Manual
VERZUIMCOACH - EMPLOYER

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TABLE OF CONTENTS
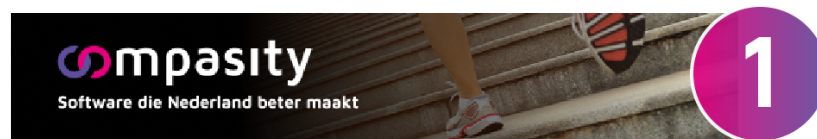
ACTIVATE YOUR ACCOUNT - EMPLOYER PORTAL

Activate account

Welcome to the Compasity Employer Portal!

As soon as an account has been created for you, you will receive an email from us under the name: [companyname]@compasity-cloud.nl.
Didn't receive an email? Please check your spam box or junk mail.
The pink button opens an internet page where you can set your personal password for Compasity, see the image below. The password must contain at least 8 characters with at least 1 uppercase letter, 1 letter, 1 number, and 1 special character.

2

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Wachtwoord instellen

U kunt hier uw nieuwe wachtwoord invoeren.
Na invoeren wordt u doorgestuurd naar de inlogpagina.

Wachtwoord *

    wachtwoord

Bevestig wachtwoord *

    bevestig wachtwoord

Opslaan

> Het wachtwoord moet bestaan uit: minimaal 8 tekens met minimaal 1 hoofdletter, 1 letter, 1 cijfer en 1 bijzonder teken.
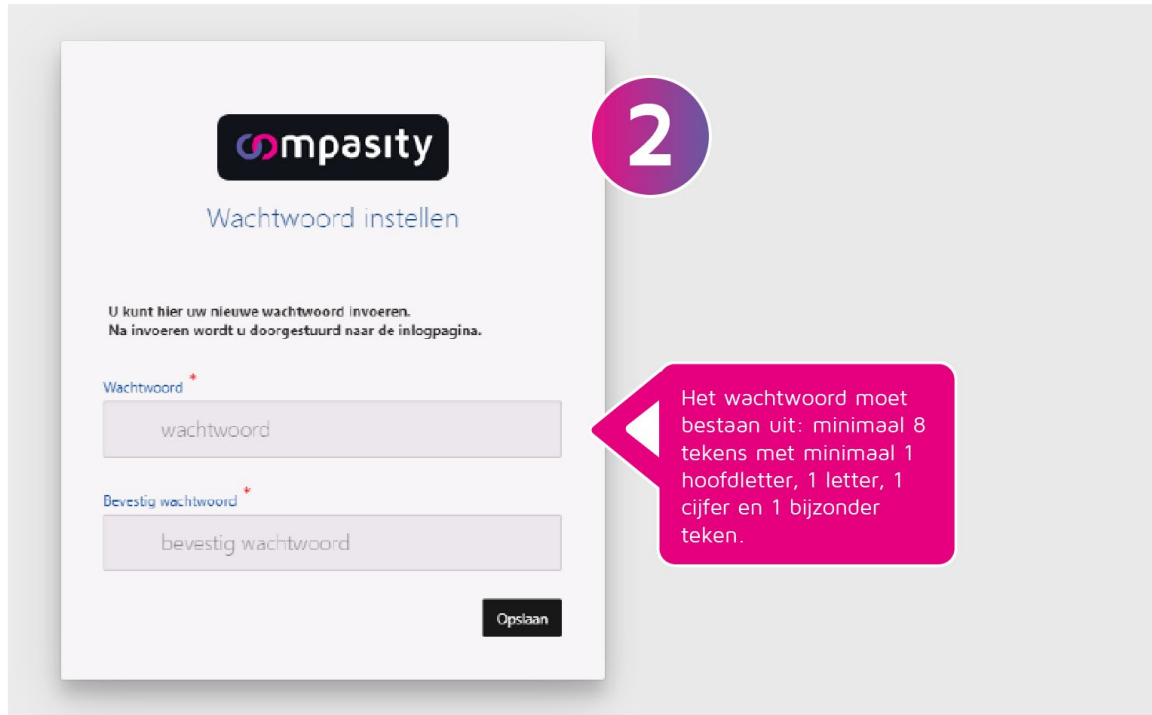
When you have created your password, you will be taken to the login screen as shown in the image below.

3

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Inloggen

Vul hier uw gebruikersnaam en wachtwoord in.

    gebruikersnaam

    wachtwoord

Inloggen   Wachtwoord vergeten

> Je kunt nu inloggen met je gebruikersnaam en wachtwoord die je zojuist hebt aangemaakt.

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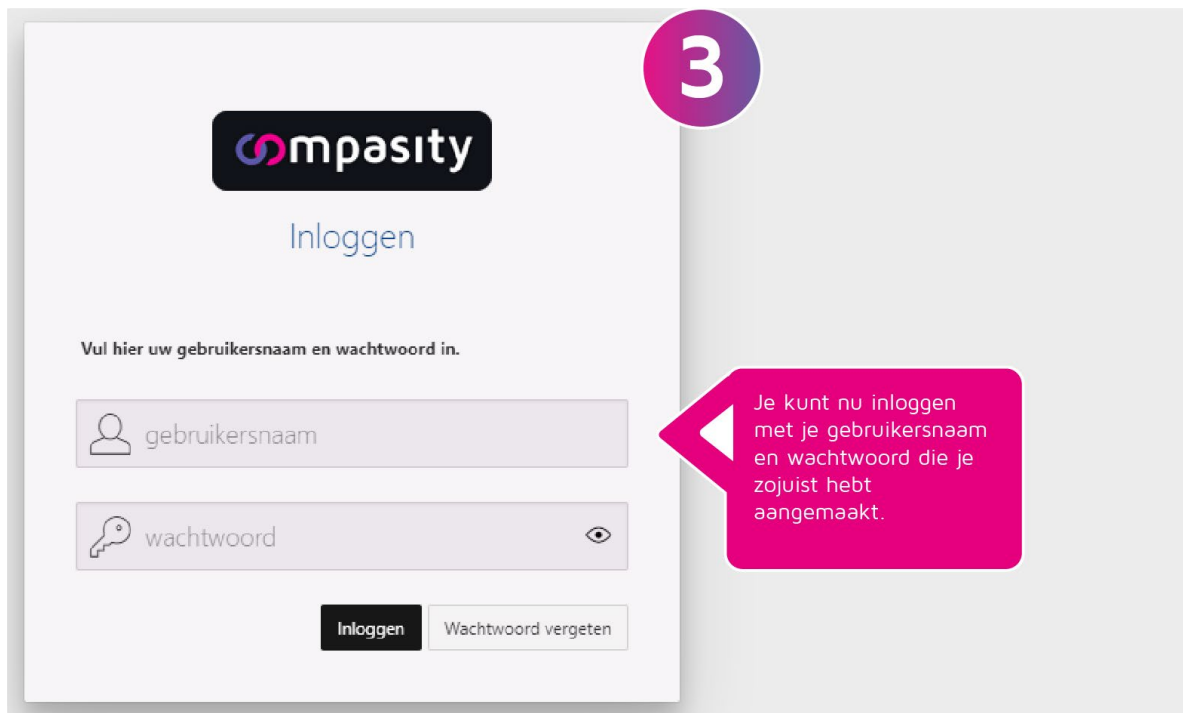
Once you are logged in, you will see a pop-up screen with information about the phone number registered on your account. With this, you can now set up the two-factor authentication required for the security of the portal (see image below).
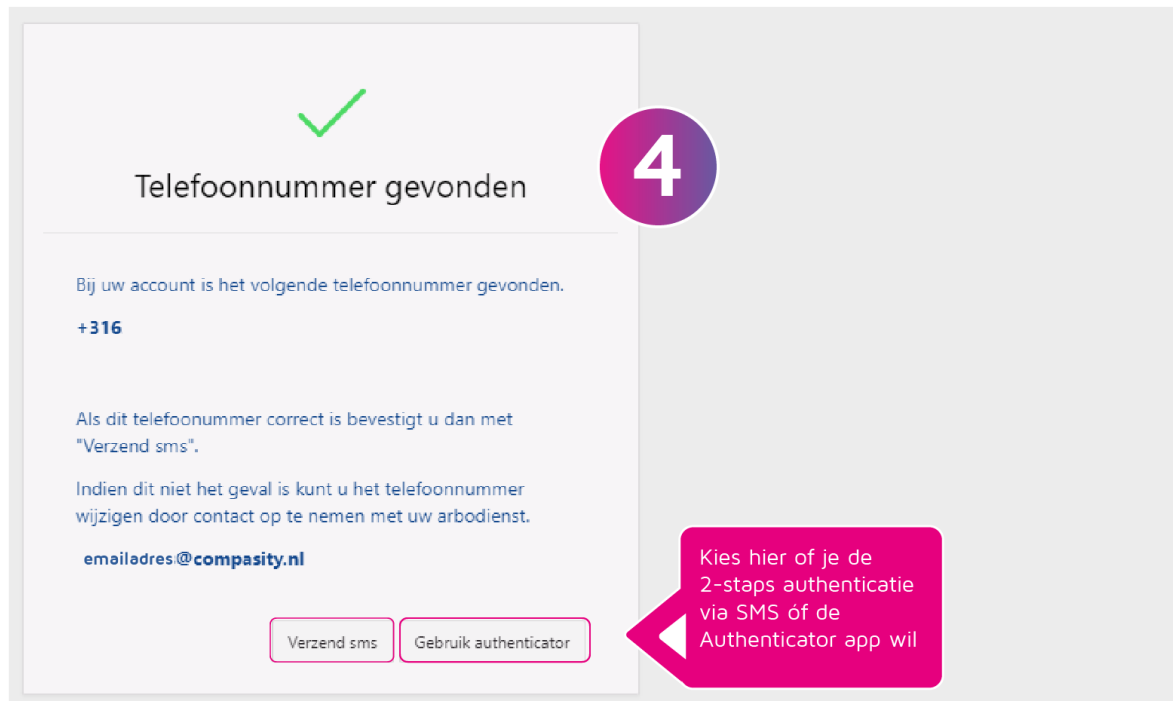

Setting up two factor authentication

The two factor authentication is needed as extra security for the portal to properly protect all data. By logging in in 2 ways, the user is authenticated in 2 ways (2 factor).
You can set this 2nd factor via the authenticator app on your phone (both for Android and Apple).

Code via de authenticator app:
Do you want to use the authenticator app? Then you first need to download the **app 'Google authenticator' or 'OpenOTP Token'** on your mobile phone.
- For an Android device: download the app from the Playstore.
- For an Apple device: download the app from the Appstore.
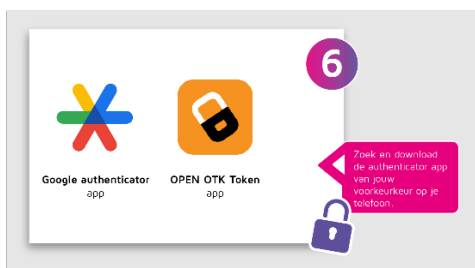
After downloading the app, click on **'Use authenticator'** in the screen below.
When you log in to the portal for the first time, you will automatically receive an email with account details and a verification code.
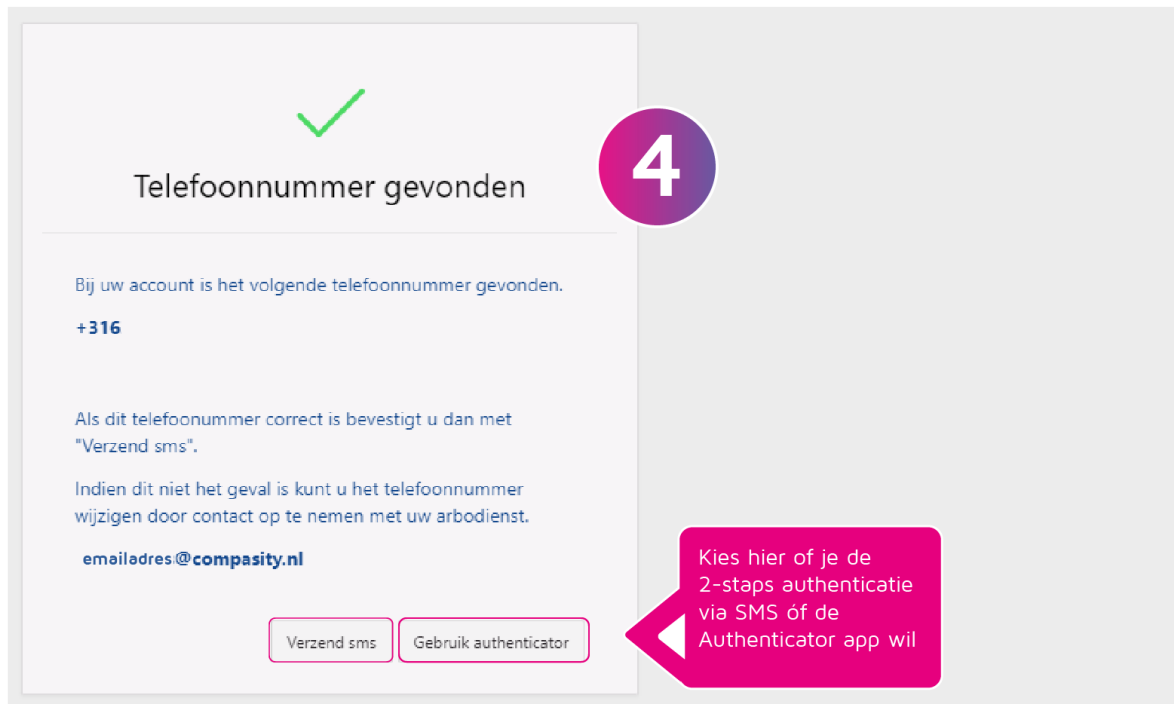
You can manually enter the code in the authenticator app. You can also choose to scan the attached QR code with your phone. In this way, the code is automatically entered into the app.

Is the QR code not visible? In the pink framed square (image below), is normally the QR code.
Many e-mail programs don't show the image. Usually it works to stand with the mouse on the square and then click on the right mouse button. Then select the option download image. You can scan this QR code with the authenticator app that you have downloaded on your phone.

Once you've entered the code via the authenticator app, you can log in to the portal. Have you lost the authenticator? For example, because you have a new phone? Then click on the '**New application code' button**.

You are now logged in to the Verzuimcoach employer portal!

Portal dashboard

When you log in, you will be taken to the dashboard overview below within the Compasity portal:
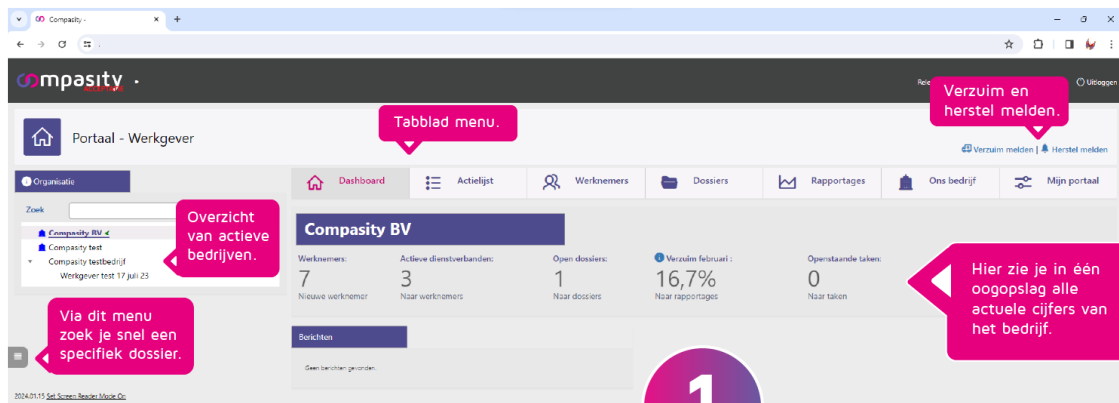

In the dashboard, you can see a global overview of the files and the most important figures at a glance.
At the top you will see the overview tab with the options: **'Dashboard'**, **'Action list'**, **'Employees'**, **'Dossiers'**, **'Reports'**, **'Our company'** and **'My portal'**. We will briefly explain these tabs for each section.

At the top right of the tab menu, you can navigate directly to the **'Report absence'** and **'Report recovery'**.
As you can see, there is also a **grey 'hamburger menu'** on the left side of the screen. This allows you to expand a window in which you can quickly and easily look up a specific file.
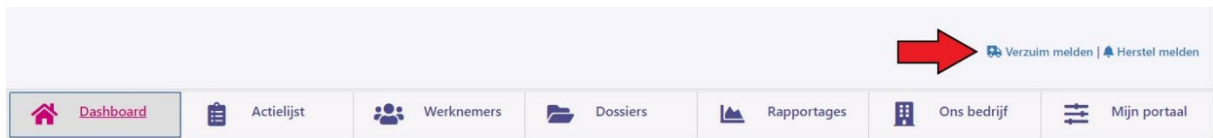In the black bar at the top, you can see which environment you are in and you can also find the option **'Log out'**.
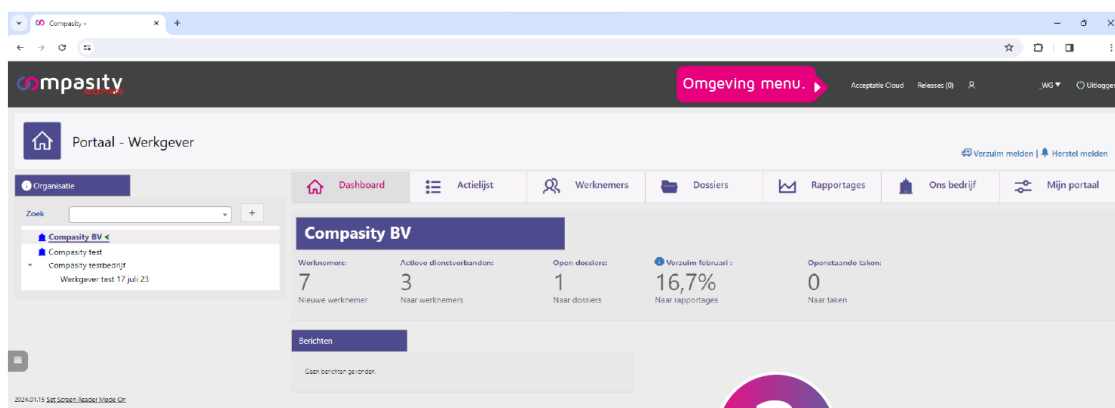
Rapid action > reporting absence

Click on '**Report absence**' at the top right of your screen.

You can search for a specific employee using different search criteria (see green box).
Then click on **'search'.**
Click on the + icon next to the employee in question to create the absence file.

If it concerns a new employee, you can easily create it with the **'New employee'**
button at the top right of the green box.
After this, you can also report the absence in the same way.
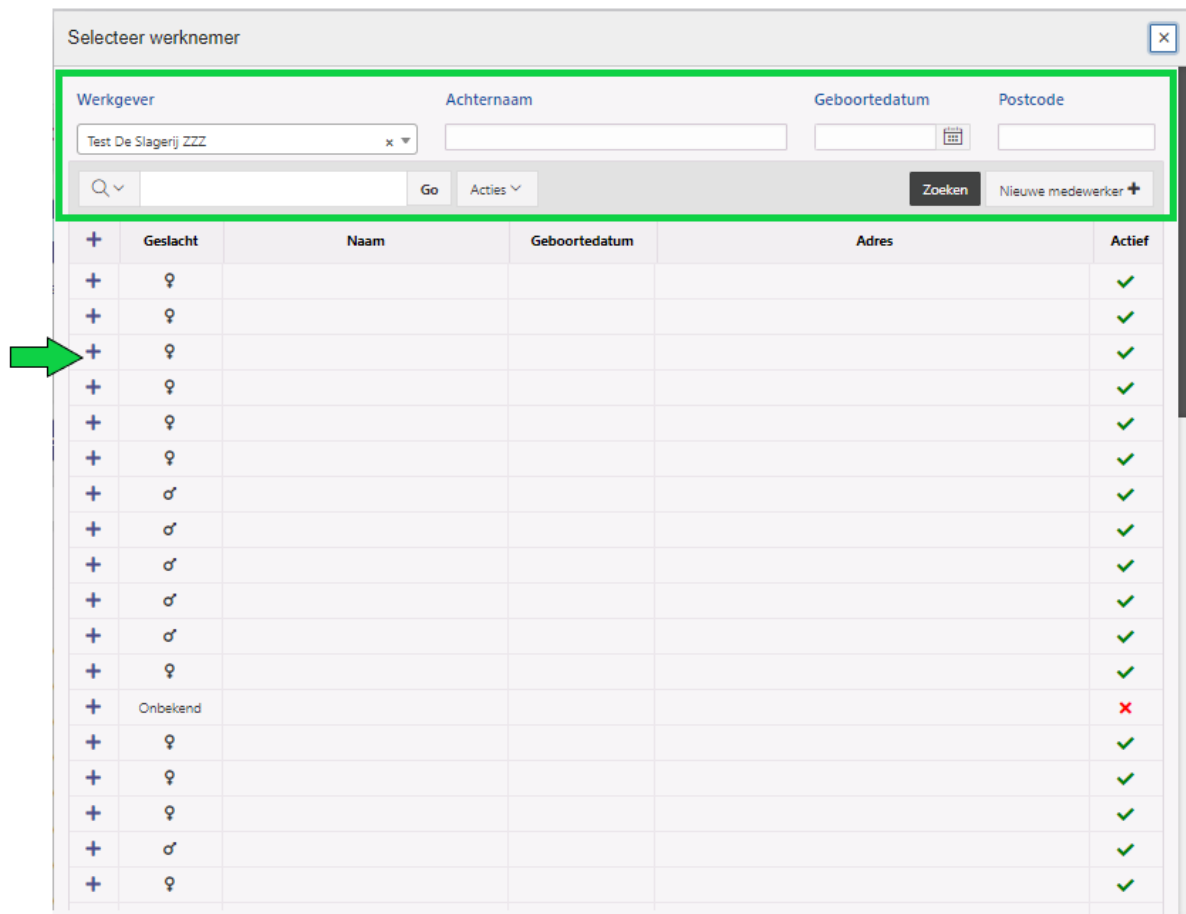
The next screen (image below) shows an overview of the employee's data and the
various options to fill in the details. Fields marked with a red asterisk are mandatory.

You can enter various criteria for this absence here. Try to fill in as much information as possible for the best and clearest possible registration. When all the details have been entered correctly, click on **'Save'**.

Now the absence file has been created for this employee. You can always find the file under the tabs **'Files'**, **'Employees'** or quickly search via the hamburger menu on the left side of the screen. You can also easily add notes, tasks, and attachments in the file.

Report Quick Action > Recovery

Click on '**Report recovery**' at the top right of your screen.
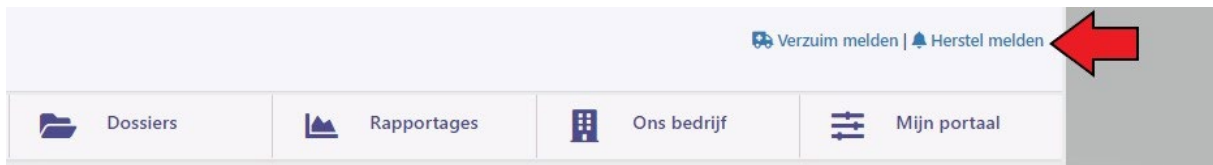
You can search for an employee using various search criteria (see green box in the image below). Then click on '**Search**'.
From the filtered list, you can select the employee in question by pressing the indicated arrow (green arrow). Click '**Next**' (red arrow) to continue.

In the screen below, you can choose between a partial or full recovery. Once the details have been filled in, you can complete the operation by clicking on **'Save'**. Now the recovery notification has been completed.

Explanation tabs

'Action List' tab (Figure 3)

 In the action list, you can see the actions/tasks that are open. You can sort this in different ways (green box). You can use the sub-tabs to switch to completed tasks, feedback and notes (see red box).
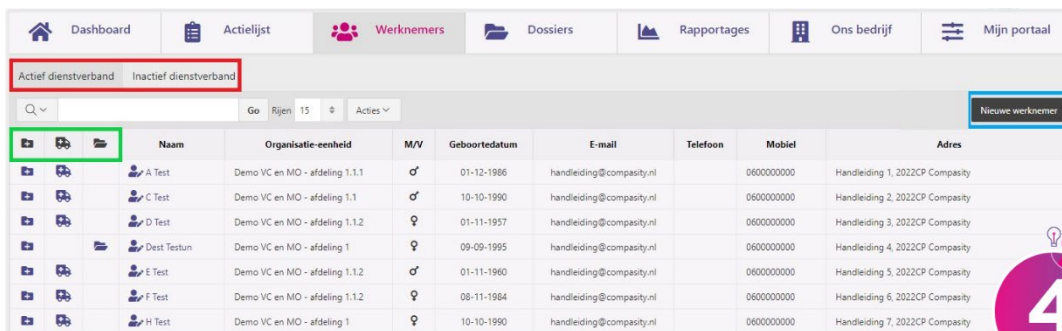In the search window, you can search with a specific filter, for example by file or name (blue box).

'Employees' tab (Figure 4)

In the '**Employees**' tab, you can choose between files of employees with an active employment contract or an inactive employment contract (red box).
In addition, under the '**Action' option**, you can choose how you want to sort the files and you can choose to download the data, among other things.

In the overview (green box) you will see the following icons:
 = create a new file, = an up-to-date medical file and = an ongoing other file (e.g. pregnancy).
If you click on one of the icons, you will go directly to the file.

In the blue box in the image above, you will see a button to create a new employee.

To create a new employee:

When you have clicked on '**New employee**' you will be taken to the screen below. Fill in the employee's details here and click on '**Next**' (fields marked with a red asterisk are mandatory).

Then, in the next screen (image below), fill in the employee's address and communication details. After that, click on '**Next**'.

Then, in the next screen (image below), fill in the employee's employment details. Try to fill this in as completely as possible. If this does not happen, it can have consequences for your reporting overviews. After that, click on '**Next**'.

Finally, you will see the control screen below. Here you can check all the fields you have filled in for inaccuracies. When everything is correct, click on '**Save**'. The employee has now been created.

Modifying employee details:

If you want to change the employee's details, you can easily do so via the **'Employees'** tab or quickly search via the hamburger menu on the left side of the screen.

This will take you to the employee file of the employee in question.
Under the '**General**' **tab,** you can change various personal and contact details of employees.
Under the tab '**Employment**' you can adjust the employment contracts of employees.
Under the tab '**Dossier card**' you will find an overview of any absence reports. The '**Decisions**' tab contains information if a WIA, WAO or wage sanction decision applies.

Tab 'files' (5)

This selection can be sorted into '**Open files**', '**Closed files**' and '**Recent files**'.
By clicking on the name of the employee, you go to the employee details (green box). On the far right of the screen, you can see how far the sick report has progressed compared to the period of the Gatekeeper Improvement Act (purple box).

By clicking on the icon on the left, 📂 you can open the file in question (blue box). You will then be taken to the screen as shown in the image below:

You can see the timeline of this case on the left side of the file. In this timeline you will find an overview of all appointments, documents and notes related to this file. In the box on the right, you can see the details of the employee in question. You can also add notes, tasks, attachments, contacts, and more.

To add a task to a file:

In the file, you can add tasks, among other things. This allows you, for example, to draw your attention to a note or appointment that you have made.
When you are in the relevant file, you can click on the icon in the right column in the taskbar menu [✓] to create a task (see image below).
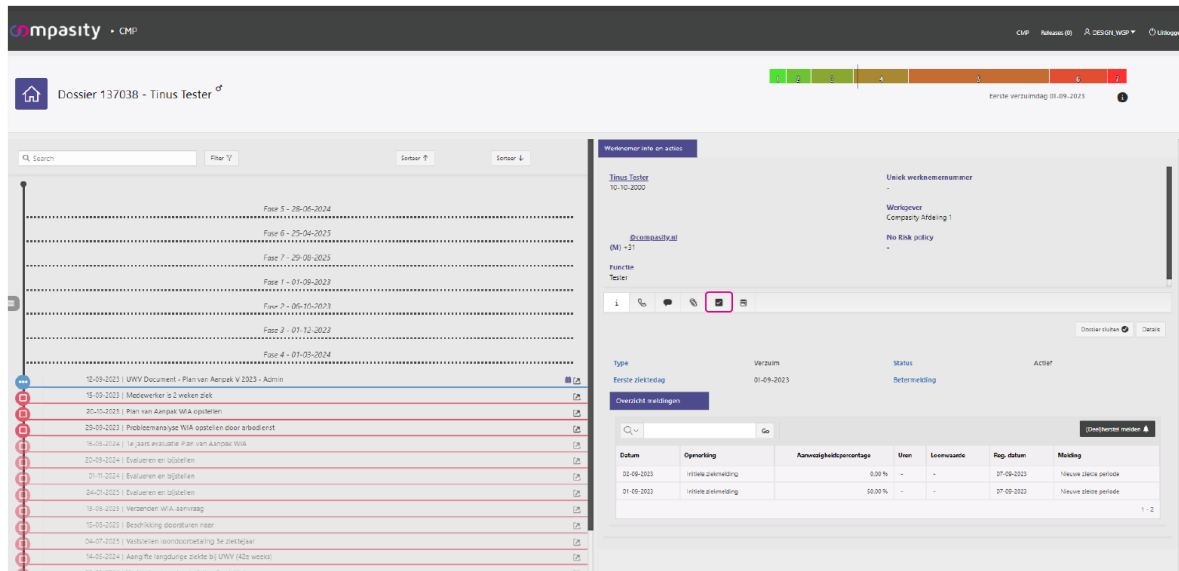
You will now see an overview of the active tasks with their status completed/not completed (see image below).
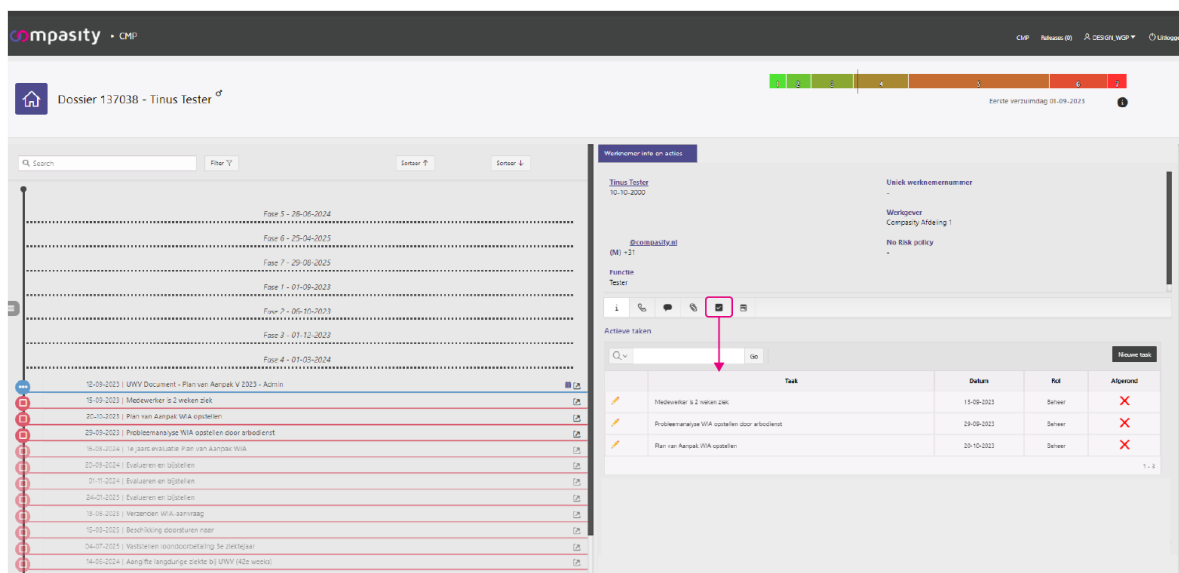
You can edit tasks more actively by clicking on the [✏] icon.

Click on the 'New task' button at the top right (above the completed tasks).
You'll see the screen below:

When you create a new task, it is mandatory to give it a title. Under '**Description**', briefly write down what the task entails so that it is clear to the person reading it. Give a due date for this task, and then choose the executive role for this task (i.e., who is this task for?). Finish by clicking '**Save**'. The task has now been created and can be seen in the '**Active tasks**' **list**.

To add an attachment in a file:

You can add attachments to a file. Open the relevant file to which you want to add an attachment. Click on the 📎 icon. You will then be taken to the screen below.
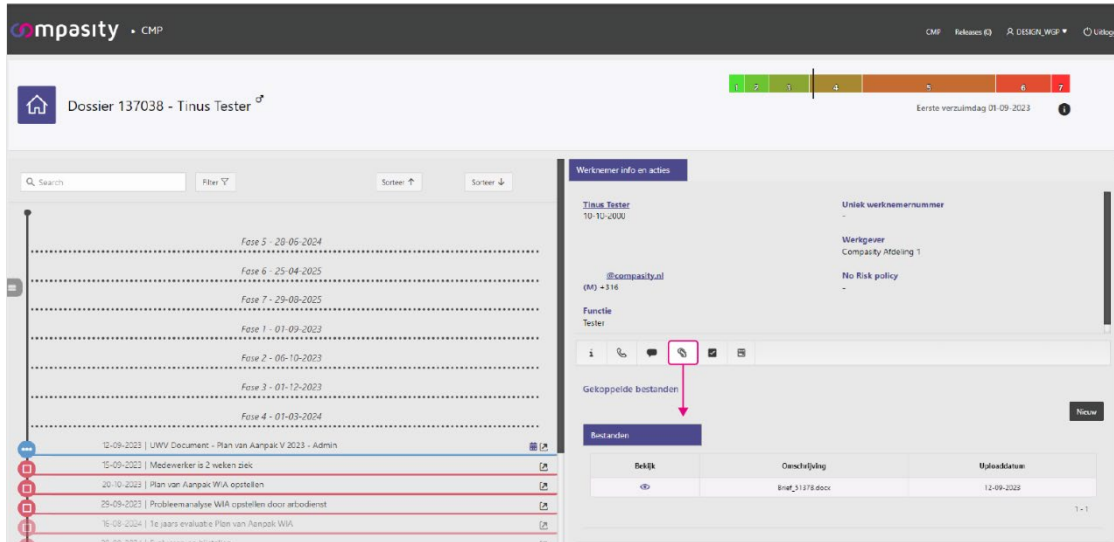
Attachments that are already in there can be viewed immediately when there is an 👁 icon in front of them. Click on the 👁 icon to view this attachment right away.

To create a new attachment, click on **'New'**. You will then be taken to the pop-up window below.
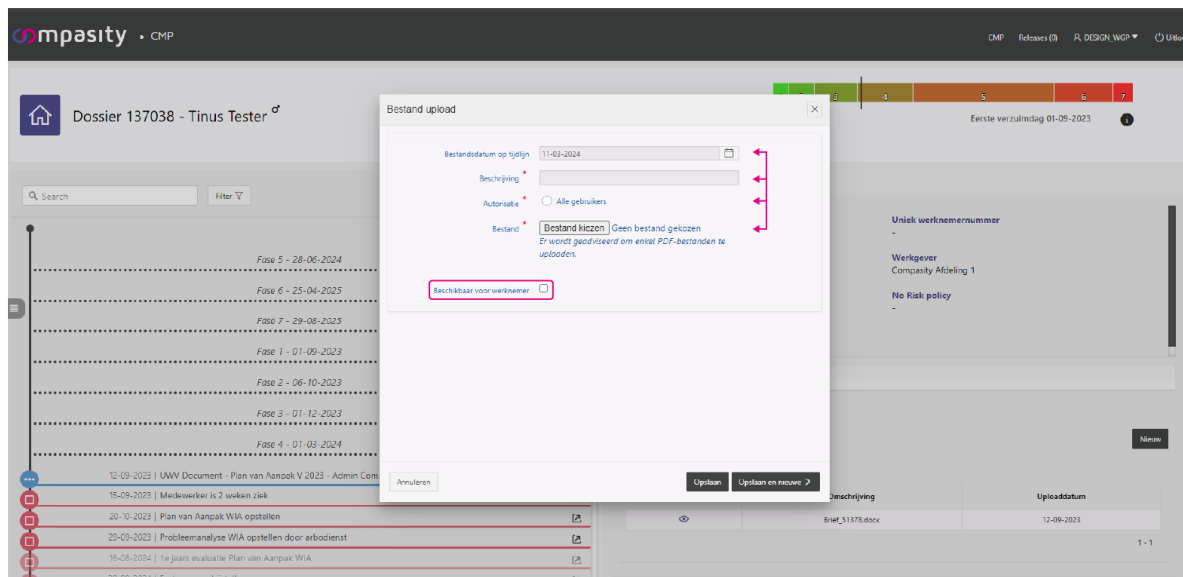
First, set when you want this attachment to appear on timeline. Then provide a short, clear description of the attachment and select the authorization.
Click on the **'Add file'** button to find the relevant attachment. The preferred file format is PDF. This is because these files are easy to view via the 👁 icon. Other files must first be downloaded by the reader.
As a last option, indicate whether you want to give the employee access to this attachment. Then click "**Save**" or "**Save & New**" to add another attachment.

Composite absenteeism report to WAZO

Those who are pregnant and working or receiving benefits are entitled to maternity leave and maternity pay. And after giving birth, you are entitled to maternity leave and a maternity allowance.

Below you will find information about the three different ways in which you can register a composite absence report in Absenteeism Coach. This concerns the combination of absenteeism and pregnancy.
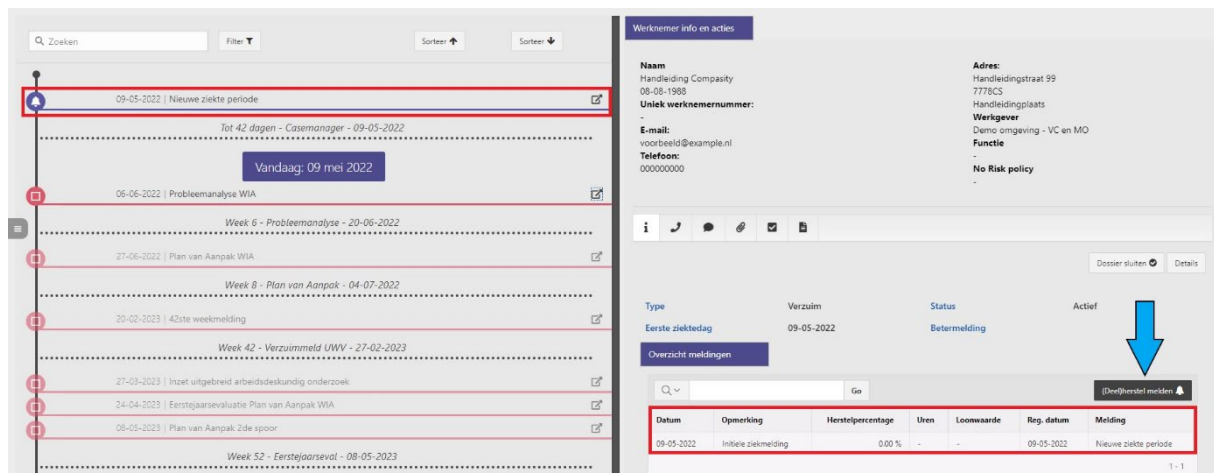
Scenario 1 - absenteeism before and after the WAZO period.
Scenario 2 – absenteeism in the follow-up of a WAZO period.
Scenario 3 – from an absence period to WAZO period and then to recovery.

Scenario 1 – absenteeism before and after the WAZO period.

In a composite absence report relating to a WAZO period, there is already an absence file before an employee actually enters her WAZO period. Below we go through this scenario with a test employee:

On 1 January 2021, an absence report was submitted to this employee in Absenteeism Coach. A file has been created for this purpose (see image below).

When the employee starts her WAZO period on 3 January, you can register this by

clicking the button [(Deel)herstel melden 🔔] (see the blue arrow in the image above). You

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will now automatically be taken to the recovery window as shown in the image below.

In the image above, you indicate in the blue box that you want to close the file together with the date that applies here. Now you will be given the option to specify a reason in the selection menu. Select '**Maternity leave entry**' and then click '**Save**'.

You will now automatically go to a new screen where you open a new file, see image below. Check whether the '**Reason**' checkbox is set to '**Maternity leave**' and whether the date of the start of the WAZO period is correct. (blue frame in image). Then save the file.

If you then open the card in the employee file, you will see the screen as shown in the image below.

Blue box = first file (1st absence notification) where the first line is about the opening of the absence file. The second line indicates that the absenteeism file is closed because maternity leave has commenced.

Red box = maternity leave file. This is a new file that is separate from the previous absenteeism file.

In this scenario, the maternity leave ended on 5 January 2021, but the employee is not yet able to work because the complaints of the first absence report are still present. The image below shows that the employee's maternity leave file is closed:

After you have closed this file, you will automatically be taken to a window in which you can submit a new absence report. Because this absence is related to the absenteeism file from before the maternity leave, you want to link this file to the file before that.

In the image below, select the desired file under the blue arrow that you want to link and check in the blue box whether the correct absence notification has been selected and the date has been entered correctly. Then click on **'Save'.**

The first file containing the absence report now looks like this (see image below). In the blue box, you can see that this file was started with an absence report. This is then transferred to a WAZO period and ends in an absence report.

Scenario 2 – absenteeism in the follow-up of a WAZO period.

In this scenario, an employee becomes ill within a WAZO period. The absence notification must then be entered after the WAZO period.
On 1 January 2021, a file was created for this employee for a WAZO period.

On 12 February 2021, the WAZO period ended, but the employee reported her absence for this. Click on '**Close file**' within the existing file, see the blue arrow in the image below.
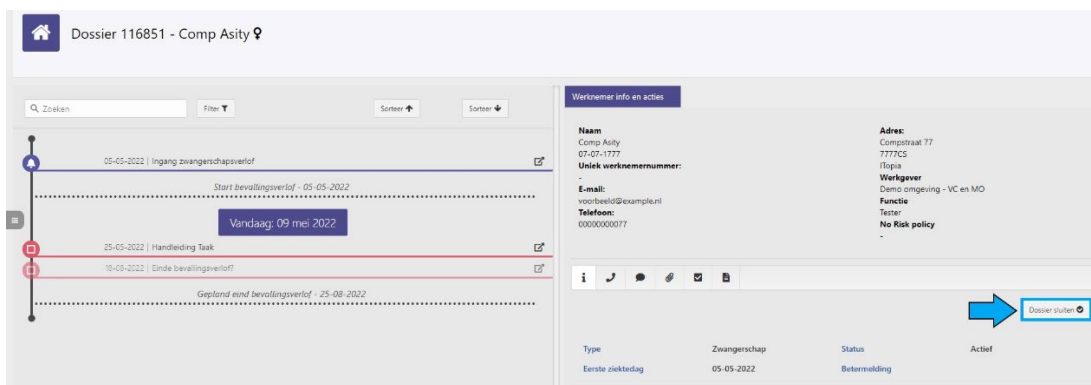
The 'Report (partial) recovery' **window will then automatically appear**.
Check in the blue box (see image below) that the correct start date is selected. Then select '**Absence after the end of maternity leave**' at the blue arrow. Now click on '**Save**'.
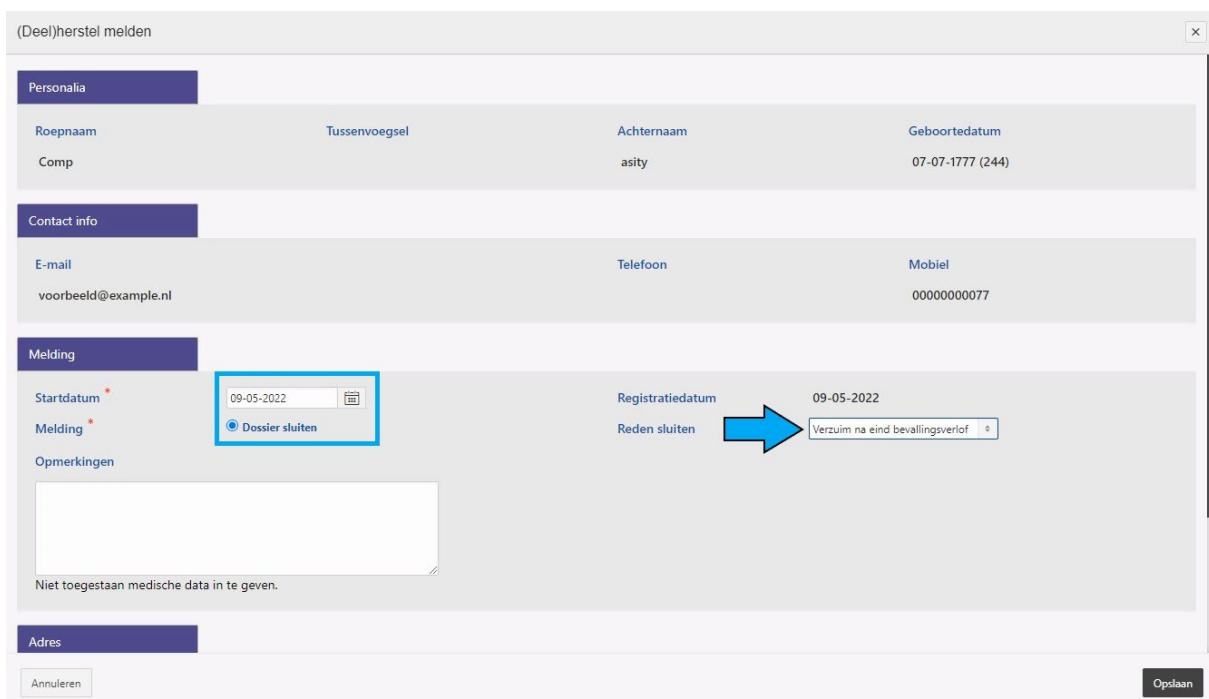
Now a new absence window will open where you can report a new absence, see **image below**. Again, check the correct reason and select the date in the red box. Fill in the interruptive information about the absence, and then save the notification.

In the employee's file card, you can now see the overview as shown in the image below.

<u>Blue box</u> = start of the WAZO period and the end of the WAZO period with absence notification.

<u>Red box</u> = start of new absenteeism file.

Scenario 3 – from absence to WAZO and to recovery.

In this scenario, there is already an absence notification before the employee enters a WAZO period. After the WAZO period, the employee has recovered.
The absence notification was made on 1 April 2021 (see also the blue box in the image below).

On 14 April 2021, the WAZO period begins. To register this, open the previously created absence report and press the '**Report (partial) recovery**' button (see the blue arrow in the image below).

You will now automatically be taken to the recovery screen as shown in the image below. Enter the correct date in the blue box and select the '**Close file**' option. Under '**Close Reason**' you will now be given a number of options; choose '**Commencement of maternity leave**' (see blue arrow) and then click on '**Save**'.

You will now automatically be taken to a new absence screen as shown in the image below. Check in the blue box whether **'Reason' has 'Maternity leave'** selected. Also check that the correct date has been entered. After that, save the notification.

When you go to the file card of the employee in question, you will see your screen as shown in the image below.
The top blue box indicates the start date of the first absence notification and the bottom blue box indicates the end date of this absence notification with the start of maternity leave.
In the red box you can see the new file for maternity leave (WAZO period).

We are now going to report the end of this employee's WAZO period. To do this, open the last file with **'Commencement of maternity leave'** by clicking on the icon in the red box 📁 .

You will be taken to the screen below. Click on **'Close file'** (blue arrow).
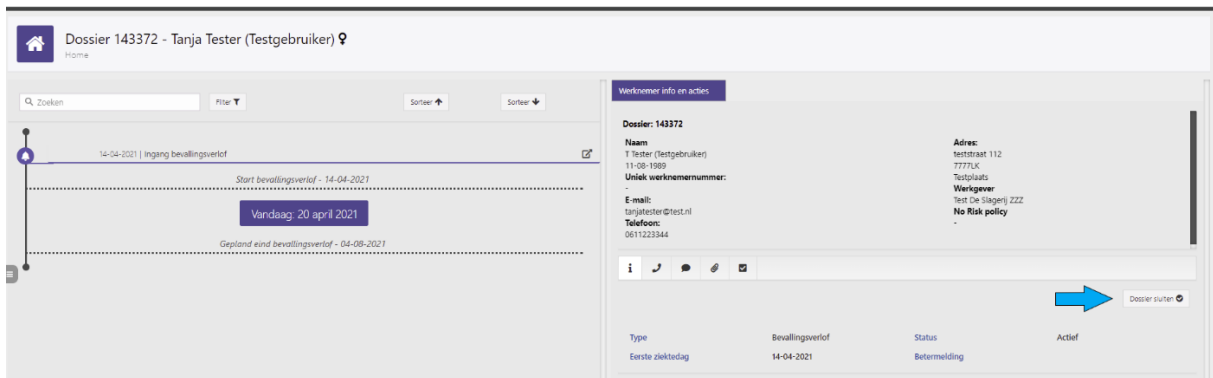
You will now automatically be taken to the new window **'Report (partial) recovery'** as shown in the image below. Check the date in the red box. Then choose from the selection list: **'End of maternity leave'** (blue arrow). Save the notification now.
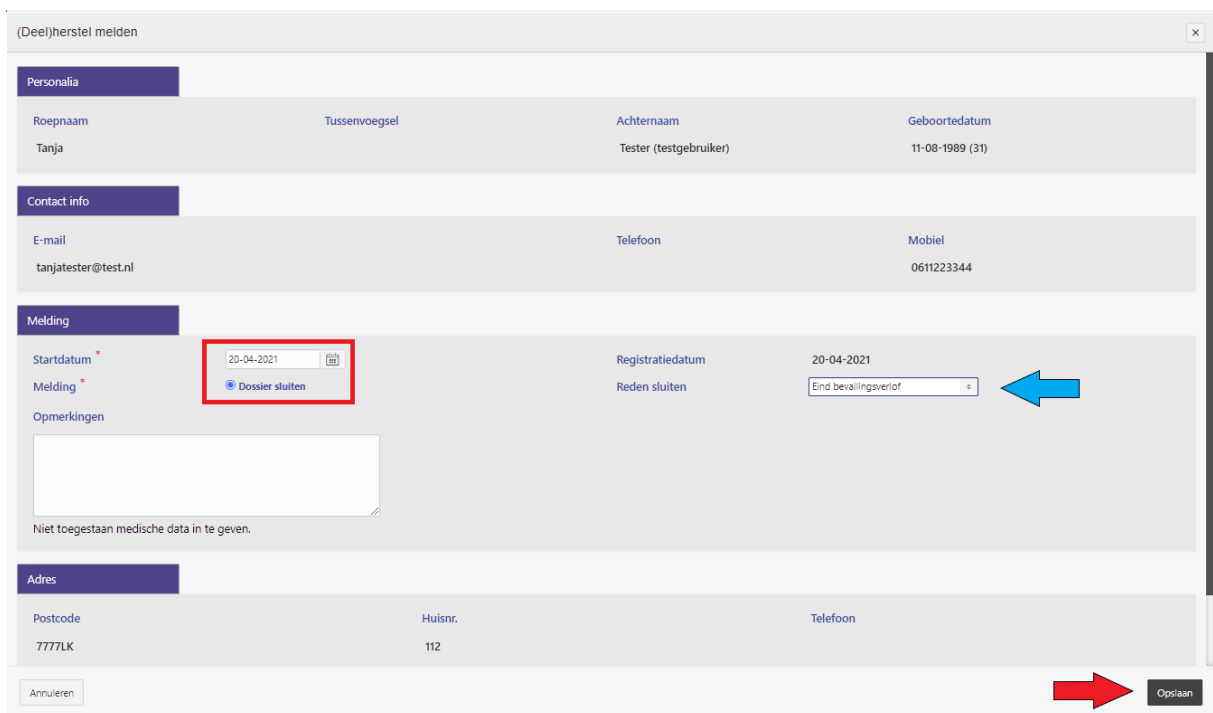
When you now go back to the file card of this employee, you will see the image below.

In the red box, you can see the absence notification prior to the WAZO period.
In the yellow box, you can see the start of the WAZO period in a new file.
In the blue box, you can see the end of the absence notification of the file.
In the green box, you can see the end of the WAZO period and the closure of the file.

Status	Dossiernummer	Dossier type	Melding type	Datum	Verzuimpercentage	Duur (dagen)	Opmerkingen
🔓	📁 143368	Verzuim	Nieuwe ziekte periode	01-04-2021	100	13	Initiele ziekmelding
🔓	📁 143372	Bevallingsverlof	Ingang bevallingsverlof	14-04-2021	-	6	-
🔓	📁 143368	Verzuim	Ingang bevallingsverlof	14-04-2021	-	Openstaand	-
🔓	📁 143372	Bevallingsverlof	Eind bevallingsverlof	20-04-2021	-	Openstaand	-

Tab 'Reports' (6)

When you click on the 'go to reports' button, you will be taken to the reporting environment.

The authorization is based on the user's profile. Are you a user with a medical profile? Then you have access to all reports. Are you a user with an 'employer' profile? Then you only have access to reports that are known in the employer portal.

In the employer portal, several options are possible within the reporting module:

- Comparison Reporting
- Absence duration classes
- Absenteeism rate
- Reporting frequency
- Download reports

1. Reports - Comparison Reporting

With this option, you can easily compare all reports that can also be made separately here, namely:

Absence duration classes
Absenteeism rate
Reporting frequency of illness (frequency of absence)

To draw up a comparison report, start by setting up the employer and/or department (see image below).
At the bottom of the heading '**Absenteeism**' (top left of the screen) you can filter the employer on which you want the report to run in the options bar.
You can then choose a specific department to the right of the screen.

At the top, you can first set up the **absence report**. This report compares the absence rate, the percentage of absence days of the available days, for the reference periods month, year and the average from the last twelve months, use the selection box next to the search field to change the comparison.
Choose the year over which you want this absence report to run. Click on '**Refresh report**'.
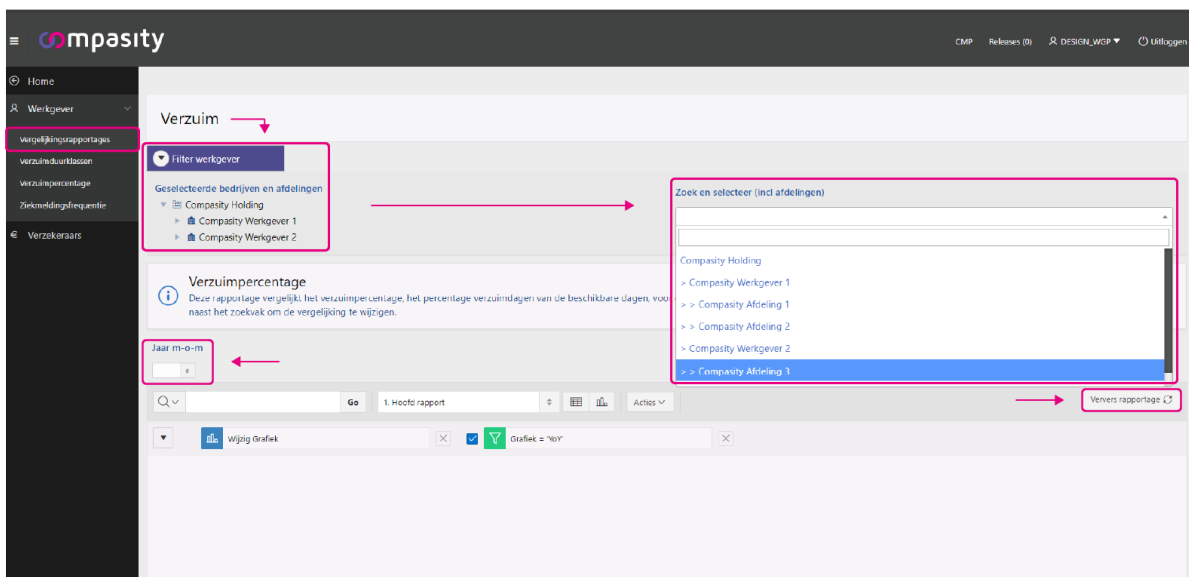
After that, you will immediately see the report on absenteeism percentage as shown in the image below.
At the $\mathcal{Q}\vee$ icon you can set certain search criteria in this report. If you don't use a graph, but only the data, you can bring up certain data or, for example, names in this report.
In addition, you can set "**Main Report**" or "**Month by Month and Annual Average.**"
Under '**Actions**' you can divide certain columns and, for example, download the report. For additional information on how to download, please see the heading '**Download report**' at the end of this chapter.
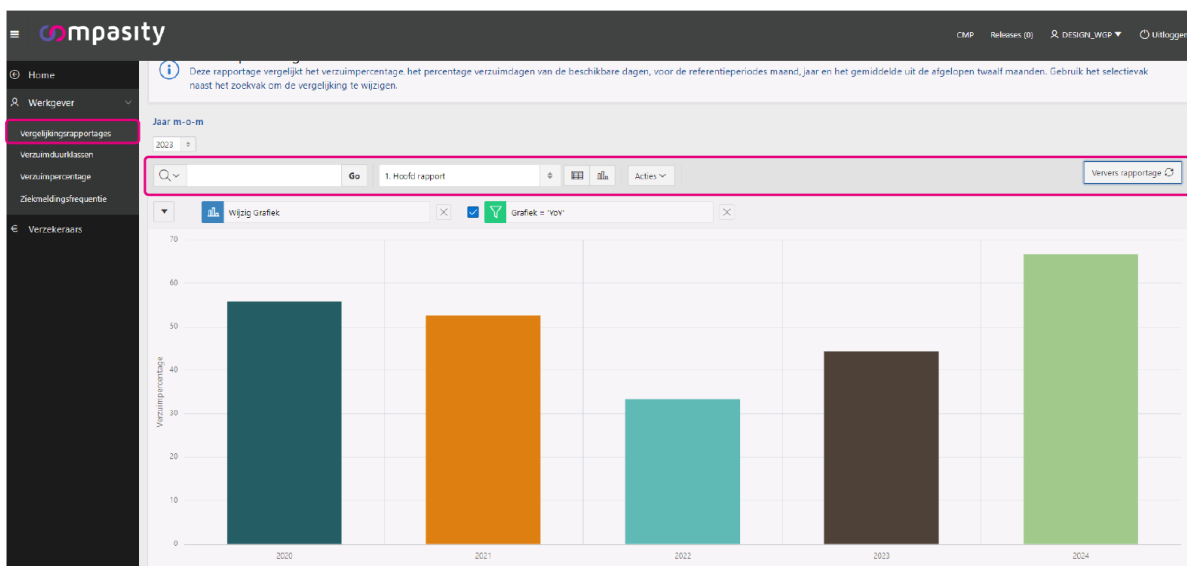
See image below.
Under **Edit Chart**, you can change special actions and the look of the chart. Click '**Apply**' to set your choices.
At the green box next to it, you can set a filter for the graph data. Click '**Apply**' to set your choices.
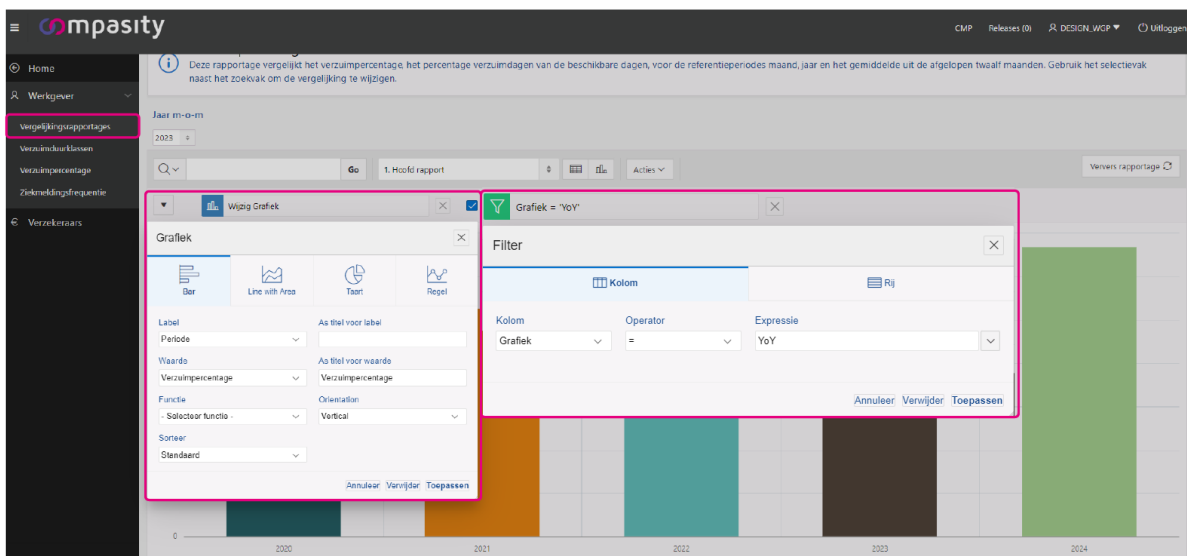
After this, you can set the **frequency of reporting sick** and **the duration of absence** in the same way. To show the data or graph, first choose '**Main report**' or '**Month by Month**' or '**Annual average**' and click on the ⊞ or ⅈⅈⅈ icon to show the data. After that, you can start adjusting the data or graph in the same way (see image below).

2. Reports – Absence duration classes

The duration of the absence is the number of calendar days from the first day of absence to the recovery date/end date.

See number 1 in image below:
First of all, you can select the period over which you want the report to run. In addition, you can select the desired age categories.
If you want to select the report including safety net, you can also indicate this.
Then press the 'refresh report' button to display the results.

At the *'Info' button* you can find information about the different absence duration classes.

See number 2 in image below:
In the first column you can make a selection of how you want to look up these different data. In the second column, you can choose the report type: **1. Main Report, 2. Percentage higher than 14% or 3. Distribution within reporting period**
At the **'Action' button** , you can adjust various overview options, but you can also download reports, save them or designate subscribers.

3. Reports – Absenteeism rate

The absenteeism rate is calculated by the total number of sick days of the employees (in percentages), of the total number of available calendar days in the reporting period.

See number 1 in image below:
In the first marquee, you can select the period over which you want the report to run. The second marquee allows you to select specific ages. As a final option, you can also indicate whether you want all employees including the safety net to be included in the report. Then click Refresh **Report** to view the data you want.
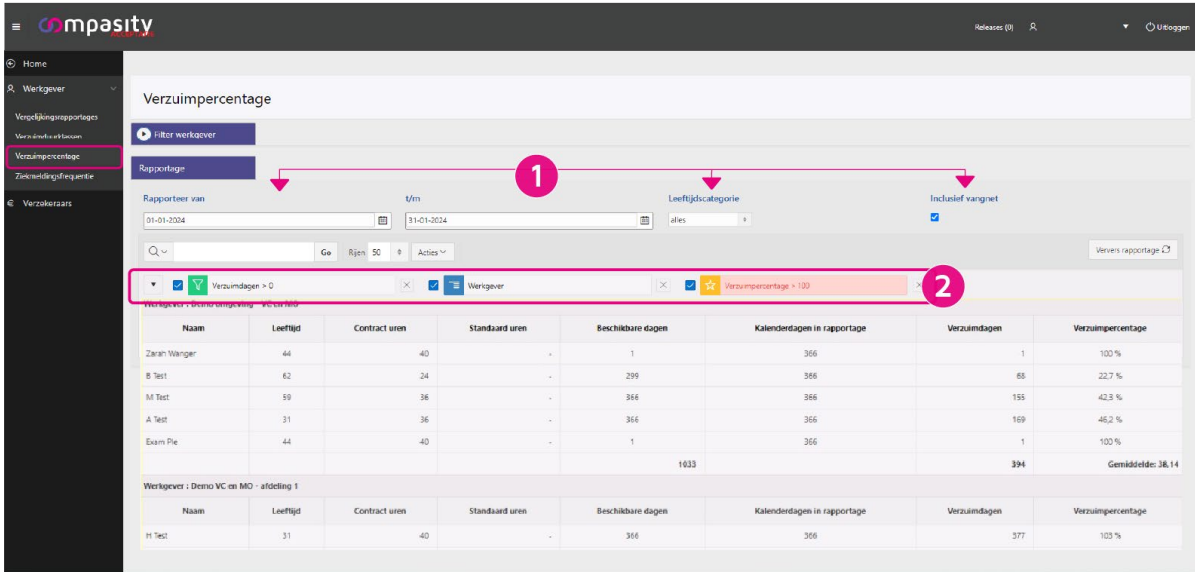
See number 2 in image below:
This box indicates 2 standard filters that you can check or uncheck. '**Absenteeism rate > 0**' shows the report of only sick employees.

Please note that the total average is only about the absenteeism population and not the entire population!

If you **tick 'Employer'**, you will see the list of absences per employer/department. This allows you to see the difference per employer/department.
Now you get an overview of the absenteeism percentage based on your preferences.

It is important that all employees have a valid employment contract, the correct working hours, correct processing of absenteeism and/or improvement reports and full-time hours entered in their file. This way you get the right results within this report and a clear overview.

Again, you can use the various filters to adjust the reporting (see image below).
For the '**Absenteeism percentage**' bar, you can also choose a specific color setting.
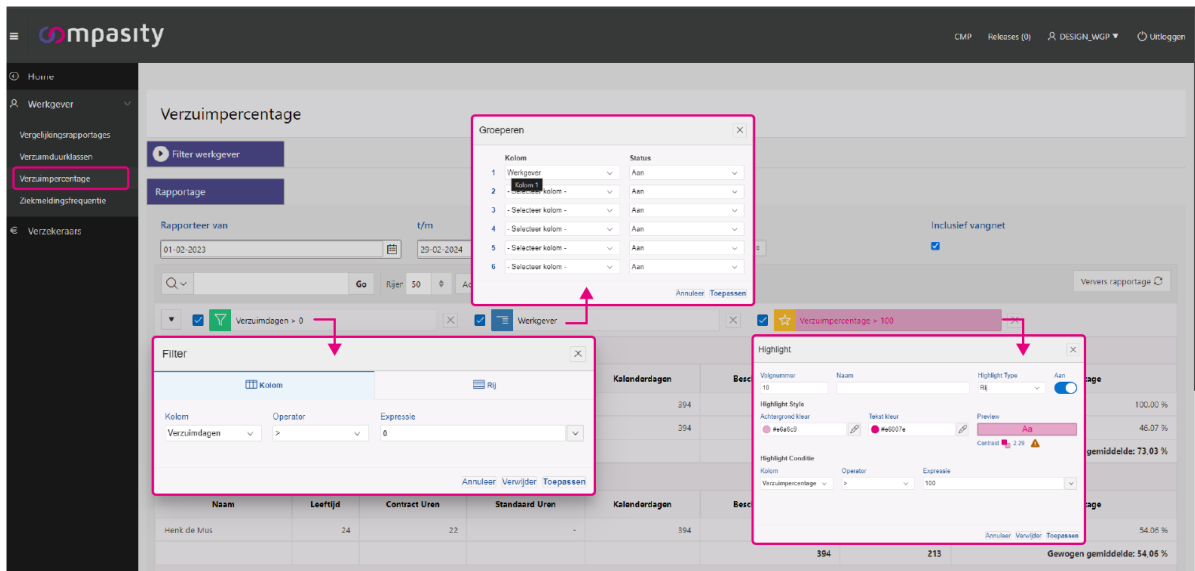
4. Reports – Reporting frequency (absenteeism frequency)

See number 1 in image below:
Select from which period you want to show the report. In addition, you can select age categories.

See number 2 in the image below:

Here you can make certain selections in the view of your report, such as the number of columns. Then click on '**Refresh report**'.
Now you will see the custom report.

5. Download rapportages

This option is available from any reporting overview.
Click on the '**Actions**' button and then choose '**Download**'. From that action you will get a window with the available download files: CSV, HTML, Excel, PDF and (depending on whether this has been set up by your health and safety service) email.

Usually, the file is downloaded as a CSV file. A CSV file is editable with Excel. CSV stands for **'comma-separated values'**. Most of the time, Excel does recognize the comma separation and turns it into columns right away and you can get started right away. See image below.

	A	B	C	D	E	F	G	H	I
1	Werkgever	Naam	Leeftijd	Kalenderc	Beschikba	Verzuimd	Verzuimpercentage		
2	Test De Slag	Zaza Zebr	10	30	18	18	100		
3	Test De Slag	Test Mede	7	30	6	1,6	26,7		
4	Test De Slag	C. Lama - I	40	30	30	0	0		
5	Test De Slag	Zoef de H	40	30	24	0	0		
6									

Sometimes this is not the case. You will then see columns separated by **;** or **,**. If this is the case, do the following:

CSV without columns can be converted quite easily with the help of Excel. Download the file and then open a new worksheet in Excel and click on **'Data'** in the bar at the top.
Then click on **'From Text/CSV'**. Then select the CSV file you want to convert. The rest is pretty much automatic.
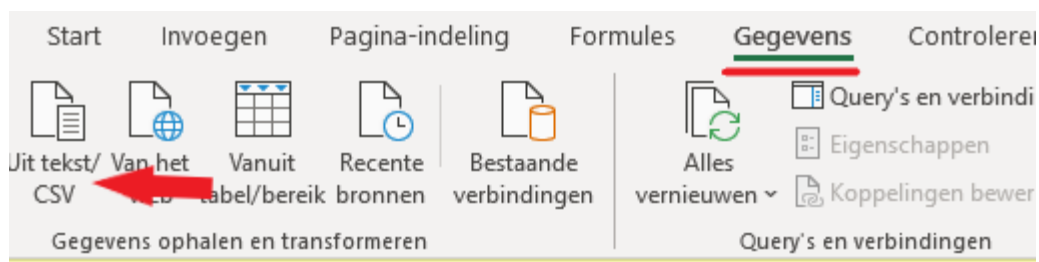
You can also separate the columns from the CSV file. The following link from Microsoft Excel is available:
https://support.microsoft.com/en-us/office/split-text-into-different-columns-with-the-convert-text-to-columns-wizard-30b14928-5550-41f5-97ca-7a3e9c363ed7

6. Insurers

Under the **tab 'Insurers'** you will find all data/files that can be forwarded to the insurers.

Tab 'Our company' (7)

In the '**My company' tab** you will find all the information about your company and the specific settings in Absenteeism Coach.
In addition to company details, you can also assign contacts per department, addresses, roles per contact under the other tabs, set insurance and retention periods for this company.

'My Portal' tab (8)

In the '**My portal' tab,** you can set which tasks you receive an alert for.