HR ASSURED™
smarter workplace solutions

Managers' Jumpstart Guide

Your guide to using the
Telephone Advisory Service & HRA Cloud

eBook

www.hrassured.com.au www.hrassured.co.nz

Contents

1. Welcome to HR Assured

The legal framework around employment law is complicated and constantly changing. Most people-managers struggle to keep up and often experience a wide range of difficulties and challenges when attempting to manage the compliance of their HR practices and processes. Don't worry, that's normal. Fortunately, help is here!

We've chosen to partner with HR Assured to ensure that you get the assistance you need, when you need it, in your day-to-day people management responsibilities.

Compliance is critical to business success. With HR Assured, you don't have to be an employment law expert to ensure compliance – you now have the following tools available for you to use:

- ✓ **Telephone Advisory Service** - This advice line provides people-managers with direct access to HR Assured for telephone advice in relation to your day-to-day employee and safety management responsibilities and legal obligations. You can seek advice on any matter, big or small!

- ✓ **HRA Cloud** – This is cloud-based software that helps you easily manage your team. You can access it through any internet-connected device using a web browser. It will save your company (and you) a lot of time, make sure you stay compliant with the many workplace and employment laws and regulations, and will help you to foster a healthy workplace culture and employee experience. In short, HR tasks and managing people will become simpler and easier.

- ✓ **A powerful duo** - The *Telephone Advisory Service* and *HRA Cloud* is powerful combination – together, they will give you peace of mind knowing you're legally compliant, your people are being looked after, and your information is secure in the cloud.

The information in this guide will show you how to get the most out of HR Assured as well as provide detail on how to use HRA Cloud.

2. How to access the Telephone Advisory Service?

The most powerful part of your HR Assured service is your access to the award-winning Telephone Advisory Service. This is a 24/7 service with extremely fast response times, staffed by highly qualified HR experts.

You can call for clear, easy to follow advice on a wide range of HR matters, such as:

- ✓ Modern Awards
- ✓ Employment contracts
- ✓ Terminations, redundancy & resignations
- ✓ Workplace investigations
- ✓ Employee entitlements & National Employment Standards
- ✓ Counselling & discipline
- ✓ Enterprise Agreements & bargaining
- ✓ Bullying & harassment
- ✓ Independent contracting agreements
- ✓ Equal Employment Opportunity (EEO) & discrimination
- ✓ Managing ill & injured workers
- ✓ Health & Safety
- ✓ And more!

For a full list of the kinds of matters the advice line can help you with, click here for Australia and click here for New Zealand (scroll down and expand the lists). Also, don't be afraid to call if your query is odd or unusual (albeit HR or safety related) and about something not on the list.

All you need to do is call 02 9083 0000 if you're in Australia, or 09 303 1778 if you're in New Zealand.

You'll be asked for the name of the business from which you're calling, together with your name.

Your name will be checked against a list of authorised users for that business. Only Managers that a business has authorised are permitted to seek advice, so check with your HR department if you're unsure whether or not you're on the list.

Disclaimer: This service advises managers on HR matters relating to their management of employees of your business. It is not for employees themselves (including managers calling, as an employee, regarding their own individual circumstances).

3. What is HRA Cloud?

HRA Cloud (also called the Management Portal) centralises all of your HR record-keeping requirements and day-to-day management tasks within the platform. HRA Cloud uses the concept of a 'worker record', to which all tasks and documents relating to that specific worker are attached. Worker records include candidate records, employee records, contractor records and volunteer records.

The records visible within HRA Cloud at any point depend on the Module that is active. Your user access permissions also determine which types of records you're permitted to view, manage and control. If you can't view or access the worker records you need contact your HRA Cloud Administrator.

Note: While the following how-to guides relate to employee records, all other types of records function the same way.

HRA Cloud will help you, as a leader and manager in your organization, to:

- ✓ **Make HR simple.** With HRA Cloud you don't need to be an HR expert. The platform guides you through smart, legally compliant HR processes with its document templates, workflows and checklists. From performance management templates and termination templates and step-by-step processes to employee management workflows and checklists, HRA Cloud has you covered.

- ✓ **Take control of your record-keeping obligations.** HRA Cloud gives you the tools you need to manage all stages of your employees' lifecycle – from onboarding to performance issues and terminations. All you need to do, as a manager, is to make sure all the HR data for your people is current and in the system.

- ✓ **Automate your HR processes and reduce the time you spend on admin.** You can use HRA Cloud to help you communicate with your employees and set them tasks relating to their personal admin and development. The platform stores all your employee records and has features that let you and your employees easily access, deliver and receive documents and files. When time-consuming HR admin tasks become simple, you'll have more time to work on the things that matter to your business and team.

- ✓ **Track key dates**. Easily keep on top of things like employee work anniversaries and birthdays, probationary periods, expired documents, licenses and certificates – and more – by using the Alerts feature in HRA Cloud.

- ✓ **Provide a better experience at work for your employees.** Employees that are managed well are happier, more productive, and will stay with the company longer. You can use HRA Cloud to track employees' professional and personal goals, manage their performance, and guide you in those 'difficult conversations'. The employee self-service (eSS) portal is another feature that'll help your people feel more engaged in their careers.

WATCH THIS VIDEO: Welcome to core HRA Cloud (Management portal)

4. Logging into the Management Portal

4.1 Obtain your credentials

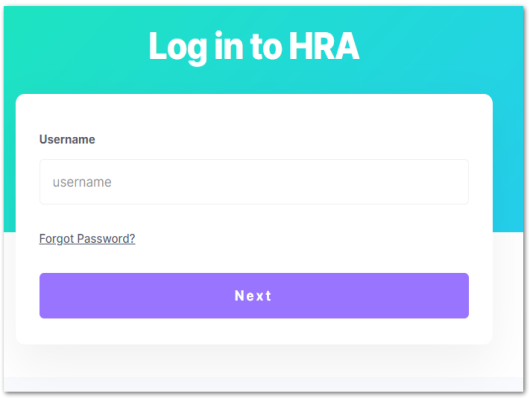
To use HRA Cloud, you'll need to have a valid username and password. Your HRA Cloud administrator will send this information to you via email.

4.2 Log into the Management Portal

1. Go to https://login.hrassured.com/login

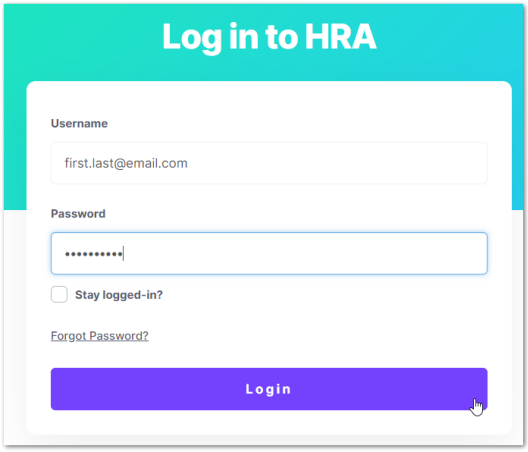
   Enter your ***Username***.

   Click ***Next***.



2. Type in your ***Password***.

   Click ***Login***.



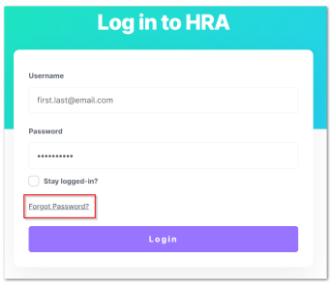
TIP

- Passwords are case sensitive.
- Make sure there are no spaces before the first characters and after the last characters of your username and password.

4.3 Reset a forgotten password

1. Go to https://login.hrassured.com/login

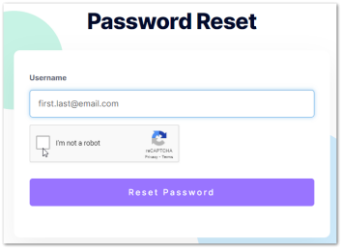
   Click ***Forgot Password***.



2. Type in your ***Username***.

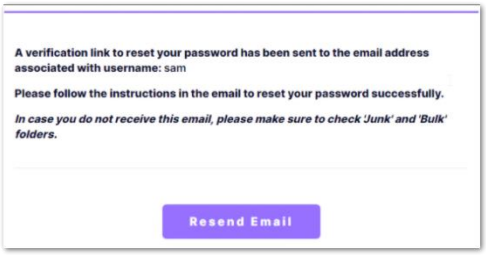
   Click ***Reset Password***.

   TIP: If you're not sure about your username, talk to your manager. Usernames are usually set to be your email address.



3. Check your inbox for an email from support@hrassured.com

   Click ***Resend email*** if necessary.

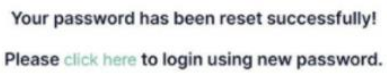


4. In the email, click on ***Click Here***.

5. Enter your new password.

   Click ***Reset password***.

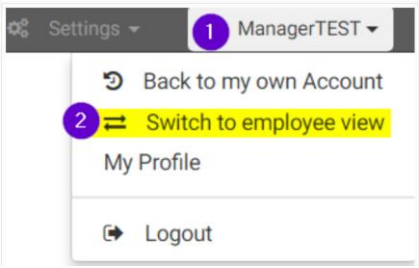
6. Once you get the confirmation message, ***click here*** to log in.



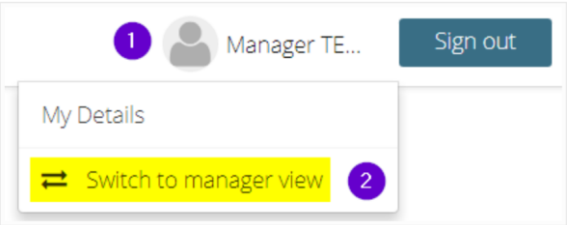
4.4 Switching to the Self-Service Portal

As a manager, you're likely to have to access to both the ***Management Portal*** and the ***Self-Service Portal (eSS)***. You can easily navigate between both portals using the same log in credentials.

1. To navigate to the ***Self-Service Portal***, click on ***your name*** in the top right corner and select ***Switch to employee view***.



2. To navigate to the ***Management Portal***, click on ***your name*** in the top right corner and select ***Switch to manager view***.



TIP:

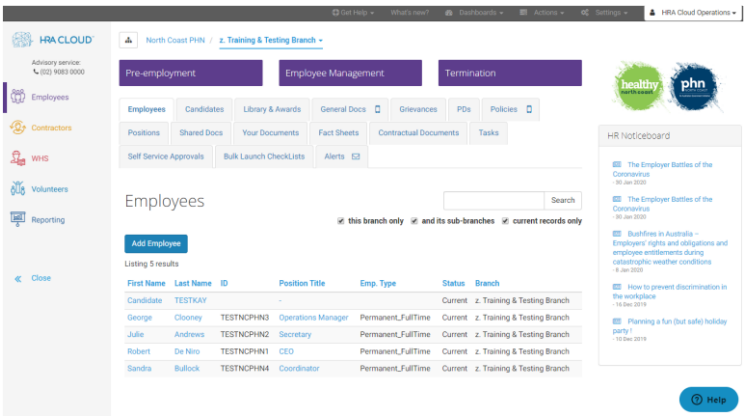
- For this to work, your HRA Cloud account administrator has to have set up your user access profile to use this functionality.
- If the option is not available, please contact your HRA Cloud account administrator, who will be able to activate it for you.
- Refer to the *Employees' Jumpstart Guide* for instructions on how to use eSS.

5. Navigating the Management Portal

5.1 The Home screen

The ***Home*** screen displays modules, workflows, tabs, noticeboards, a help button and other features which are displayed according to your user access permissions.

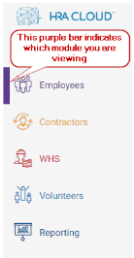
TIP: The exact components on your ***Home*** screen might differ from the image below, depending on access permissions of your user profile.



5.2 Modules

The modules available in HRA Cloud are:

- Employee Management
- Contractor Management
- Volunteer Management
- WHS Management
- Reporting



You can access each module through the vertical menu on the left-hand side of the screen.

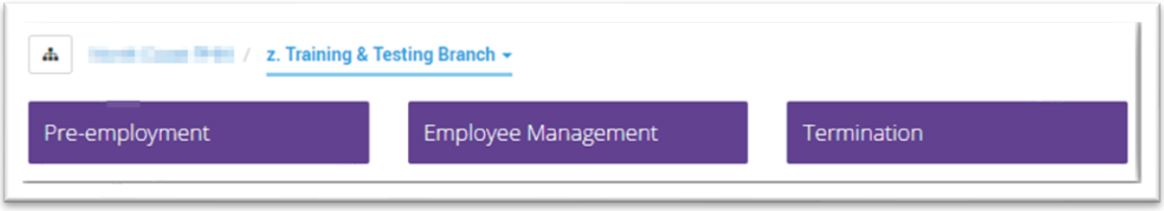
Click on the module you want, and you'll be redirected to its landing page.

Generally, when logging in, you'll always be directed to the landing page of the Employment Management module.

TIP: Your user access permissions determine which modules you're permitted to view, manage and control. If you believe that you're missing access to some modules, contact your manager.

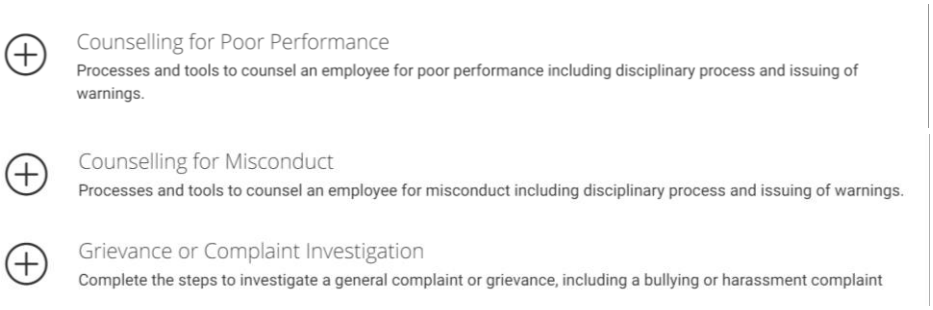
5.3 Workflows and Checklists

Each module has its own landing page, and at the top of each will be three management workflows. Workflows can be seen as the different stages of the module lifecycle. For example, the ***Employee Management*** module is segmented into the three key workflows: ***Pre-employment, Employee Management and Termination***, which corresponds to the three stages of the employee lifecycle:



Under each workflow are corresponding checklists, designed to ensure that your business is compliant and meets best-practice standards. Checklists can be seen as processes that need to be followed. They're designed to assist you in carrying out the relevant process from start to finish and providing you with a best-practice approach to many people management situations.

For example, the ***Employee Management*** workflows has the following checklists: ***Counselling for Poor Performance***, ***Counselling for Misconduct, Grievance or Complaint Investigation*** and more.



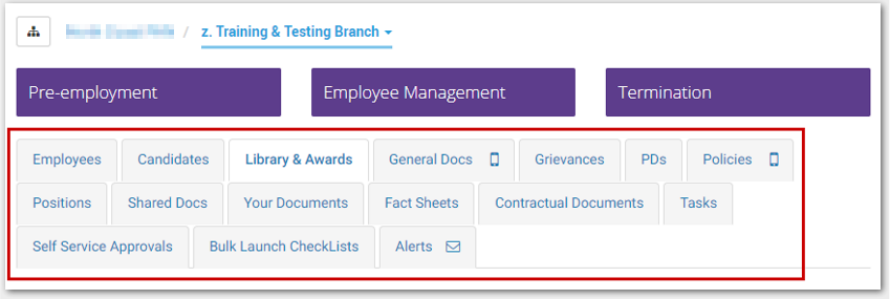
HRA Cloud has a wide range of employment law document templates designed to support you through all stages of the employee life cycle. From letters of offer to new employees and warning letters for underperforming, to termination letters for unsuccessful probations or employees who resign.

The recommended way to create these documents is via checklists. This way, you know that you're using the right template at the right stage in the HR process.

TIP: Your user access permissions determine which checklists and templates you're permitted to view, access and complete. Contact your HRA Cloud administrator if you can't see or access the checklist you need.

5.4 Feature tabs

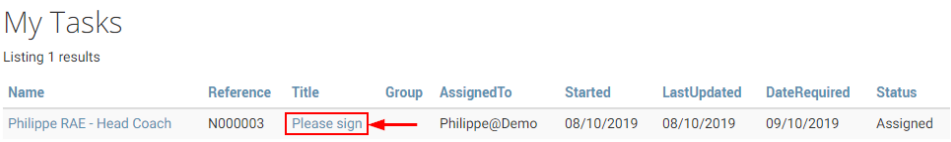
Each module contains a set of ***feature tabs***, each of them serving a different purpose for the module.



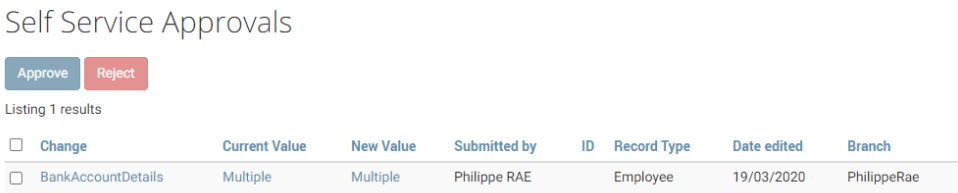
HRA Cloud helps you stay organised and proactively manage important, upcoming dates and things you need to review.

- The ***Tasks*** and ***Self Service Approvals*** tabs are important for you, as a Manager. Under these tabs you'll find the tasks you need to carry out to stay up to date with your work.

- Under ***Tasks*** you'll find a list of the tasks assigned to you. Clicking on the Title of the task will open the task, and you can then run the most appropriate action, such as completing the task, reassigning it to another manager, updating it or seeing its history.



- Under ***Self Service Approvals*** are the lists of update requests from employees (via the Self-Service Portal). Some information updated by employees in the Self-Service Portal will need to be approved by their manager before being finalised in the system. You're able to approve or reject requests in bulk, or individually. If you want to provide an explanation for rejecting a request, you need to do it individually.



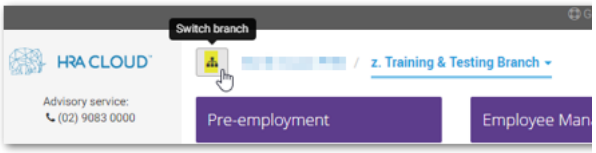
TIP: To be notified of alerts, you need to be ***subscribed to alerts*** and have an ***email address*** saved against your user profile. This should have been done by default when your account was created. You can check and adjust your subscriptions without needing to speak with your HRA Cloud account administrator by navigating to the ***Alerts*** tab, clicking ***Alert Subscriptions*** and updating your subscriptions according to your preferences.

5.5 Switching between branches

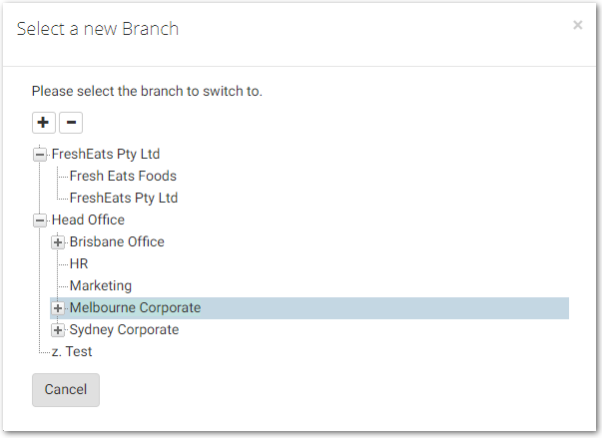
Employees and their documents are organised in a structure made up of branches that match the organisational structure. Branches can be set up in many ways: to reflect your regional structure, cost centre structure and/or job types, for example.

If you've been granted access to more than one branch, you can use the ***Branch Locator*** to navigate between them.

1. Click the ***Switch Branch*** icon in the top menu



2. Select the branch you want to switch to.



6. Managing employees

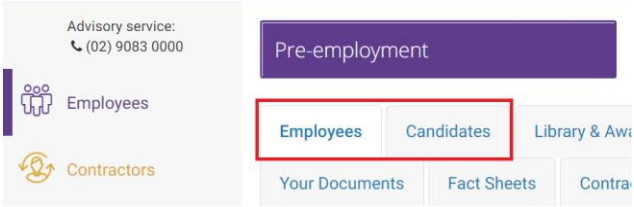
6.1 Listing and searching employees

You can only see employees that belong to the branches to which you've been granted access.

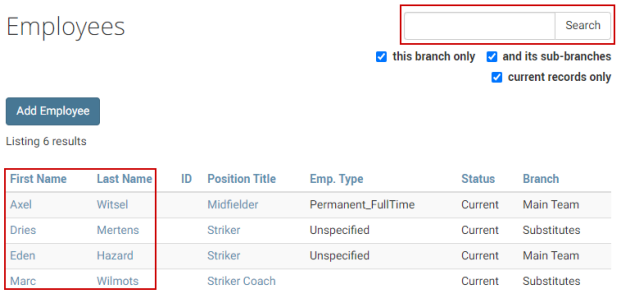
To access an employee record, you can either browse the list of employees or use the ***Search*** box.

1. Select the ***Employees*** module.

   Click ***Employees***.

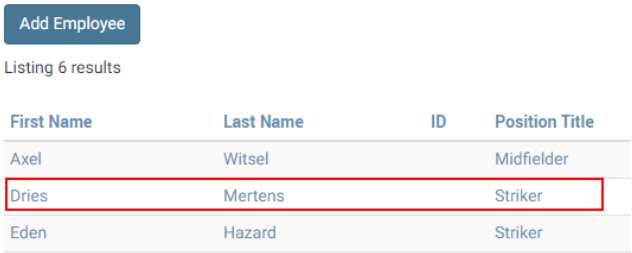


2. Locate or search the relevant record.



> **TIP**: Where appropriate, you need to ensure that the correct checkboxes below the ***Search*** field are selected. Some records may not appear if you limit your search to only one branch (where the employee is not assigned to that branch) or current records only.

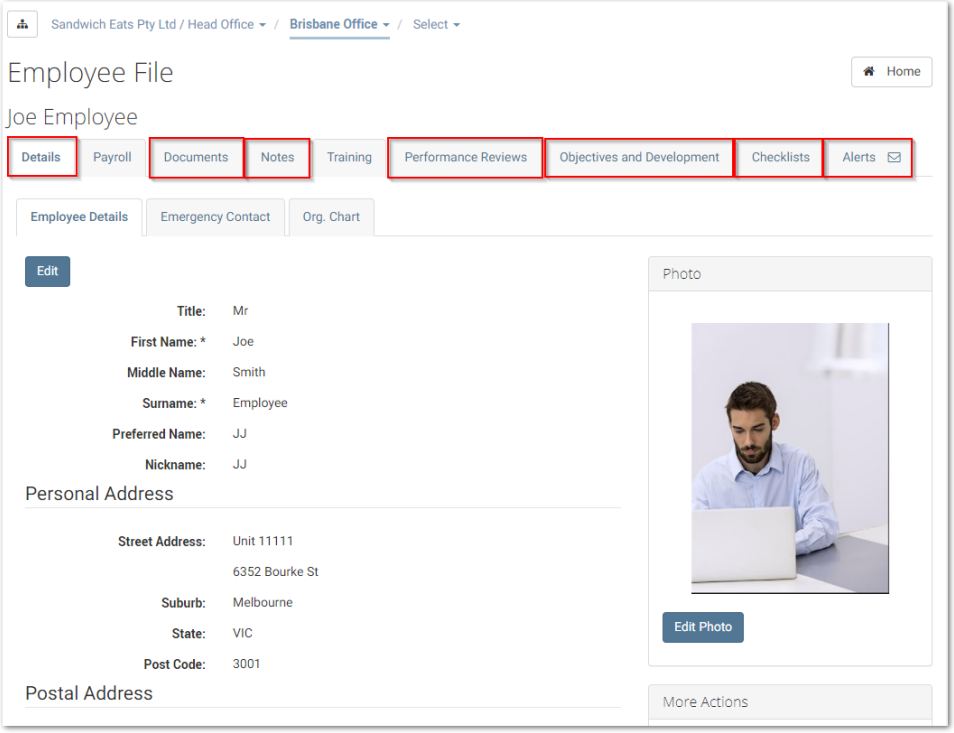
3. Click on the relevant employee.



6.2 Navigate the employee screen

The employee screen contains a set of important tabs, each with a specific function. The name of each tab shows the sort of information and functions that are available under it.

TIP: Depending on the customisation of your account or the different integrations in place, you might see a slightly different list of tabs than those shown in the example.



- ✓ ***Details***: This tab stores all of the employee's personal, emergency contact and job details.
- ✓ ***Documents***: This tab stores all relevant HR documents related to the employee.
- ✓ ***Notes***: This tab stores important details such as work-related changes, emails sent to the employee via the system, and reminders and observations regarding the employee's performance.
- ✓ ***Objectives and Development***: This tab stores an employee's short and long-term personal and professional objectives. These can be identified during a performance review period or at any stage during the employee's lifecycle at your business.
- ✓ ***Checklists***: This tab stores all checklists that were launched at any stage during the employee's lifecycle.
- ✓ ***Alerts***: This tab stores all alerts relating to the employee.

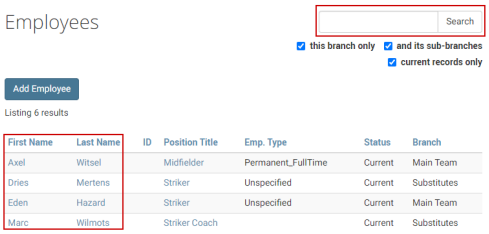
6.3 Record a note against an employee

It's a legal requirement that you keep complete and accurate records. As a Manager, you can record notes against your employees at any time. Notes usually relate to employee performance, changes to employment status and/or discussions with the employee.

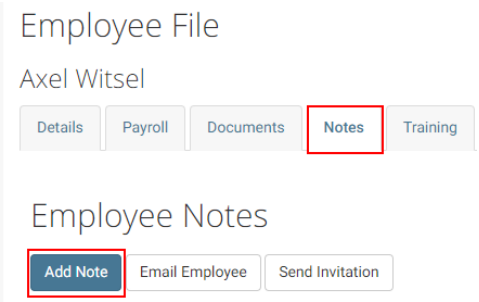
As you create a note for an employee, you have the option to also assign a ***Self-Service*** task to the employee.

> **TIP**: You can also record a Note detailing the nature of advice received from the **Telephone Advisory Service**. This will provide evidence of your efforts to follow a compliant HR process, if your business is ever faced with a claim. The Note will also remind you of the agreed next steps and actions as discussed with HR Assured.

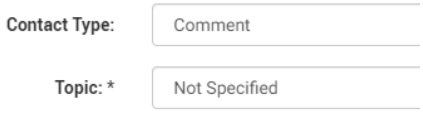
1. Search and locate the relevant record.



2. Open the employee record and click on ***Notes***. Click ***Add Note***.



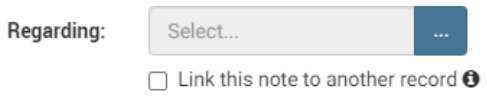
3. Select the type of activity (***Contact Type***) for the note and enter the ***Topic***.



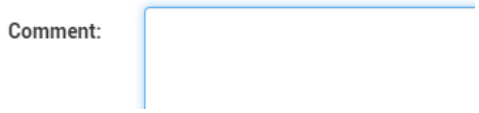
4. If appropriate, mark the note as ***Sensitive***.

> **TIP**: Notes marked as '***Sensitive'*** can only be seen by you, as the author of the note, and potentially by your HRA Cloud administrator (if they have the user access permissions to do so). The employee will never be able to see a sensitive note.

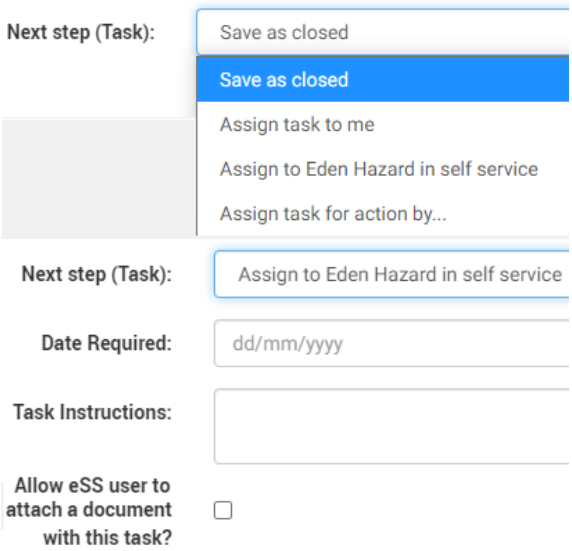
5. If the note also concerns another employee, select that other employee and, if applicable, link the note to that other employee.



6. Fill out the ***Comment*** box with as much detail as possible.



7. Use ***Next step (Task)*** to select what you want to do with the note.

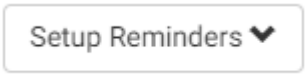


TIP: The ***Assign to [EMPLOYEE NAME] in Self Service*** allows you to assign a task to the employee who will be notified by email to log into eSS and complete the task.

You need to enter the details of the required action and a deadline if applicable.

If you require the employee to upload a document as part of completing the task, select '***Allow eSS user to attach a document with this task?***'

8. Use ***Setup Reminders*** if you need to create an alert for the note.



9. Save the note by clicking on ***Create Note***.

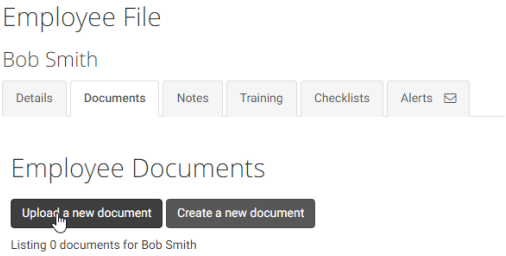
6.4 Upload a document for an employee

It's important to ensure that each employee record is maintained with up-to-date HR documentation on their employment history. This includes any documents you may receive from the **Telephone Advisory Service**. This will keep the management team appropriately informed on all staff matters when managing employees throughout the employee-lifecycle.

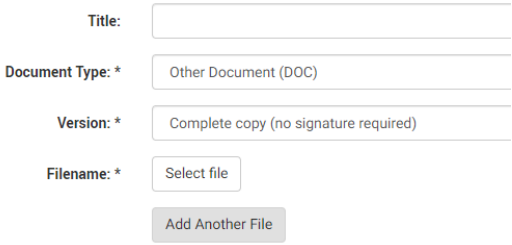
TIP: As you upload a document for an employee, you can also assign a ***Self-Service*** task to the employee.

1. Open the employee record and click on ***Documents***.

   Click ***Upload a new document***.



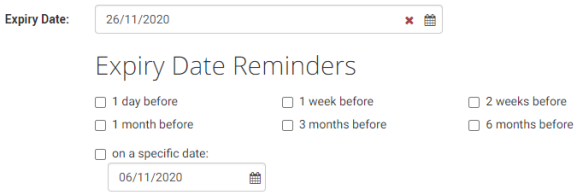
2. Populate the ***Title***, ***Type and Version*** fields and select the document to upload.



TIP: Remember to correctly select the ***Document Type*** because this is how user access is controlled. For the complete list of document types, click here.

3. If necessary, track the ***Expiry Date*** for the document and set-up an expiry reminder, then click ***Upload.***

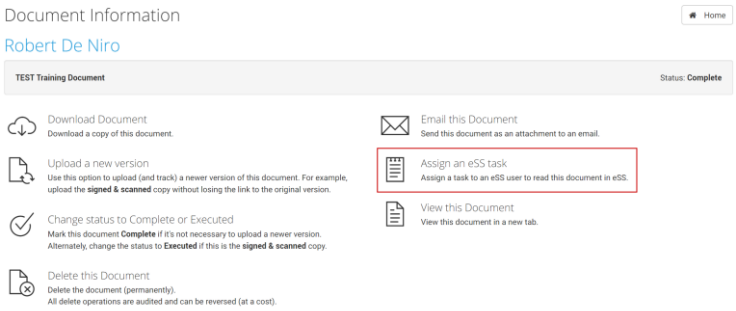
   Reminders are emailed to the user and appear in the system under the ***Alerts*** tab at account level and employee record level.



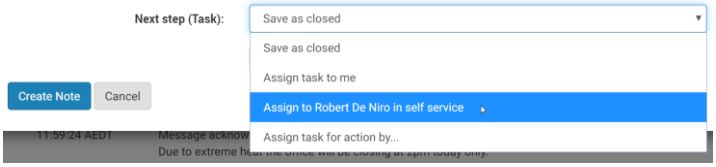
TIP: You can select multiple reminders for when you would like to receive an alert notification. You can use the same process to add reminders to any already uploaded document.

Once a document has been uploaded, you're able to assign the employee a task to read the document in the ***Self-Service Portal***.

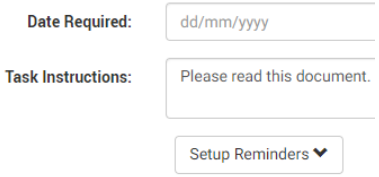
4. Open the document, click ***Assign an eSS task***.



5. Under the ***Next Step (Task)*** field, make sure the ***Assign to [EMPLOYEE NAME] in Self Service*** option is selected.



6. Select a due date if necessary and provide clear instructions to the employee. You can set some reminders if needed.



7. Once complete, click ***Assign***. The employee will then get an email informing them of the task to complete in eSS. The document will be attached as part of the eSS task.

7. Communicate with employees via email & eSS messages

You can use HRA Cloud to send emails and eSS messages to your employees. This streamlines your record keeping requirements because a copy of the email is automatically stored against the employee record under the ***Notes*** tab.

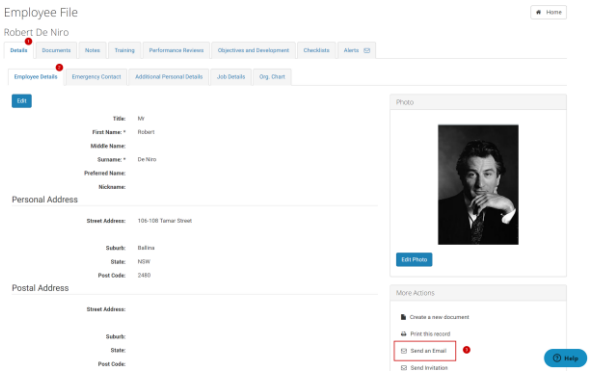
You can only send an email to an individual employee, but you can send an eSS message in bulk to a group of employees. You can also send an eSS message to an individual employee.

7.1 Send an email to an employee

There are two places from which you can email an employee:

Option 1: From the Employee Details screen

Go to the ***Employee Details*** screen. Under ***More Actions*** on the right-hand side (below the picture), click on ***Send an Email***.

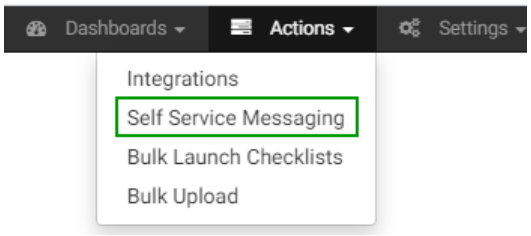


Option 2: From the *Notes* tab

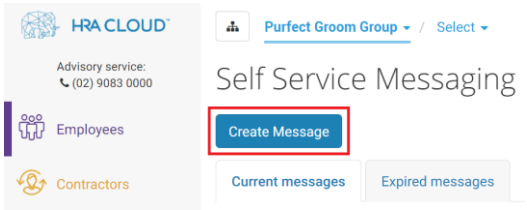
Go to the ***Employee Details*** screen, click the ***Notes*** tab then click ***Email Employee***.

7.2 Send a bulk eSS message to a group of employees

1. In the top right menu, click on ***Actions*** and select ***Self Service Messaging***.

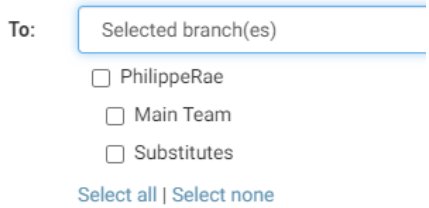


2. Click on the ***Create Message*** button.

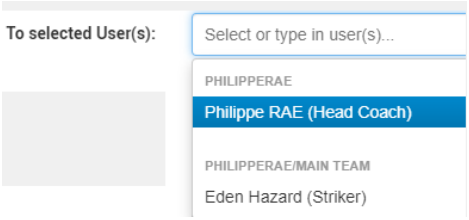


3. Under the ***To*** field, you have the option of sending an eSS message as follows:

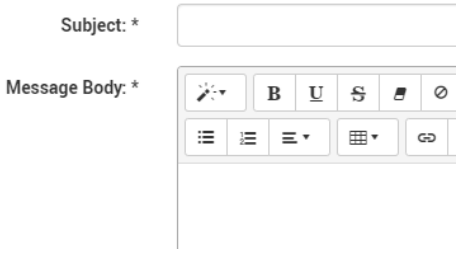
Send the message to all employees within a ***Branch***. To do this, click ***Select branch(es)*** and then click the ***Record Type*** (which is likely to be ***Employees***).



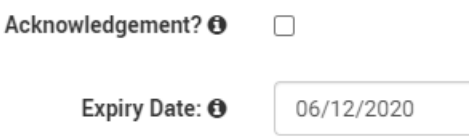
Send a message to an individual ***eSS user***. To do this, use ***To selected user(s)*** and select the relevant user.



4. Enter the ***Subject*** and ***Message Body***.



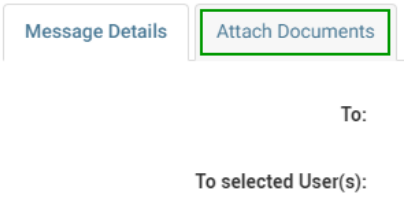
5. Tick the ***Acknowledgement*** checkbox if the employee needs to formally acknowledge that they have received the message.



TIP: The expiry date is used to automatically remove message from the employee's eSS mailbox.

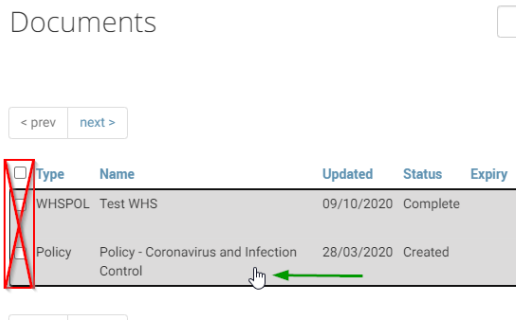
Using the ***Acknowledgment*** feature will create an audit trail against the employee record to track the date and time at which the message was acknowledged. This audit trail is visible under the ***Notes*** tab within the employee record.

6. Click on ***Attach Documents*** if you need to attach a document to your message.



To attach multiple documents, hold down the ***Ctrl*** key while selecting each additional document. DO NOT click the checkboxes in the list to attach the documents.

These check boxes are used to download the documents to your local machine, not to attach them to your eSS message.



8. Managing employees via workflows and checklists

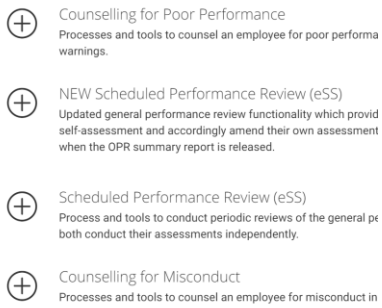
> While working through any HR checklist, remember that you can call to seek advice from the **Telephone Advisory Service** to assist you in the process. You can record the notes of the call, and the advice you received, in the process of working through the checklist.

8.1 Initiate a checklist against an employee

1. Click the relevant set of employment workflows: ***Pre-employment***; ***Employee Management***; ***Termination***.

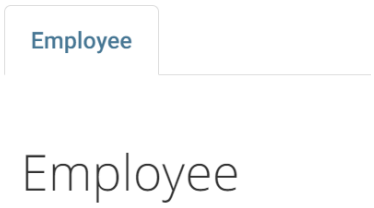
2. A pop-up box will appear on your screen listing all the checklists available for that set of employment workflows. Click on the **+** next to the checklist you need to complete.

   This example is for a ***Counselling for Poor Performance*** checklist.



3. Select ***Initiate/Commence*** if you need to create a new checklist. Select ***Resume*** if you need to complete a checklist you've already started.

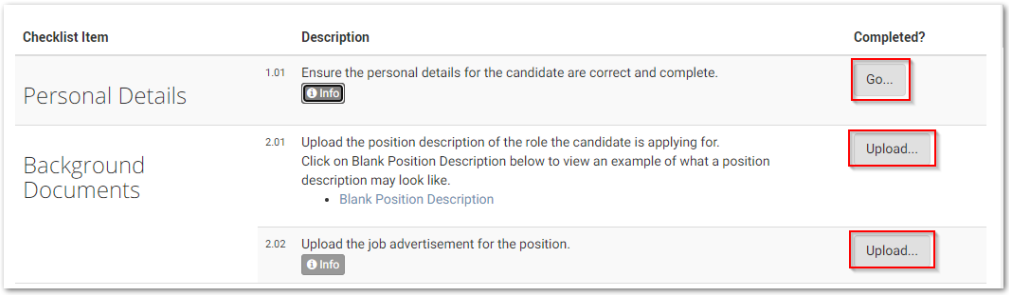
4. Select the relevant employee record within the ***Employees*** tab. The checklist should now be launched against the relevant employee record.



5. You will be prompted to complete each step in the checklist as follows:

   If you need further context or information on how to complete a step, please click on the ***Info*** button. A pop-up message will appear.

   To complete each step, click on the buttons down the right-hand side of the checklist steps.



Some steps are compulsory (for legal reasons) where you will not be permitted to move to the next step until the compulsory step is completed.

Other steps will be optional and can be skipped. The final steps within the checklist will prompt you to complete and close the checklist. We recommend you complete all steps.

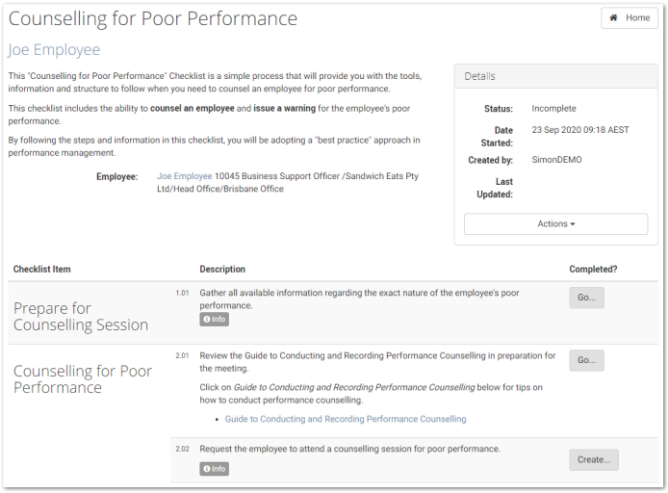
9. Managing employees with document templates

9.1 Create a document via a checklist (best practice)

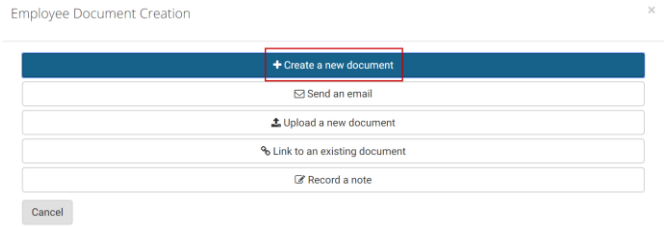
> In the process of generating a document, please remember that you can call to seek advice from the **Telephone Advisory Service** who can assist you in understanding the contents of the document.

In the process of completing a checklist using the above instructions, some steps will prompt you to create a document to be sent to the employee (such as, for example, a warning letter).

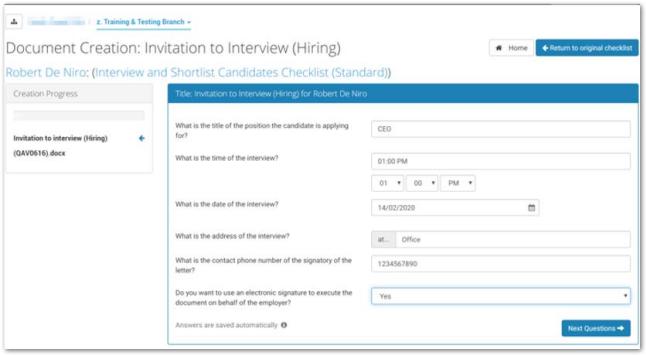
1. At the relevant step, click ***Create*** to start creating the document.



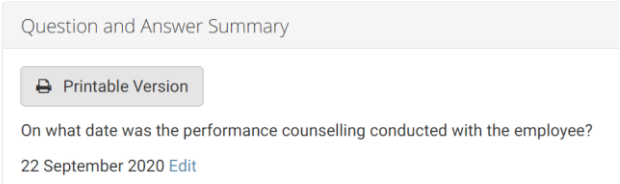
2. Select ***Create a new document*** in the next screen.



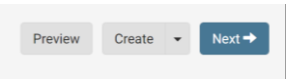
3. You will then be presented with a question-and-answer process where your answers will tailor the template document to align with the details of the employee and their unique circumstances.



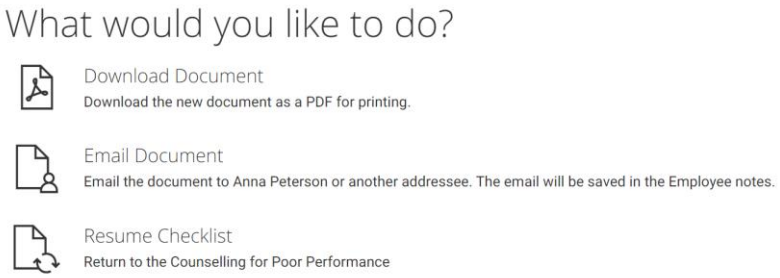
4. Once you've completed all the answers, you can review the questions and answers, and amend them as required, by clicking on the ***Edit*** button.



5. You can ***Preview*** the document, if required. Otherwise, click on the ***Create*** or ***Next*** button to create the document.



6. You will then need to resume the checklist by clicking on the ***Resume Checklist*** button.

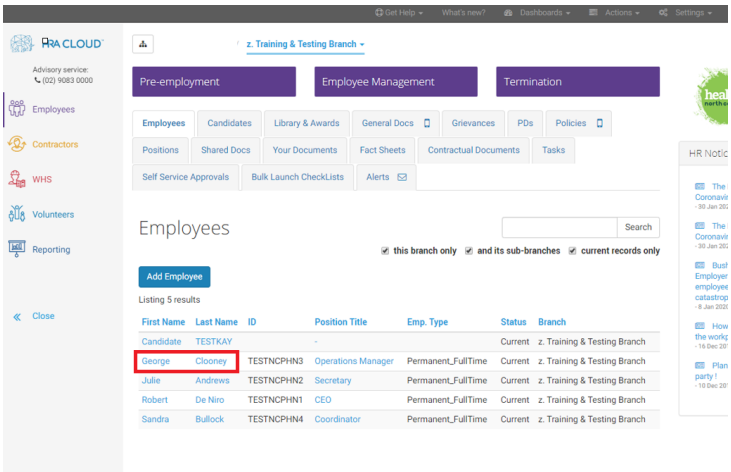


By resuming the checklist, this created document is automatically stored against the employee's record under the ***Documents*** tab.

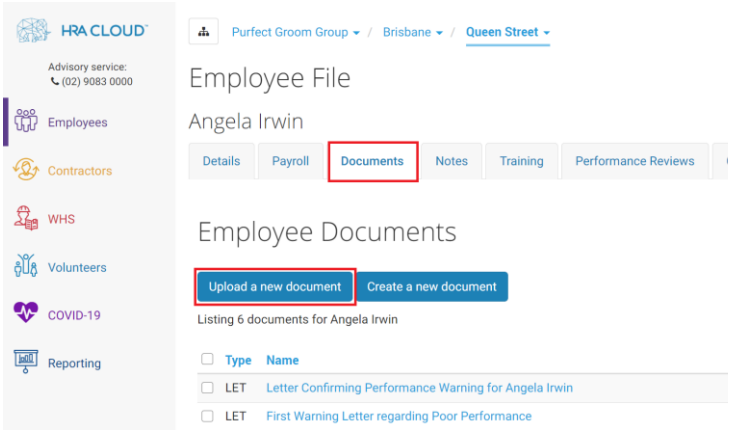
9.2 Create a document from the employee record (no checklist)

In the process of generating a document, please remember that you can call to seek advice from the **Telephone Advisory Service** who can assist you in understanding the contents of the document.

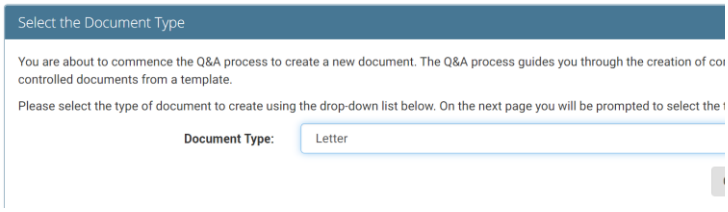
1. Under the ***Employees*** tab, click on the name of the relevant employee record.



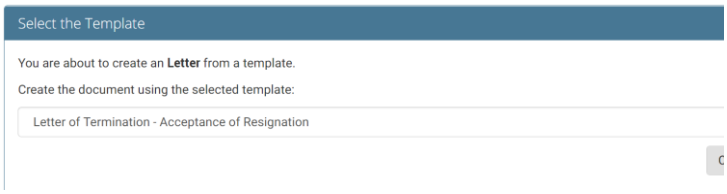
2. Go to the ***Documents*** tab and then select ***Create a new document***.



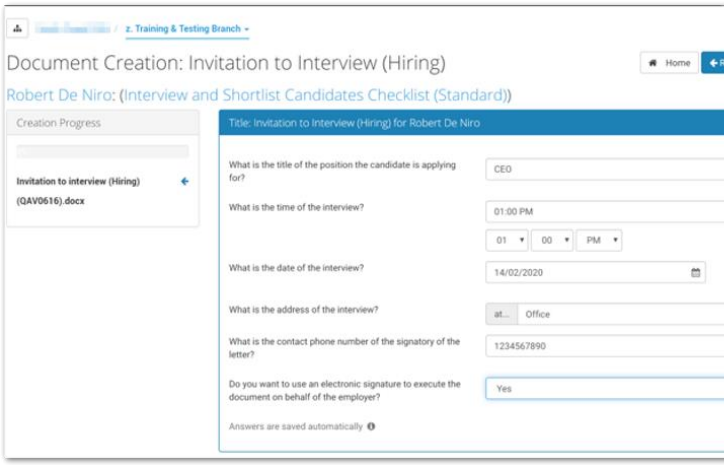
3. Select the ***Document Type*** from the drop-down menu. It's likely to be a ***Letter*** or ***Form*** document type.



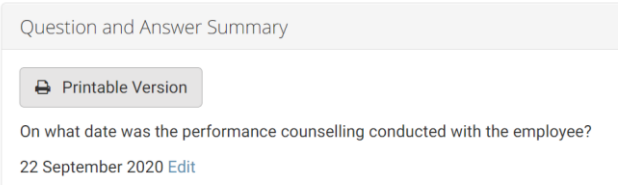
4. Select the ***Template*** from the drop-down menu and then click ***Next***.



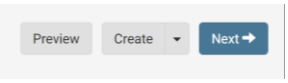
5. You will then be presented with a question-and-answer process where your answers will tailor the template document to align with the details of the employee and their unique circumstances.



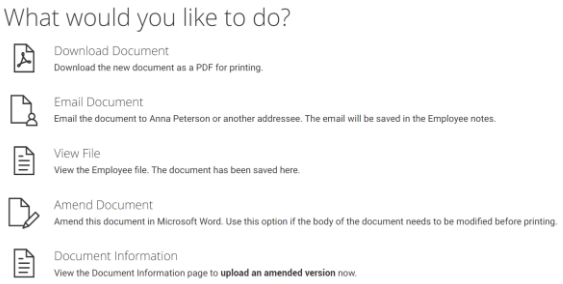
6. Once you've completed all the answers, you can review the questions and answers, and amend them as required, by clicking on the ***Edit*** button.



7. You can ***Preview*** the document, if required. Otherwise, click on the ***Create*** or ***Next*** button to create the document.



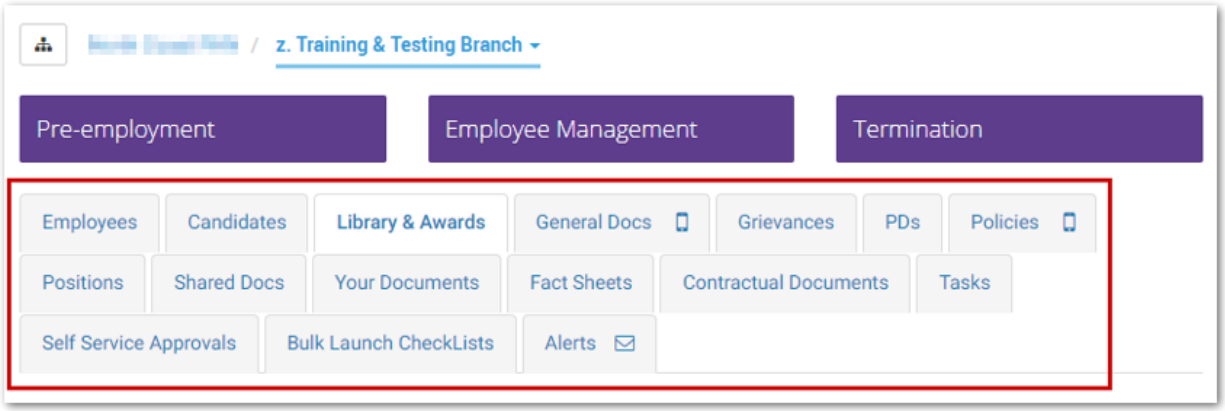
8. In the next screen, you can then ***Download the document*** or ***Email the Document*** to the employee.



This created document is automatically stored against the employee's record under the ***Documents*** tab.

9.3 Search for documents and other records

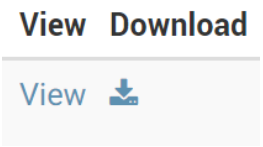
1. Go to the relevant tab. The name of each tab shows the sort of information and functions that are available under it.



2. Once you are in the desired tab, search using the name of the relevant document or record.

> **TIP**: Ensure that you select (or deselect) the appropriate checkboxes (underneath the ***Search*** field), as some records may not appear if you're searching in only one branch or current records only.

3. Click on the name of the relevant record or document.



> **TIP**: For documents, you can quickly download or view the document by simply clicking on the relevant icons.

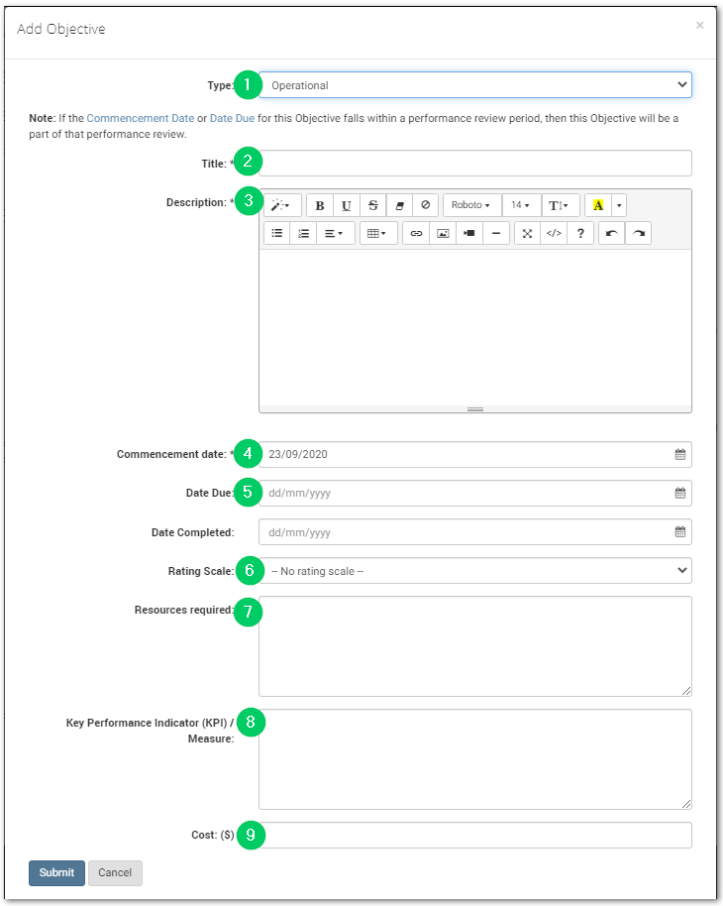
10. Employee Professional Development

10.1 Track employee professional development goals and objectives

Professional objectives and development needs can be identified during a performance review period or at any stage during a worker's employment. Employee objectives can be created and managed in several ways:

- Employees can submit objectives via Self Service; and
- Managers can submit development goals and objectives using HRA Cloud's Management portal. For instructions on how to do this, follow the steps below to:

1. Go to the ***Objectives & Development*** tab within the relevant employee's record.
2. Click ***Add Objective***.
3. Populate the necessary fields. Fields **1-4** are mandatory, while fields **5-9** are optional.



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