

# Flexar

putting flex work to work

## Employee Options



# Employee Options

- Create or Edit Flex Work Proposal/Arrangement (or Register participation in Flexible Work)
- Submit Proposal for consideration
- Print Proposal (via Proposal PDF)
- Perform Review of Arrangement
- Complete a Survey
- Create Proposal from previous Arrangement
- Change Password (if not SSO)

NOTE: In the following slides the notes or annotation for the slide are text boxes inserted in the slide.

*This is a sample of the notes or annotations text box as they will appear in the following slides – text is red, italic, Ariel, 12 or 14 pt. The boxes have no outline and vary in transparency.*

# LandingPage Options

## Feature and Configuration Test Site

**pipersoft**

*just use it!*

### Flexibility Portal

This is the official FM\_Test1 of tools for Managers and Ass work arrangements to improve their work effectiveness. The Flexibility Toolkit includes self-assessments, training, best practices segments and the Flexibility Monitor.

*This is the LandingPage or the 'Flexar Portal' – providing access to all parts of the Flexar system and collaborative systems like the Orientation and Toolkit. It is completely customizable.*

To get the most out of this system, we strongly recommend that first time users go through the Orientation and Toolkit first. On return visits you can go directly to the most relevant material.



#### ORIENTATION

to the groundrules and the process for proposing

#### TOOLKIT

provides an overview of all options, training and FAQs

#### ASSOCIATE PROPOSAL

connects to the on-line system to create or edit proposals

#### MANAGER PROCESS

enables the manager to process associates' proposals

#### ADMINISTRATOR ACCESS

allows maintenance of the Flexibility Monitor system

*The Employee Menu is accessed by clicking the "Associate Proposal" box.*

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**Flexar**

# Employee Home

## Feature and Configuration Test Site



*This banner is customized per client specifications to appear as part of their intranet (instead of a cloud-based service) and is presented at the top of every page.*

Home

Logout

### The Flexibility Monitor - Employee Menu

Welcome to Pipersoft's one-stop vehicle for proposing new and managing existing Flexible Work Arrangements. As you work your way through the required screens, you will be prompted for certain information. You may get assistance on each of these through the Help option below. You may develop your answers to the proposal questions off-line in a Word document and then copy and paste your responses from the practice form to the online form if you wish.

### Employee Options Menu

- Create New or Edit Existing Proposal
- My Arrangements / Proposal
- Select Arrangement for Review or Survey
- Create Proposal from Previous Proposal
- Help

*The text can be re-phrased as a "Registration Process" as opposed to a "Proposal Process".*

*Menu options can be excluded to meet your needs.*

*The text between the "Home" bar and the "Employee Options Menu" is optional and customizable.*

# Create or Edit Proposal

Proposals for flex work are created or edited using a 5-panel wizard:

- 1) Present the Person **Profile** – read-only, for confirmation of the person's data.
- 2) Select **Arrangement** Flex Work Type(s).
- 3) Identify a Proposed **Schedule** (Onsite and/or Offsite)
- 4) Answer some **Proposal Questions**
- 5) Review and Accept the standard **Agreement** and Submit proposal for consideration.

# Person Profile

Feature and Configuration Test Site



Home

Logout

Profile

Arrangement

Schedule

Proposal Questions

Agreement

First Name:	<input type="text" value="Ben"/>	Personnel Area:	<input type="text" value="Tinkering"/>
Last Name:	<input type="text" value="Franklin"/>	Personnel Sub Area:	<input type="text" value="Private Tinkering"/>
Employee ID:	<input type="text" value="A100006"/>	Cost Center:	<input type="text" value="Tinker"/>
Email:	<input type="text" value="ben.franklin@pipersoft.net"/>	Employee Group:	<input type="text" value="Inventors"/>
Manager Name:	<input type="text" value="Thomas Jefferson"/>	Employee Sub Group:	<input type="text" value="Grandest"/>
2nd Level Manager:	<input type="text"/>	Hire Date:	<input type="text" value="6/21/2010"/>
HR Contact:	<input type="text"/>	Job Code:	<input type="text" value="08"/>
Job Title:	<input type="text" value="Inventor"/>	Exempt Status:	<input type="text" value="E"/>
Job Function:	<input type="text" value="Inventing"/>	Organization:	<input type="text" value="Amgen"/>
Org Unit:	<input type="text" value="Inventors"/>	Vice Presidents:	<input type="text" value="John Adams"/>
Org Unit Number:	<input type="text" value="8"/>	Country Code:	<input type="text" value="US"/>

This is your personnel profile within the Flexibility Monitor. You cannot change any of the values. If you find an error please report it to HR.

*This data is typically auto-populated from the Human Resource Database through an encrypted XML, CSV or secure data link (Ab Initio) – values are display only.*

*Person Profile is displayed to verify information. Captions are customizable.*

Next >

# Arrangement Type Selection

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Arrangement

Schedule

Proposal Questions

Agreement

- Variable Hours - Adjusting start and end times to improve work
- Offsite Work - Working up to one day a week from home or elsewhere
- Job Share - where 2 people fulfill responsibilities of single position
- Occasional Days - Arranging to be away from the office one or two days a month
- Part Time - hours per week are less than 38

*The set of flex work choices & language can be changed in the setup.*

*More than one can be selected if policy supports hybrids.*

These are the arrangement types offered presently. Select the one arrangement that best fits your proposed arrangement. Make your selection by clicking the checkbox. Your selection is saved when you click a button below. You will be prompted for other details based on the selections you make here.

*The above support text can be changed or excluded per client needs.*

*Wizard tabs and button colors, shapes and styles are customizable.*

*The Previous and Next buttons perform an implied "Save" on every panel.*

Save

< Previous

Next >

# Proposal Schedule

Home

Logout

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Arrangement

Schedule

Proposal Questions

Agreement

Note: You can place any text here you wish in order to help the user provide the needed information #2.

Assisting language is customizable.

Day	Current Schedule				Proposed Schedule			
	Onsite		Offsite		Onsite		Offsite	
	Earliest	Latest	Earliest	Latest	Earliest	Latest	Earliest	Latest
Mon	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Tues	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Wed	8:00 AM	5:00 PM					7:00 AM	4:00 PM
Thurs	8:00 AM	5:00 PM					7:00 AM	4:30 PM
Fri	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Sat								
Sun								

A time control is used to capture supported time values.

Copy Current Values to Proposed

Each Proposal has a Schedule - Current and Proposed, in the Office and/or Remote . The Schedule may be 1 interval per day (see above) or 2 intervals per day (not shown).

Save

< Previous

Next >

# Proposal Questions/Answers

Home

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Proposal Questions

Agreement

*Only proposals with complete, accurate and thoughtful responses will be accepted. All others will be returned for completion or declined. It is the responsibility of the applicant and their manager to provide an acceptable proposal. You may save your proposal as work-in-progress but submit it only when completed and ready for consideration.*

*The header text can be customized to meet needs of the client.*

**1) Briefly describe your job including the functions you perform and the results you produce. \*\***

Policy and Procedures author and editor

*The questions can be changed per the client needs and can change over time to meet changing needs. Supporting text can be provided to assist in providing more suitable answers.*

**2) How will this proposed option allow you to maintain or improve your individual performance? \*\***

Improve focused work without distractions or interruptions.

*Questions can be general or flex type specific and present only if that work type is selected..*

*Users can copy/paste answers from external documents.*

**3) How will this proposed option add value to the company clients? \*\***

Improve the value and timeliness of the work performed for our client companies and countries.

**4) What challenges will the proposed option raise with your a)manager b)team or coworkers c)internal customers and d)external customers? Have you discussed working under this arrangement with your manager? \*\***

*(Please note: all arrangements have challenges.)*

Save

< Previous

Next >

# Proposal Agreements

Home

Logout



Please read the agreement and answers carefully, click Yes to agree, enter dates and click Submit OR click Save button and then select Logout.

## North American Telecommuting Agreement

(To be completed by staff member and manager if a proposal to telecommute is approved. This agreement.)

I understand and accept the following provisions regarding my telecommuting arrangement with Employer:

### Work Arrangement

1. As a telecommuting staff member, I will be performing my work at a non-Employer location.
2. The scheduled days and hours I will work off-site are arranged in accordance with the total number of hours I work is not exceeded and email on the days when I telecommute.
3. Business needs—including travel, trainings, meetings, and other important issues. I will remain available by telephone and email on the days when I telecommute.
4. On days when I am required to work on-site at Employer, my telecommuting schedule or work at Employer on days when I am required to work on-site at Employer will not be treated as a telecommuting day.

August 2015						
S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Agreement documents can be general (any flex type) and flex type specific. These are company policy documents to ensure compliance with confidential materials, liability waiver, suitability of workplace, not a change to "will to work" and other important issues.

Calendar controls are used to ensure valid date selection.

Proposed Start Date: 8/29/2014 Expected End Date: 8/21/2015

Print Proposal

Yes, I have read and accept the Agreement and my answers are complete and accurate.

Agreements can be used to re-refresh Code of Conduct compliance and extensions relevant to Remote Work and Telecommuting – completely customizable through document composition.

All text is customizable.

Submit Save < Previous

# Proposal Agreements

Home

Logout

Profile

Arrangement

Schedule

Proposal Questions

Agreement

Please read the agreement and answers carefully, click Yes to agree, enter dates and click Submit OR click Save button and then select Logout.

## ***North American Telecommuting Agreement***

*(To be completed by staff member and manager if a proposal to telecommute is approved. A copy of the approved Flex Proposal Form must be attached to this agreement.)*

I understand and accept the following provisions regarding my telecommuting arrangement with Employer:

### **Work Arrangement**

1. As a telecommuting staff member, I will be performing a portion of my work from a non-Employer location.
2. The scheduled days and hours I will work off-site are specified in my Flex Proposal Form (attached). Unless I have entered into a part-time or job sharing arrangement, the total number of hours I work is not expected to change as a result of the telecommuting arrangement. I will remain available by telephone and email on the days when I telecommute.
3. Business needs—including travel, trainings, meetings, etc.—may require me to adjust my telecommuting schedule or work at Employer on days when I would normally work off-site, and I am willing to do so.
4. On days when I am required to work on-site at Employer, whether scheduled or unscheduled, commuting time to and from Employer will not be treated as

Proposed Start Date:  Expected End Date:

 Print Proposal

Yes, I have read and accept the Agreement and my answers are complete and accurate.

*The “Submit” button is not activated until the user checks the “accept agreement” box.*

Submit

Save

< Previous

# Proposal Agreements

Home

Logout

Profile

Arrangement

Schedule

Proposal Questions

Agreement

Please read the agreement and answers carefully, click Yes to agree, enter dates and click Submit OR click Save button and then select Logout.

## North American Telecommuting Agreement

(To be completed by staff member and manager if a proposal to telecommute is approved. A copy of the approved Flex Proposal Form must be attached to this agreement.)

I understand and accept the following

### Work Arrangement

1. As a telecommuting staff member, I
2. The scheduled days and hours I will into a part-time or job sharing arrangement, the total number of hours remain available by telephone and email on the days when I telecommute.
3. Business needs—including travel, trainings, meetings, etc.—may require me to adjust my telecommuting schedule or work at Employer on days when I would normally work off-site, and I am willing to do so.
4. On days when I am required to work on-site at Employer, whether scheduled or unscheduled, commuting time to and from Employer will not be treated as

Proposed Start Date: 8/29/2014 Expected End Date: 8/21/2015

Print Proposal

Yes, I have read and accept the Agreement and my answers are complete and accurate.

*The “Successfully Submitted” message is presented, notifying the user of the status change - from Pending to Submitted..*

Submit

Save

< Previous

# On Submit Proposal

3 things happen for Submitted Proposals:

- 1) The Flexar ***database is updated*** to record the change.
- 2) An ***email is created*** that is sent to the applicant's manager (proposal reviewer or 1<sup>st</sup> reviewer) notifying them that the submitted proposal is ready for review with a link to the process for reviewing that proposal.
- 3) A ***Proposal PDF*** (Portable Document File) ***is created*** containing the information from each wizard panel.

# Email on Submit



Tue 8/26/2014 5:20 PM ← *Date and time of email.*  
FM\_Test1@flexwa.com *Sender email address.*  
Franklin\_Ben\_20140826\_326 *Arrangement name in the Subject line.*

To: tom.jefferson@pipersoft.net ← *Ben's manager – Tom - who needs to review Ben's proposal.*  
Cc: ben.franklin@pipersoft.net *Ben is cc'd so he knows Tom has been informed of the proposal submission.*

This Proposal has been SUBMITTED for consideration and decision regarding outcome. The receiving Manager should process the proposal at your earliest convenience by clicking the link below or from the Manager Menu.

[https://www.flexwa.com/FM\\_Test1/ProcessRequest.aspx?FWAE\\_ProcessRequest\\_GUID=DEB499C2-7F26-4104-B1A1-EB9DDF3A6084](https://www.flexwa.com/FM_Test1/ProcessRequest.aspx?FWAE_ProcessRequest_GUID=DEB499C2-7F26-4104-B1A1-EB9DDF3A6084) *The link to the review process and the subject proposal .*

- automatically created by **Flexar** with text for “SUBMITTED” proposals.
- “Subject:” contains the Arrangement Name.
- “From:” is the Flexar mail sender for the client company.
- “To:” is the email address of the next proposal reviewer or processor.
- “Cc:” are the parties notified of the submitted proposal (no action expected).
- A link to “ProcessProposal” with the identified Arrangement.

# Proposal PDF Page 1

## Flexible Work Proposal

powered by Pipersoft

### Person Profile

First Name:	Ben	Personnel Area:	Tinkering
Last Name:	Franklin	Personnel Sub Area:	Private Tinkering
Employee ID:	A100006	Cost Center:	Tinker
Email:	ben.franklin@pipersoft.net	Employee Group:	Inventors
Manager Name:	Thomas Jefferson	Employee Sub Group:	Grandest
2nd Level Manager:		Hire Date:	06/21/2010
HR Contact:		Job Code:	08
Job Title:	Inventor	Exempt Status:	E
Job Function:	Inventing	Organization:	Amgen
Org Unit:	Inventors	Vice Presidents:	John Adams
Org Unit Number:	8	Country Code:	US

### Flex Work Arrangement Selection

Offsite Work - Working up to one day a week from home or elsewhere

### Flex Work Type Details

# Proposal PDF Page 2

## Schedule – Current & Proposed

Day	Current Schedule				Proposed Schedule			
	Onsite		Offsite		Onsite		Offsite	
	Earliest	Latest	Earliest	Latest	Earliest	Latest	Earliest	Latest
Mon	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Tues	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Wed	8:00 AM	5:00 PM					7:00 AM	4:00 PM
Thurs	8:00 AM	5:00 PM					7:00 AM	4:00 PM
Fri	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Sat								
Sun								

### Original

**Proposed Start Date:** 8/29/2014

**Proposed End Date:** 8/21/2015

**Create Date:** 8/26/2014

### Most Recent

**Proposed Start Date:** 8/29/2014

**Proposed End Date:** 8/21/2015

# Proposal PDF – Questions/Answers Pages

## Questions and Answers

*Only proposals with complete, accurate and thoughtful responses will be accepted. All others will be returned for completion or declined. It is the responsibility of the applicant and their manager to provide an acceptable proposal. You may save your proposal as work-in-progress but submit it only when completed and ready for consideration.*

**1) Briefly describe your job including the functions you perform and the results you produce.**

Policy and Procedures author and editor

**2) How will this proposed option allow you to maintain or improve your individual performance?**

Improve focused work without distractions or interruptions.

**3) How will this proposed option add value to the company clients?**

Improve the value and timeliness of the work performed for our client companies and countries.

**4) What challenges will the proposed option raise with your a)manager b)team or coworkers c)internal customers and d)external customers? Have you discussed working under this arrangement with your manager?**

*(Please note: all arrangements have challenges.)*

communications, collaboration and cooperation - same as when I am in the office.

**5) What solutions would you propose to overcome each of the challenges raised in question 4?**

regular cell phone calls (at well placed times to avoid disruptions), emails and texts.

**6) How will coverage be ensured when you are not on-site? How will your availability and attendance at meetings be maintained?**

Meetings will be scheduled for days of the week in-office. We will schedule these so all can and should attend. This remote work will make the time together more important and more focused.

**7) How flexible can you be about the proposed arrangement?**

very - I chose the best days to be out of the office.

**8) What measures of job performance/productivity, both qualitative and quantitative, will be important in determining if your work is being done as effectively, or more so, than before your flexible work arrangement?**

quality, quantity, timeliness, on-schedule, on-budget, managers and co-workers are happy and our team is developing as it should.

**9) What review process do you propose that you and your manager use to constructively**

# Proposal PDF – Agreement(s) Pages

## ***North American Telecommuting Agreement***

*(To be completed by staff member and manager if a proposal to telecommute is approved. A copy of the approved Flex Proposal Form must be attached to this agreement.)*

I understand and accept the following provisions regarding my telecommuting arrangement with Employer:

### **Work Arrangement**

1. As a telecommuting staff member, I will be performing a portion of my work from a non-Employer location.
2. The scheduled days and hours I will work off-site are specified in my Flex Proposal Form (attached). Unless I have entered into a part-time or job sharing arrangement, the total number of hours I work is not expected to change as a result of the telecommuting arrangement. I will remain available by telephone and email on the days when I telecommute.
3. Business needs—including travel, trainings, meetings, etc.—may require me to adjust my telecommuting schedule or work at Employer on days when I would normally work off-site, and I am willing to do so.
4. On days when I am required to work on-site at Employer, whether scheduled or unscheduled, commuting time to and from Employer will not be treated as work hours or compensable time.
5. I understand that my participation in this telecommuting arrangement is not a contract, term, benefit, or condition of employment and should not be construed as such. The arrangement may be revoked or modified by Employer at any time.
6. I understand that I remain an at-will employee and that this agreement does not limit Employer's or my right to terminate my employment at any time, with or without cause, and with or without notice.
7. If I transfer, am promoted, or otherwise move to another position, this telecommuting arrangement will be subject to automatic review and possible modification or revocation.

# Proposal PDF – Manager Comments Pages

## provided from proposal review

### Manager Comments

#### On the Proposed Schedule:

We discussed a schedule of 3 days out of office. Let's start with the 2 days and see how it goes. I think Wed & Thur are the best days to not be in the office.

#### On Answers to Questions:

- 1) You do quite a bit more than this - identify your other roles - mentoring, project over-sight, project design review, performance reviews, mgt.
- 2) You have to give me more. I need compelling basis.
- 3) Good, but there is more.
- 4) I need more than keywords!
- 5) SAA - same as above
- 11) office furniture, network bandwidth, everyone has a "corner office", ...

# Summary of Proposal Process

- 5 simple tabs in the wizard-based process.
- All presented data (text and captions) are stored in the Flexar database to enhance customization.
- All captured data (user input) are stored in the Flexar database to enhance collaboration & reporting.
- a Proposal PDF file is created that records and formats values of the Proposal at time of submission.
- An email is automatically created to alert the applicant's manager that a proposal is ready for consideration.

# Telecommuting & Onsite Work

Home Logout

Profile **Arrangement** Schedule Proposal Questions Agreement

**Telecommute and Work Site**

I telecommute and work onsite in the same state

I telecommute and work onsite in different states

*Note the different style of tab used for this client Flexar site.*

*Telecommuting has special circumstances – how many states work is performed and what percentages for each state. This usually has tax obligation issues about which HR/Payroll must be informed.*

Save < Previous Next >

# Telecommuting – Multiple States

Home Logout

Profile → **Arrangement** → Schedule → Proposal Questions → Agreement

### Telecommute and Work Site

I telecommute and work onsite in the same state  
 I telecommute and work onsite in different states

### Work State Percentages

Staff members who work in multiple states or countries must complete the following section.

Home State/Country:	<input type="text" value="MA"/>	<input type="text" value="80"/>	%
Work 2 State/Country:	<input type="text" value="RI"/>	<input type="text" value="20"/>	%
Work 3 State/Country:	<input type="text"/>	<input type="text"/>	%

*Many people who telecommute perform work in more than one state, or taxing authority. This must be identified for HR/Payroll. Each day is 20%. This is optional for Telework.*

# Job Share Specific Information

Home Logout

Profile **Arrangement** Schedule Proposal Questions Agre

**Job Share Partner**

Staff ID:

First Name:

Last Name:

Phone:

Email:

*Select the Job Share partner from a panel of employees using the magnifying glass and the relationship is created and all other data is automatically determined from the Flexar database. Change partners the same way.*

**Job Share arrangements have a “Job Share Partner”.**

# NEXT STEPS

Your company could be enjoying the benefits of Flexar in less than 3 weeks for much less than you expect.

You can view the Flexar Manager Options Menu and the Administrator Options Menu presented in the Walkthrough section.

If you have any questions or would like to schedule a Flexar walk-through, please call 240-602-1127 and ask for a Flexar specialist or email [support@pipersoft.net](mailto:support@pipersoft.net) with your request.

If you would like a cost quote and proposal, please call the above number and ask for a Sales specialist or use the above email and ask to be called by a Flexar sales specialist.