Handleiding

HumanCapitalCare Werkgeverportaal

Human Capital Care

Table of Contents

1. Definitions

This user manual contains a number of terms. An explanation of the frequently used terms is provided below:

Active employee	An employee who is linked to an employer through one or more active employment contracts.
Decision	A decision issued by the Employee Insurance Agency (UWV) regarding the benefits you pay to a current or former employee related to the Sickness Benefits Act (Ziektewet).
Cockpit	A feature in the system that allows the user to create documents, notes, free tasks and uploads in the system.
Dashboard	A quick overview of the most important data. The information displayed varies depending on the portal.
File	A personalised set of data, documents and tasks.
Log	A feature that displays which actions have been performed in the system.
Organisational unit	This refers to departments, teams, etc., which can be used to set up a layered organisational structure.
Portal	Separate parts of the system based on functionality, permissions and security.
Protocol task	A task set up within a protocol, indicating when it starts and which user it should be visible to.
Alert	An automatic notification sent by the system to, for example, a user based on a pre-set event or in a specific situation.
Template	A pre-configured template created by the administrator that a user can select.
Two-step verification	An extra layer of security required to log in, in addition to a password.
UWV documents	All documents in the system available to the user that comply with the standard Employee Insurance Agency (UWV) templates.
Free task	This task, also known as a manual task, is a task that the user can add to the file at their own discretion.
Employee card	An overview containing the most important employee data, such as personal details and employment information.
Employee portal	Portal containing functions and information intended for the employees themselves. Employees can use this portal to access their own files, for example.

2. General

This manual describes all of the functions available to you as a user of the HumanCapitalCare Employer Portal. This portal is primarily intended for managers. Other parties involved in the absenteeism process may also be granted access, allowing the information to remain secure within the system.

This manual describes the general operation of the system. The functional administrator can decide whether or not to activate certain features for specific user roles in the system. Therefore, the layout and system options that you see as a user may differ from those described in this manual. The application administrator within your organisation or HumanCapitalCare can provide information about the specific layout.

2.1 Creating an account

The username is chosen by the application administrator and is listed separately in the invitation e-mail you received.

Beste Visser, A. ,

Er is een verzoek gedaan om uw wachtwoord te resetten voor uw account. Het gaat om uw account in de omgeving van Demo Arno

Uw gebruikersnaam is : demo-arno_admin

Klik hier om een wachtwoord in te stellen

Met vriendelijke groet,

If you did not receive an invitation e-mail, please check your spam folder.

Click on the link in the invitation e-mail. A new page will open in your browser to set up the account.

On the screen, enter the e-mail address (<u>not the username</u>) where you received the invitation e-mail and create a password for the account. The password must meet the following minimum requirements.

- Minimum length: 14 characters
- At least 1 capital letter

- At least 1 number
- At least 1 special character

After entering the e-mail address and password, click 'Save' (Opslaan). The account has now been created. You can now log in with your username and the password you have chosen. More information about this can be found in the next section.

2.2 Logging in and out

2.2.1 First time login

Once you have successfully created the account, you can log in using the following URL: https://login.bluevi.com. This link will take you to the login page of BlueVi, the platform that the employer portal runs on. You can enter your username and chosen password on this page to access the system.

Please note: you must enter the username provided in the welcome e-mail, which is not necessarily your e-mail address. The username can be changed later in the settings.

2.2.2 Setting up two-step verification

After your first login, choose a method for two-step verification (MFA). Log in using your username and password. Then enter an additional verification code. You can do this using Google Authenticator. This method uses an app called Google Authenticator to generate verification codes that you must enter when logging in. This is a popular method because of the extra security it offers and the fact that the app can work offline.

2.2.2.1 Google Authenticator

To use Google Authenticator, you must first download the app from the App Store (for iOS) or the Play Store (for Android), if you do not already have it. After downloading and opening the app, follow these steps:

1. Select 'Google Authenticator' on the screen and click 'Accept' (Accepteren).
2. Scan the QR code on the screen with the Google Authenticator app. This can usually be done by clicking a button within the app and pointing your phone's camera at the QR code.
3. Then click 'Activate' (Activeren).
4. Enter the code that appears in the app
5. Then click 'Yes' (Ja) to complete the authentication.

From now on, you will need a verification code from the Google Authenticator app when logging in. Make sure you have your phone with you when logging in.

Note: Codes displayed by the Google Authenticator app are refreshed every 30 seconds. If the time of the code displayed in the app is about to expire, we recommend waiting until the new code is visible.

2.2.2.2 SMS

1. Select the SMS method and click 'Accept' (Accepteren).
2. Enter the mobile number where you want to receive the verification code.
3. Click 'Save' (Opslaan). You will now receive a verification code by SMS on the phone number specified.
4. Enter the code you received on the login screen and click 'Save' (Opslaan).
5. When logging in, always enter the code you receive via SMS.

Note: The SMS code is valid for 24 hours, after which it must be requested again. Be sure to always have the phone with you with the active phone number, otherwise you will not be able to log in without the verification code.

2.2.3 Changing the user name

Follow these steps to change your username in the application:

1. Go to the icon at the top right of the screen and click on the 'Person icon':

2. Select the 'My Account' (Mijn Account) option.
3. You will now see an overview of the account details known in the system.
4. Scroll down to the 'User data' (Gebruikersgegevens) section and, if desired, change the details in the 'User name' (Gebruikersnaam) field.
5. Enter your password at the bottom to confirm the change.
6. Click 'Save' (Opslaan) at the bottom right.

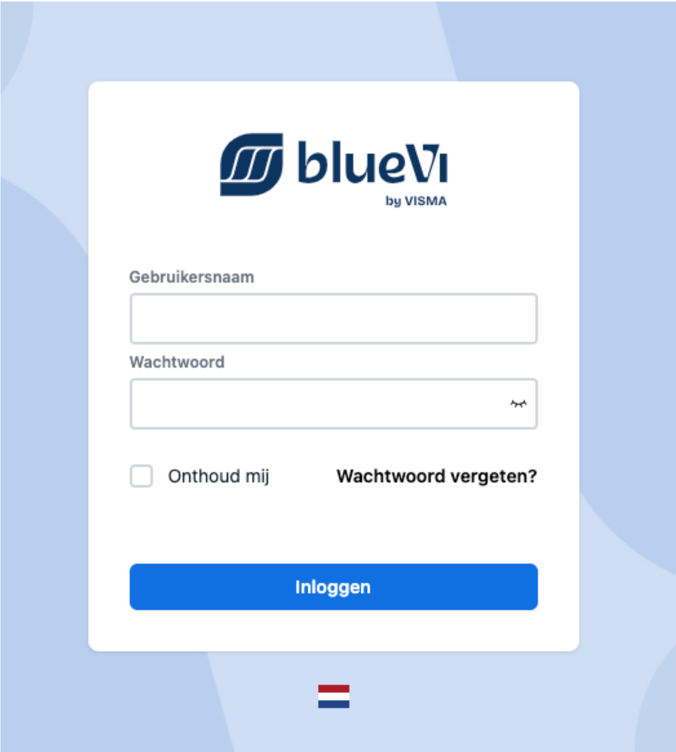
After completing these steps, your username will be changed to the username you have chosen.

2.2.4 After logging in for the first time

To access the portal, log in via the following link: https://login.bluevi.com. When the system asks for your details, enter the following information:

- Username (Note: this does not have to be the same as your e-mail address)
- Password
- After entering the correct username and password, the application will ask for an additional verification code. This is part of the two-step verification (MFA) process. Depending on your

chosen method, you will find the code in the Google Authenticator app or receive it via text message.



2.2.5 Forgotten password

If you have forgotten your password, you can easily create a new one using the 'Forgot your password?' (Wachtwoord vergeten?) option. Follow the steps below to set a new password:

1. Go to the login screen at https://login.bluevi.com.
2. Click on 'Forgot your password?' (Wachtwoord vergeten?).
3. Enter your username:
    a. This was sent with the invitation e-mail, or
    b. This is the username you entered yourself after changing your username. If you have forgotten your username, please contact your organisation's application administrator or occupational health and safety service.
4. Then click 'Send' (Verstuur). You will receive an e-mail at the address associated with your username.

Note: If you did not receive an e-mail > first check the spam folder in your mailbox. The e-mail may have ended up there. Can't find the e-mail? Then contact your organisation's application manager or occupational health and safety service. They can help you further and possibly send you a new invitation e-mail so you can activate the account and create your own password.

5. In the e-mail, click on 'Click here to set a password' (Klik hier om een wachtwoord in te stellen).
6. Then enter the e-mail address of the account (not the username) and enter a new password. Confirm the password by entering it again in the 'Repeat password' (Wachtwoord herhalen) field.
7. Finally, click 'Save' (Opslaan). From that point on, you will be able to log in with this new password.

Note: If your account has not yet been activated and you have not yet created your own password, you will not be able to set a new password using the 'Forgot your password?' (Wachtwoord vergeten) option. In that case, please contact your organisation's application administrator or occupational health and safety service to request a new password. The application administrator will then be able to send you a new invitation e-mail, allowing you to activate your account and create your own password.

2.2.6 Resetting two-step verification

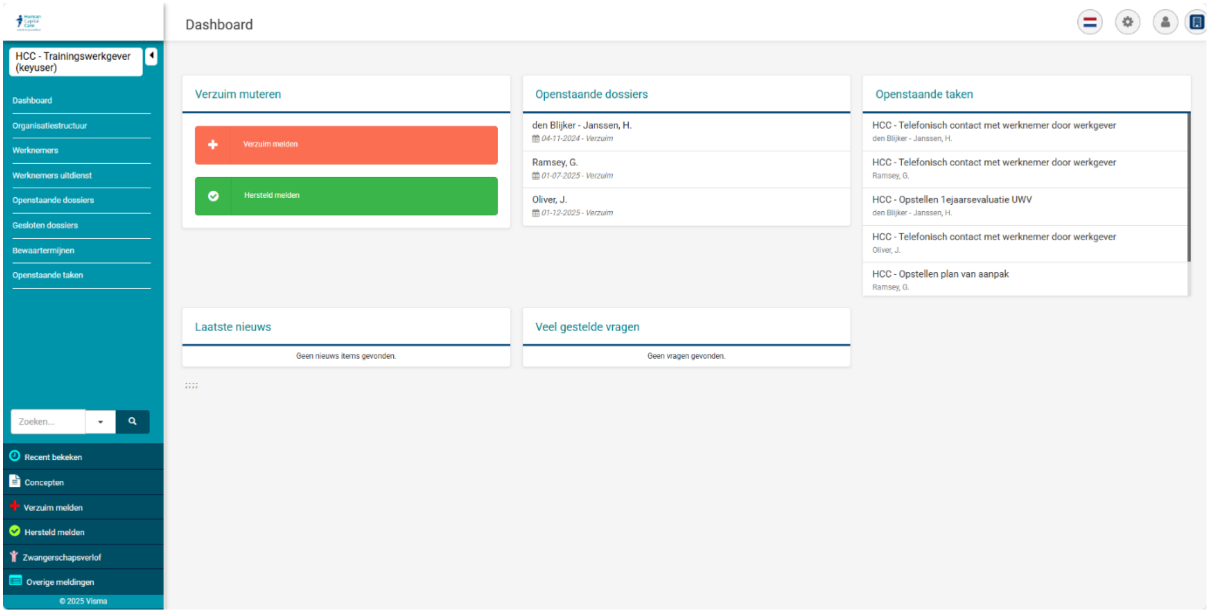
1. If you can no longer log in with your MFA method, for example because your telephone number has changed or you no longer have the Google Authenticator app, please contact the administrator of the HumanCapitalCare Employer Portal within your organisation. If you still have the Google Authenticator app or the selected telephone number but want to change the MFA method, follow the steps below to set up a new MFA method:
2. Go to the login screen (https://login.bluevi.com) and log in with your username and password.
3. On the two-factor authentication screen, click 'Reset two-factor authentication'.

4. On the next screen, you will see several options:
    a. My code does not work
    b. I no longer have the Authenticator app
    c. I have lost my mobile phone
    d. Reset two-factor authentication

The system will help you further based on your choice. For example, you can install a new authentication app or enter a new telephone number.

2.3 Dashboard

When you are logged in, you will enter the employer portal dashboard:

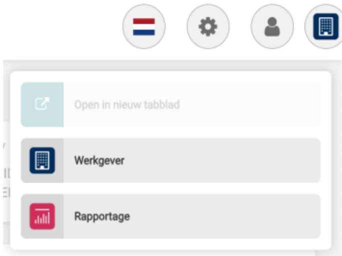


Several customisable windows (widgets) are available on the central screen of the dashboard, which you can configure as you wish. These windows provide the user with different types of information:

- Change absences (Verzuim muteren)
- Open files (Openstaande dossiers)
- Open tasks (Openstaande taken)
- Latest news (Laatste nieuws)

At the top left and right of the dashboard, you will find several menu options that we explain in the following sections.

You can easily switch between portals anytime, anywhere. Once you are logged in, click on the icon at the top right. Then select the portal you want to go to.

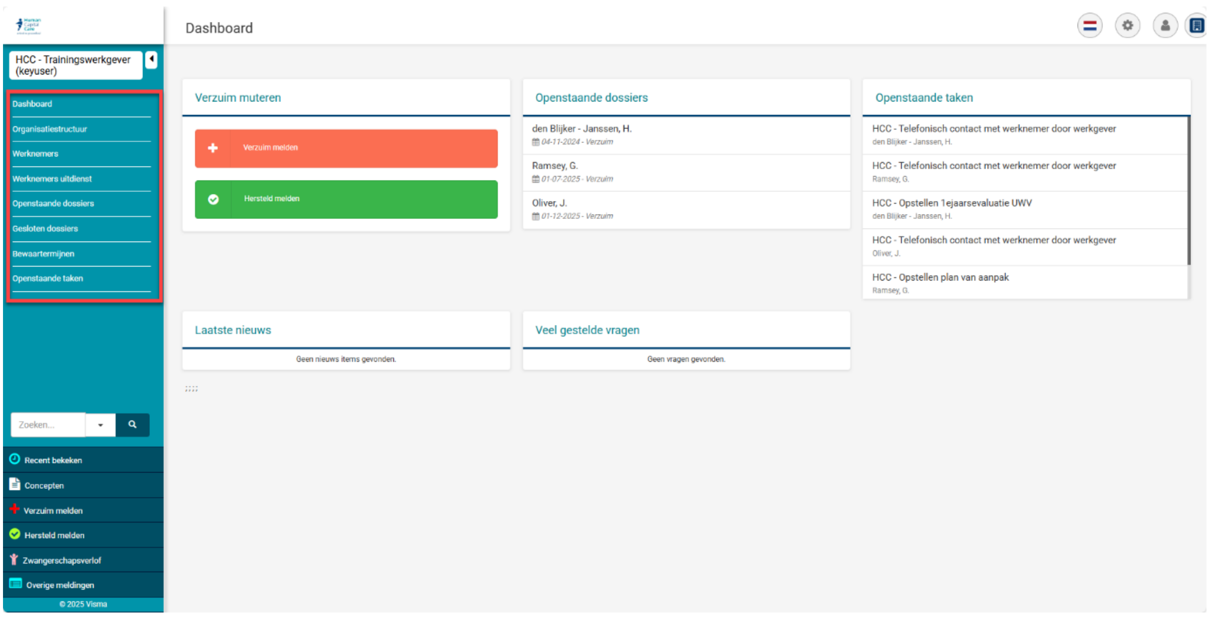


2.3.1 Navigation menu on the left

At the top left, you will see the options and features available to you. Which functions you see depends on your user permissions.

This could include:

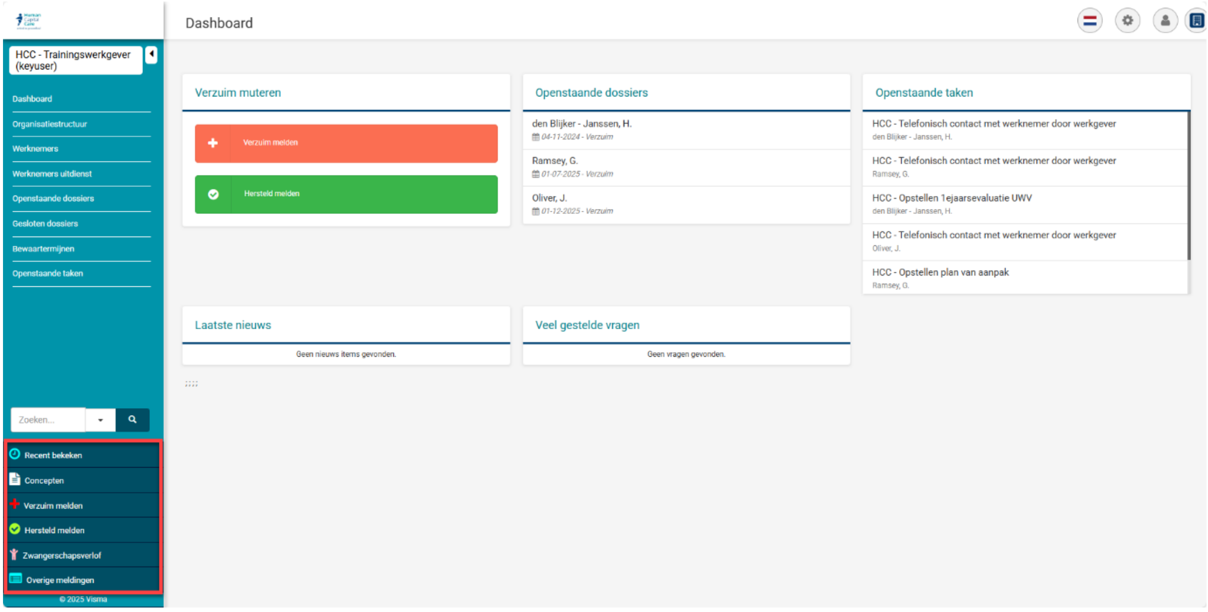
- Organisational structure (Organisatiestructuur)
- Employees joining and leaving the company (Werknemers in- en uit dienst)
- Open files (Openstaande dossiers)
- Open tasks (Openstaande taken)
- Employer files (Werkgever dossiers)
- Appointments (Afspraken)



At the bottom left, you will find some useful shortcuts available. The shortcuts you see depend on your permissions:

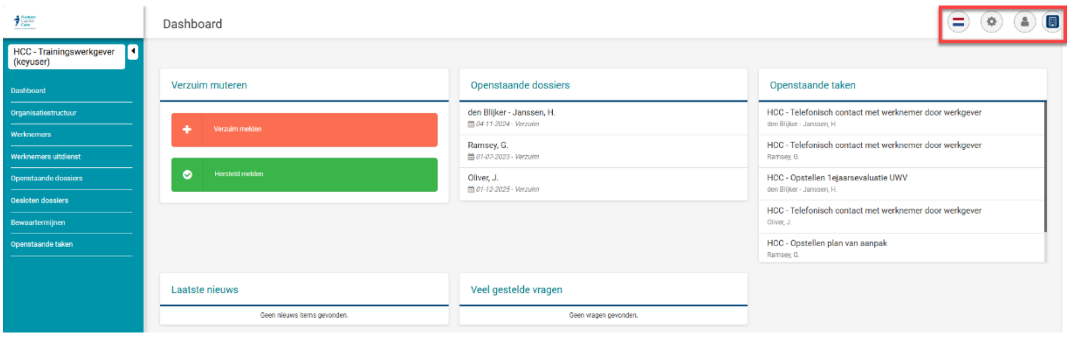
- Quick search (Snelzoeken): search by employee, organisational unit, file or task
- Recently viewed (Recent bekeken): view recently viewed files
- Drafts (Concepten): open documents in draft status
- Absence reports (Verzuimmelden): quickly add a sick report
- Recovery notification (Hersteld melden): add a (partial) recovery notification

- Other notifications: add another type of notification



2.3.2 Navigation menu at top right

In this section, you can adjust settings. For example, you can change the language to English, open another portal or go to 'My account’ (Mijn account).



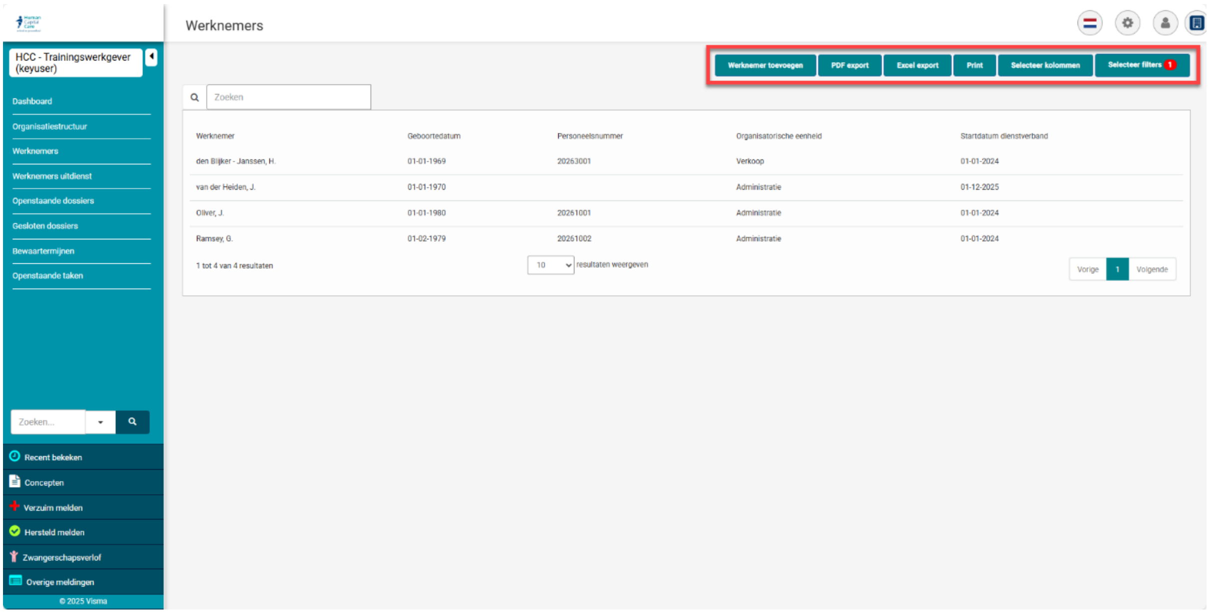
2.4 Overviews

The HumanCapitalCare Employer Portal has overviews available in the system by default, including:

- Employees (Werknemers)
- Employees leaving the company (Werknemers uit dienst)
- Open files (Openstaande dossiers)
- Open tasks (Openstaande taken)

2.4.1 Customisation and other features

In the portal, you can adjust columns and apply filters in overviews. This feature allows you to quickly and easily organise, supplement and tailor the information presented on the screen to your personal preferences and needs:



This includes, for example:

- Selecting columns: this allows you to set which columns you, as a user, would like to see in the overview. You can then add or remove columns using the green plus sign. You also easily adjust the order of the columns using the arrows.
- Selecting filters: by using filters, you can easily make specific data visible in the overview. For example, by filtering by a specific file type or a specific employer. It is also possible to apply a combination of different filters.
- Export function: this allows you to export the data displayed on the screen to PDF or Excel.
- Printing
- Sorting columns: using the arrows.
- Searching: using the search function to perform targeted searches.

2.5 My account

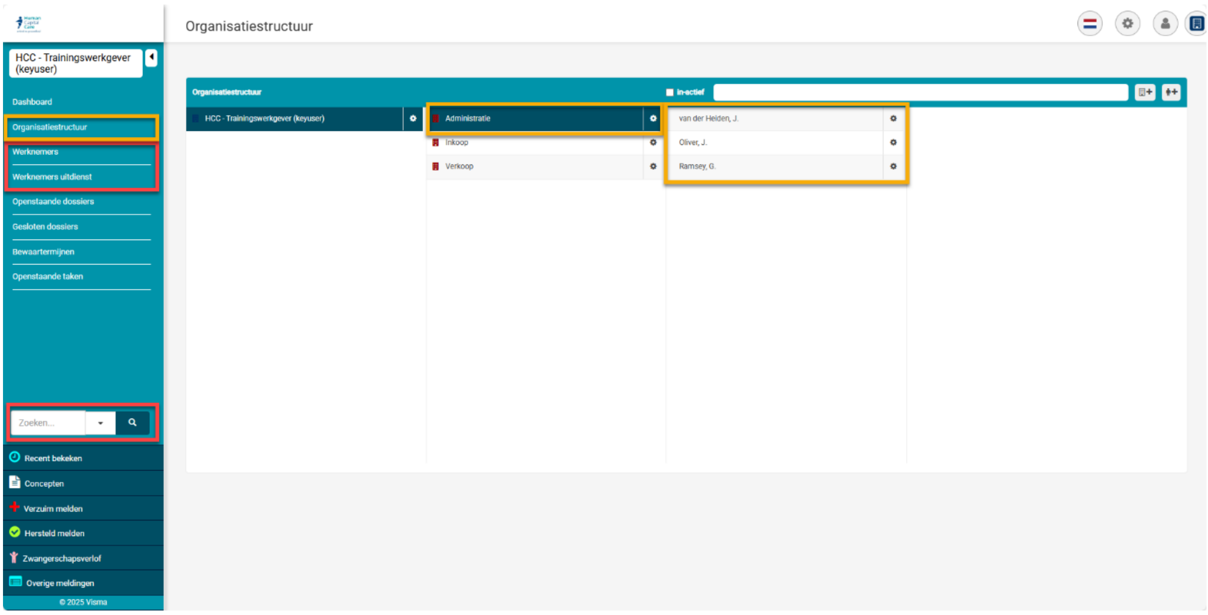
1. Click on the person icon at the top right:
2. Select the 'My Account' (Mijn Account) option.
3. On the left, you can see the different menu options:
    a. Account details (Accountgegevens): view and change your information. You can also set your signature for e-mails here.
    b. Absences (Afwezigheid): assign a replacement with the same role. During your absence, your replacement will have your permissions temporarily.
    c. Linked accounts (Gekoppelde accounts): link multiple accounts so you can work with one login and easily switch to the linked environment or other user account.
    Choose a clear name for the environment or role of your other account. After linking, you will see this environment at the top right under the person icon...
    d. Google Authenticator: generate a QR code to activate the app on another device.
    e. U2F token: enable a U2F token for extra security (MFA).
    f. Log (Logboek): view all the actions your account has performed.

3. Searching in the portal

3.1 Looking up an employee

In the portal, you can search for an employee in several different ways:

1. Via 'Quick search' (Snelzoeken) in the left menu. For example, search by staff number, first name, surname or date of birth.
2. Via the 'Employee overview' (Werknemersoverzicht). Here you can search, as well as add and sort columns.
3. Via 'Organisational structure' (Organisatiestructuur): click on 'Organisational structure' to open the overview. Click on an organisational unit to see the associated employees or open subordinate units.

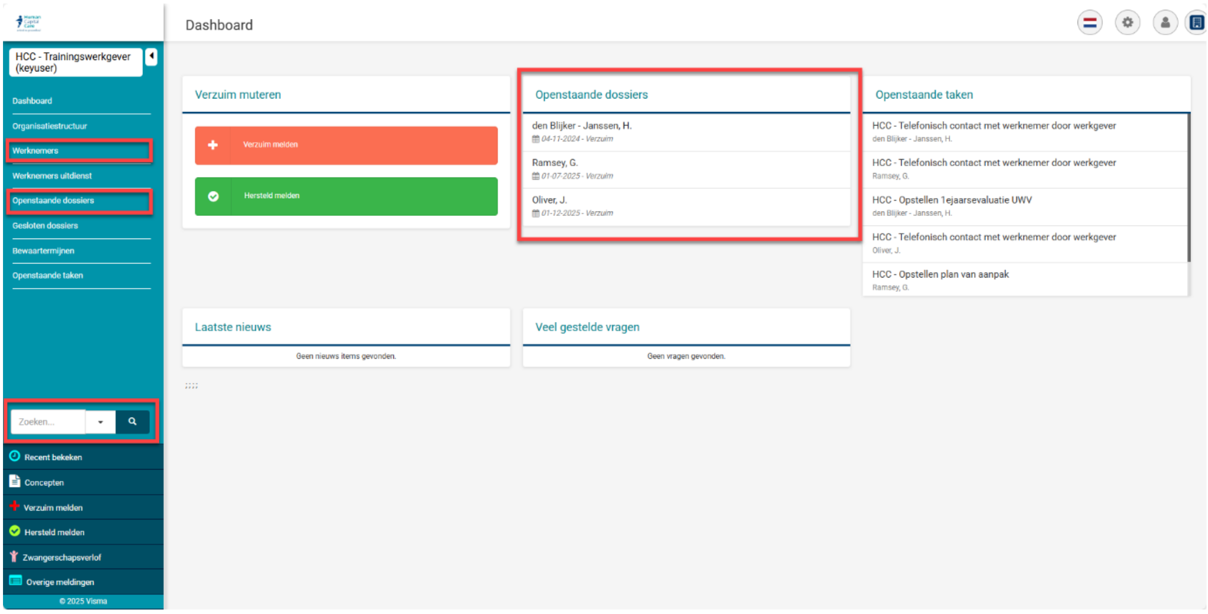


Note: Employees who have left the company are listed in a separate overview in the portal. As a result, they are not included in the overview of Active Employees by default.

3.2 Looking up a file

There are four ways of searching for a file in the HumanCapitalCare Employer Portal:

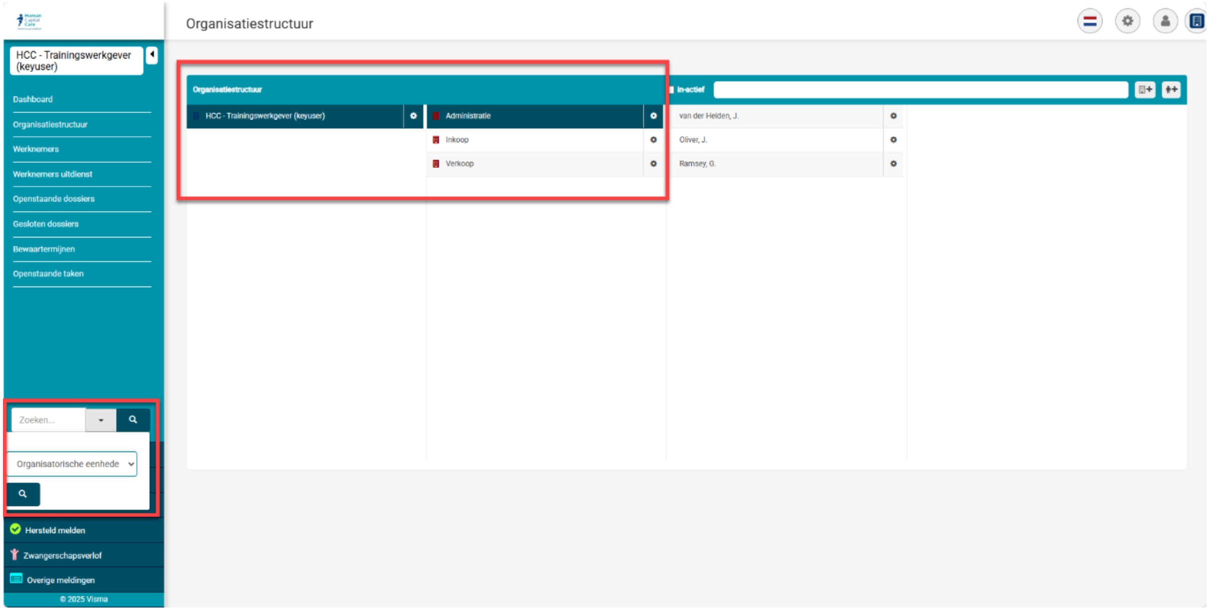
1. Dashboard: view open files for which you are authorised.
2. Open files (Openstaande dossiers): use the overview in the navigation bar and apply filters to adjust the selection and order.
3. Search module (Zoeken): click on the arrow next to the search bar and choose 'File'. For example, you can search by the employee's name.
4. Via employee: go to the employee and open the 'Files' (Dossiers) overview (via the brown folder). Here you will find all the files for which you are authorised.



3.3 Looking up organisational units

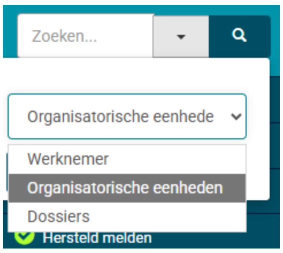
There are two ways of searching for an organisational unit in the HumanCapitalCare Employer Portal:

1. Search module (Zoeken): use the search bar in the left-hand column. Click the arrow and select 'Organisational units' (Organisatorische eenheden) to find an employer or department.
2. Organisational structure (Organisatiestructuur): click on 'Organisational structure' to open the overview. Click on an organisational unit to display the subordinate layers.



3.4 Via Quick Search

You will find a search function in the left-hand menu of the portal.



This function allows you to easily search based on specified search criteria. You can search by the following main topics, for example:

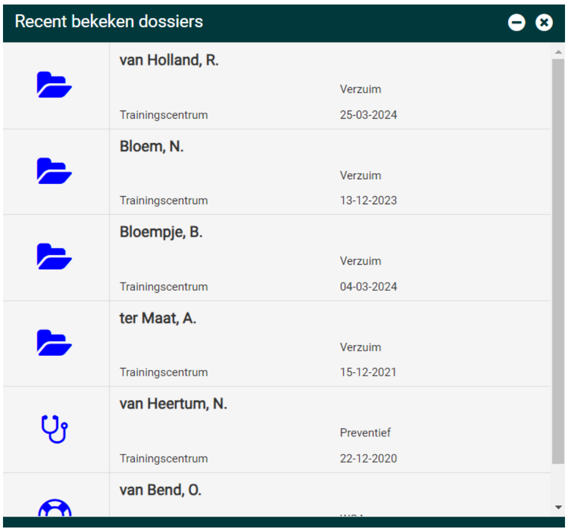
- Employee (Werknemer)
- Organisational units (Organisatorische eenheden)
- Files (Dossiers)

Have you selected a main topic? Then you can search for different types of information, such as:

- Employer name (Naam werknemer)
- Employee name (Naam werkgever)
- Date of birth (Geboortedatum)
- Personnel number (Personeelsnummer)

3.5 Recently viewed

The 'Recently viewed' (Recent bekeken) function gives you quick and easy access to your most recently viewed files. This feature can be found at the bottom left of the screen.



4. Creating a file or registering a notification

In this chapter, we assume that users enter data into the portal themselves. Does your organisation use a link to an HR system, for example? If so, certain functions described here may not be available. You can easily register new notifications via 'Report absence’ (Verzuim melden) and 'Recovery notification' (Hersteld melden) in the left-hand menu. You also have the option of creating a 'Preventive file’ (Preventief dossier). This is useful when there is not necessarily absenteeism, but you want to build up a file to prevent any issues.

You can read more about how this works in the following.

4.1 Reporting in sick

In the portal, sick leave is reported based on employment contracts rather than employees themselves. An employee may have multiple employment contracts, for example because the employee has two different positions in practice or works for two different employers. In this kind of a situation, it is possible that an employee may have to report in sick for one job, but can still perform perfectly fine in the other.

The steps below explain how to add an absence report for an employee:
1. In the left-hand column, go to 'Files' (Dossiers) and 'Notifications' (Meldingen) or 'Reporting absence’ (Verzuim melden).
2. The search field for selecting an employee will now open. Enter at least three characters to search for an employee, for example their surname or date of birth.
3. Then select the employee you want to report as sick.

Note: If the employee has more than one employment contract, you will see the employee appear more than once in the search results. Each employment contract is shown as a separate line. Select the correct employment contract for which you want to report the employee as sick.

4. Click on the 'Report absence' (Verzuim melden) option.
5. Fill in the requested information, including:
    a. Absence data (Verzuimgegevens)
    b. Safety net Yes/No, including subordinate information (Vangnet Ja/Nee, incl. onderliggende info)
    c. Accident Yes/No, including subordinate information (Ongeval Ja/Nee, incl. onderliggende info)
    d. Recuperation address details (Verpleegadres gegevens)
    e. Etc.

Click 'Save' (Opslaan) after filling in all requested information to save the absence report. The employee's absence file is created and you will now automatically go to the employee's created file.

4.2 (Partial) recovery notifications

This section explains how to report an employee as partially or 100% recovered in the HumanCapitalCare Employer Portal:

1. At the bottom of the left-hand column, go to ‘Recovery notification’ (Hersteld Melden).
2. The search field for selecting an employee will now open. Enter at least three characters to search for an employee, for example their surname or date of birth.
3. Then select the employee you want give a (partial) recovery notification.
4. Click on the 'Recovery notification’ (Hersteld melden) option.
5. Fill in the requested details. Here you can choose whether you want to report partial recovery or full recovery.
6. Click 'Save' (Opslaan) after filling in all requested information to save the recovery notification. The absence file is automatically closed in the event of a full recovery notification.

Note: With regard to a (partial) recovery notification, it is important to bear in mind that the portal uses a start date for the (partial) recovery. You should therefore always enter the date on which the (partial) recovery will start in the (recovery) date field. In concrete terms: someone who will be returning to work on Monday 25 March after a period of absence will have 25/3 as the recovery date in the system.

4.3 Maternity leave notification

When an employee on maternity leave needs to be reported in the system, follow the steps below:

1. In the left-hand column, go to 'Other notifications’ (Overige meldingen).
2. The search field for selecting an employee will now open. Enter at least three characters to search for an employee, for example their surname or date of birth.
3. Then select the employee you want to report as sick.
4. Click on the 'Maternity leave' (Zwangerschapsverlof) option (only visible for female employees)
5. Fill in the requested details.
6. Click 'Save’ (Opslaan) after filling in all requested information to save the maternity leave notification. The employee's maternity file will be created and you go to it automatically.

5. Working in the file

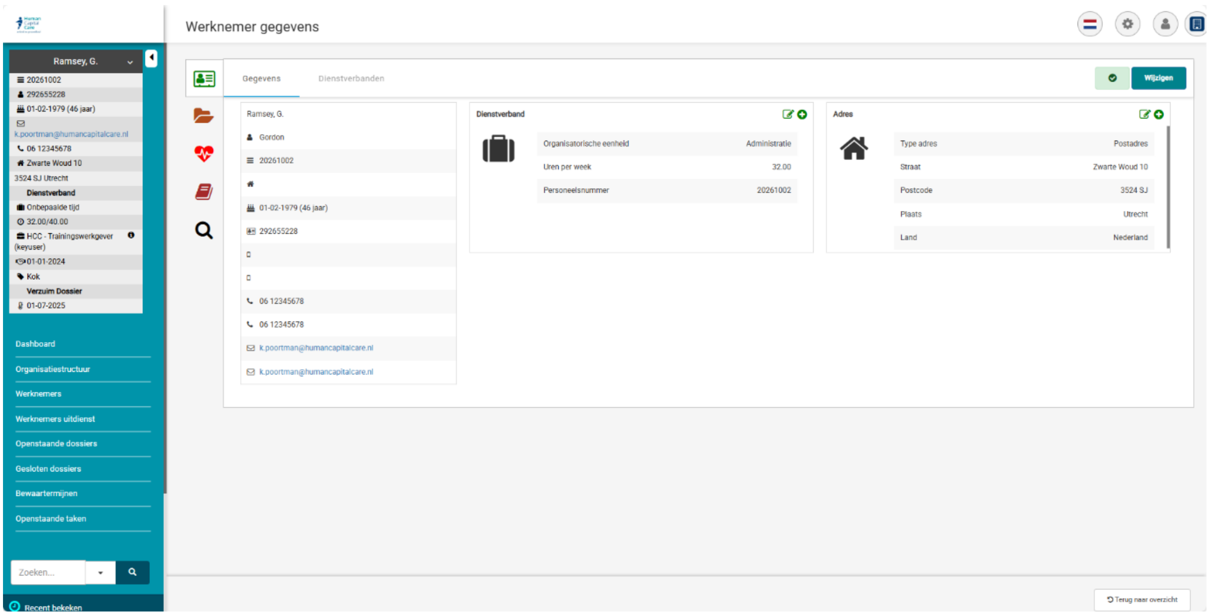
5.1 General

The employer portal has different file types, also referred to as file categories. Depending on the configuration and the authorisations set for you, you will see one or more file types in the system. Below is a list of the most common (non-medical) files at employee level:

- Absence (Verzuim)
- Pregnancy (Zwangerschap)

5.2 File structure

To help you, as a user, maintain an overview of the system, every file in the employer portal is structured in the same way.

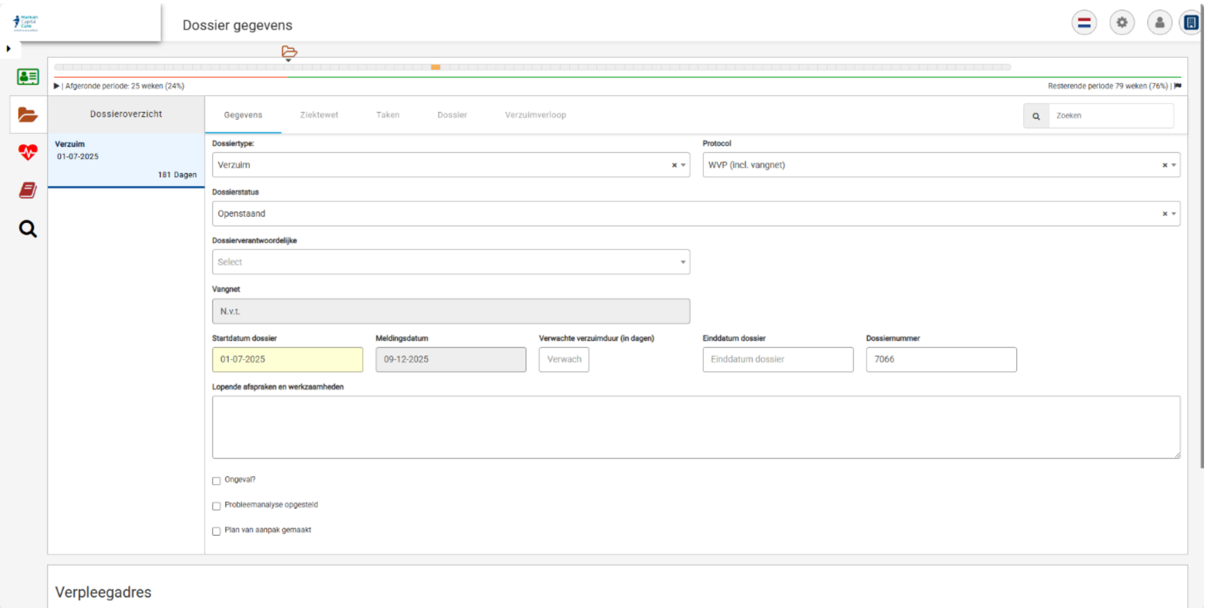


5.2.1 Data tab

When you go to the 'Data' (Gegevens) tab in a file, you can see the most important information related to the file at a glance. Here, you can see, for example:

- File type (Dossiertype)
- The protocol initiated (with tasks)
- File status (Dossierstatus)
- Start date and (possibly) end date (Startdatum, einddatum)
- Has there been an accident (Ongeval?) (right of recourse in absence cases)
- Recuperation address (Verpleegadres)

The information displayed on this screen depends on the file type and may vary as a result.



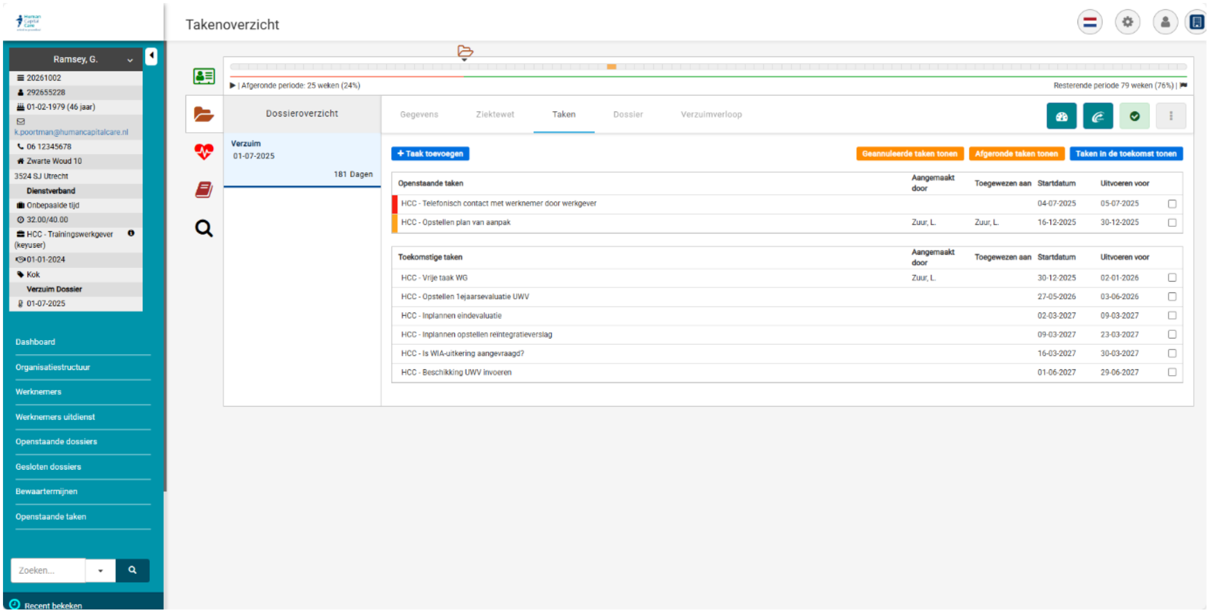
5.2.2 Tasks tab

In the 'Tasks' (Taken) tab of the file, you can see the tasks for which you are authorised as a user. The tasks displayed depend on the configuration chosen by the system's application administrator. By default, this overview opens with the 'Open tasks' (Openstaande taken) to be performed in relation to the file. A task in the employer portal is an action to be performed in relation to, for example, an employee's absence. Tasks may consist of protocol tasks and free tasks. Protocol tasks are tasks that are started automatically based on a configuration and a 'trigger', e.g. a sick report. Free tasks are tasks added by a user.

Each task description has a colour coded on the left. These colour codes indicate:

- Red = task is late
- Orange = the end date of the task is approaching
- White = task is planned for the future

There may also be tasks visible where the entire line is light grey. These are tasks that you have read access to as a user, but which you are not required to perform. This makes it easy, for example, to monitor whether certain tasks are being performed on time.



In addition, for each task, you can see who created it, when it must be performed (‘Start date’/Startdatum) and the deadline for completing the task (‘Execute by’/Uitvoeren voor). On the right-hand side above the task overview, there are a number of filter options to view future or completed tasks, for example. These are filtered out by default.

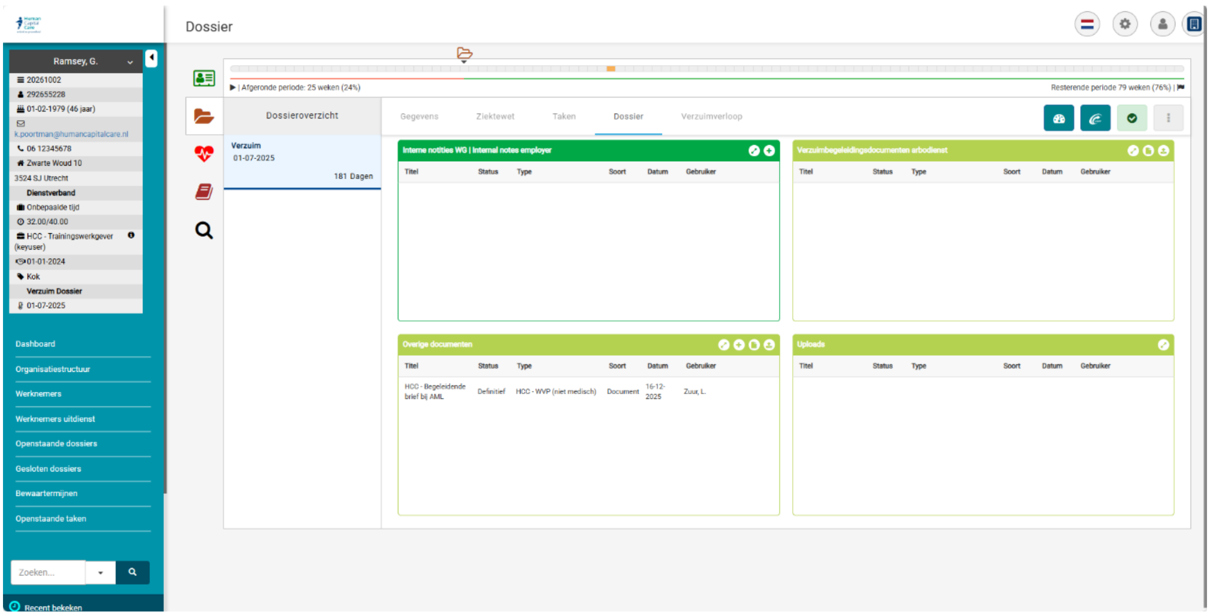
Here, you will also find the option to manually add tasks to the file. The options available for manually adding tasks depend on the configuration chosen by the application administrator. Follow the steps below to add a free task to the file:

- Click on the 'Add task' (Taak toevoegen) option.
- Select the task you want to add from the list of tasks.
- Then select the start date. This is the date on which the task must be performed.
- Enter any additional information in the ‘Task description’ (Taakomschrijving) field. This is what you will see after saving as ‘Mouse over’.
- After filling in all the requested information, click 'Save’ (Opslaan).

5.2.3 File tab

Depending on the layout selected by the application manager, you will see different layouts under the ‘File’ (Dossier) tab. The layout you see here may vary by file type and is intended to 'categorise' the different types of information in a file in a logical way for you as a user. Here you will see all the documents and/or notes present in the system, including the most important information, for which you are authorised to access as a user. Clicking on a document or notes opens it.

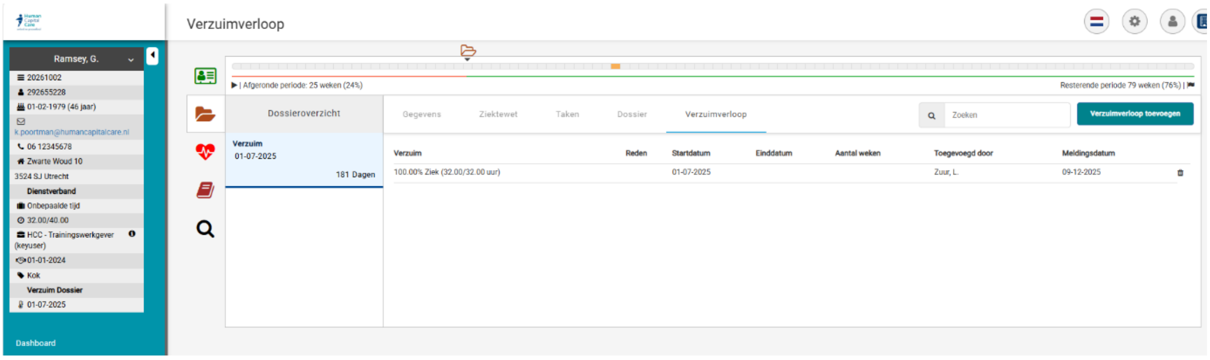
For each section, you have the option of creating a document in the system or uploading a document from your computer. When you create or just upload a document, the cockpit of the employer portal will open. For an explanation of how this cockpit works, please refer to section 5.3.



5.2.4 Absence trend tab

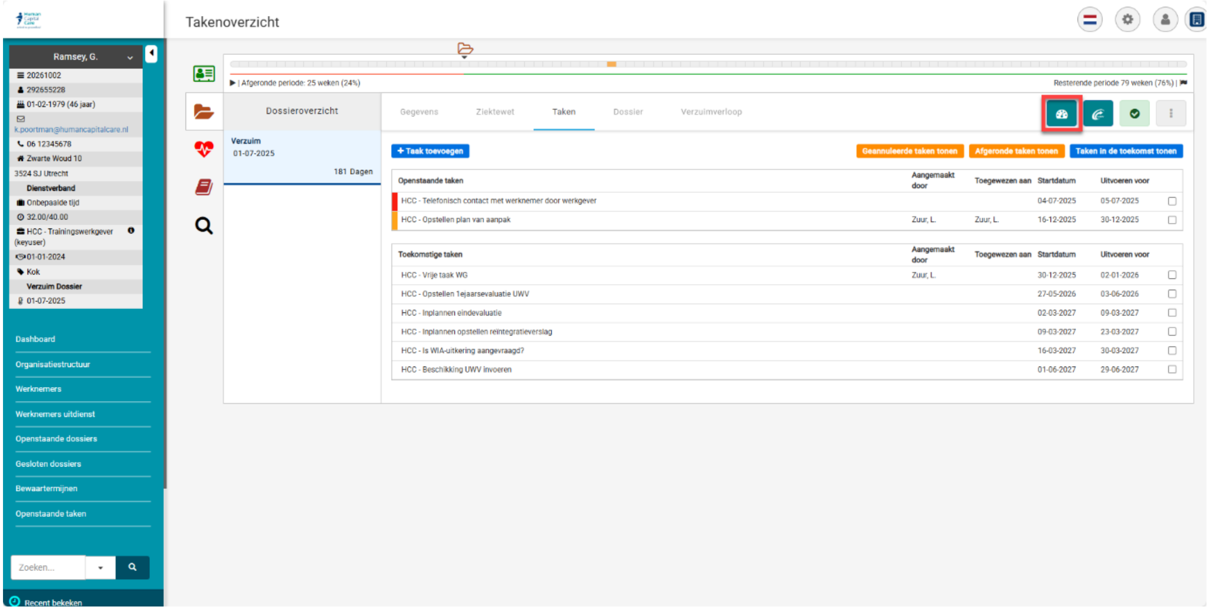
The 'Absence trend' (Verzuimverloop) tab is only visible in the absence file and provides insight into the employee's absence trend and in relation to the absence file selected.

Note: If absences are combined, the absence trend will continue in the absence file selected. If absences are not combined, the absence trend will be reset in a newly created absence file.



5.3 Working with the cockpit

In each file, you have the option of opening the cockpit of the HumanCapitalCare Employer Portal. The cockpit makes it easier for you as a user to put documents or notes into the system, for example. You open the cockpit via this button visible on the 'Tasks' (Taken) tab and the 'File' (Dossier) tab:

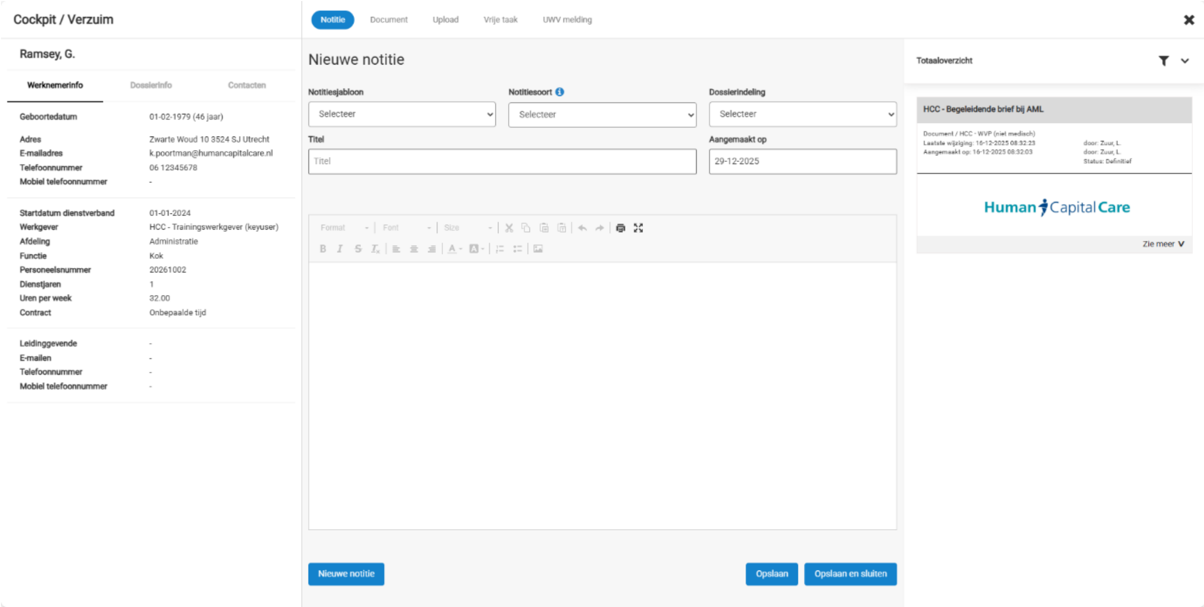


Key cockpit functions:

- Creating documents
- Creating notes
- Creating free tasks
- Uploading documents
- Creating UWV documents

The cockpit always - and whenever necessary - gives a notification when you, the user, have not filled in a mandatory (yellow) field while trying to save data.

The cockpit is structured as follows:



In the top centre, select what you want to add:

- Note (Notitie)
- Document
- Upload (of documents)
- Free task (Vrije taak)
- UWV documents

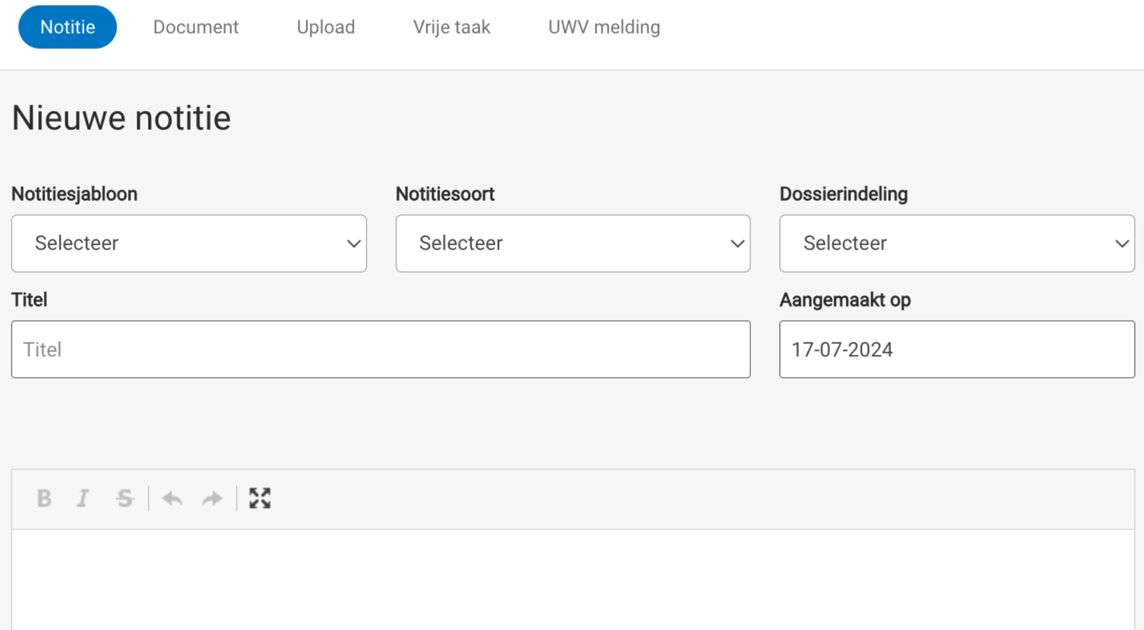
The centre screen of the cockpit is where you work on your document or note. If you select a template, you will see the template here, where you can fill in the details. If you have not selected a template, this will be a (blank) screen that you can fill in.

The right-hand side of the cockpit provides a complete overview of previous notes and documents that already exist in the file. Here too, you will only see items for which you have authorisation as a user. If your user permissions allow, you also have the option here to:

- Filter by type and/or category
- Edit items
- E-mail the contents of an item
- Expand or collapse items to read more content

5.3.1. Adding a note

A step-by-step explanation of how to create a note via the cockpit is provided below:



Top centre of the cockpit:

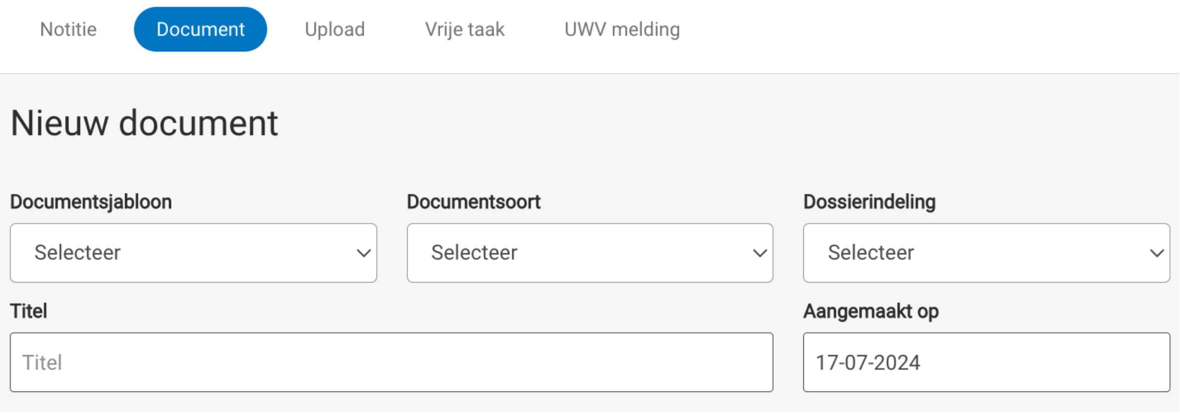
1. After opening the cockpit, click on 'Note' (Notitie) at the top.
2. If necessary, select a Note template (Notitiesjabloon). These are pre-set templates in which certain information has already been filled in.
3. Select a note type from the drop-down list. Depending on the chosen layout and permissions, a number of note types will now be displayed.
4. Choose a file format (Dossierindeling). This determines which file section the note belongs to in the file. By default, each note type is already linked to a category.
5. The Creation date (Aanmaakt op) is filled in with the current date, also by default.
6. Give the note a title. This is the title that will be visible in the file at first glance. If you do not enter a title, the name of the note template will be used by default.

Centre of the cockpit:

7. Now create the note or fill in the selected template with information.
8. At the bottom, you will see three options. Choose the follow-up action you want to perform after you have filled in all the details:
    a. New note (Nieuwe notitie): a message will appear saying, ‘A draft has been saved. Do you want to save it?’ (Er is een concept opgeslagen. Wilt u deze bewaren?’ om je huidige notitie te bewaren, of niet.) in order to save your current note, or not.
    b. Save (Opslaan): save the completed data temporarily.
    c. Save and close (Opslaan en sluiten): save the completed data and close the cockpit.

5.3.2. Adding a document

A step-by-step explanation of how to create a document via the cockpit is provided below:



Top centre of the cockpit:

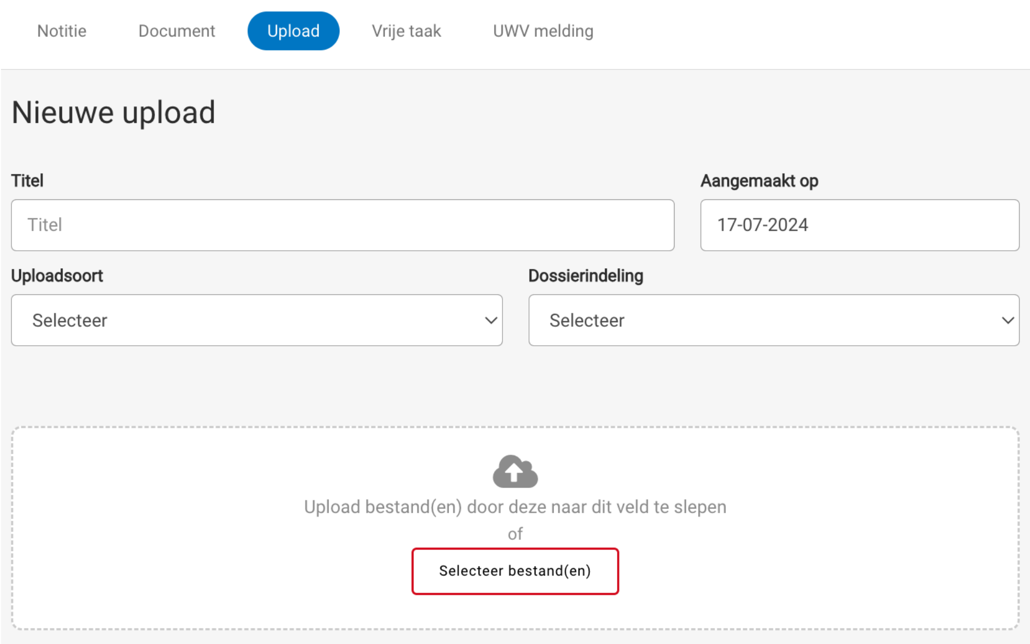
1. After opening the cockpit, click on 'Document' at the top.
2. If necessary, select a Document template (Documentsjabloon). These are pre-set templates in which certain information has already been filled in.
3. Select a document type (Documentsoort) from the drop-down list. Depending on the chosen layout and permissions for your user role, a number of document types will now be displayed.
4. Choose a file format (Dossierindeling). This determines which file section the document belongs to. By default, each document type is already linked to a file section.
5. Give a title to the document. This is the title that will be visible in the file at first glance. If you do not enter a title, the name of the document template will be used by default.
6. The creation date is filled in with the current date, also by default.

Centre of the cockpit:

7. Now create the document or fill in the selected template with information.
8. At the bottom, you will see three options. Choose the follow-up action you want to perform after you have filled in all the details:
    a. New document (Nieuw document): a message will appear saying, ‘A draft has been saved. Do you want to save it?’ (Er is een concept opgeslagen. Wilt u deze bewaren?) in order to save your current document, or not.
    b. Save (Opslaan): save the completed data temporarily
    c. Save and close (Opslaan en sluiten): save the completed data and close the cockpit.

5.3.3. Uploading a document

A step-by-step explanation of how to upload files via the cockpit is provided below:



Left side of the cockpit:

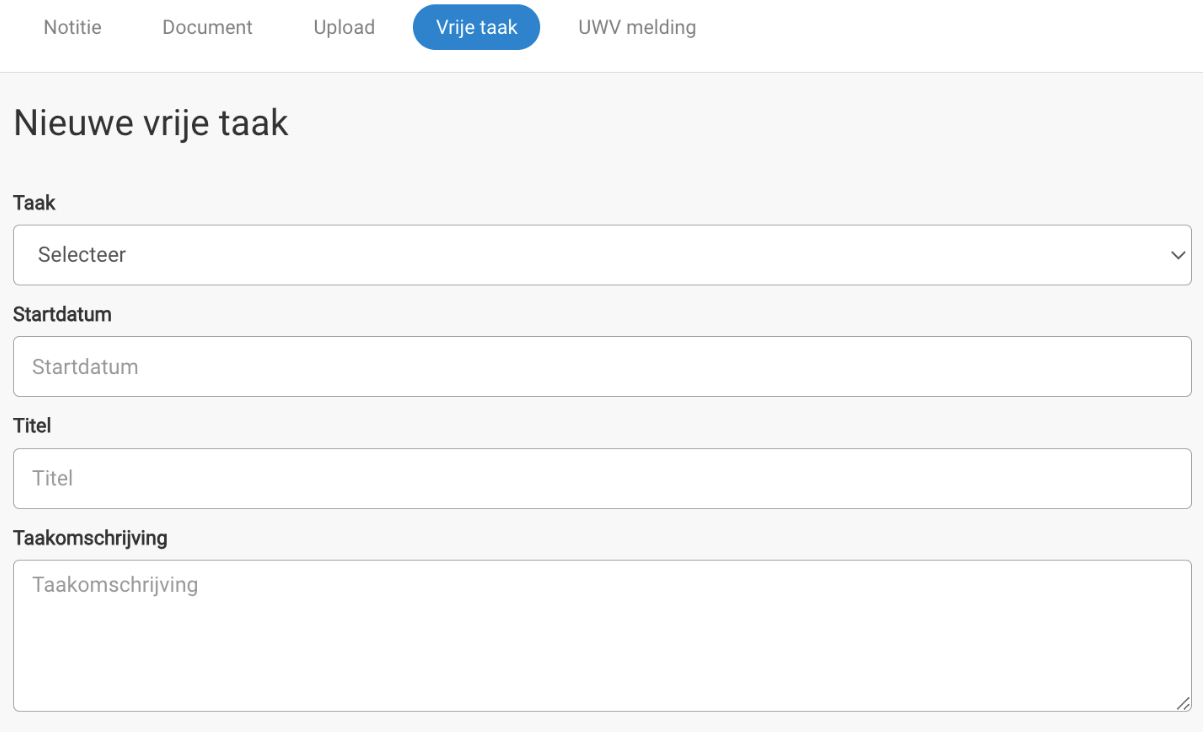
1. After opening the cockpit, click 'Free task' (Vrije taak) at the top.
2. Select a task from the drop-down list, depending on the chosen layout and permissions for your user role, a number of tasks will now be displayed.
3. Choose the start date of the task. This is the date on which the task is scheduled in the file and also determines the status of the task (overdue, execute now, etc.).
4. Give a title to the task. This is the title that will be visible at first glance in the file. If you do not enter a title, the name of the selected task will be used by default.

Centre of the cockpit:

5. Provide a job description here if desired to describe exactly what needs to be done.
6. You will see three options at the bottom. Choose the follow-up action you want to perform after you have filled in all the details:
    a. Save (Opslaan): save the completed data temporarily
    b. Save and close (Opslaan en sluiten): save the completed data and close the cockpit

5.3.4. Adding a free task

A step-by-step explanation of how to add a free task via the cockpit is provided below:



Top centre of the cockpit:

1. After opening the cockpit, click 'Free task' (Vrije taak) at the top.
2. Select a task from the drop-down list. A number of tasks will now be displayed.
3. Choose the start date of the task. This is the date on which the task is scheduled in the file and also determines the status of the task (overdue, execute now, etc.).
4. Give a title to the task. This is the title that will be visible in the file at first glance. If you do not enter a title, the name of the selected task will be used by default.

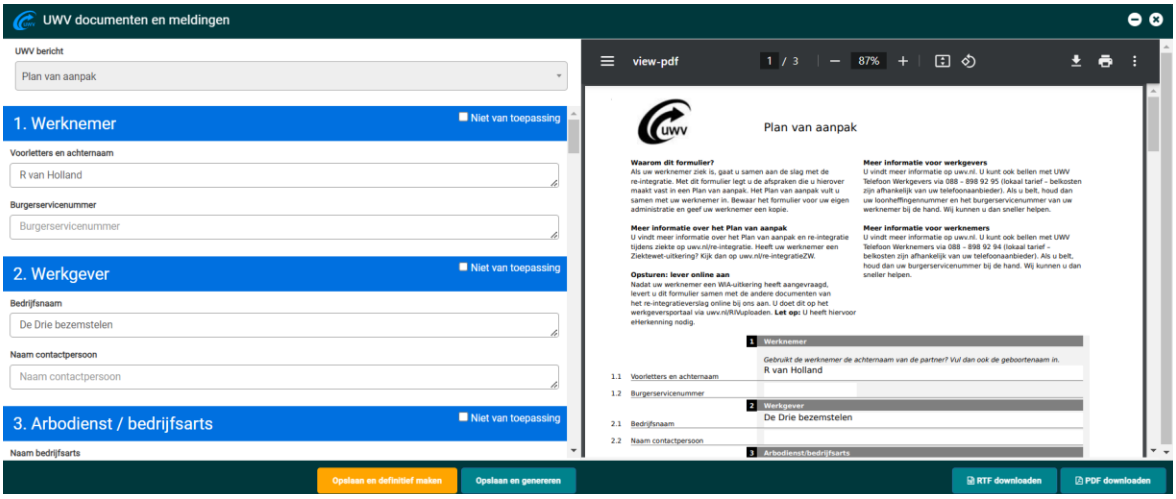
Centre of the cockpit:

5. Provide a job description here if desired to describe exactly what needs to be done.
6. You will see two options at the bottom. Choose the follow-up action you want to perform after you have filled in all the details:
   a. Save (Opslaan): save the completed data temporarily.
   b. Save and close (Opslaan en sluiten): save the completed data and close the cockpit.

5.3.5. UWV documents and notifications

The HumanCapitalCare Employer Portal contains all standard UWV documents, as used by the UWV. The UWV section still has the 'old' style layout; this screen differs from the previous screens and will also be updated with the 'new look' in an upcoming release. If you want to create a UWV document such as an action plan, you can easily do so via the cockpit. Based on already available (employee) information, a number of details are already filled in on the UWV document.

A step-by-step explanation of how to create a UWV document via the cockpit is provided below:

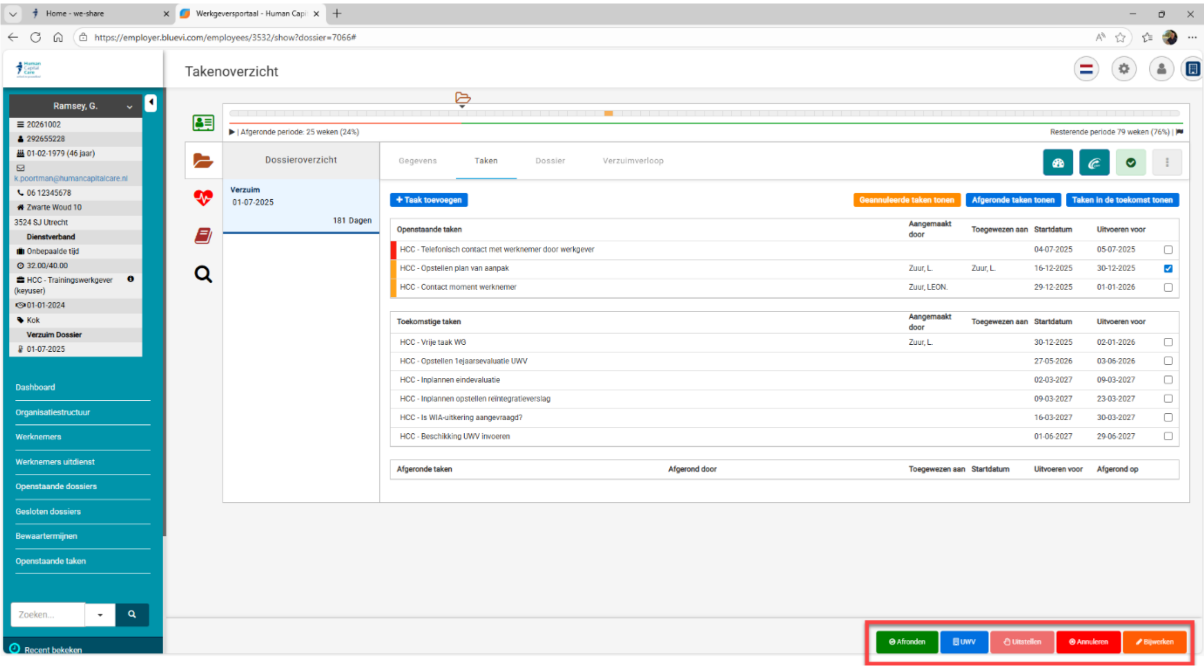


5.3.5.1 Creating UWV documents

1. At the top, click 'UWV notification' (UWV-melding) in the cockpit.
2. Select a UWV report (UWV-bericht) from the drop-down list. A number of input fields will now be displayed on the left.
3. Fill in the (relevant) input fields and check that they have already been filled in.
4. Click 'Save and generate’ (Opslaan en genereren). The system will now display the completed UWV template on the right-hand side of the screen.
5. Check the completed form. If there are still any items that need to be adjusted, you can do so using the input fields on the left. After making the change(s), click 'Save and generate' (Opslaan en genereren) again. The UWV document will then be updated.
   Now that the UWV document is ready, you will see three options at the bottom of the screen.
6. Select the follow-up action you want to perform:
   a. Save and finalise (Opslaan en definitief maken): the document is no longer editable, unless the document is first returned to draft (this is a role setting). You will then leave the cockpit.
   b. Save and generate (Opslaan en genereren): the UWV document is saved in draft in the interim; you can do this as many times as you like.
   c. PDF download: download the completed UWV template as a PDF file.

5.4 Editing or completing a task

The task overview shows tasks to be performed. These can be tasks added via a configured protocol or tasks that are added manually by a user.



When you select a task, the options available to you as a user appear at the bottom right. The actions displayed depend on the selected task and on choices made in the configuration:

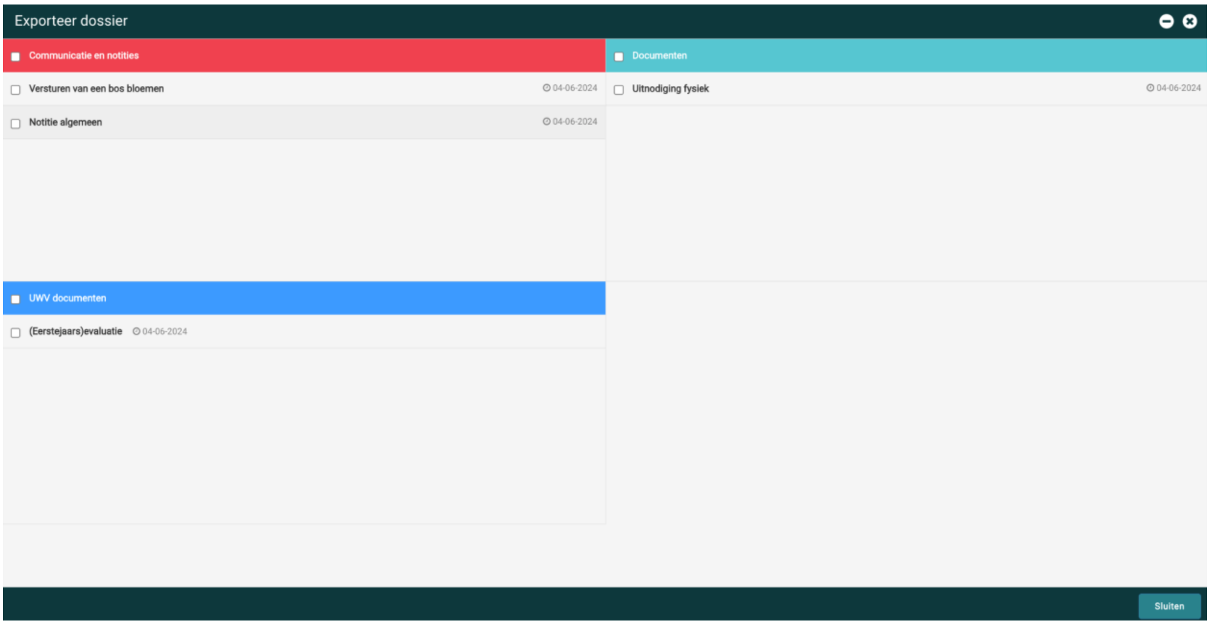
- Complete (Afronden): the task is given an end date (= current date) and is marked as completed in the file.
- Assign (Toewijzen)): allows you to assign the task to a specific user in the system. This user will see the task in the task overview.
- Cancel (Annuleren): the task is cancelled and no longer needs to be performed.
- Postpone (Uitstellen): allows you to reschedule the task.
- Reopen (Heropen): allows you to reopen cancelled or already completed tasks.
- Update (Bijwerken): allows you to update tasks that are manually added, e.g. the start date or the name of the task.
- Create document (Document opstellen): allows you to create a document in the context of the task to be performed.
- Create note (Notitie opstellen): allows you to create a note in the context of the task to be performed.

- UWV: this takes you directly to the input screen to fill in the UWV template linked to the task. See also section 5.3.5.1 'Creating UWV Documents', step 2 and onwards.

5.5 Exporting the file

Sometimes it is necessary to export a file. For example, for submitting the UWV after 104 weeks of illness. In the HumanCapitalCare Employer Portal, it is possible to easily export the contents of the file. To do so, follow the steps below:

1. Find the file whose contents you want to export.
2. Go to the 'Tasks' (Taken) tab or the 'File' (Dossier) tab.
3. Go to the Extra options menu (Extra opties menu) in the top right, represented by three vertical dots.
4. Select the 'Export file' (Exporteer dossier) option.
5. You will now see an overview of all the documents in the file that you can export, sorted by category in the file.



6. Select the documents you want to export and click 'Export file' (Exporteer dossier) at the bottom right. The export function will now put all the files to be exported into a ZIP file. Depending on the number of files, this may take some time.
7. Go back to the 'Extra options menu' (Extra opties menu) at the top right. These are the three vertical balls.
8. Select the 'Export file' (Exporteer dossier) option again.
9. When the download is complete, you will see a .zip file. You can download this file by clicking on the file name.

6. Adding departments and employees

This chapter describes how to manually add an employer and employee in the employer portal. In practice, many organisations work with a link between, for example, an HR source system from which employer, department and/or employee data is supplied to the portal. If your organisation works with a link to a source system, the add employer and/or employee data feature will normally be deactivated. It is also possible that this feature will only be activated for specific user roles.

6.1 Departments

6.1.1 Adding a department

You can also add departments to an existing employer. For example, to assign employees to a specific department so that you can report at department level at a later stage. Follow the steps below to add a department:

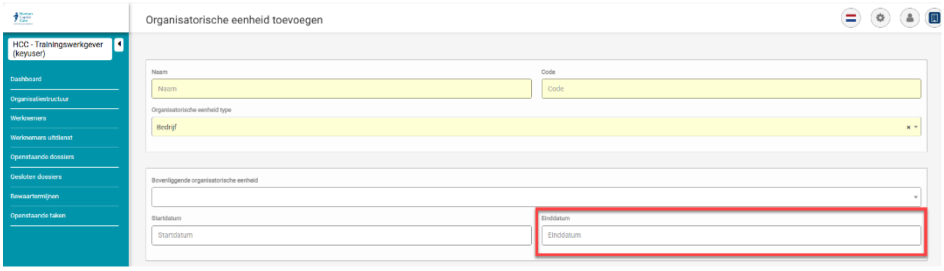
1. Select the 'Organisational structure' (Organisatiestructuur) option in the menu on the left.
2. Next, select the 'Add organisational unit' (Organisatorische eenheid toevoegen) option at the top right.

3. Then enter the department name and department code, and under 'Organisational unit type' (Organisatorische eenheid type), select 'Department' (Afdeling).
4. After this, select the 'Parent Organisational Unit' (Bovenliggende Organisatorische Eenheid). Here, you choose the level under which you want to create the department.
5. Then select 'Department' (Afdeling) under 'Organisational Unit Type' (Organisatorische Eenheid Type).
6. Fill in all the requested information if desired. The yellow fields are mandatory.
7. After you have filled in the information, click 'Save' (Opslaan) at the bottom right of the page.
8. The department will now be saved and visible under the 'Employer structure' (Werkgeverstructuur) menu option.

6.1.2 Changing or deactivating a department

If you want to change a department, do so using the steps below:

- Select the 'Organisational structure' (Organisatiestructuur) option in the menu on the left.
- Then use the tree structure (displayed from left to right in the portal) to find the relevant department you want to change.
- Click on the gear icon to the right of the department name.
- The overview screen that opens will show all the relevant department details. Click 'Edit' (Wijzigen) at the top right. If you want to deactivate the department, enter an end date.



- Adjust or complete the details where necessary, and click 'Save' (Opslaan) at the bottom right.
- You will now return to the overview screen with the department details.

6.1.3 Deleting a department

If you want to delete a department (because it has been created incorrectly, for example) you can do so in the employer portal by following the following steps:

- Select the 'Organisational structure' (Organisatiestructuur) option in the menu on the left.
- Then use the tree structure (displayed from left to right in the portal) to find the relevant department you want to change.
- Click on the gear icon to the right of the department name.
- The overview screen that opens will show all the relevant department details. Click 'Edit' (Wijzigen) at the top right.
- You will see the 'Delete' (Verwijderen) button at the bottom left.
- The system will now confirm that it is going to delete the department; click ‘Yes’ (Ja).
- You will now return to the employer portal dashboard.

PLEASE NOTE! All data relating to the department will be deleted if you continue after the warning. This cannot be undone! In some cases, you will not be able to delete the department (for example, if there are still active employees), and the system will notify you of this.

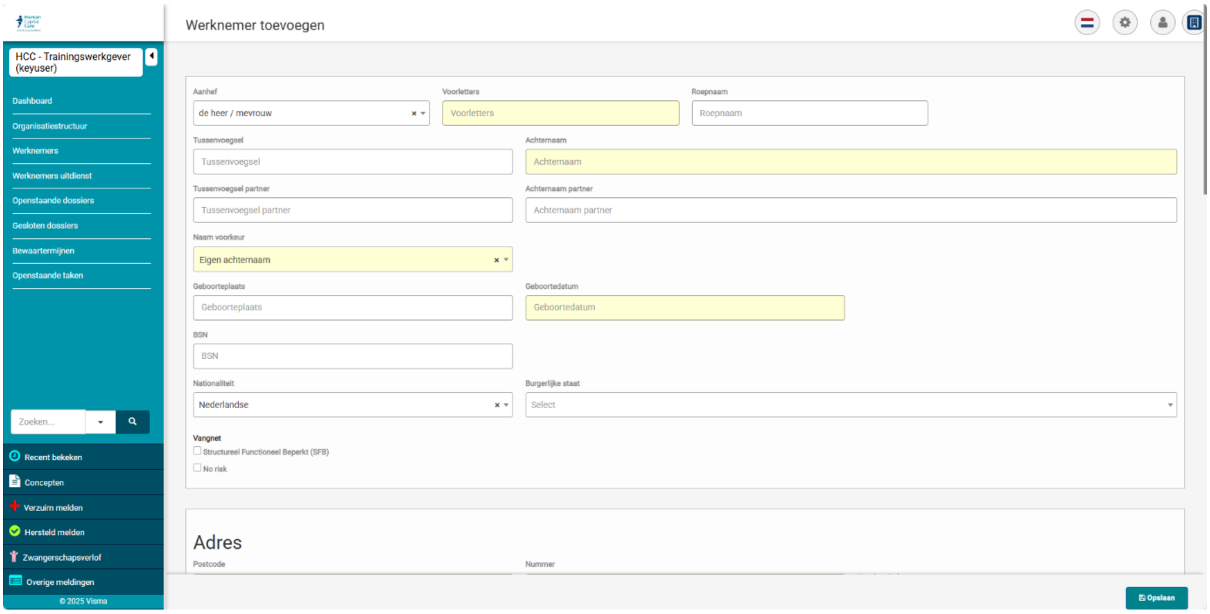
6.2 Employees

6.2.1 Adding an employee

This section describes how to create a new employee in the employer portal:

1. Select the 'Organisational structure' (Organisatiestructuur) option in the menu on the left.
2. Next select the 'Add employee' (Werknemer toevoegen) option at the top right.

3. Afterwards, fill in the requested details.

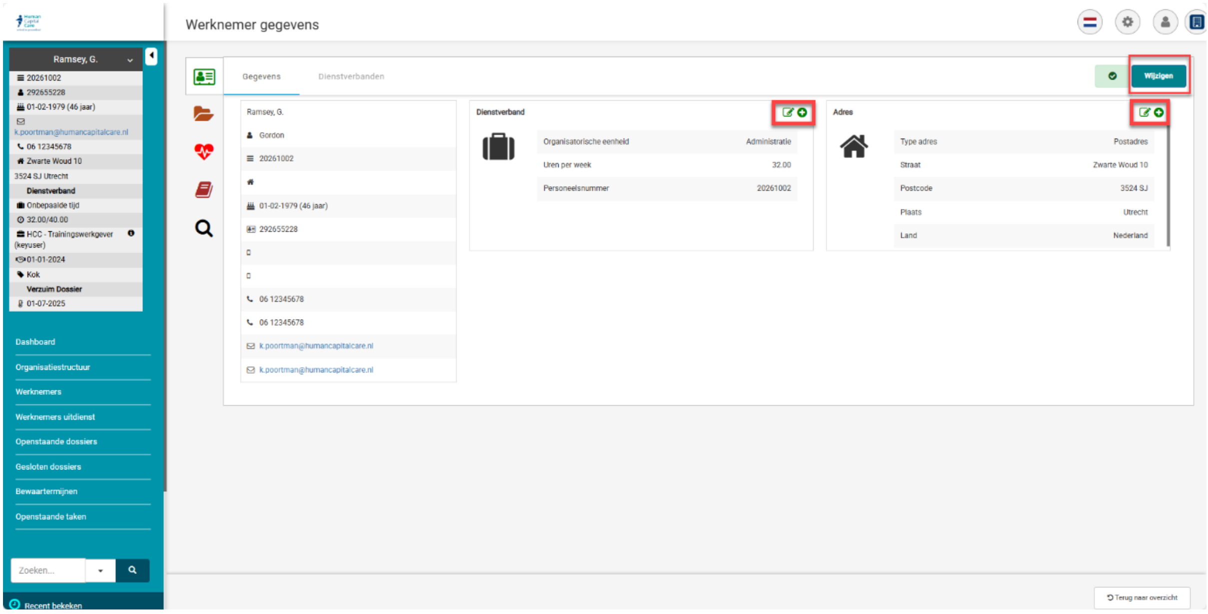


4. Please fill in all the requested information as completely as possible. The fields marked in yellow are mandatory in the system and must be filled in.
5. Once you have entered all the required information, click 'Save' (Opslaan) at the bottom right. The employee will now be created in the system.

6.2.2 Changing employee details or reporting as leaving the company

This section describes how to change employee details in the portal:

1. Go to the 'Employees' (Werknemers) overview.
2. Find the employee whose details you want to change and click on the relevant line.
3. The employee overview will now open. Here you have three options to change and/or add details:
   a. Option 1: add or change (existing) employment details
   b. Option 2: add or change (existing) address details
   c. Option 3: add or change all employee details



4. Use one of the three options provided in the system and complete the details or change them where necessary, always confirming by saving. Yellow fields are always mandatory to complete in the system. If you wish to report the employee as having left the company, enter an end date under ‘Employment’ (Dienstverbanden).
5. After saving, a confirmation will appear in the top right-hand corner indicating that the data has been successfully saved.
6. You will now automatically return to the employee card.

6.2.3 Removing an employee

If you want to delete an employee (because it has been created incorrectly, for example) you can do so in the portal by following the following steps:

1. Go to the 'Employees' (Werknemers) overview. Find the employee you want to remove and click on the relevant line.
2. If a file exists, you first have to delete the documents and/or notes in the file.
3. After the file is empty, delete the file itself.
4. Once all files have been deleted, go to the employee card, 'Details' (Gegevens) tab and select 'Edit' (Wijzigen) on the right-hand side of the screen.
5. You will now see the 'Delete' (Verwijderen) button at the bottom left.
6. The system will now confirm that you are going to delete the employee. Click 'Yes’ (Ja).
7. You will now return to the employer portal dashboard.

PLEASE NOTE! All employee details will be deleted if you continue after the warning. This cannot be undone! In some cases, you will not be able to delete the employee (for example, if there are still active files). The system will notify you of this.