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

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.

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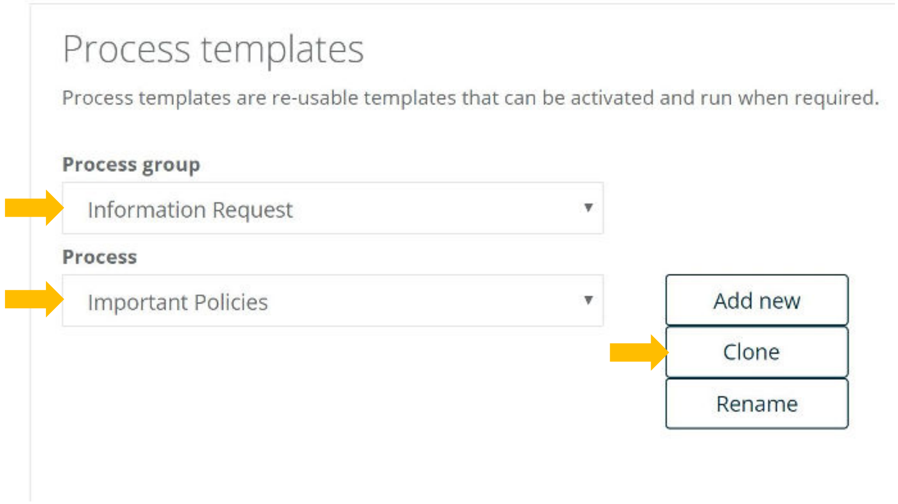
1) Setup the Info Request workflow

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

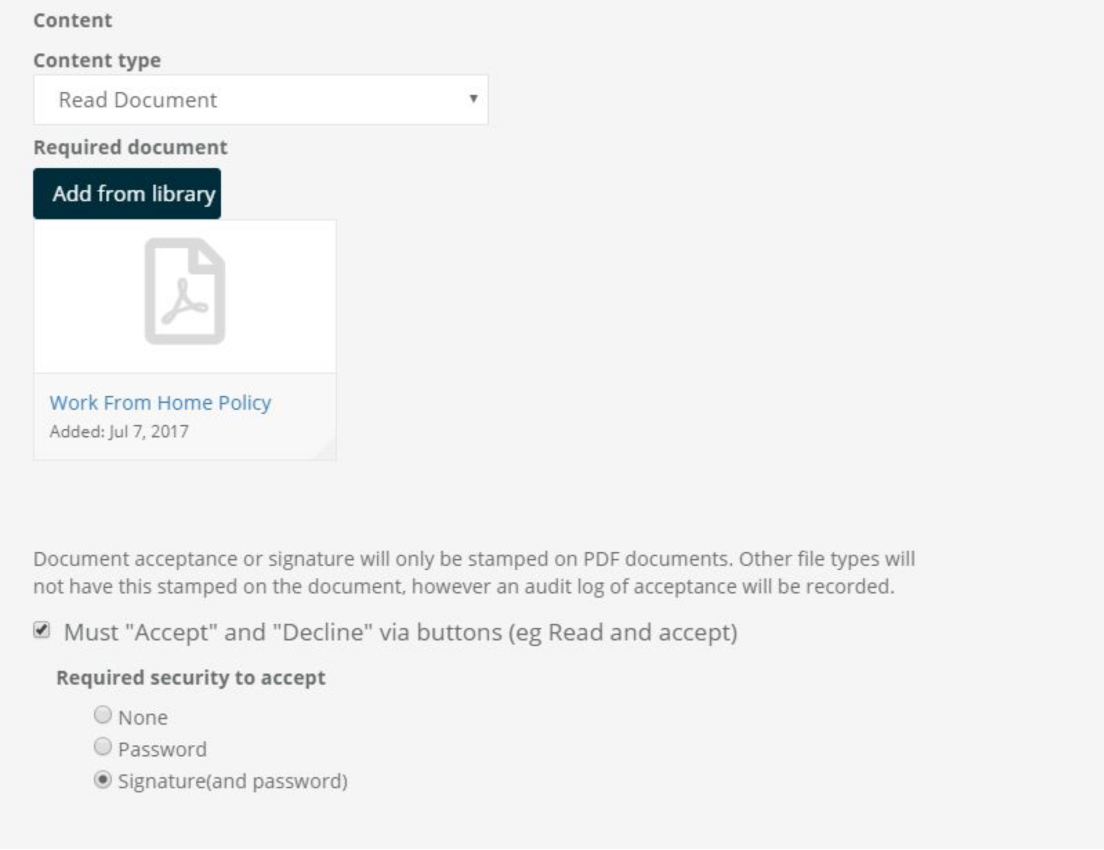


Knowledge Base:
[Create and Activate an Info Request]

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.

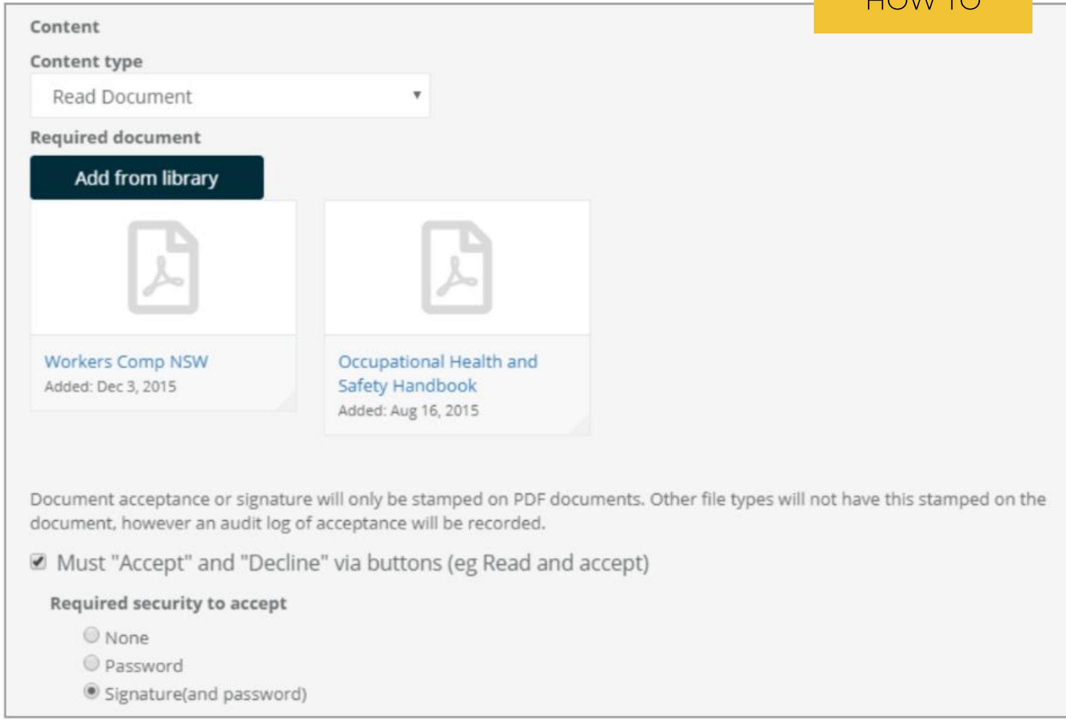


PART 1 | INFO REQUESTS

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

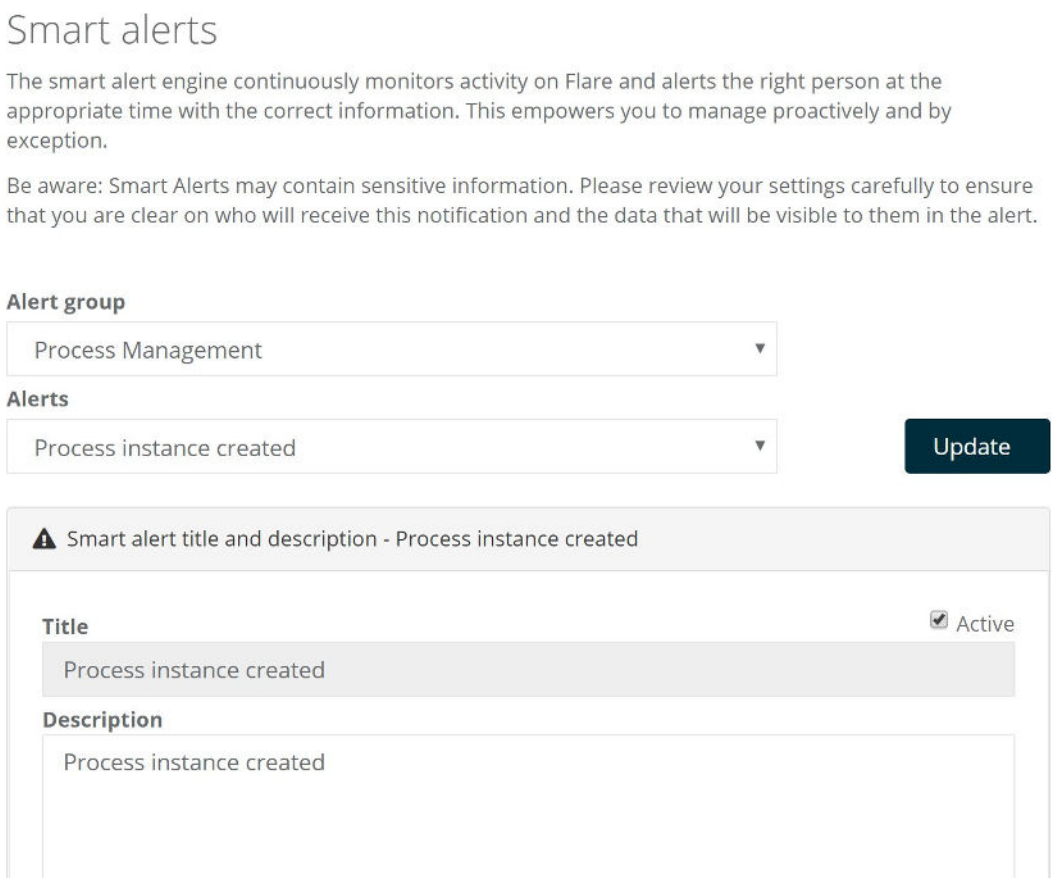


Knowledge Base: [How to add date timestamps to documents]

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



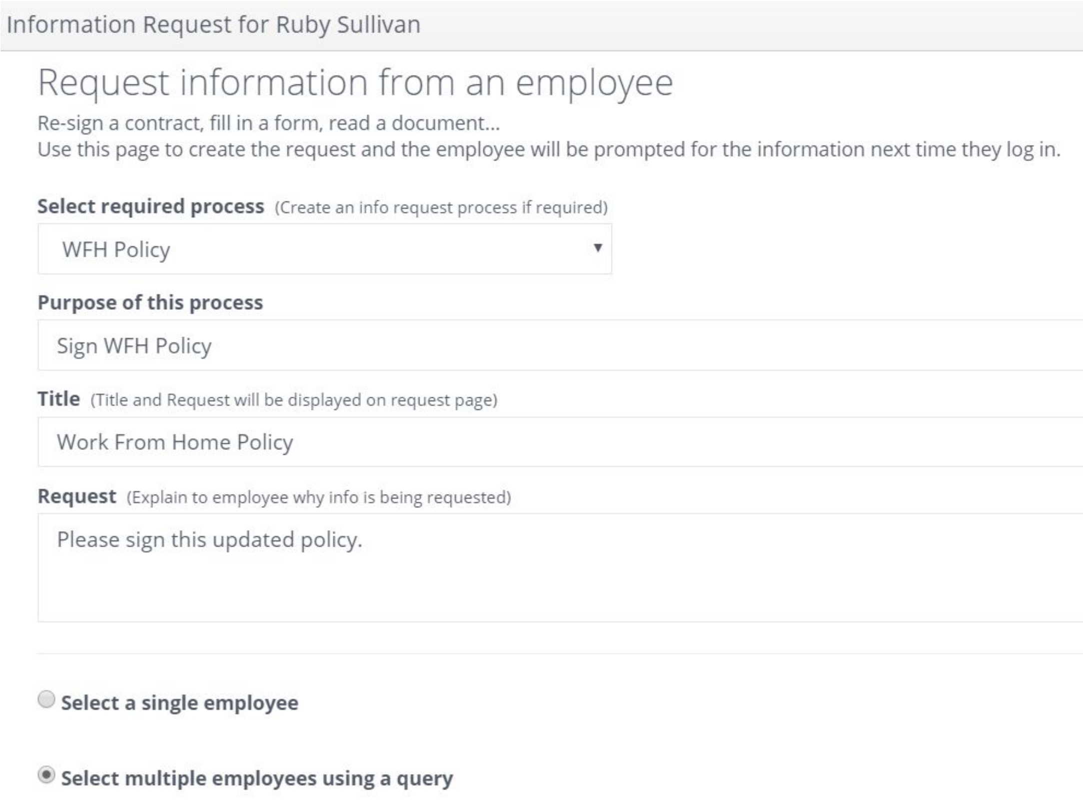
PART 1 | INFO REQUESTS

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

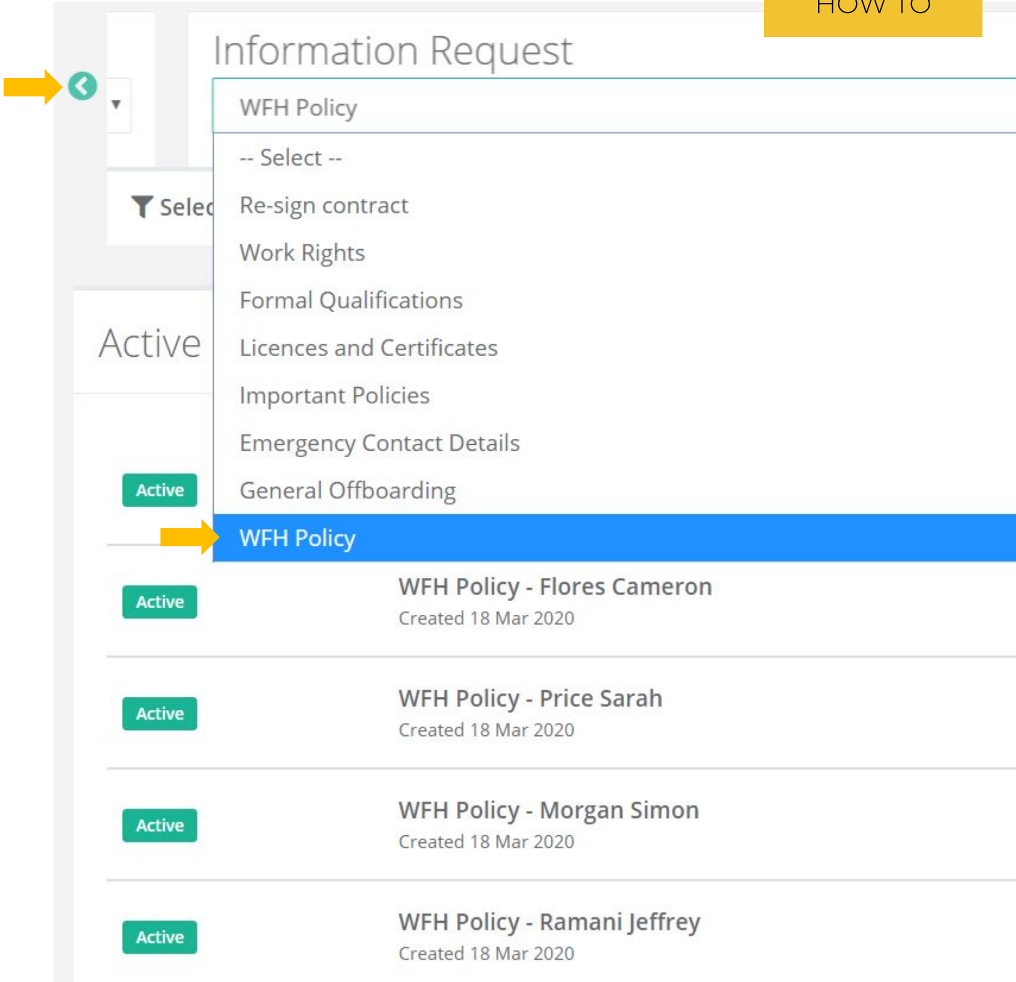


PART 1 | INFO REQUESTS

3) Tracking the Info Request workflow completion

To review a User's progress:

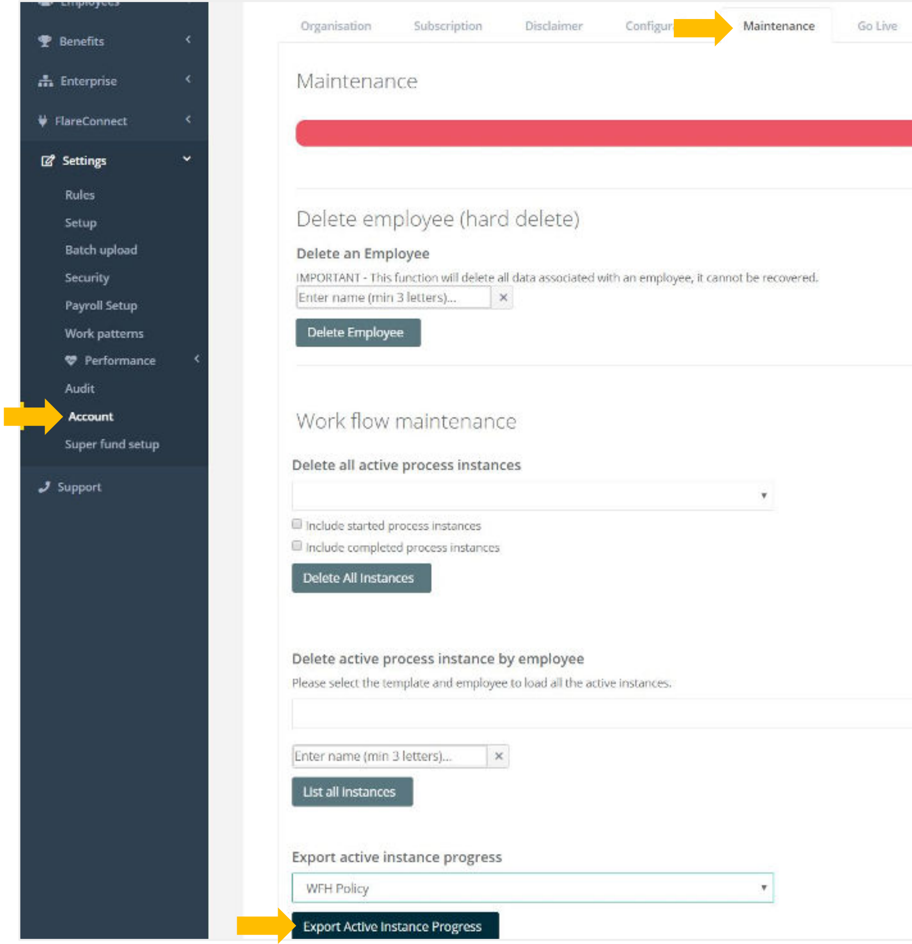
1. Navigate to *Organisation > Process*
2. Use the green arrows to navigate the which process type you want to view
3. Select the relevant workflow from the dropdown list



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