

A vintage-style globe showing North America, with text overlaid. The globe is centered on the continent, showing various states and provinces. The text is overlaid on the left side of the globe.

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 yellow desk, writing on a document. A brown leather bag is on the desk. The background is a blurred office setting with a computer monitor.

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.



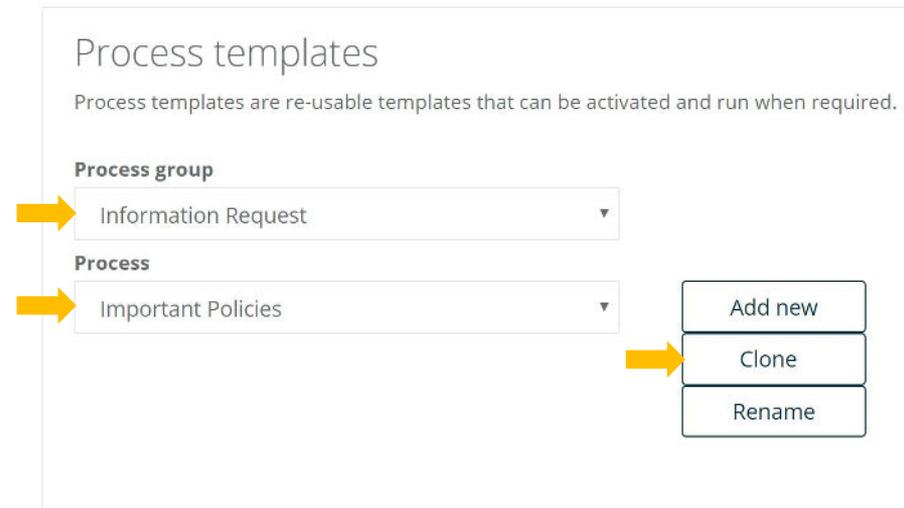
PART 1 | INFO REQUESTS

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

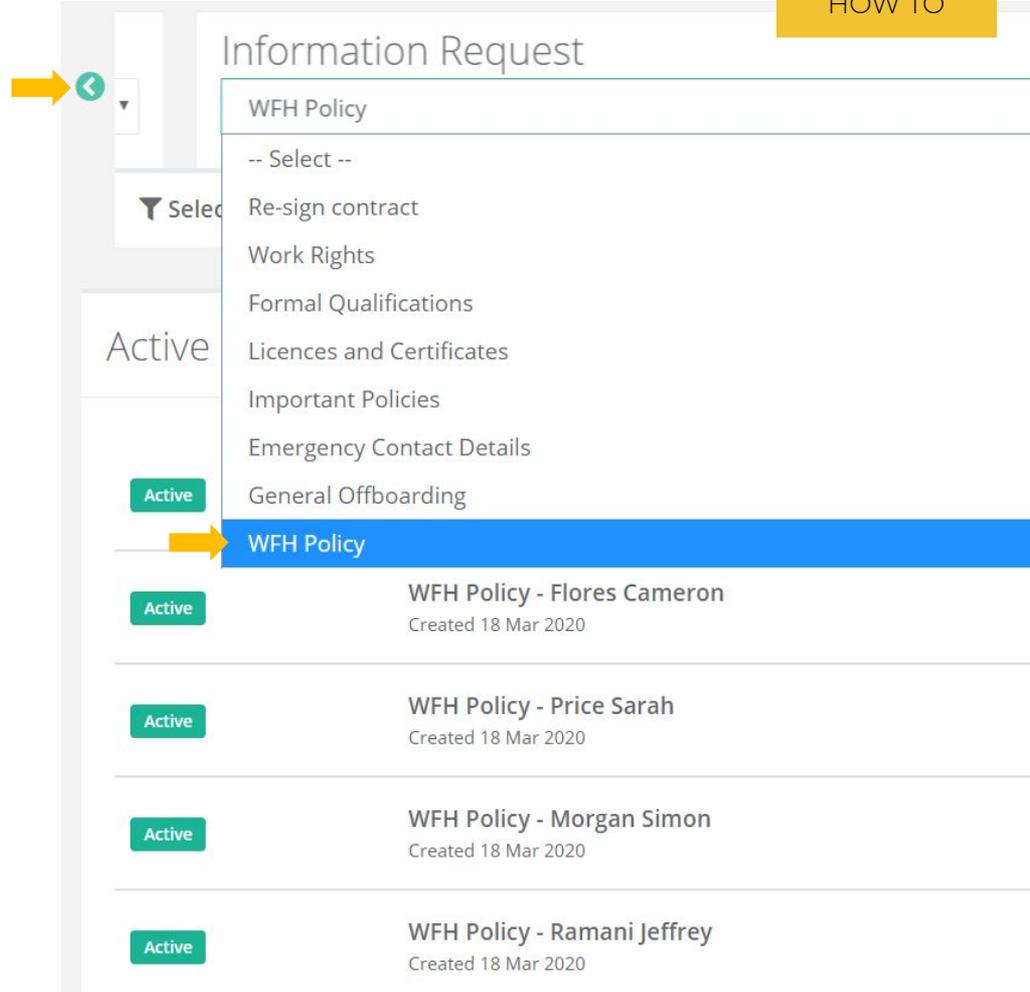
Select multiple employees using a query

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 a web interface for 'Information Request'. A dropdown menu is open, listing various request types. The 'WFH Policy' option is highlighted in blue, and a yellow arrow points to it. Below the dropdown, a table lists active requests for 'WFH Policy'.

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 menu with the following items: Benefits, Enterprise, FlareConnect, Settings (expanded), Rules, Setup, Batch upload, Security, Payroll Setup, Work patterns, Performance, Audit, Account (highlighted with a yellow arrow), Super fund setup, and Support. 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. Below the tabs, the 'Maintenance' section is active, showing a red progress bar. The 'Delete employee (hard delete)' section contains a warning, a text input field for 'Enter name (min 3 letters)...', and a 'Delete Employee' button. The 'Work flow maintenance' section includes 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. The 'Delete active process instance by employee' section has a text input field for 'Enter name (min 3 letters)...' and a 'List all Instances' button. The 'Export active instance progress' section features a dropdown menu with 'WFH Policy' selected and a yellow arrow pointing to the 'Export Active Instance Progress' button.

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](#)

