capability
aandacht & actie

XpertSuite

Manual
for Employers



Capability, de arbodienst van aandacht & actie

capability
aandacht & actie

INHOUDSOPGAVE

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INTRODUCTION

Below you will find the user instructions for XpertSuite, Capability's absence tracking system. XpertSuite (XS for short) is a user-friendly, efficient and privacy-proof absence system. XS is easy to use, reliable and clear. It is easy to create absence reports/statistics. In addition, it has extensive features and tools.

This manual describes the functionality you need to do the absence follow-up of your employees.

Please also visit our website. Here you will find more information about the use of XpertSuite.

- Instructional videos
- Webinar – use of the system (in Dutch)
- This manual
- The link to the frequently asked questions (FAQ)

If you have any questions or experience any problems with XS, please contact our 1st line helpdesk. You can reach us via:

- By phone: 088-0450100
- Email: xs-helpdesk@ capability.nl

Good to know!

If your organization uses a interface between your HR-system and Capability, you will have to do your absence notifications (sick, recovered, pregnancy notifications) in your HR-system. Also, it is **not** possible to add employees.

If you are insured by Aegon, you need to make sure that your employee file is registered in the Aegon portal. Your absence notifications should also be done in the Aegon portal.

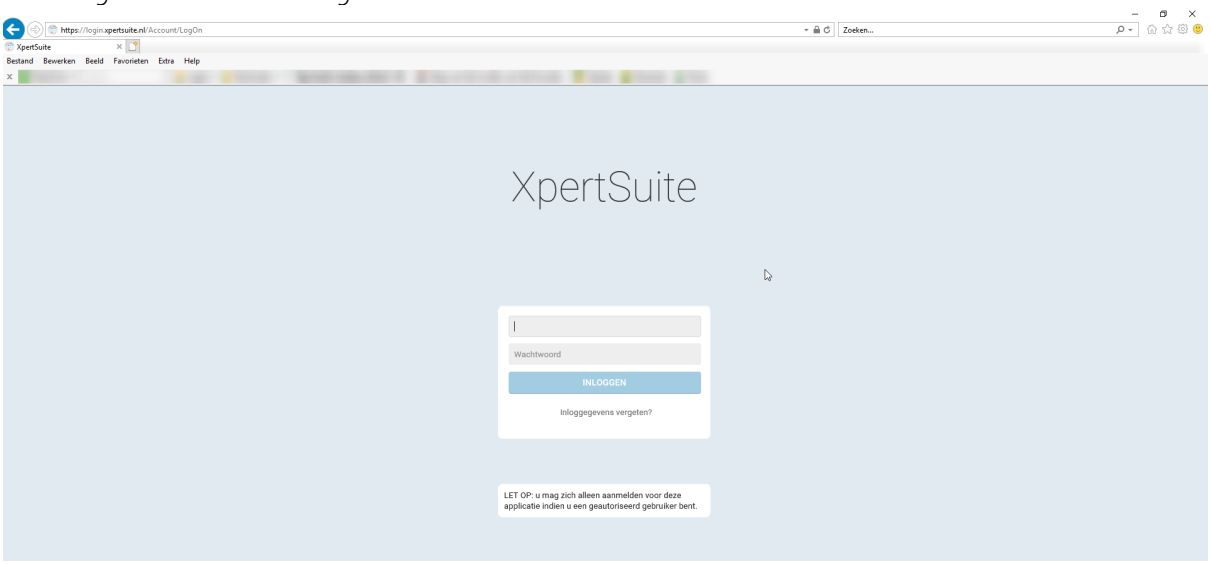
Logging in into XS

To log in to XS, open an internet browser (Google Chrome, Safari, Internet Explorer, Microsoft Edge etc.). You can log into XS via the link https://login.xpertsuite.nl/Account/LogOn

Once you have successfully logged in, you will be taken to the "Start Page". The start page offers, among other things, an overview of messages, trajectories, actions you can perform and tasks to be completed.

Login process

Below you will see the login screen for XS.



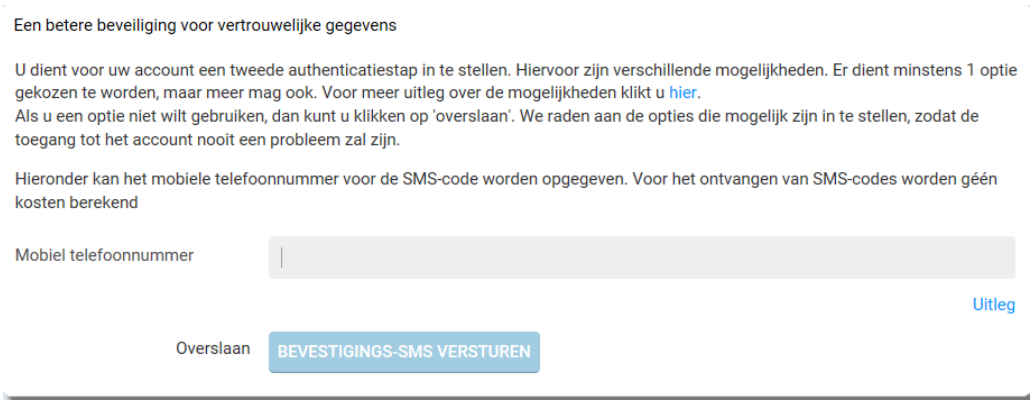
In the center of the screen, you can enter your username and password (together known as logincredentials).

After entering your validated login credentials, the next step is to set up the mandatory 2-factor authentication (2FA). The 2FA is a process for better security of personal data where you can choose from several options: an SMS code, a yubikey (USB) code or an authentication app.
2FA consists of two elements and always includes a login with login credentials, followed by 1 (or more) choices from three available options. These are described in the following sections:

- SMS verificatie code
- YubiKey code
- Een authenticator app

SMS code

When you choose to register a mobile phone number as a 2FA method, you can enter your cell phone number in the screen as shown below. The SMS code will consist of letters and numbers **only** (no capital letters).



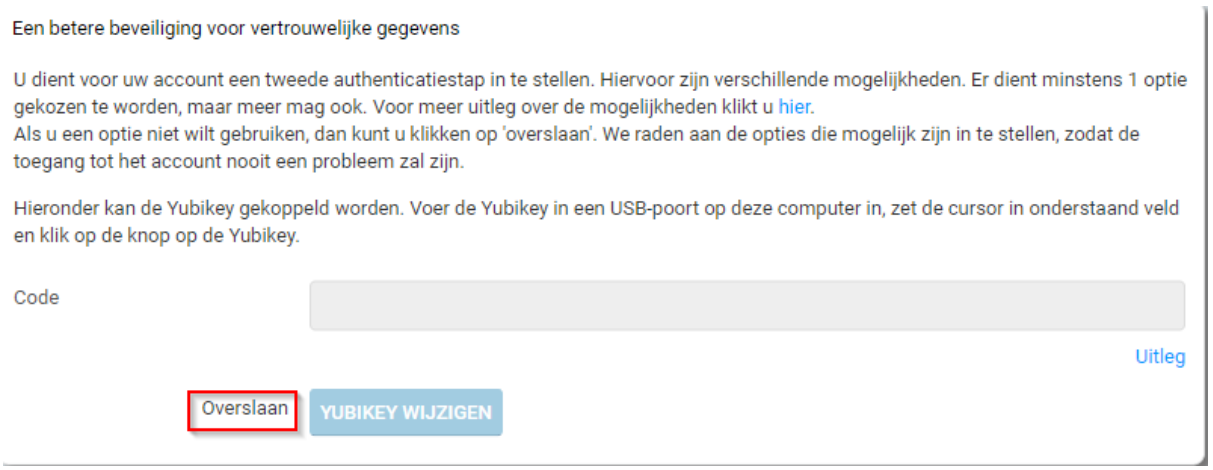
The translation of this screen is as follows:

You need to set a second authentication step here
At least one option should be selected but more is also allowed, for more explanation of these options click here. If you don't want to use an option click on skip. We recommend that you choose the options that are possible so that you always have login possibilities. Below you can enter your mobile phone number so you can receive SMS codes.

Click on the button 'send SMS confirmation' (BEVESTIGINGS SMS VERSTUREN).

Yubikey

The second 2FA method available is the Yubikey (a type of USB stick) code. If you do not have a Yubikey, please skip this step. In the image below you can see the Skip button marked with red.



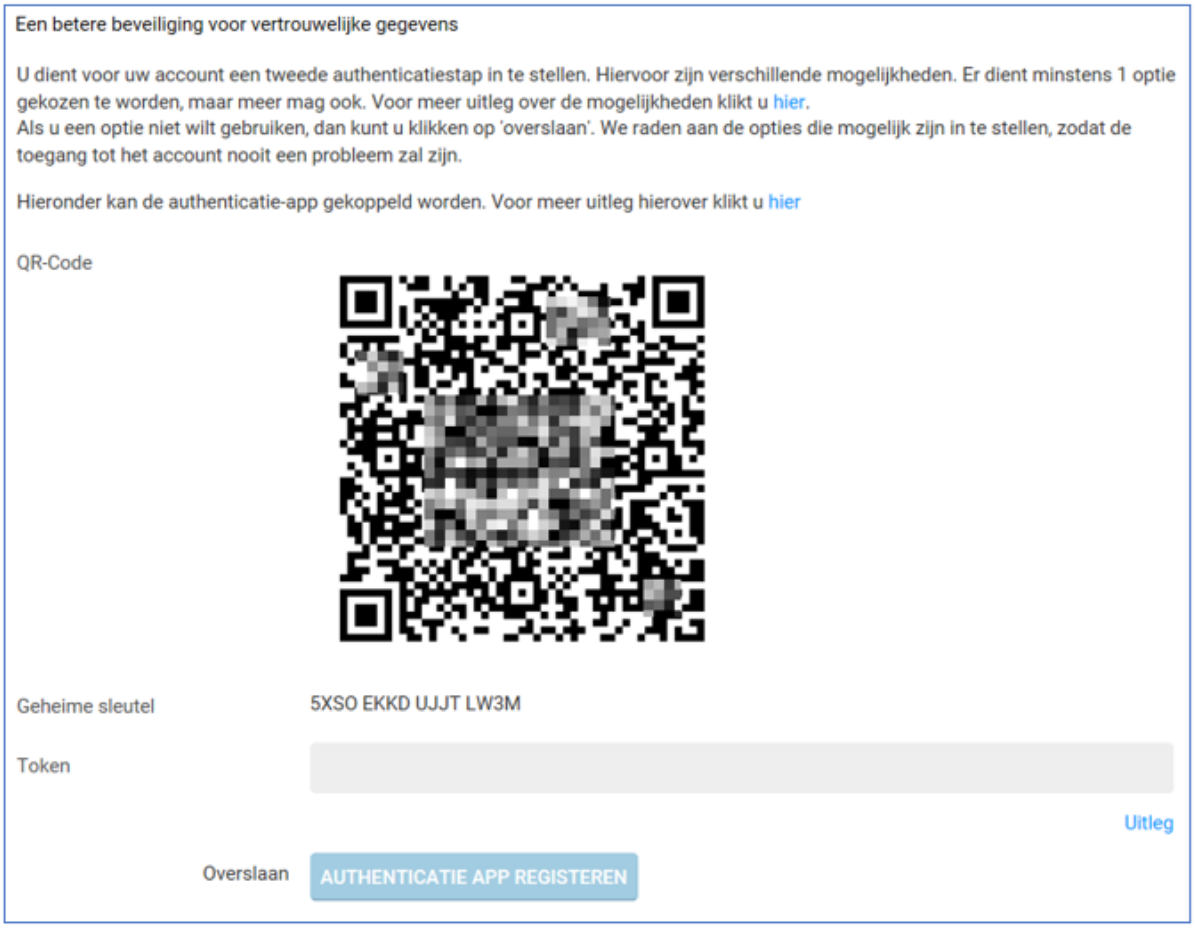
If you have a YubiKey, you will be asked to connect it to a USB port on your computer during authentication. Then, place the mouse cursor in the Yubikey code screen and briefly press the Yubikey USB. The field will automatically complete the YubiKey code and the 2FA authentication will be completed.

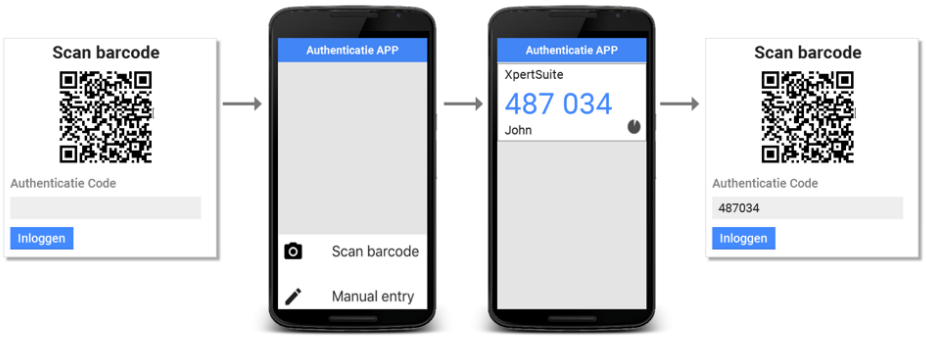
2-Factor authenticatie app on your smartphone

The third and final 2FA option is an Authenticator app. An authentication app generates a one-time code ("token") that you can enter manually in your login screen. Authentication apps can be installed on any device that supports apps, ranging from phones to tablets and more. A list of authentication apps can be found at the end of this chapter.

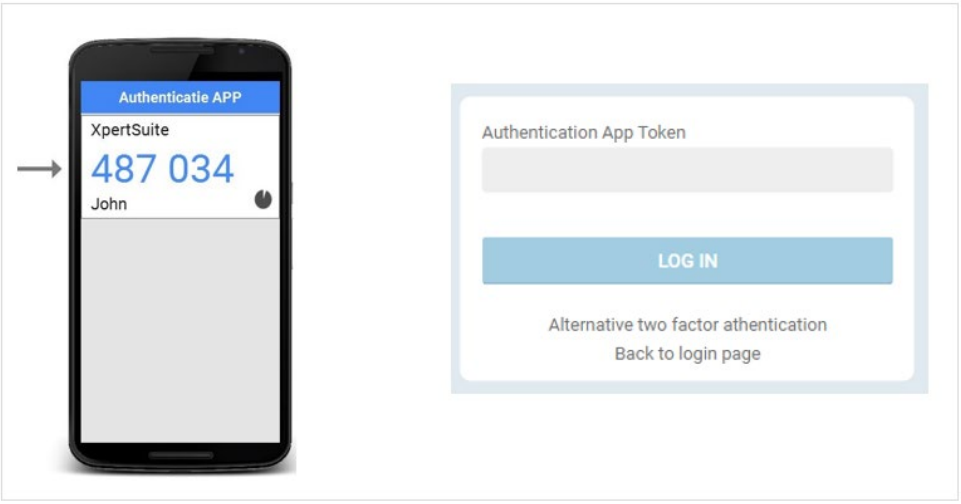
When you use the chosen app to scan a supplied barcode during the initial login, the one-time password generator for XS is added into the app.

Note that the screen below is an example of a QR code.





You only need to scan the barcode at the first login setting. Then you need to open the chosen authentication app and you can enter the XS code shown as below.



A list of commonly used authentication apps is shown below:

Google Authenticator	GET IT ON Google Play / Download on the App Store
Microsoft Authenticator	GET IT ON Google Play / Download on the App Store
Authy	GET IT ON Google Play / Download on the App Store
FreeOTP	GET IT ON Google Play / Download on the App Store

Backup code

Once you have set up your authentication options you will see a backup code on your screen. This code can replace your specified 2FA method if you do not have your phone or YubiKey. The image below shows an example of a backup code.

By clicking 'Stuur een SMS met de back-upcode' you can send a text message with the code to your mobile phone.



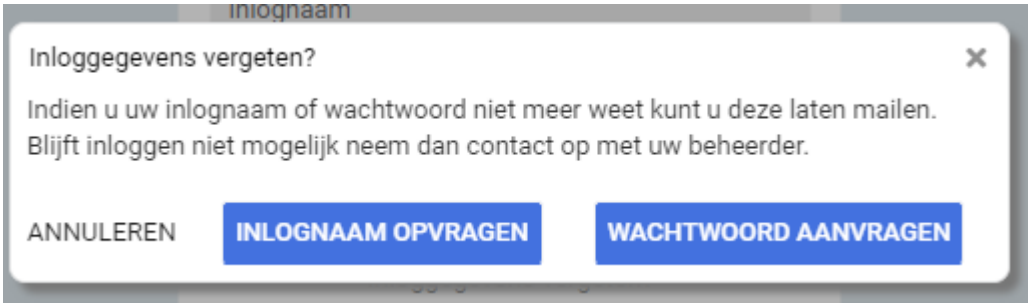
FORGOTTEN USER NAME OR PASSWORD

If you have forgotten your username or password, you can retrieve it from the login page.

Go to the login page at: https://login.xpertsuite.nl/Account/LogOn and click on 'Inloggegevens vergeten?' (forget your login credentials?)



The following screen displays:

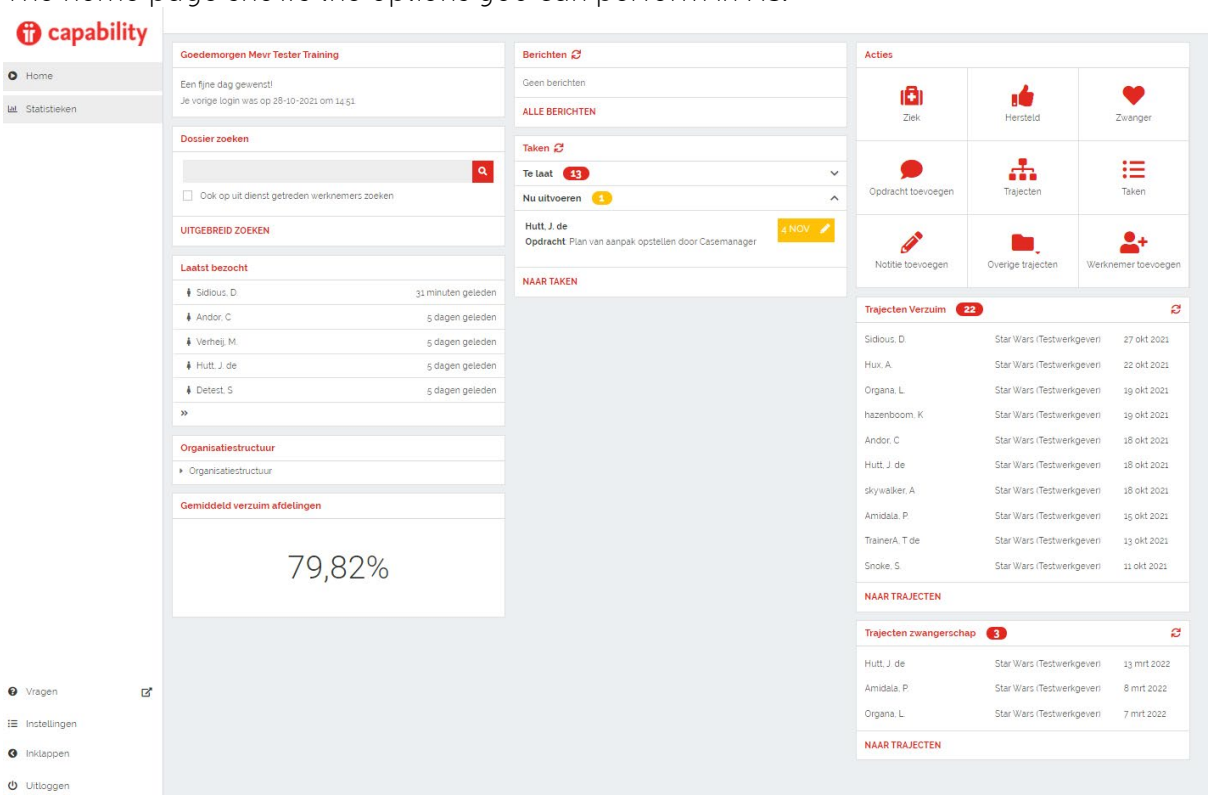


After you click on REQUEST LOGIN NAME (INLOGNAAM OPVRAGEN) or REQUEST PASSWORD (WACHTWOORD OPVRAGEN) and you filled in the required information into the next screen, the requested details will be send to you.

Homepage

The button in XS leads you to the home screen. In the next chapter, we cover some of the things you can find on the home page.

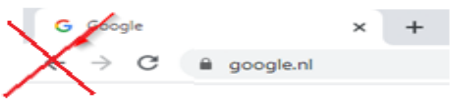
The home page shows the options you can perform in XS.



On the left side of the screen, you will find the menu options. In the rest of the screen, you will find all kind of options such as the ability to search for records, the last viewed employees, messages from the absence manager, tasks that are open for you, actions that you can perform and all the trajectories that are currently in place within your organization. It also shows the percentage of average absence departments.

browsing through xs

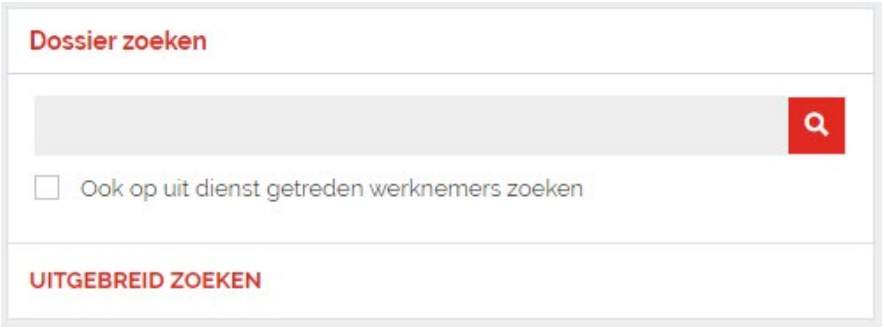
When navigating in XS, it is important that you only use the buttons in the XS screen. This means that the browser buttons do not provide valid actions (e.g. the button to go back in the browser)



You can click the Home button to return to the home screen or the button to return to the File Overview. The system alerts you when you may lose entered data.
In most situations, you will see a CANCEL or SAVE button in XS that you can use.

SEARCH FUNCTION (Dossier zoeken) – searching an employee

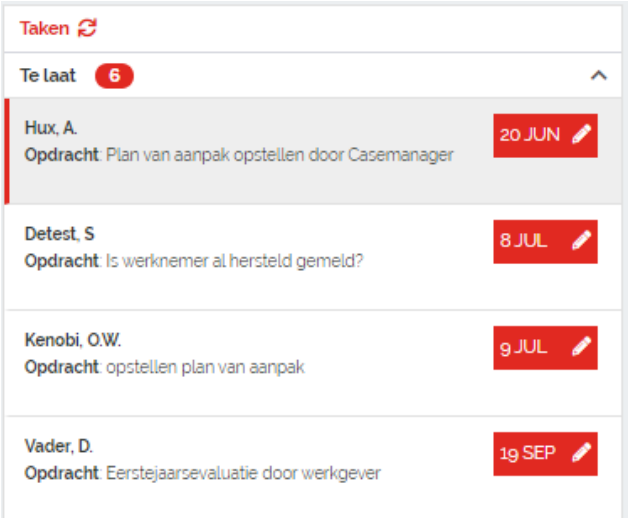
On the home page, you will see the search function that allows you to look up employees. You can search by various search terms (name, date of birth). Enter the reference in the gray text box, click on the search icon (magnifying glass) and select the desired employee from the list of results. Click UITGEBREID ZOEKEN to show the details.



TASK LIST (TAKEN)

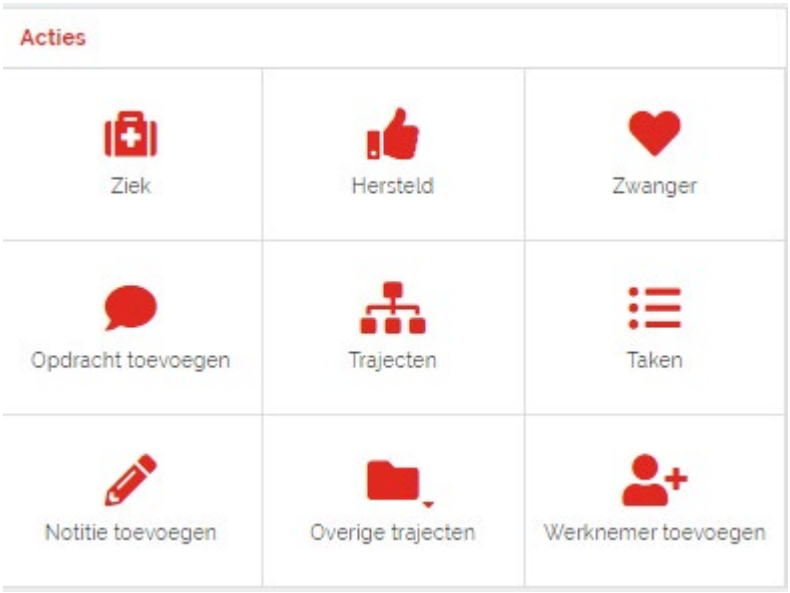
On the start page you will see the overview with all the tasks to be performed and assigned to other users. Clicking on a task in this list opens the complete list of tasks to be performed. You can also filter this complete list by), for example "All own tasks" (alle eigen lopende taken) or "All tasks" (alle taken

More information about tasks can be found in Chapter 12.



3.4 ACTION BUTTONS

With the action buttons at the top right of the home page , you can immediately perform various
actions.



- Ziek — Sick: employee sick (first button on the left);
- Hersteld — Recovered: Report an employee (partially) recovered (next button in the middle);
- Zwanger — Pregnant: create a pregnancy report for your employee. (heart icon)
- Add assignment: add an assignment to a project
- Trajectories: an overview of all current trajectories within your organization, per trajectory
- Tasks: an overview of all tasks. You can filter which tasks you want to see here.
- Add note: add a note to a project
- Other trajectories: various trajectories (create, terminate and correct)

- Add employee: add new employees

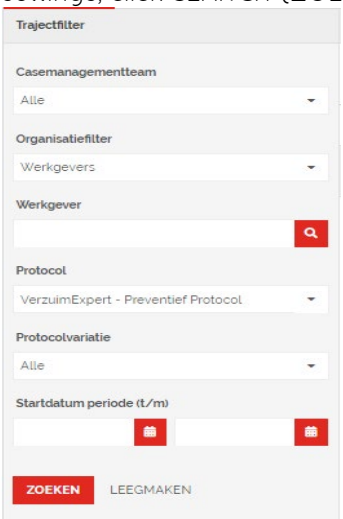
NOTE: If your organization uses an interface between your HR system and Capability, you need to do your absence notifications (sick, recovered, pregnancy notifications) in your HR system. It is also not possible to add employees.
If you are insured by Aegon, then you must ensure that employee records are registered in the Aegon portal. Your absence notifications should also be done in the Aegon portal.

Absence trajects

In the start screen you will find an overview of all current trajectories,, divided into trajectories for Absence and trajectories for Pregnancy with the number of processes indicated in red.

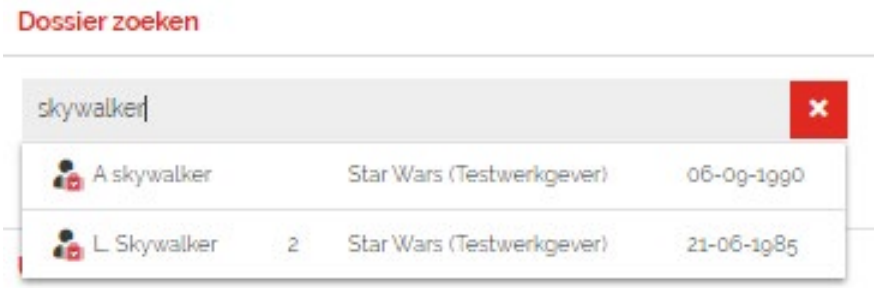


At the bottom of each overview is the TO TRAJECTS (NAAR TAKEN) button. Clicking on this button will open a screen containing all the current trajectories by type. It is possible to use the trajectory filter to determine which trajectories you would like to see in the overview at that time. After selecting the filter settings, click SEARCH (ZOEKEN). The paths that fit within the filter are now shown.



EMPLOYEE FILE

To access the employee's file, first search for the employee using the search function. You can look up the employee by entering a search term such as (name, date of birth, BSN and employee number) and clicking on the desired employee.



4.1 OVERVIEW PAGE (overzicht)

In het tabblad "Overzicht" (Overview) vindt u de recente trajecten en alle relevante informatie over de betreffende medewerkers.



This includes the following information:

- The recent trajectories/ absence history of this employee. Through the different icons there is a shortcut for notes, tasks and documents
- The general data of the employee
- Personal notes
- If necessary, a temporary home address
- Contact details of the supervisor
- The current employment

4.2 tasks (taken)

In the tab "Tasks" you can find all information regarding current tasks: tasks still to be performed and tasks issued (to others).



On this page you have the possibility to show one specific trajectory or the tasks of all (current) trajectories. You also have the possibility to use the filter. It is recommended to keep the filter "All own urgent tasks".

Meer informatie over taken kunt u vinden in hoofdstuk 12.

4.3 THE TRAJECTORY FILE (trajectendossier)

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



The data in question is the following:

- 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

4.4 File autorisations (dossierautorisatie)

The "File Authorisations" tab lists - if applicable - the assigned case manager and company physician who can handle the files.



4.5 Messages (berichten)

The "Messages" tab takes you to the DialogueXpert. (in red)

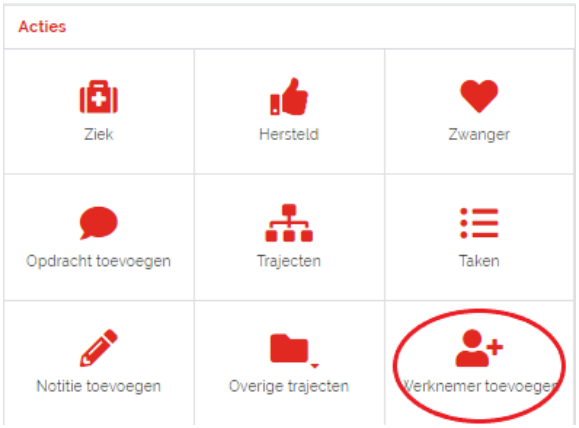


More about DialogueXpert can be found in Chapter 13.

5 ADD, CHANGE OR REPORT A NEW EMPLOYEE OUT OF SERVICE

adding a new employee (werknemer toevoegen)

You add a new employee using the 'Add Employee' button on the home screen.



In the following screen enter all the requested data. The fields marked with an * are mandatory.

The fields are categorized in:

- Personal data
- Address
- Contact details
- Financial details - this includes the start date of employment
- Note
- Employment

Once you have entered all the information, click SAVE (OPSLAAN).
At this point an employee file is created. After saving the data, you can choose to open this file immediately.

NOTE: If your organization uses an interface between your HR-system and Capability, you need to enter your employees in your HR-system. The connection will take care of entering your employees in XS.

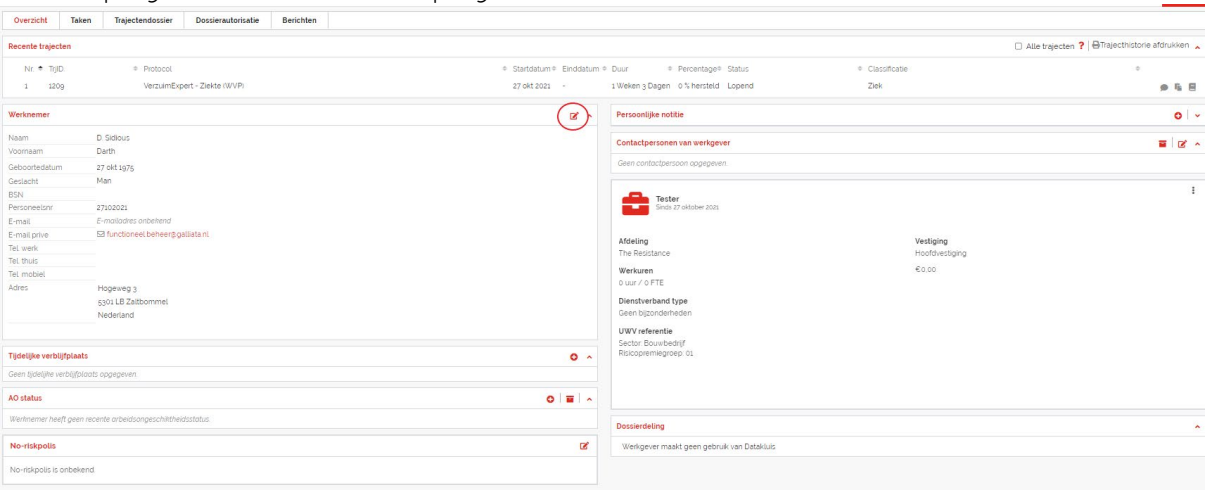
If you are insured by Aegon, you need to make sure that your employee file is registered in the Aegon-portal.

MODIFY AN EMPLOYEE'S DATA

You can change an employee's data through their employee record.
First, look up the employee using the 'File Search' option on the home screen.



The employee record is now displayed.



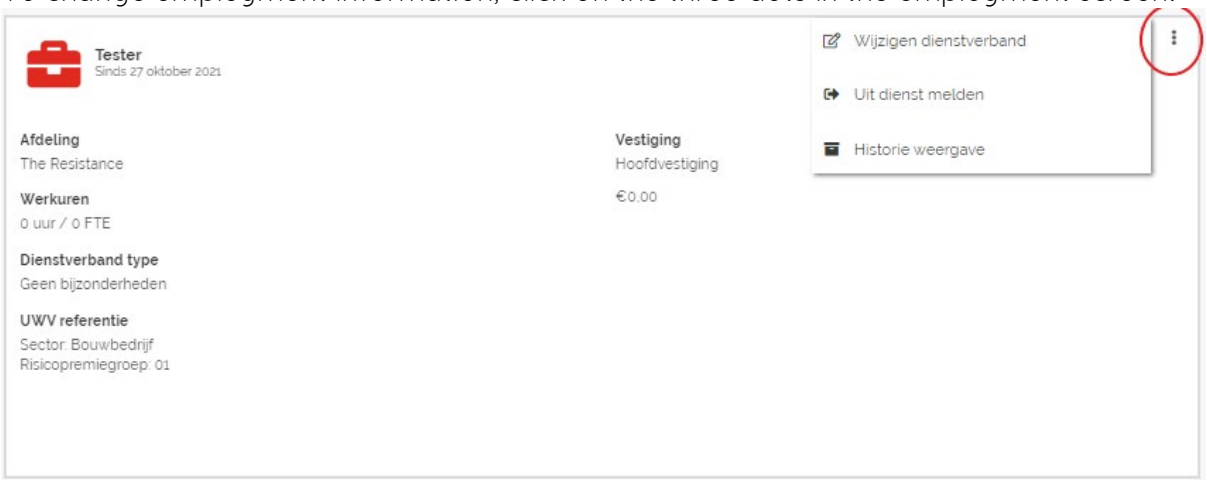
Using the button  under the Employee data, you can change the data.
If you click on this button, the modification screen will open. The following data can be changed through this screen:

- Personal data
- Address
- Contact details
- Financial data

You can also add a note here
Once you have changed the desired data, click on SAVE (OPSLAAN).

To change an employment record or report an employee out of employment

To change employment information, click on the three dots in the employment screen:



As soon as you click on the 3 dots, a screen will open in which you can choose Change employment (Wijzigen dienstverband), Report out of service (Uit dienst melden) and View history Historie weergave).

Change of employment:

When changing employment, there may be 2 situations:

A. Correcting the employment data: the current employment will be overwritten
B. Employment will change: the current employment will be closed, a new employment will be created.

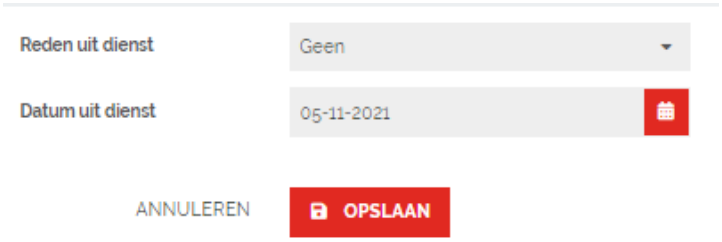


On the next screen, fill in all the requested information and click the 'VERDER'

Depending on your choice, the existing employment will now be modified or a new employment will be created.

Reporting an Employee Out of Service:

To report an employee off duty, click on the three dots in the employment screen again. Now choose "Report from service. On the next screen, fill in the reason and the out of service date and click SAVE (OPSLAAN).



REPORTING SICK

An employee can be registered sick for a variety of reasons. Regardless of the absence classification, absence should always be recorded in an employee record.

The following absence classifications can be selected when entering a sick report:

- Sick: If no special situations are in place
- Sick due to an accident at work: If the absence is caused by an accident at work. This is important to report such an accident to the correct authorities.
- Sick leave due to an accident with recourse: If the absence is caused by an accident where third parties may be liable for the accident. This is important in connection with the (possible) recovery of the (absenteeism) costs from the person responsible for the accident.
- Illness as an accident of pregnancy

Please note: In the following situations, you do not need to report sick leave in XS:

- If there is an interface between your HR system and XS. You should then report sick leave in your HR system.
- If you are insured by Aegon. You should then report sick leave in Verzuimsignaal, the portal of Aegon.

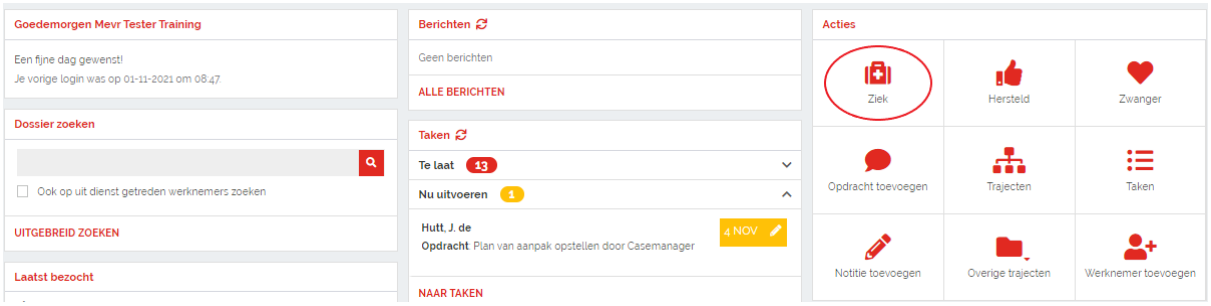
REPORTING SICK

There are two ways to report an employee sick.
- Via the button Sick (ZIEK) in the start screen
- Via searching for the employee in the start screen

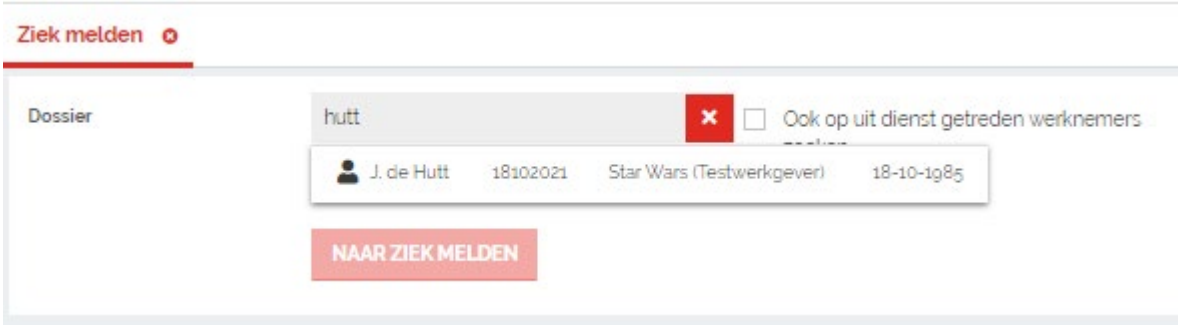
Both ways are described below.

Reporting sick via the sick button

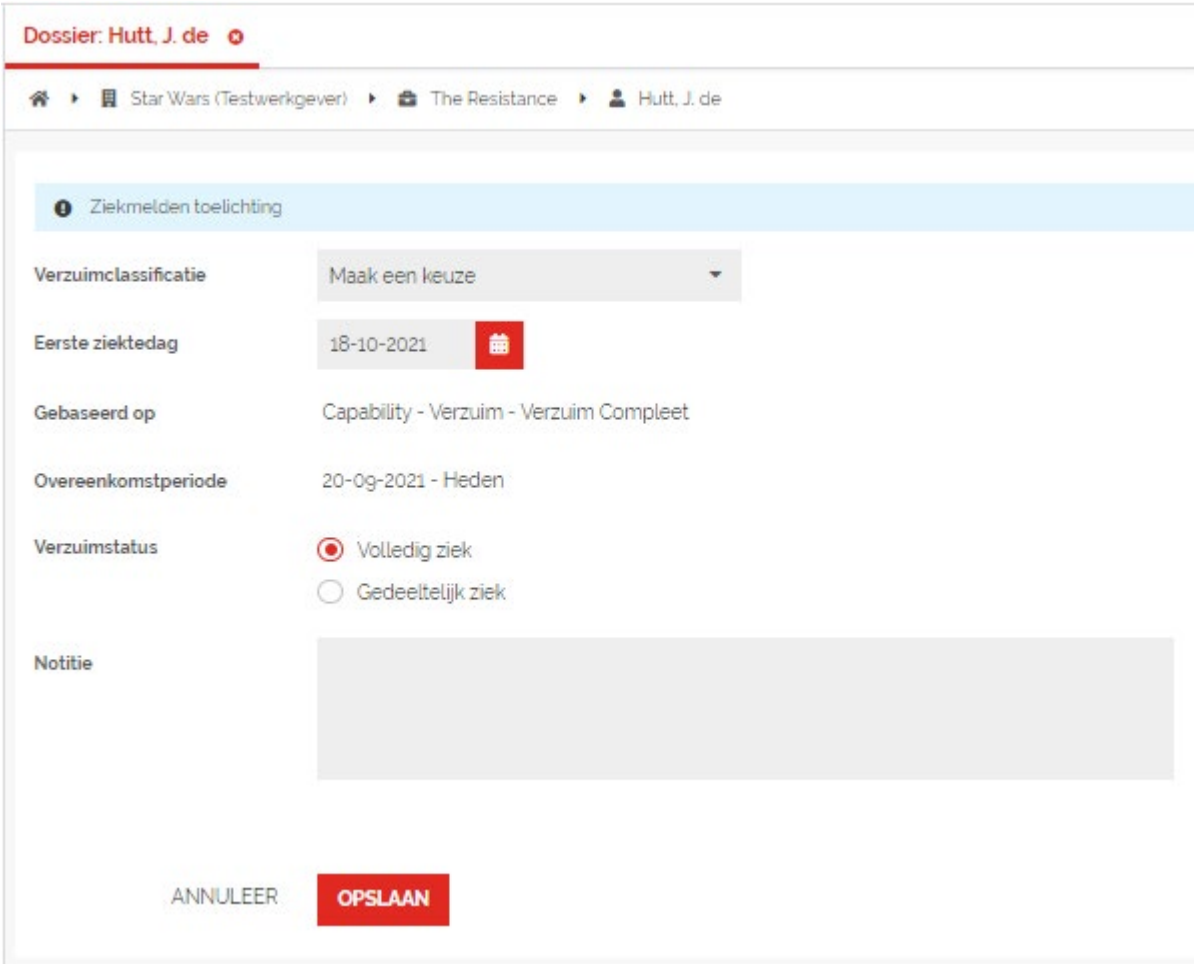
Click on the Sick button in the start screen.



A search screen will now open in which you can search for the employee.



Select the employee and click on NAAR ZIEKMELDEN
In the next screen you can register sick leave.



Choose an absence classification, complete all requested information, and click SAVE. Please note that medical terms are not allowed in the note field. The sick note is now registered. You will then see an overview of all tasks scheduled in the sick leave process.

When reporting a female employee sick, you will be given the option to mark the option 'Sickness due to pregnancy'. Once you do that, you will also need to fill in more details about the pregnancy. As soon as you click on SAVE (OPSLAAN), a pregnancy notification will be created immediately - see also chapter 6 Pregnant.

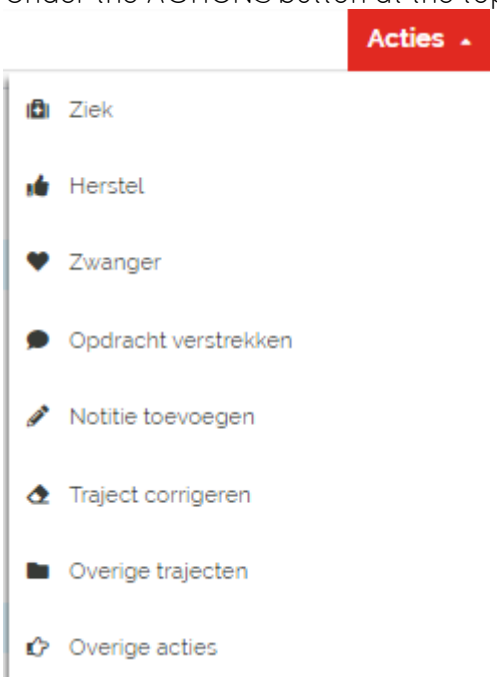
Reporting sick via searching for the employee on the home screen.

In the start screen, select the employee under Search for file



The employee record will now be displayed.

Under the ACTIONS button at the top right of the screen, select Sick (ZIEK).



The sickness report screen - as also described on the previous page - will now open. Please fill in all requested data and click SAVE (OPSLAAN).

Please note that medical terms are not allowed.

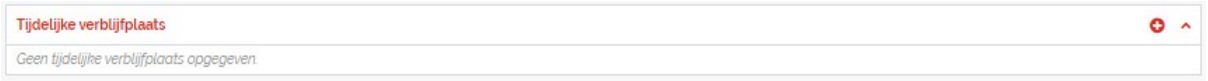
TEMPORARY STAY at another residence

It is possible that an employee is staying at a temporary address, for example in a hospital. In XS it is possible to register this temporary address. This can be done in the following way.

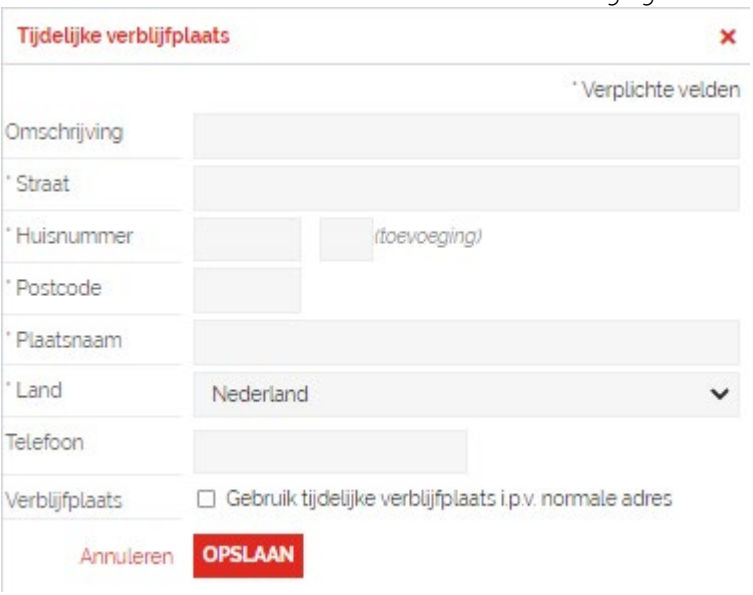
First select the employee by using the search function so that you are in the employee file. Click on the tab "Overview" (Overzicht)



Here you can find the "Temporary Residence" option. Click on the + button to add a temporary residence.



U ziet dan het onderstaande scherm. Vul de gegevens in en klik op de knop OPSLAAN.



AN EMPLOYEE IS INCORRECTLY REGISTERED AS SICK

To correct an absence trajectory: see chapter 11.

Reporting pregnancy

If an employee is pregnant, register this in XS as soon as possible. The system will ensure that you, as the employer, are informed in good time of the legal obligations. Once the employee has been reported pregnant, the application for maternity leave will be initiated.

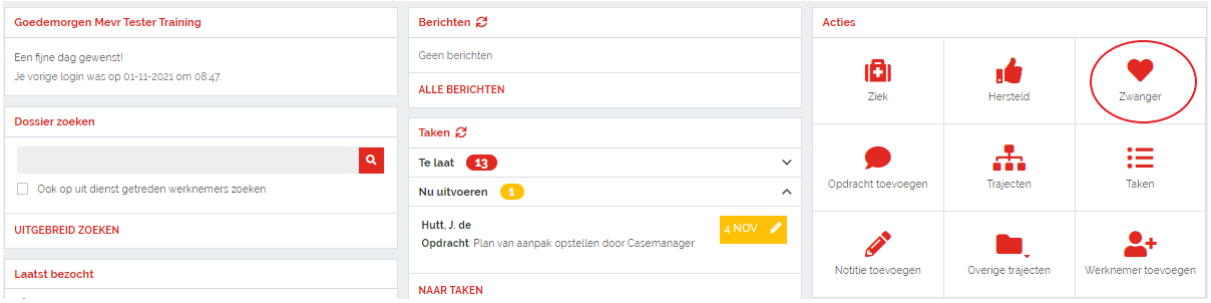
Reporting a pregnancy

You can report pregnancy in two ways.

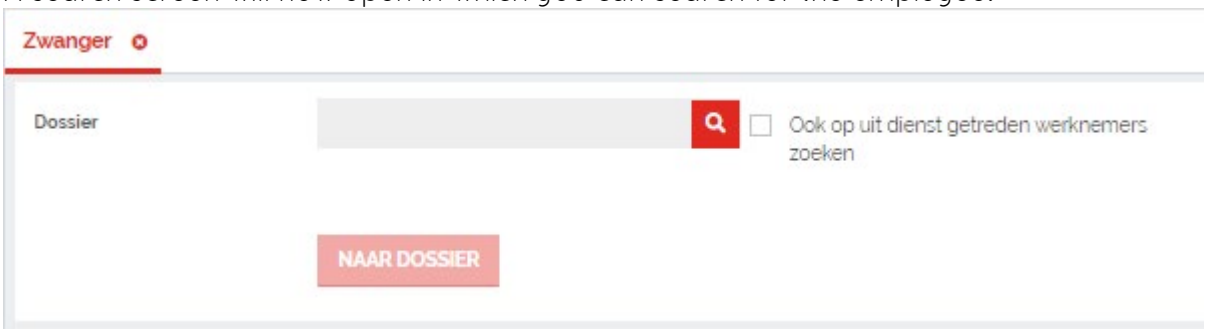
- Via the Pregnant button in the start menu
- Via searching for the employee in the start menu - via the File search screen in the start screen, search for the employee. Then click ACTION at the top right of the screen and choose Pregnant. Then perform the steps for completing the screen as described in this section.

Reporting a pregnancy via the Pregnant button (Zwanger)

Click on the Pregnant button on the start screen

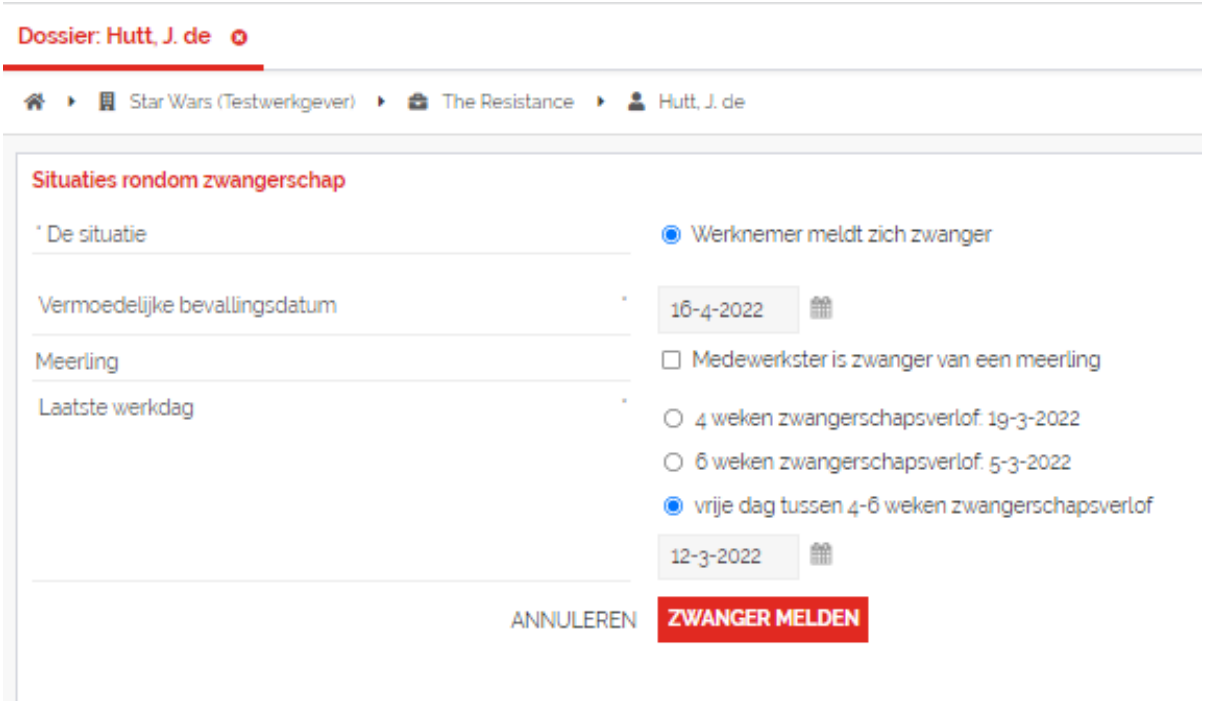


A search screen will now open in which you can search for the employee.



Select the employee here and click on TO DOSSIER (NAAR DOSSIER).

The next screen allows you to register the pregnancy notification.



The following information must be entered:

1. Probable date of birth: this is found on the employee's maternity leave statement = vermoedelijke bevallingsdatum.
2. Multiple birth: here it can be indicated whether the employee is pregnant with multiple births = meerling
3. Last working day: the option 4 or 6 weeks is standard, but you can also choose a day between 4-6 weeks.

Note: The start date of the leave must always be 6 weeks if the employee is ill as a result of the pregnancy. The program calculates what the end date of the leave will be. If after the delivery the real delivery date is registered, the system will automatically correct the leave if necessary.

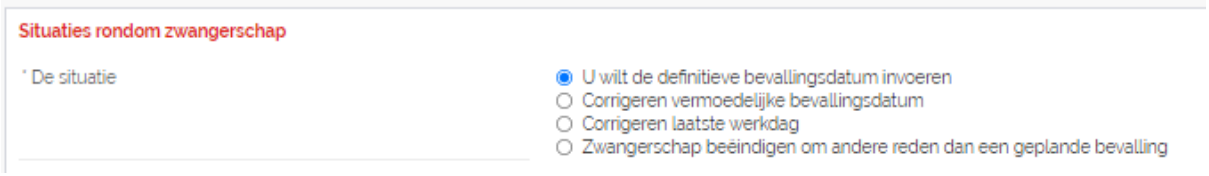
Fill in all the requested information and click on ZWANGER MELDEN

The pregnancy is now registered.

SITUATION AROUND PREGNANCY - BEFORE child birth

Now that the pregnancy process is underway, you can change the situation around the pregnancy before delivery, if desired. First select the employee by using the search function. Then, under the ACTIONS button at the top right of the screen, select Pregnant (ZWANGER).

You see the following screen:



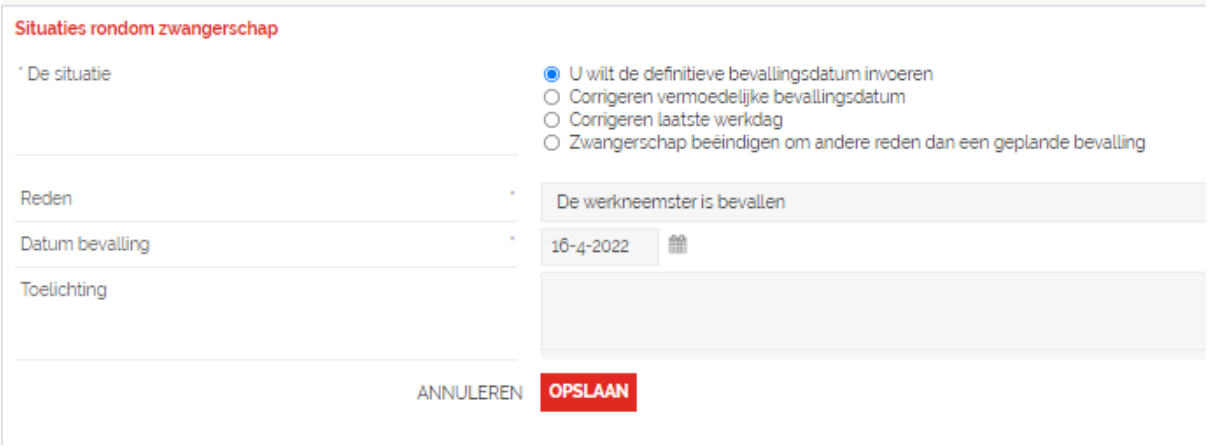
Four situations may arise:

A. Reporting date of birth
B. Correcting the presumed date of birth
C. Correcting the last working day before maternity leave
D. Terminate pregnancy notification for any reason other than a planned childbirth

Please note that for all situations, it is not permitted to put medical information or any interpretations in the note fields.

Situation A - Reporting final delivery date.

If the employee has given birth you will report the date of birth



You choose "The employee has given birth" under Reason (De werkneemster is bevallen). Enter the date of birth. You can also add an explanation (optional).

Click on SAVE (OPSLAAN).

Situation B - Correcting the presumed date of delivery

If the presumed date of birth is incorrect, you can correct the presumed delivery date here. The last working day can also be corrected (choose a date between 4-6 weeks before the presumed date of birth).

Tip: Ask the employee for the pregnancy declaration. This contains the estimated delivery date.



Click on the SAVE (OPSLAAN) button.

Situation C - Correcting the last working day before maternity leave.

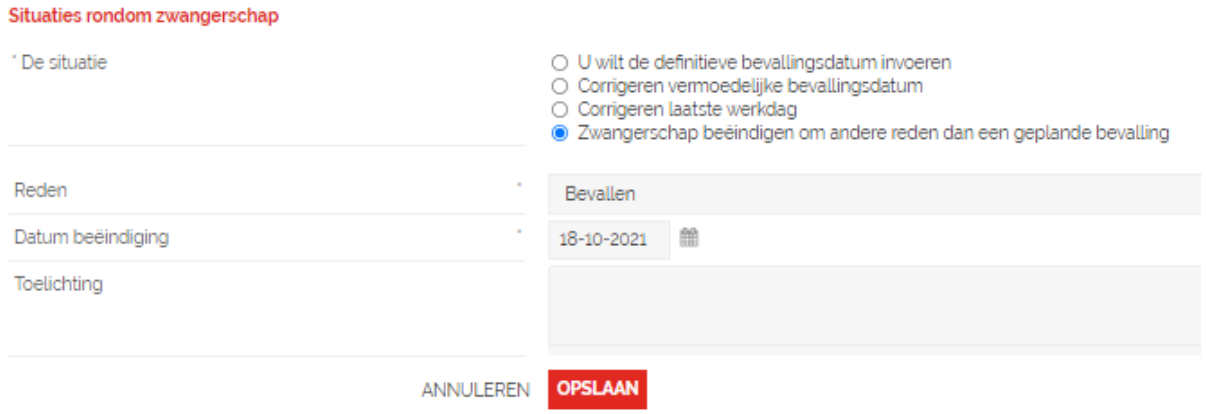
Here you can correct the last workday before maternity leave. Choose a date between 4-6 weeks before the expected delivery date.



Click on the SAVE (OPSLAAN) button.

Situation D - Terminate pregnancy notification for reasons other than a planned birth

For a variety of reasons, a pregnancy may be terminated earlier than the expected delivery date. The reason can be specified in the screen below. In addition, the date of termination must be filled in. An explanation is optional.

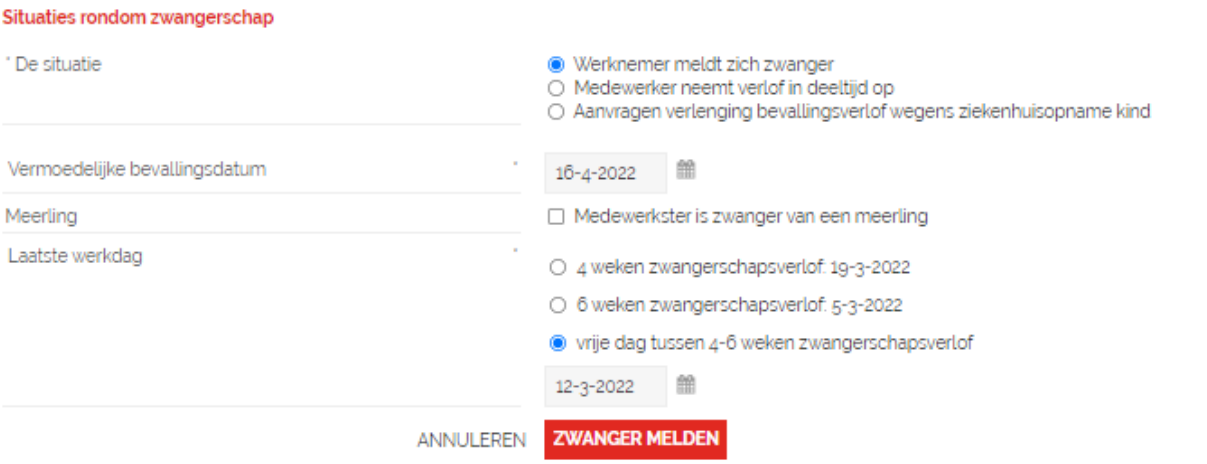


Click on the SAVE (OPSLAAN) button.

SITUATION AROUND PREGNANCY - AFTER CHILD BIRTH

Now that the pregnancy process is underway, you can change the postpartum situation if desired. First select the employee by using the search function. Then, under the ACTIONS button at the top right of the screen, select Pregnant (ZWANGER)

The following screen is shown:



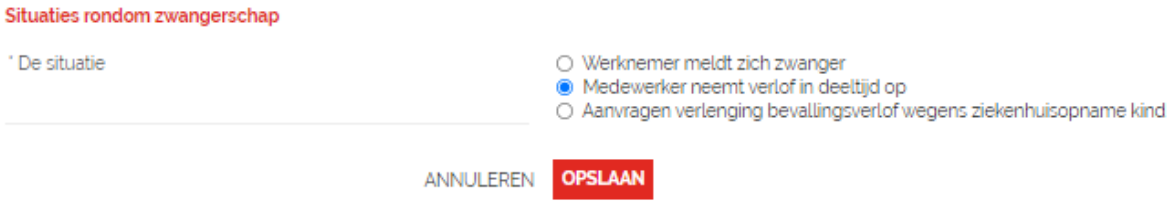
Three situations may arise:

A. Employee reports being pregnant
B. Employee takes part-time leave

C. Apply for extension of maternity leave due to hospitalization of child

Situation A - employee reports being pregnant.
After the official delivery date, an employee may report being pregnant again. See chapter 6.1.

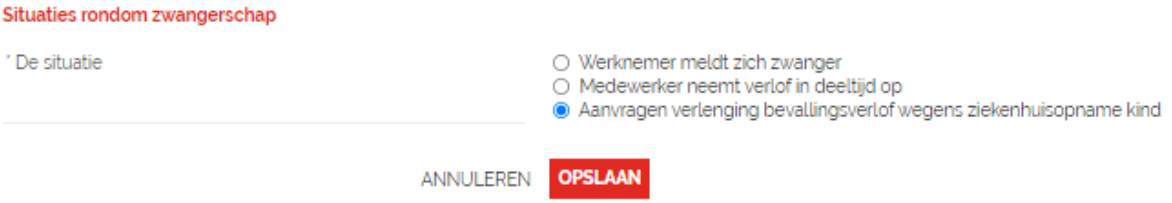
Situation B - Employee takes part-time leave.
Since January 1, 2015, the employee has the option to take the maternity leave remaining from 6 weeks after the delivery date in a staggered manner over a period of up to 30 weeks. Select the option "Employee takes part-time leave" – medewerker neem verlof in deeltijd op.



Click SAVE (OPLSAAN).

Situation C - Application for extension of maternity leave due to hospitalization of child
The childbirth leave is extended when the child, due to his or her medical condition, is hospitalized for more than 7 days during the childbirth leave. The childbirth leave will at that time be extended by the number of hospitalization days, counting from the 8th day of hospitalization until no later than the end date of the original childbirth leave, with a maximum of 10 weeks.

Select the option "Apply for extension of maternity leave due to hospitalization of child" = Aanvragen verlening bevallingsverlof wegens ziekenhuisopnage kind.



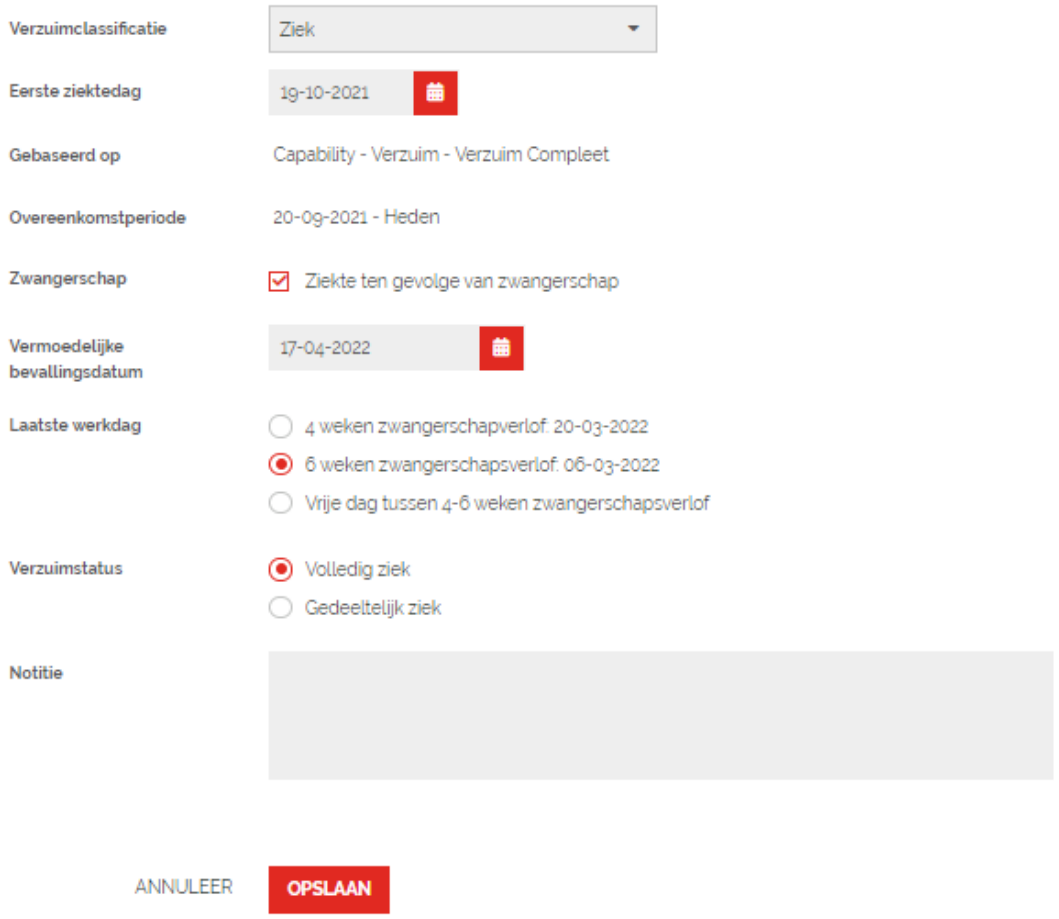
Click SAVE (OPSLAAN).

SICK DUE TO PREGNANCY

When an employee is sick due to pregnancy, you can use the "Sick" button. The process works as described in Chapter 6: Reporting Sick.

Search for the employee via the Sick button or via File Search on the home screen.

The sickness report screen is shown:



The following information must be entered:

1. Absence classification: select the type of cause of the absence under absence classification.
2. First day of illness: fill in the first day of illness.
3. Pregnancy: tick the option "Sickness as a result of pregnancy".
4. Absenteeism status: the absenteeism percentage is automatically set to 100%.
5. Note: fill in a note if required. Important: It is not allowed to put medical information or any interpretations in the note fields.

Click on the SAVE (OPSLAAN) button to save the registration.

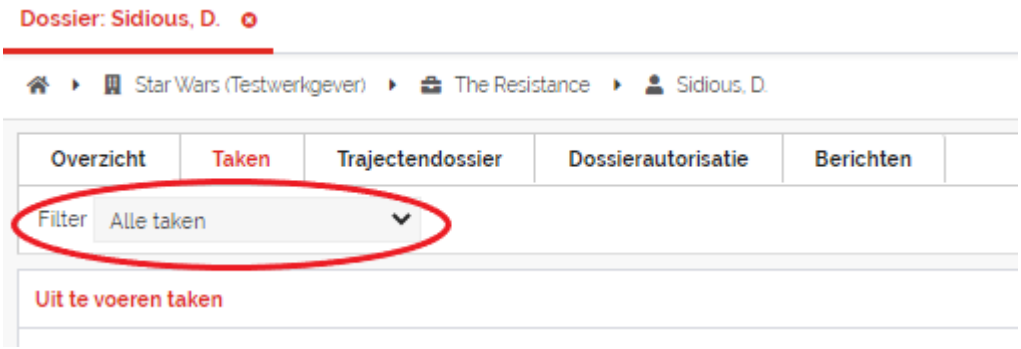
If no notification of pregnancy has been registered for this employee yet, this notification will be created in addition to the notification of sickness. A Pregnancy trajectory will be started.

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.

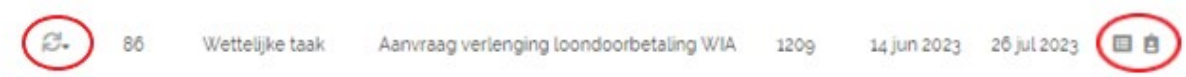


The filters you can choose can be divided into 2 categories: Own tasks, which should be performed
by you and All tasks, which should be performed by the various stakeholders.
It is recommended to keep the filter "All own urgent tasks".

icons on a tasks

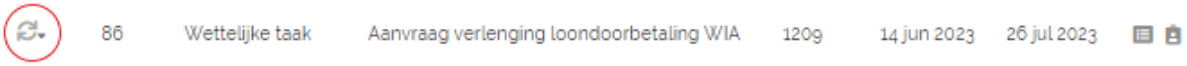
What do the icons on a task mean?

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.



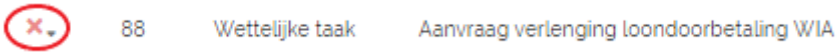
After you click on the DELAY TASK (TAAK UITSTELLEN) button, you will see both the original task and the new task listed in the task overview, with the old task given the deferral icon.



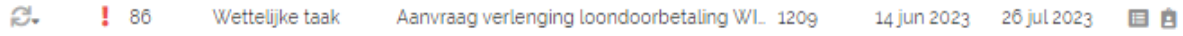
- **Expired - Vervallen**: You are not going to perform the task at all and let the task expire. When you click on 'Abandon' a new screen will open in which the name of the employee and details about the absence will be given. In addition, a description of the task is given. An explanation of the deferral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



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



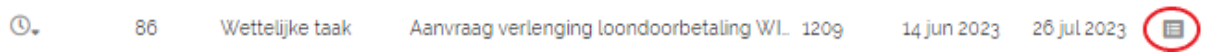
- Make important = maak belangrijk: If you don't want to lose track of a task, you can make a task important. The task will then be marked with a red exclamation point and placed at the top of your task list.



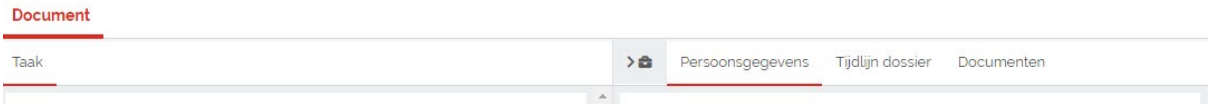
You can also make a task Not Important again. Click on the status icon at the beginning of the task and then choose Not Important anymore.

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.

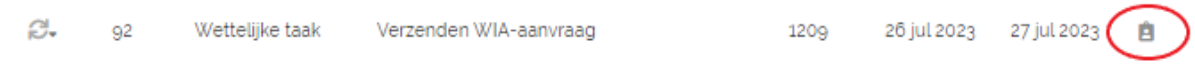


Clicking on this icon will open a new screen. On the left side of this screen you will find the document that needs to be filled in. On the right side you will find an overview with information about the employee, the process and the documents that are available in the process, depending on the tab you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

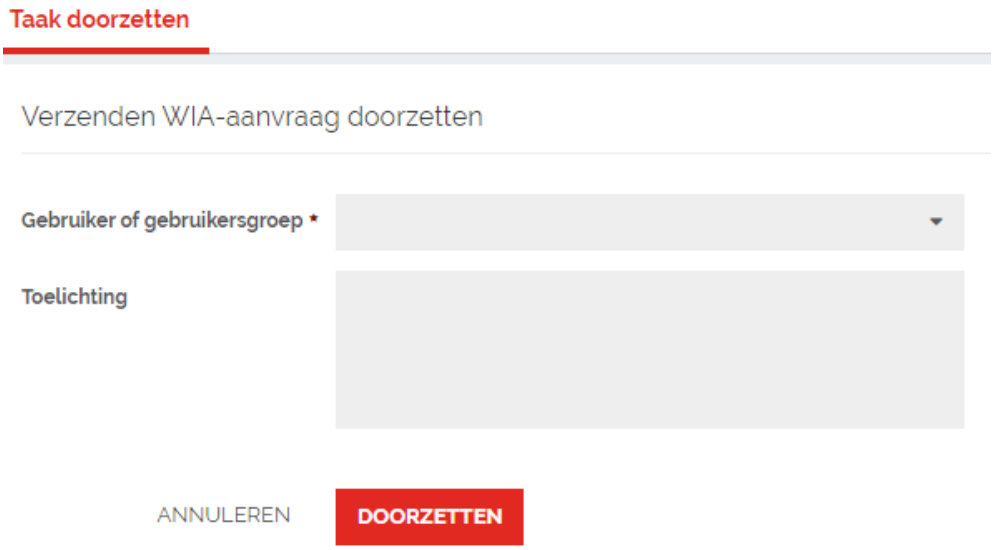


Task forward icon

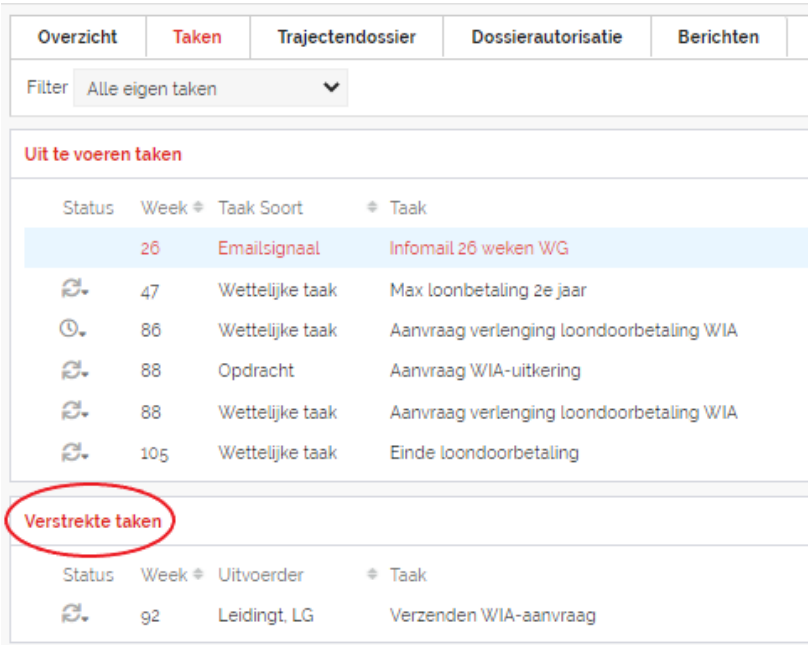
It is possible to forward a task to someone else. To do so, use the Forward Task icon:



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.



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 'Verstrekte taken'.



The trajectory file (Trajectendossier)

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

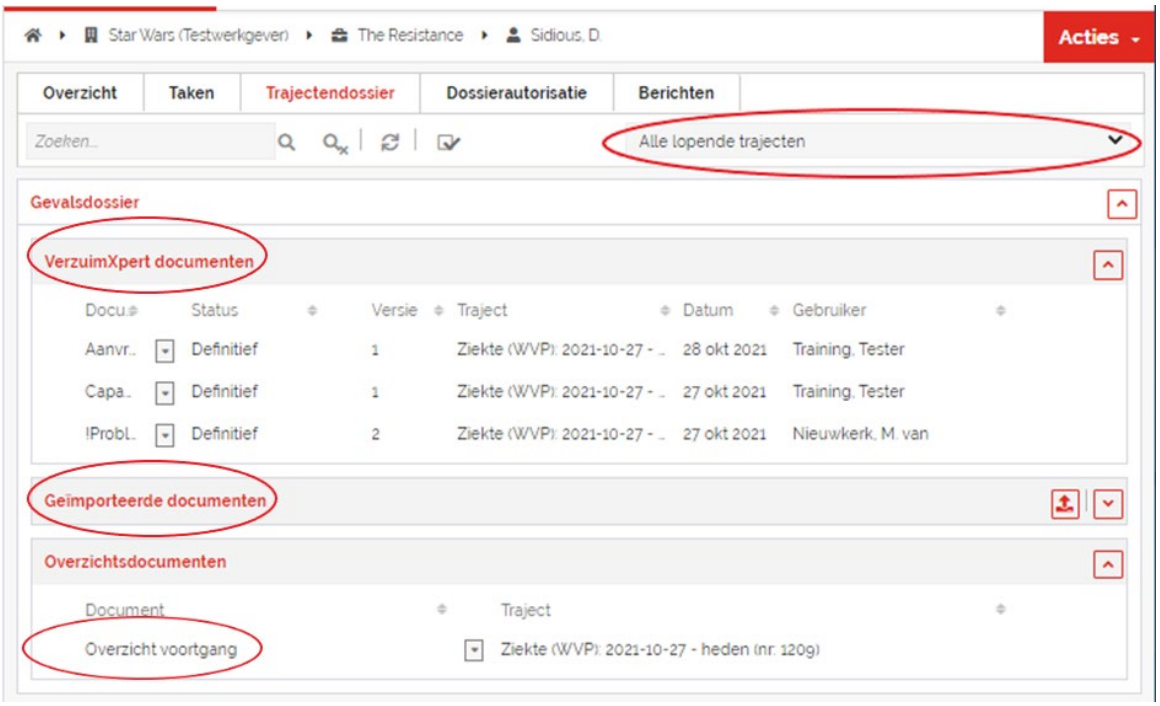
You can find the trajectory file by first searching for the employee. The employee file will now open. Go to the tab "trajectory file".



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:



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.

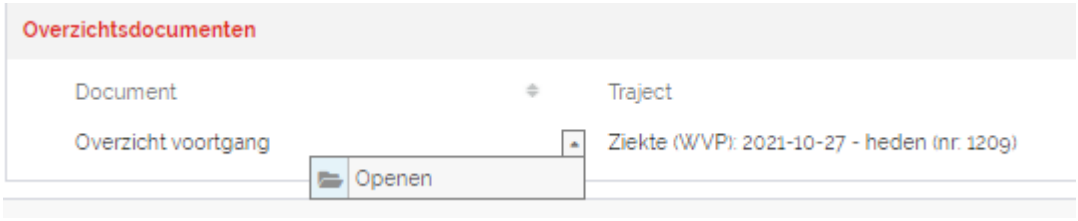


Imported Documents (geïmporteerde documenten)

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.



Overzichtsdocumenten



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.



Reporting Recovery

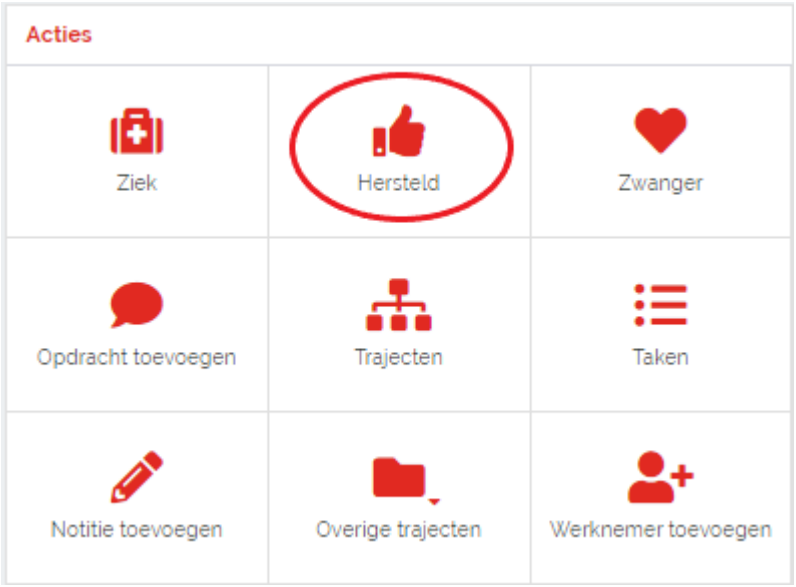
If the employee has returned to work after illness, you can report the employee fully or partially recovered in XS.

There are two ways to report recovery for an employee.

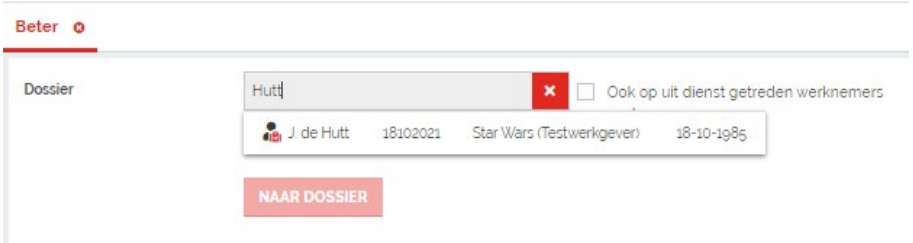
- Through the button 'HERSTELD' at the home page
- Via searching for the employee in the home p - via the File search screen in the start screen, search for the employee. Then click ACTION at the top right of the screen and choose RECOVERY. Then perform the steps for completing the screen as described in this section.

Report recovered via the HERSTELD button

On the home screen, click the Recovered button.

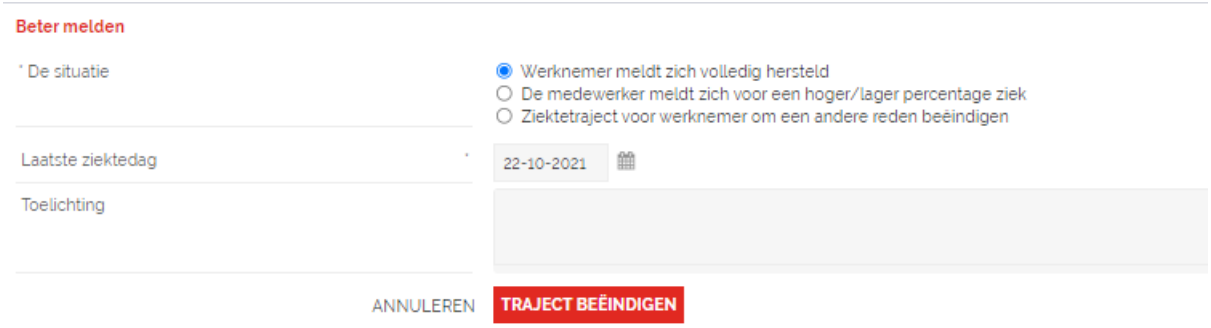


A search screen will now open in which you can search for the employee.



Select the employee and click on NAAR DOSSIER
In the next screen you can register the recovery report.

You will see the screen below:

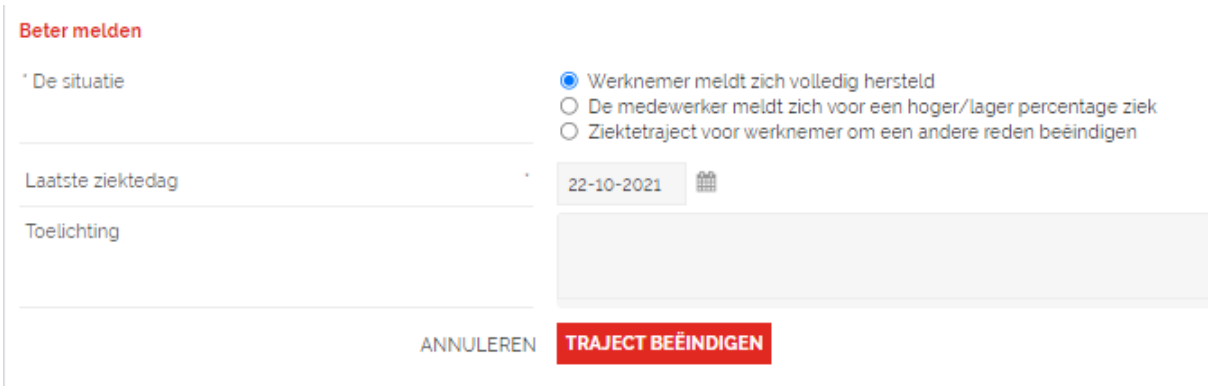


There are 3 possible situations:

A. The employee has reported full recovery
B. There is (modified) partial recovery
C. Terminate the illness process because the employee has left the service or died

Situation A

Employee reports full recovery.



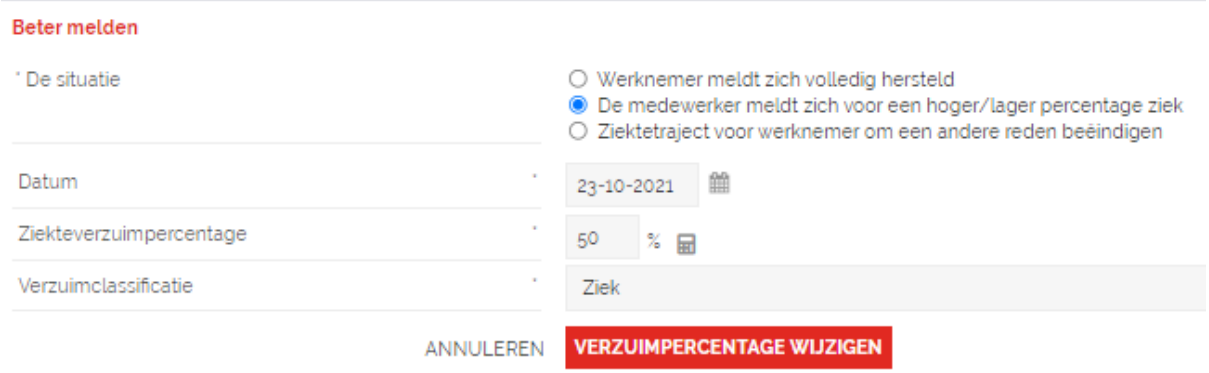
The following information must be entered:

1. Select the situation "employee reports full recovery".
2. Select the date of the last day of illness
3. Fill in any notes. Important: It is not allowed to put medical information or any interpretations in the note fields.

Click on the END THE TRAJECT (TRAJECT BEEINDIGEN) button to save the action.

Situation B

Partial recovery occurs: the employee reports sick for a higher/lower percentage.

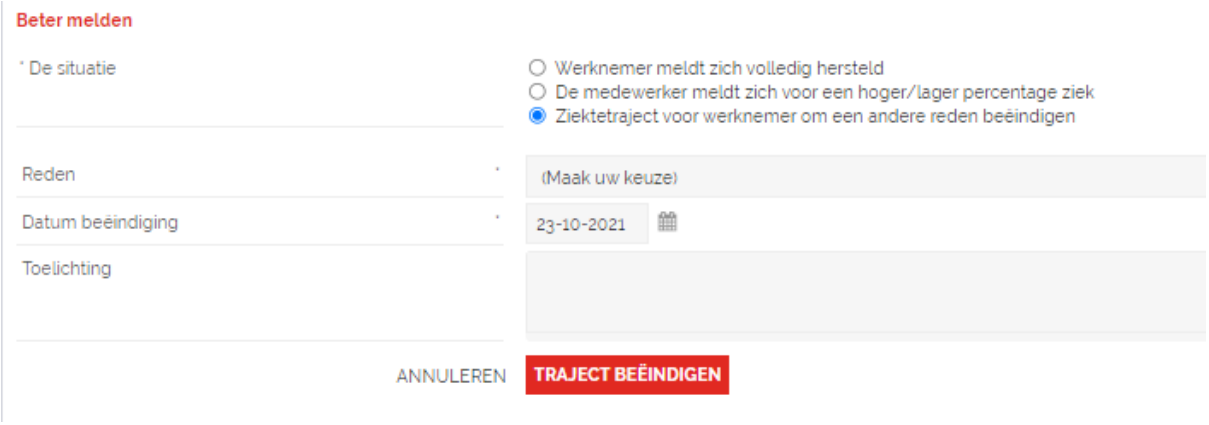


The following information must be entered:

1. Select the situation "the employee reports sick for a higher/lower percentage" – second option
2. Select the date from which the change takes effect
3. Enter the adjusted sick leave percentage
4. Choose the absence classification

Click the VERZUIMPERCENTAGE WIJZIGEN button to save the action.

Situation C
Terminate the sick leave process because the employee is out of service or has died.



The following information must be entered:

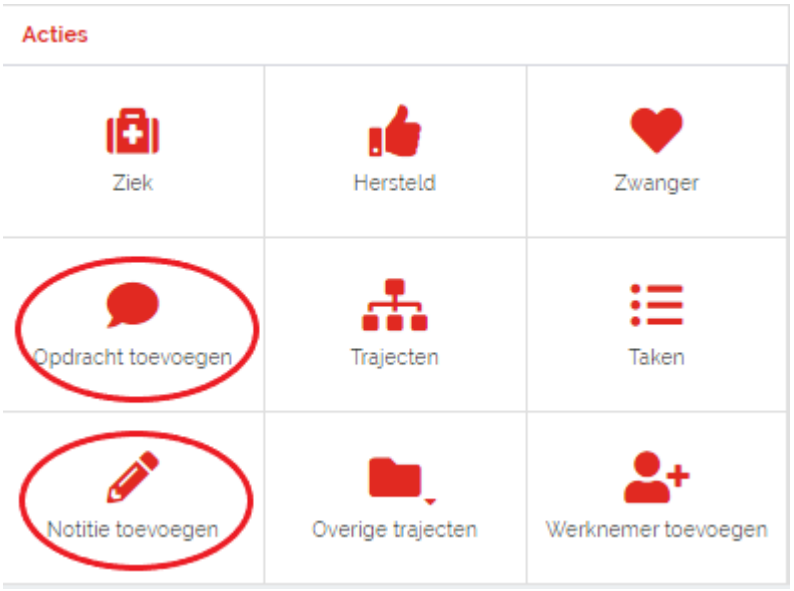
1. Select one of several reasons (if the employee is out of service, state the last day of work)

2. Select the date from which the change will take place
3. Fill in any explanations. Important: It is not allowed to put medical information or any interpretations in the note fields.

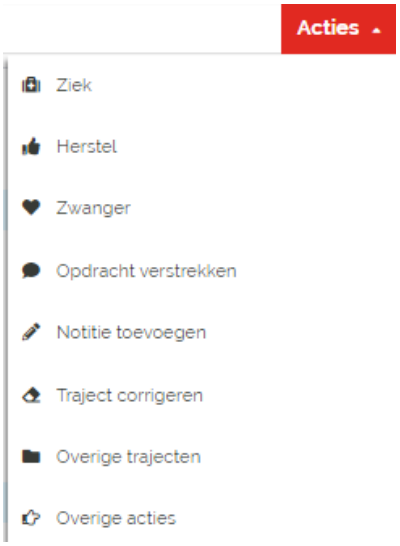
Click the END THE TRAJECT (TRAJECT BEEINDIGEN) button to save the a action.

add assignment and add note

It is possible to add assignments and notes to a trajectory. You can do this using the buttons on the home page



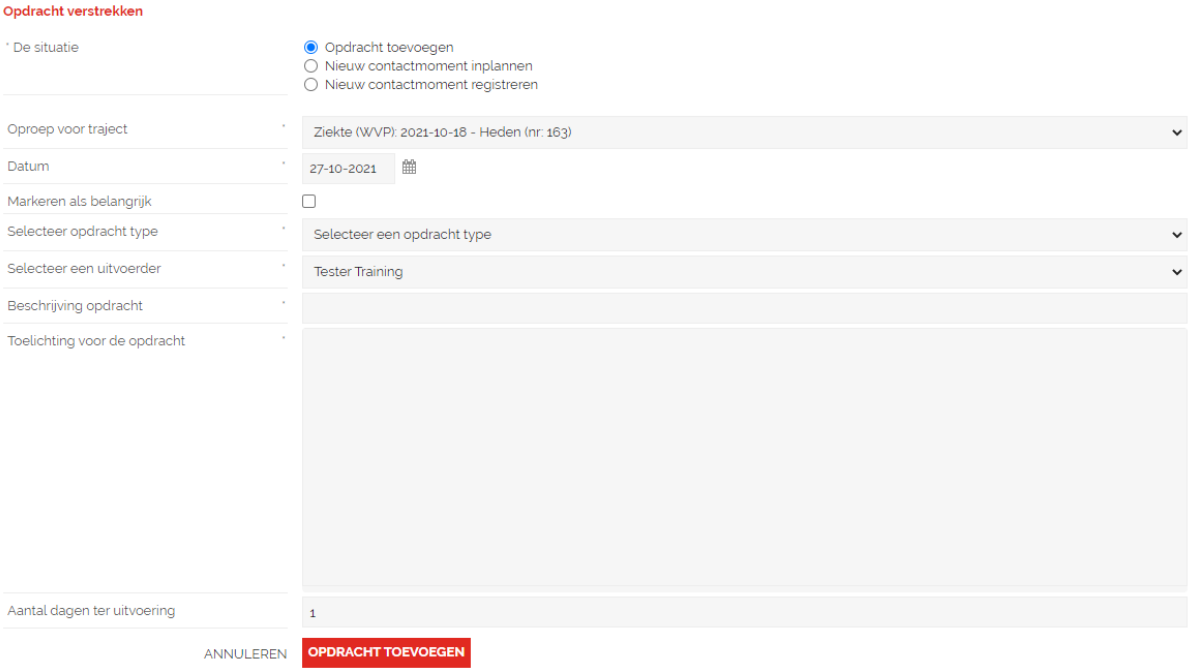
You can also perform both actions by first looking up the employee through File Search on the home screen. Then click on the button "Actions" at the top right here the option "Issue assignment" (Opdracht toevoegen) or "Add note" (Notitie toevoegen).


Acties
Ziek
Herstel
Zwanger
Opdracht verstrekken
Notitie toevoegen
Traject corrigeren
Overige trajecten
Overige acties

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 het 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:



There are 3 options available when issuing an assignment:

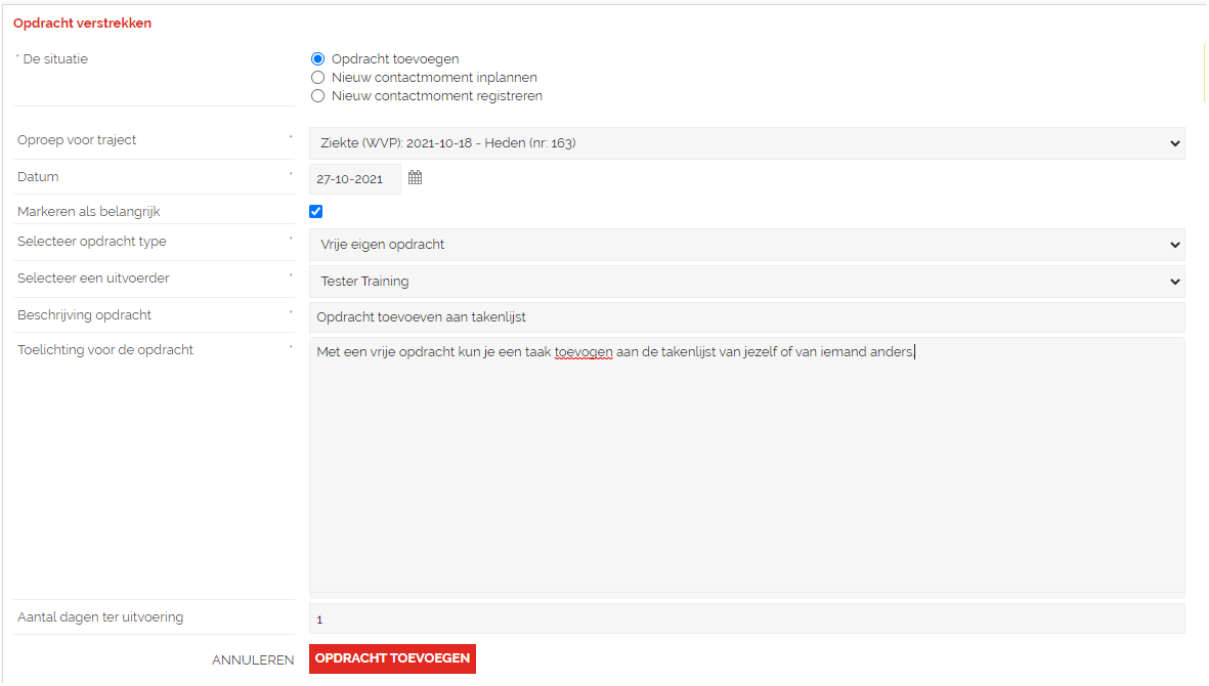
A. Add assignment – Opdracht toevoegen
B. Schedule a new contact moment – nieuw contactmoment inplannen
C. Register new contact moment – nieuw contactmoment registreren

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

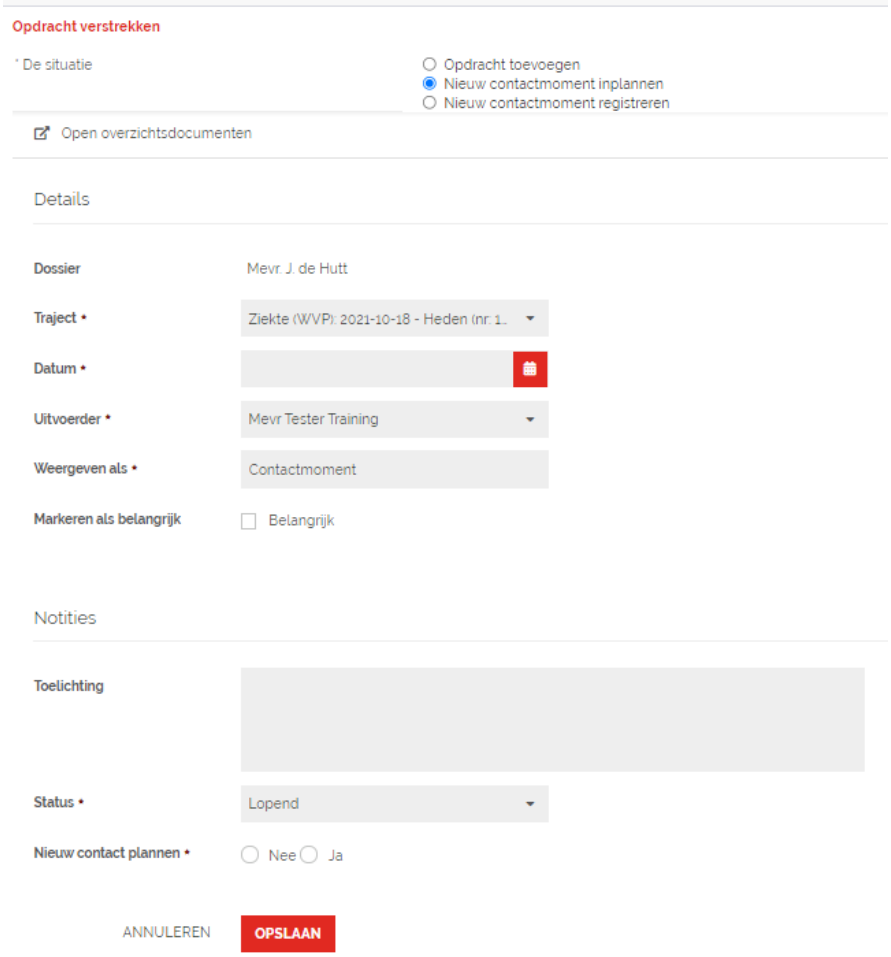


Option B - Schedule a new contact moment

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).

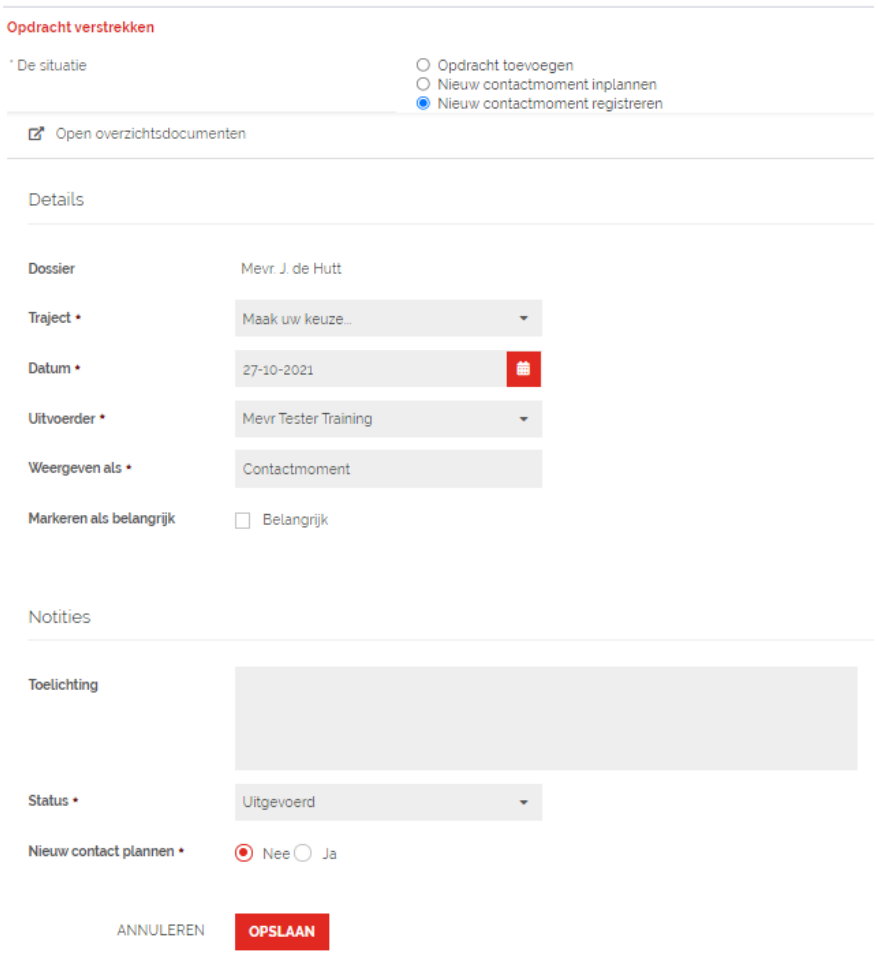


Option C - Register new contact moment

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.



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)



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



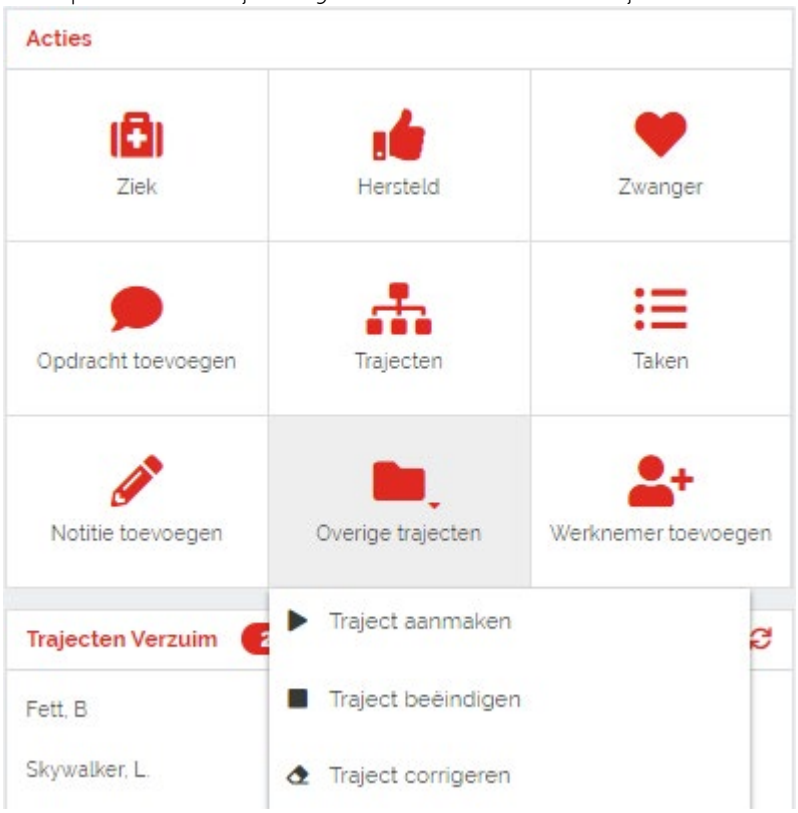
other trajectories

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

A. Create trajectory – traject aanmaken

B. End trajectory – traject beeindigen

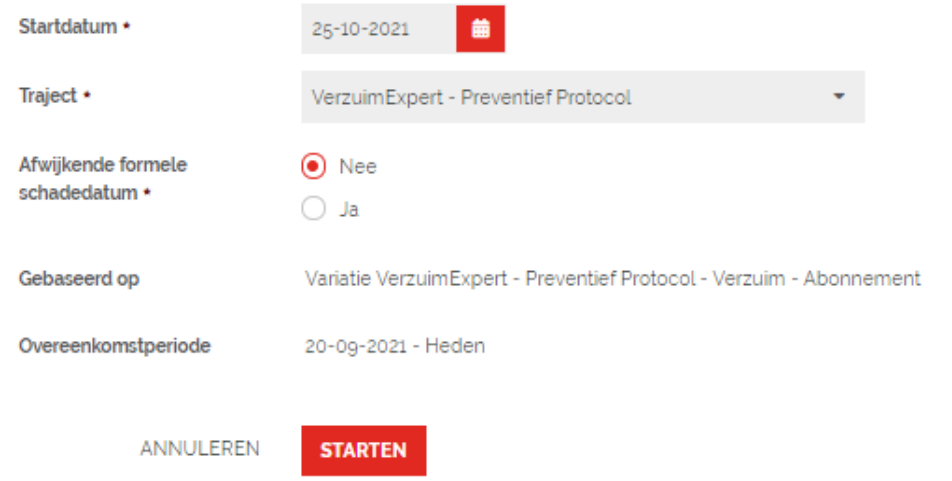
C. Correct a trajectory – traject corrigeren

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

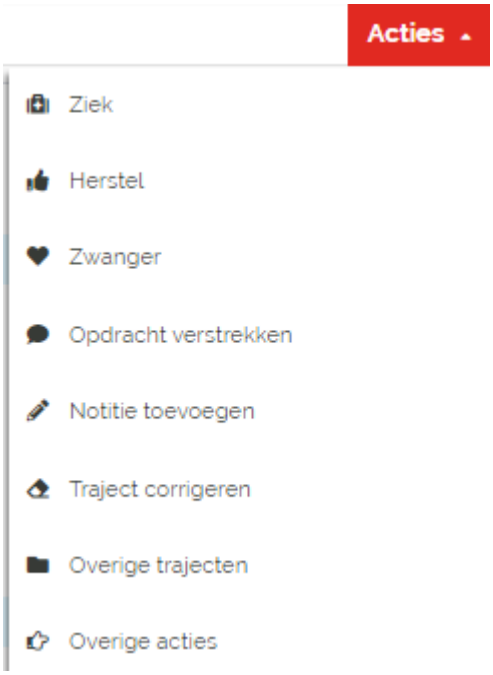


correct a trajectory

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:

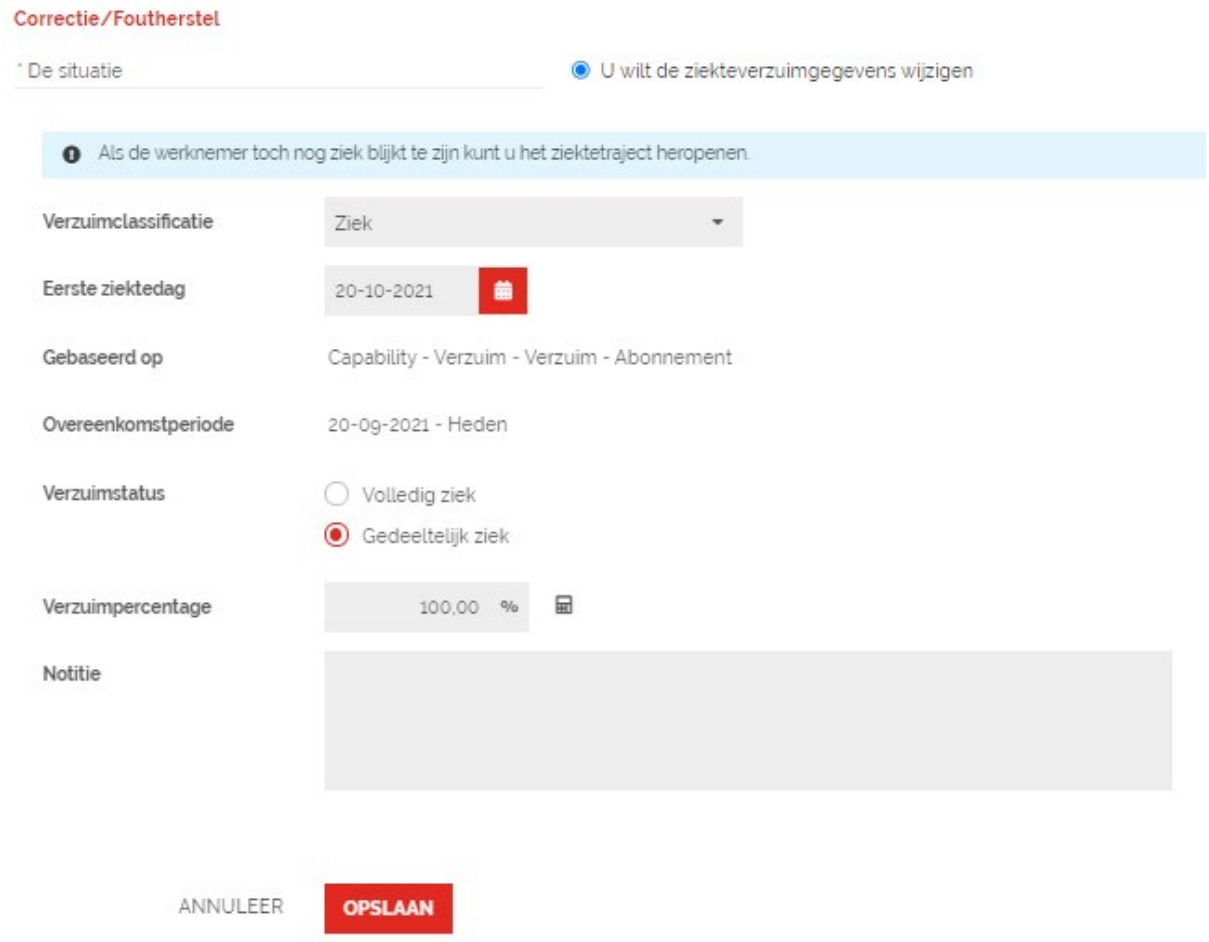
A. Correcting/modifying sick leave data

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 wijzgen.

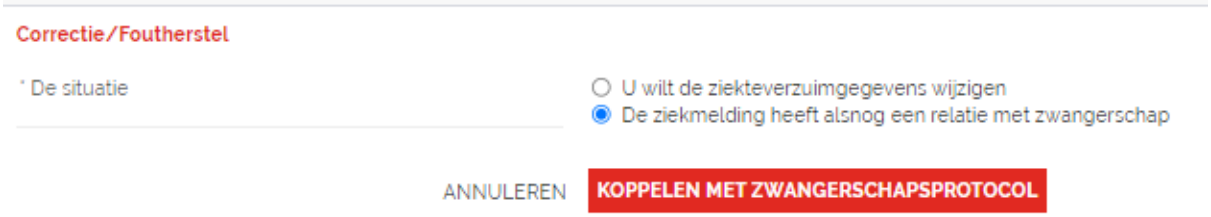
The following screens is shown:



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

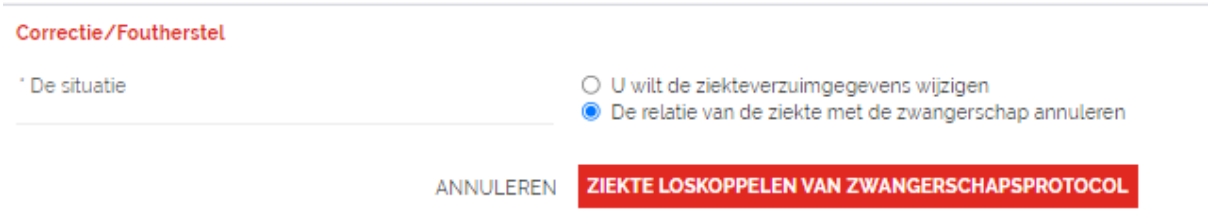
Situation B Linking/disconnecting the sick leave to or from a pregnancy

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.



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.



Corrections to the pregnancy notification

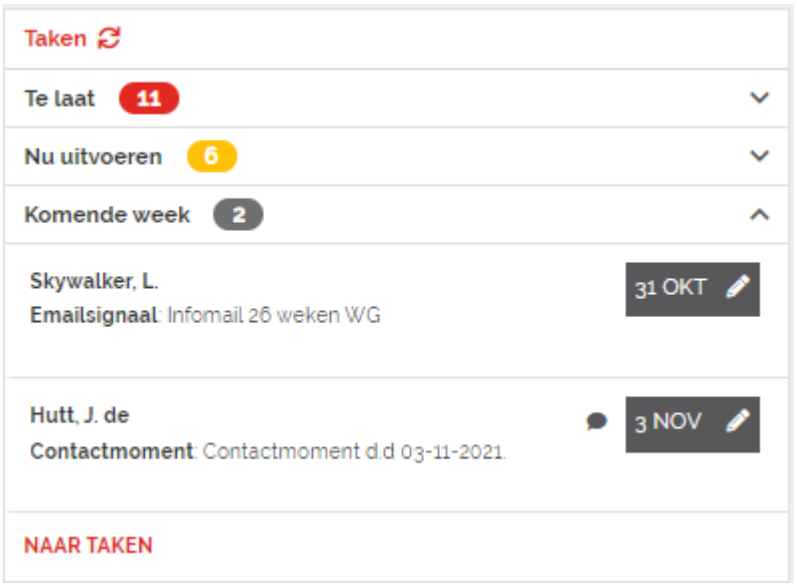
Correcting the last working day and correcting the estimated delivery date can be done in the "Pregnant" screen. You can find more information about this in chapter 6.

tasks

when you have reported an employee sick or pregnant you need to perform regular (legal) tasks to manage the pathway. With the help of XS you will be reminded in time of a task and supported with the execution of the task.

TASKS

On the home page you can find the Tasks overview. This overview is divided into Overdue (Te laat), Perform Now (Nu uitvoeren) and This week (Komende week). It is a short listing of all current tasks.



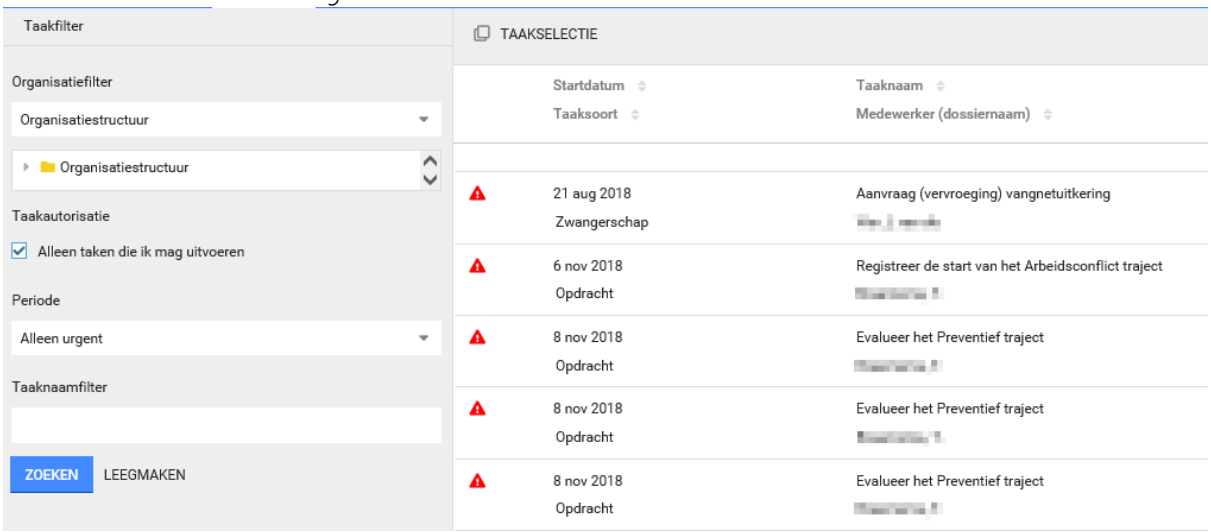
You can tell the status of the tasks by the color:

- Red: the task's deadline has passed and the task has the highest priority.
- Orange: the task is approaching the deadline to process and has a higher priority.
- Grey: the task is still in time to be processed.

Tasks to do

When you click on the home page under Tasks, the complete task overview opens.

You will see the following screen:



In this overview you can find the tasks that you need to perform yourself for the trajectories.

- Click on the task you want to perform. The trajectory will now open. Now go to the task you want to perform (tip: use the filter to display your tasks clearly).
- For the execution of some tasks (e.g. the Action Plan) a new screen will open with a form that supports you in the execution of the task.
- When you have completed a task of your own, you can change the status.
- If you deploy a task to yourself it will also appear under "tasks to be performed".

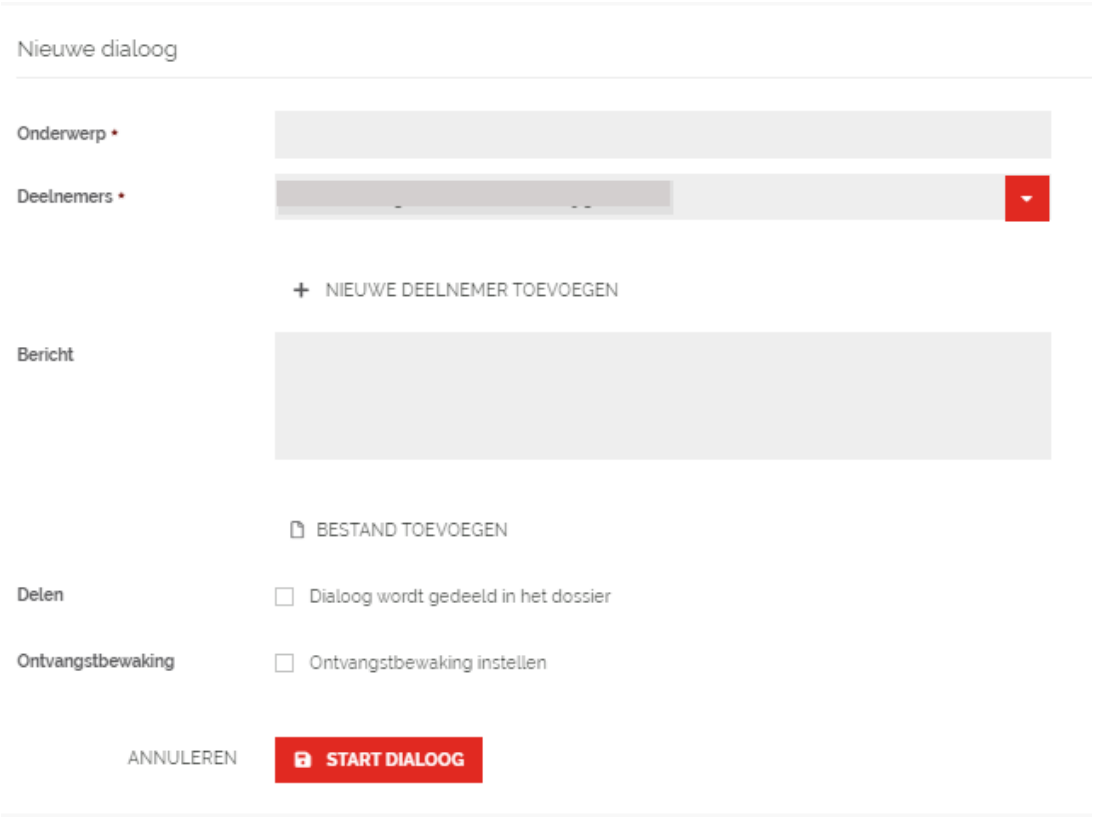
On the left side of the screen you will see the filter options you can use to display the tasks

dialogue functions

The dialogue function within XS is used to send secure messages to employees. To access the dialogue function, go to the BERICHTEN tab in the employee's file.



The following dialogue screen opens:



This screen contains the following items:

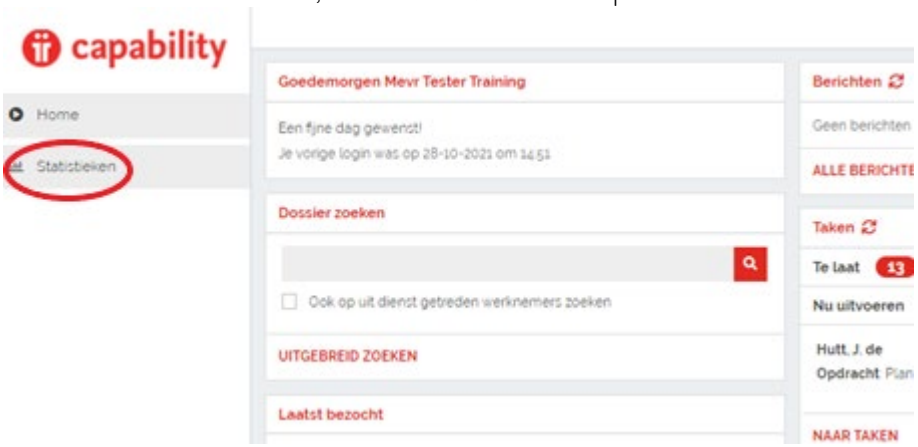
- Subject -onderwerp
- Participants: here the employees should be added to the dialogue
- Message
- Possibility to add files from a local disk to the message.

Once the message has been sent to the employee by clicking START DIALOGUE, the employee will receive an email address with which to log in to DialoogXpert. Once logged in, the program is similar to the functions of Whatsapp and dialogues can be held.

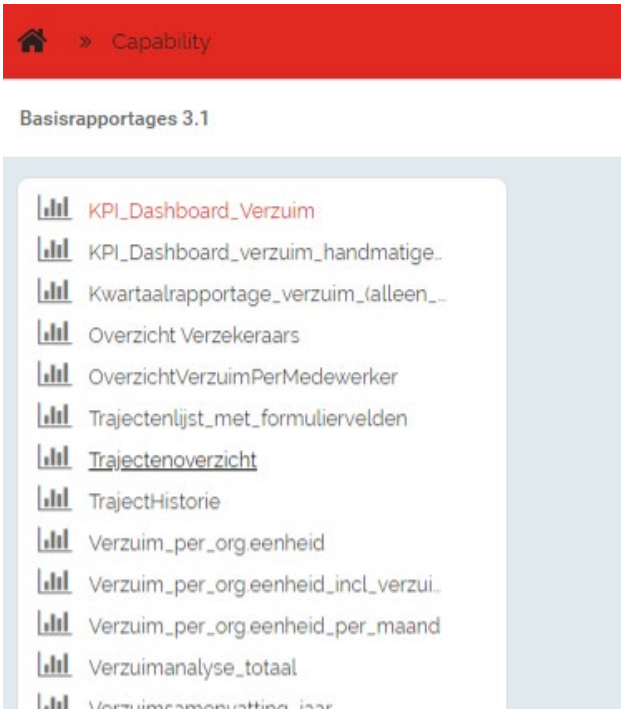
statistics

Within XS there is also the possibility to run various reports related to the absence.

To access the statistics, select the Statistics option from the home screen.



A screen will now open showing a list of available reports. The screen below shows some of the reports.



Once you select a report, a screen will open where you can enter variables. The VIEW REPORT button at the top right will generate the report.



If it involves a lot of data - depending on the variables you have specified - it may take a little longer for the report to display.

On the last page of the report you will often find information about how the report was built.

By clicking on the diskette icon, you can save the report. This is possible in various file formats.

