

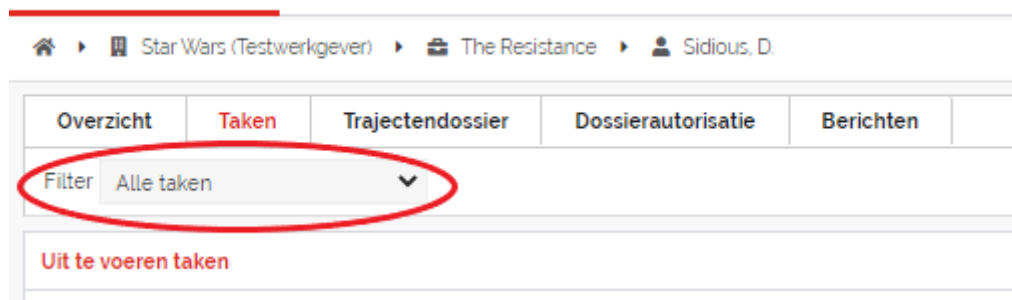
## Working in a trajectory

As soon as the sick report is created in XS, a trajectory is created. In this track, tasks are created for the next 2 years (WvP). As an employer, you have access to all tasks that need to be carried out during the trajectory.

### Filtering within the tasks

Depending on the duration of the absence, the number of tasks will increase. You therefore have the option of filtering within the tasks of the course.

Dossier: Sidious, D. 

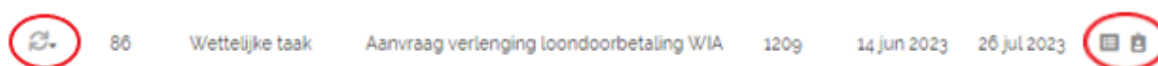


The filters you can choose can be divided into 2 categories: Own tasks, which should be performed by you and All tasks, which should be performed by the various stakeholders. It is recommended to keep the filter "All own urgent tasks".

## icons on a tasks

### What do the icons on a task mean?

At a task in the overview, you will find several icons.

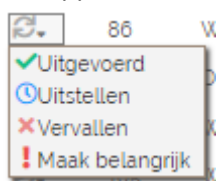


The meaning of these icons is described below.

### Status-icon



The status icon is at the beginning of the task line. With this icon you can change the status of the task. By default, the task is set to 'Running' = Lopend. If you click on this icon, the following selection box will appear:



- **Completed - uitgevoerd:** You have completed the task. This task gets a green check mark in the task overview.
- **Postpone - uitstellen:** You are going to postpone the task to a later time. If you want to postpone the task, a new screen will open in which the name of the employee and details about the absence will be given. In addition, a description of the task is given. In the date fields you can then specify the new reminder date and latest execution date of the task. An explanation of the postponement is mandatory.

**Uitstellen: (Wettelijke taak) Aanvraag verlenging loondoorbetaling WIA**

\* Verplichte velden

Medewerker	Sidious, D.
Verzuimperiode	27 okt 2021 tot/met heden
Startdatum	14 jun 2023
Duur	42 (dagen)
Omschrijving	Over de periode waarvoor uitstel van de WIA-aanvraag wordt verzocht is de werkgever verplicht het loon door te betalen. Uitstel is dus alleen interessant als het zeker is dat de werknemer weer volledig zal herstellen. De werkgever betaalt dan namelijk geen hogere WIA-premie omdat de werknemer niet in de WIA terechtkomt. Klik op het Invulscherp icoontje van deze taak om een aanvraag voor verlenging tot doorbetaling in te dienen.
* Herinneringsdatum	15-6-2023
* Uiterlijke uitvoerdatum	16-6-2023
* Toelichting uitstelling	<div></div>

ANNULEREN
**TAAK UITSTELLEN**

After you click on the DELAY TASK (TAAK UITSTELLEN) button, you will see both the original task and the new task listed in the task overview, with the old task given the deferral icon.

	86	Wettelijke taak	Aanvraag verlenging loondoorbetaling WIA
	88	Opdracht	Aanvraag WIA-uitkering
	88	Wettelijke taak	Aanvraag verlenging loondoorbetaling WIA



- **Expired - Vervallen:** You are not going to perform the task at all and let the task expire. When you click on 'Abandon' a new screen will open in which the name of the employee and details about the absence will be given. In addition, a description of the task is given. An explanation of the deferral is mandatory and should be provided by you.

**Vervallen: (Wettelijke taak) Aanvraag verlenging loondoorbetaling WIA** ✕

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\* Verplichte velden

Medewerker	Sidious, D.
Verzuimperiode	27 okt 2021 tot/met heden
Startdatum	29 jun 2023
Duur	12
Omschrijving	Over de periode waarvoor uitstel van de WIA-aanvraag wordt verzocht is de werkgever verplicht het loon door te betalen. Uitstel is dus alleen interessant als het zeker is dat de werknemer weer volledig zal herstellen. De werkgever betaalt dan namelijk geen hogere WIA-premie omdat de werknemer niet in de WIA terechtkomt. Klik op het Invulscherm icoontje van deze taak om een aanvraag voor verlenging tot doorbetaling in te dienen.
* Toelichting vervallen taak	<div style="border: 1px solid #ccc; height: 40px;"></div>

ANNULEREN
TAAK VERVALLEN

After you click the TAAK VERVALLEN button, you will see in the task overview that the task has been given the expired icon.

✕ 88 Wettelijke taak Aanvraag verlenging loondoorbetaling WIA

- **Make important = maak belangrijk:** If you don't want to lose track of a task, you can make a task important. The task will then be marked with a red exclamation point and placed at the top of your task list.

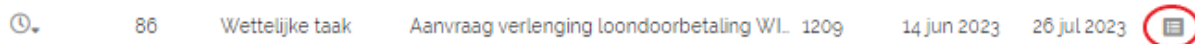
🔄 ! 86 Wettelijke taak Aanvraag verlenging loondoorbetaling WIA 1209 14 jun 2023 26 jul 2023 📅 📄

You can also make a task Not Important again. Click on the status icon at the beginning of the task and then choose Not Important anymore.

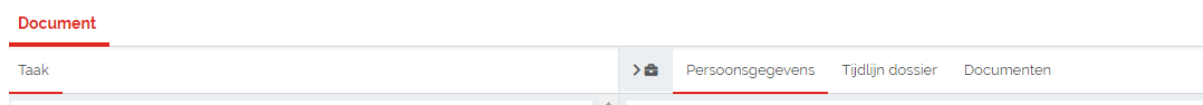


## Input screen icon

Behind a number of tasks you will find the fill-in-the-blank icon. This icon indicates that a document must be filled in, e.g. a UWV form.



Clicking on this icon will open a new screen. On the left side of this screen you will find the document that needs to be filled in. On the right side you will find an overview with information about the employee, the process and the documents that are available in the process, depending on the tab you click. In this way you will have information available very quickly that you can use when filling in the document.



## Task forward icon

It is possible to forward a task to someone else. To do so, use the Forward Task icon:



If you click on this icon, a new screen will open.

In this screen, select another user and provide an explanation. Then click on DOORZETTEN.

## Taak doorzetten

Verzenden WIA-aanvraag doorzetten







Gebruiker of gebruikersgroep \*

Toelichting

ANNULEREN DOORZETTEN

The task will then be shown to the new user in the task list. In your own task overview you will see the transferred task under the heading 'Verstreckte taken'.



Overzicht	Taken	Trajectendossier	Dossierautorisatie	Berichten
Filter <div>Alle eigen taken</div>				
Uit te voeren taken				
Status	Week	Taak Soort	Taak	
	26	Emailsignaal	Infomail 26 weken WG	
	47	Wettelijke taak	Max loonbetaling 2e jaar	
	86	Wettelijke taak	Aanvraag verlenging loondoorbetaling WIA	
	88	Opdracht	Aanvraag WIA-uitkering	
	88	Wettelijke taak	Aanvraag verlenging loondoorbetaling WIA	
	105	Wettelijke taak	Einde loondoorbetaling	
Verstreekte taken				
Status	Week	Uitvoerder	Taak	
	92	Leidingt. LG	Verzenden WIA-aanvraag	

## The trajectory file (Trajectendossier)

In the tab "Trajectendossier" you can find all relevant information/documents of a (current) trajectory.

You can find the trajectory file by first searching for the employee. The employee file will now open. Go to the tab "trajectory file".

Overzicht	Taken	Trajectendossier	Dossierautorisatie	Berichten
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The following items can be found here:

- Xpert Suite documents: here you can find the documents that are created and stored within XS.
- Invitations: invitations for an appointment with the company doctor are stored here
- Imported documents: here all documents that a user uploads separately are stored.
- Overview documents:
  - Contact moments overview: overview containing all notes;
  - Progress report: contact details employee and Arbodienst;
  - Overview reintegration activities: here are all activities related to the trajectory who performed them and when this happened;
  - Appointments overview: overview of appointments with the company doctor
  - Notes



The trajectory file looks like this:

The screenshot shows the 'Trajectendossier' interface. At the top, there's a navigation bar with 'Star Wars (Testwerkgever)', 'The Resistance', and 'Sidious, D.'. A red 'Acties' button is on the right. Below the navigation bar, there's a search bar and a dropdown menu labeled 'Alle lopende trajecten'. The main content area is divided into sections: 'Gevalsdossier', 'VerzuimXpert documenten', 'Geïmporteerde documenten', and 'Overzichtsdocumenten'. The 'VerzuimXpert documenten' section contains a table with columns: Docu.#, Status, Versie, Traject, Datum, and Gebruiker. The table lists three documents: 'Aanvr.', 'Capa.', and 'IProbl.', all with status 'Definitief'. The 'Geïmporteerde documenten' section has an upload button. The 'Overzichtsdocumenten' section shows a document titled 'Overzicht voortgang' for the trajectory 'Ziekte (WVP): 2021-10-27 - heden (nr: 120g)'.

By filtering at All current trajectories (alle lopende trajecten), you can determine whether you would like to see a complete overview or only those cases that belong to a particular trajectory.

## VerzuimXpertdocuments

Here you will find all documents that have been created during the course of the trajectory.

In the example below all documents are on final. It is also possible that a document is on draft. In that case you can use the arrow behind the name of the document to make it final.

VerzuimXpert documenten					
Docu.#	Status	Versie	Traject	Datum	Gebruiker
Aanvr..	Definitief	1	Ziekte (WVP): 2021-10-27 - ..	28 okt 2021	Training, Tester
Capa..	Definitief	1	Ziekte (WVP): 2021-10-27 - ..	27 okt 2021	Training, Tester
IProbl.	Definitief	2	Ziekte (WVP): 2021-10-27 - ..	27 okt 2021	Nieuwkerk, M. van

## Imported Documents (geïmporteerde documenten)


Here you will find documents that have been imported. You can also upload documents here. By clicking on the upload button behind Imported documents, a screen will open where you can indicate to which track the file should be added. It is possible to upload multiple files at once.



## Upload document(en)

Traject	Ziekte (WVP): 2021-11-02 - Heden (nr. 1...
Medisch	<input type="checkbox"/> De bestanden worden gecategoriseerd als medisch bestand
Opslaan als pdf	<input checked="" type="radio"/> De bestanden los opslaan en niet converteren naar pdf <input type="radio"/> De bestanden samenvoegen en opslaan als één pdf
Bestanden	Klik hier om een bestand toe te voegen 
<div>ANNULEREN</div> <div>OPSLAAN</div>	

## Overzichtsdocumenten

Overzichtsdocumenten	
Document	Traject
Overzicht voortgang	Ziekte (WVP): 2021-10-27 - heden (nr. 120g)
<div> Openen</div>	

You will find various overviews in the Progress Overview. By clicking on the arrow behind the overview you can open the overview by clicking on OPEN. The overview will then be displayed. In the overview you can also filter the progress per trajectory.

## Tijdslijn dossier

Overzicht voortg...	Alle trajecten
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## Adding an assignment

You can add an assignment for yourself but also for another person involved in the course, e.g. the absence manager. When adding an assignment a task is created in the trajectory. This task is given the task type OPDRACHT and will be added to the task list of either you or the person you selected as the performer of the task.

If you choose Provide Assignment (OPDRACHT TOEVOEGEN), the following screen will open:

**Opdracht verstrekken**

\* De situatie

☒ Opdracht toevoegen  
☐ Nieuw contactmoment inplannen  
☐ Nieuw contactmoment registreren

Oproep voor traject \* Ziekte (WVP): 2021-10-18 - Heden (nr: 163) ▼

Datum \* 27-10-2021 📅

Markeren als belangrijk ☐

Selecteer opdracht type \* Selecteer een opdracht type ▼

Selecteer een uitvoerder \* Tester Training ▼

Beschrijving opdracht \*

Toelichting voor de opdracht \*

Aantal dagen ter uitvoering 1

ANNULEREN **OPDRACHT TOEVOEGEN**

There are 3 options available when issuing an assignment:

- A. Add assignment – Opdracht toevoegen
- B. Schedule a new contact moment – nieuw contactmoment inplannen
- C. Register new contact moment – nieuw contactmoment registreren

## Option A - Add assignment

1. With this option you can add a free own assignment to the track.
2. The following data must be entered:
  1. Assignment for track: select the correct track
  2. Select Assignment Type: select the correct assignment type
  3. Select an executor: select the correct executor here
  4. Description of assignment: describe the subject of the assignment here





5. Explanation for the assignment: here you can fill in a detailed explanation.  
Important: it is not allowed to put medical information or possible interpretations in the note fields.
6. Number of days to complete: how many days will the executor have to complete the assignment. Once the number of days has passed, the task will be marked as late

Click on the button OPDRACHT TOEVOEGEN

Opdracht verstrekken

De situatie

☒ Opdracht toevoegen  
☐ Nieuw contactmoment inplannen  
☐ Nieuw contactmoment registreren

Oproep voor traject

Ziekte (WVP): 2021-10-18 - Heden (nr: 163)

Datum

27-10-2021

Markeren als belangrijk

☒

Selecteer opdracht type

Vrije eigen opdracht

Selecteer een uitvoerder

Tester Training

Beschrijving opdracht

Opdracht toevoegen aan takenlijst

Toelichting voor de opdracht

Met een vrije opdracht kun je een taak toevoegen aan de takenlijst van jezelf of van iemand anders

Aantal dagen ter uitvoering

1

ANNULEREN

OPDRACHT TOEVOEGEN

## Option B - Schedule a new contact moment

With this option you can schedule a new contact moment in the process.

Again, fill in the requested information and click on SAVE.


1. Contact moment for trajectory: select the correct trajectory
2. Select the desired date for the contact moment.
3. Select an executor: select the correct executor here
4. Explanation for the assignment: here you can fill in a detailed explanation.  
Important: it is not allowed to put medical information or possible interpretations in the note fields.
5. Status: default to Ongoing.
6. If necessary, schedule a second new contact moment by clicking Yes at Schedule new contact (Nieuw contact plannen).






## Opdracht verstrekken

\* De situatie

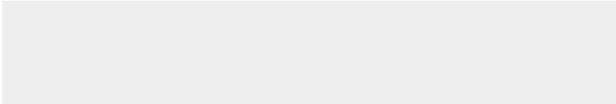

- ☐ Opdracht toevoegen  
☒ Nieuw contactmoment inplannen  
☐ Nieuw contactmoment registreren

 Open overzichtsdocumenten

## Details

Dossier	Mevr. J. de Hutt
Traject *	Ziekte (WVP): 2021-10-18 - Heden (nr. 1.. 
Datum *	
Uitvoerder *	Mevr. Tester Training 
Weergegeven als *	Contactmoment
Markeren als belangrijk	<input type="checkbox"/> Belangrijk

## Notities

Toelichting	
Status *	Lopend 
Nieuw contact plannen *	<input type="radio"/> Nee <input type="radio"/> Ja

ANNULEREN

OPSLAAN

## Option C - Register new contact moment

With this option you can register a new contact moment in the course. For example if you have spoken to your employee and you want to report this to your absence manager.

Again, fill in the required details and click on SAVE.

1. Order for trajectory: select the correct trajectory
2. Select the desired date for the contact moment.
3. Select an executor: select the correct executor here
4. Explanation for the assignment: here you can fill in a detailed explanation.  
Important: it is not allowed to put medical information or possible interpretations in the note fields.
5. Status: default to Executed
6. If necessary, schedule a second new contact moment by clicking Yes at Schedule new contact.



## Opdracht verstrekken

\* De situatie


- ☐ Opdracht toevoegen
- ☐ Nieuw contactmoment inplannen
- ☒ Nieuw contactmoment registreren

 Open overzichtsdocumenten

## Details

Dossier Mevr. J. de Hutt

Traject \* Maak uw keuze...

Datum \* 27-10-2021 

Uitvoerder \* Mevr. Tester Training

Weergeven als \* Contactmoment

Markeren als belangrijk ☐ Belangrijk

## Notities

Toelichting

Status \* Uitgevoerd

Nieuw contact plannen \* ☒ Nee ☐ Ja

ANNULEREN

OPSLAAN



## Adding a note

You can use a note to add a comment in the trajectory. When adding a note, a task is created in the employee's trajectory. This task is given the task type Note and is added to the task list. When creating the note, you can indicate whether you want the note to be included in the Progress File. This will make the note visible to all the implementers in the project.

When you select the option Toevoegen van een notitie (add note), the following screen opens. Fill in the required information, select for which project the note applies and check the box whether the note should be added to the progress file. Click on ADD NOTE (NOTITIE TOEVOEGEN)

**Notitie**

De situatie

Toevoegen van een notitie

Datum: 3-11-2021

Notitie geldt voor traject: Ziekte (WVP): 2021-10-27 - Heden (nr: 1209)

Opnemen in voortgangsdossier: ☒

Omschrijving notitie

ANNULEREN **NOTITIE TOEVOEGEN**

Note: If you want to pass something on to e.g. your absence manager, use the option Messages (berichten) via the employee file.

Overzicht	Taken	Trajectendossier	Dossierautorisatie	Berichten
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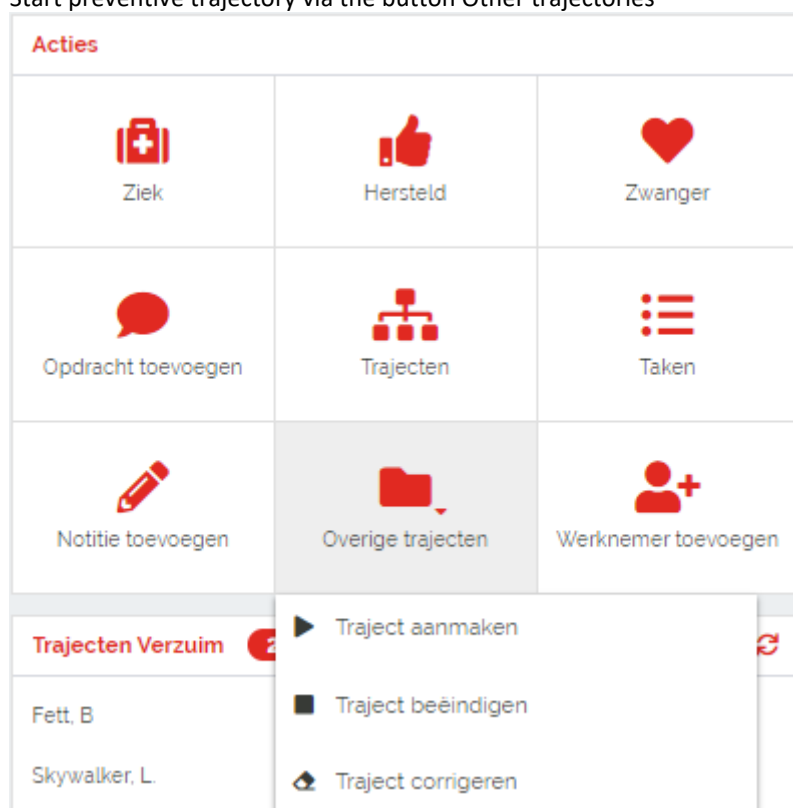
## Other trajectories

Besides a sickness and pregnancy trajectory, it is also possible to start other types of trajectories in XS. At the moment we only know the option Preventive trajectories.

There are two ways to start another type of trajectory.

- Through the button Other Trajectories in the start screen
- Via the Search for the employee in the start menu - via the File search screen in the start screen, you search for the employee. Then click ACTION at the top right and choose OTHER TRAJECTS (OVERIGE TRAJECTEN). Then perform the steps for completing the screen as described in this section.

Start preventive trajectory via the button Other trajectories



The following options can be selected

- Create trajectory – traject aanmaken
- End trajectory – traject beëindigen
- Correct a trajectory – traject corrigeren

At this time, only the 'Create track' - option A is available

## Situation A Create Trajectory

After selecting this option, the employee search screen opens. Find the employee and select 'NAAR DOSSIER'.



Fill in the start date and choose the trajectory. At this moment it is only possible to start a Preventive protocol.  
Click on START

Startdatum *	25-10-2021 
Traject *	VerzuimExpert - Preventief Protocol ▾
Afwijkende formele schadedatum *	<input checked="" type="radio"/> Nee <input type="radio"/> Ja
Gebaseerd op	Variatie VerzuimExpert - Preventief Protocol - Verzuim - Abonnement
Overeenkomstperiode	20-09-2021 - Heden

ANNULEREN

STARTEN



## correct a trajectory

The available corrections are based on the employee's current trajectories. These trajectories are given a unique reference of the start date and trajectory number.

### ‘traject corrigeren’

First, select the employee by using the search function via File Search in the home screen. Once the employee file is open, you will see the "Actions" button on the top right. Click on it and select the option "Traject corrigeren".



## corrections

Depending on the current/closed trajectories, you will now be presented with a number of options for corrections. The following situations may apply:

- A. Correcting/modifying sick leave data
- B. Linking or disconnecting the sick leave to or from a pregnancy.



## Situation A Correcting/modifying sick leave data



You want to correct/amend sick leave data. In this case, select the "You want to change sick leave data" option – U wilt de ziekteverzuimgegevens wijzigen.

The following screens is shown:

### Correctie/Fouttherstel

\* De situatie ☒ U wilt de ziekteverzuimgegevens wijzigen

**i** Als de werknemer toch nog ziek blijkt te zijn kunt u het ziekteverzuim heropenen.

Verzuimclassificatie	Ziek
Eerste ziekte dag	20-10-2021 
Gebaseerd op	Capability - Verzuim - Verzuim - Abonnement
Overeenkomstperiode	20-09-2021 - Heden
Verzuimstatus	<input type="radio"/> Volledig ziek <input checked="" type="radio"/> Gedeeltelijk ziek
Verzuimpercentage	100,00 % 
Notitie	

ANNULEER

OPSLAAN

Now enter the data you wish to change and click the SAVE (OPSLAAN) button.





## Situation B Linking/disconnecting the sick leave to or from a pregnancy

You want to report that your employee's sick leave is still related to pregnancy. This is only possible if there is a pregnancy notification registered for the employee.

### Correctie/Fouttherstel

\* De situatie

- ☐ U wilt de ziekteverzuimgegevens wijzigen  
☒ De ziekmelding heeft alsnog een relatie met zwangerschap

ANNULEREN

**KOPPELEN MET ZWANGERSCHAPSPROTOCOL**

Choose the option 'The sick report is pregnancy related' (KOPPELEN MET ZWANGERSCHAPSPROTOCOL) and click on the button SAVE. The sick note will now be given the classification 'Sick due to pregnancy'.

It is also possible to disconnect a sick notification that is linked to a pregnancy.

Then choose within Correction for 'Cancel the relation of the illness with the pregnancy' (ZIEKTE LOSKOPPELEN VAN ZWANGERSCHAPSPROTOCOL) and click on SAVE. The sick notification will now be given the classification Sick.

### Correctie/Fouttherstel

\* De situatie

- ☐ U wilt de ziekteverzuimgegevens wijzigen  
☒ De relatie van de ziekte met de zwangerschap annuleren

ANNULEREN

**ZIEKTE LOSKOPPELEN VAN ZWANGERSCHAPSPROTOCOL**

## Corrections to the pregnancy notification

Correcting the last working day and correcting the estimated delivery date can be done in the "Pregnant" screen. You can find more information about this in chapter 6.

