ **Select a single employee**

☒ **Select multiple employees using a query**

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

The screenshot shows the 'Manage employees' interface. On the left, a dark sidebar contains a list of options: Organisation, Directory, Manage employees, Library, Training, Process, Check-in, Payroll, Approvals, Reports, and Reporting data. A yellow arrow points to 'Manage employees'. On the right, the 'Manage employees' section is active. It features a dropdown menu labeled 'Show the following employees' with 'Terminated employees' selected. Below this are two buttons: 'Add a new person' and 'Batch upload'. Further down, the 'Manage employee status' section contains a table with two rows. The first row shows 'Adams, Dennis' with a pencil icon. A yellow arrow points to this pencil icon. The second row shows 'Burke, Tony' with a 'Set status' button and a pencil icon.

SetSta...	Employee Name
<input type="text"/> [pencil icon]	Adams, Dennis
<input type="text"/> Set status [pencil icon]	Burke, Tony

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