Van Altena & de Jongh

Planningsagenda

Manual October 2025

Date

October 2025

Author

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ATTACHMENTS

Part 1: Getting started

1.1 Logging in to the Planning Calendar

Step 1: Go to www.planningsagenda.nl

Step 2: Click on "Login" at the top right

Step 3: Enter your username and password

Step 4: Click on "Login"

1.2 Set up multi-factor authentication

Why MFA?
Multi-factor authentication (MFA) is mandatory within Planning Calendar. This provides extra security for sensitive employee data.

When should you set up MFA?
When you log in for the first time, a QR code will automatically appear that you must scan with an Authenticator app.

Which app do you need?

The most commonly used Authenticator apps are:

- Google Authenticator (Android/iOS)
- Microsoft Authenticator (Android/iOS)
- Other authenticator apps also work

How to Install Google Authenticator - Step by Step

Step 1: Install Google Authenticator

- Download via Google Play Store (Android) of App Store (iOS)
- Open the app after installation

Step 2: Add a new account

1. Tap the '+' button in the bottom right of the app
2. Choose one of the following options:
    - **Scan QR code:** Use your camera to scan the QR code from Planning Calendar
    - **Enter Setting Key:** Manually enter the account name and key

Step 3: Use verification code

1. Once added, a **6-digit code will appear** next to your account name
2. This code changes every 30 seconds
3. Enter this code when Schedule Calendar prompts when logging in

NOTE: Be sure to save backup codes in case you lose your phone. Use an app lock or biometric security on your phone for added security.

1.3 Your First Login – What You Need to Know

After your first successful login with MFA:

- You will be taken directly to the **Dashboard** (see Chapter 2)
- Your login details will be remembered (when using "Remember")
- With each subsequent login, the system will ask for your MFA code

TIP: Make a note of your username and keep it in a safe place. You should never write down or share your password.

Summary Chapter 1:

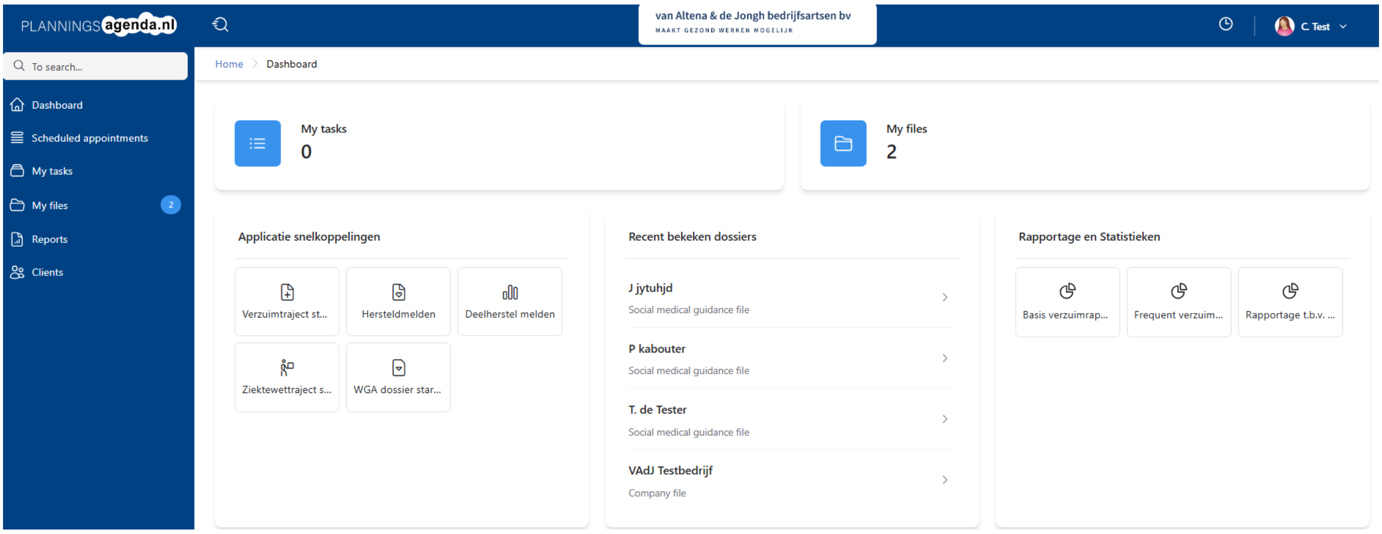
- Logging in via www.planningsagenda.nl
- MFA is mandatory for extra security
- Use an Authenticator app like Google Authenticator
- Store backup codes in a safe place

Next steps: Go to Chapter 2 to get to know the dashboard.

See:

- Section 2.5 - Managing Your Account
- Appendix A - FAQ about login problems

2. The dashboard – your starting point



2.1 Overview of the dashboard

The dashboard is the first screen you see after logging in. It provides an overview of your organization and the most important information at a glance.

What do you see on the dashboard?

- **Left side:** Navigation menu with all main functions
- **Middle:** Widgets with quick access to tasks, folders and shortcuts
- **Right side:** Statistics and overviews
- **Top:** Search function and account settings

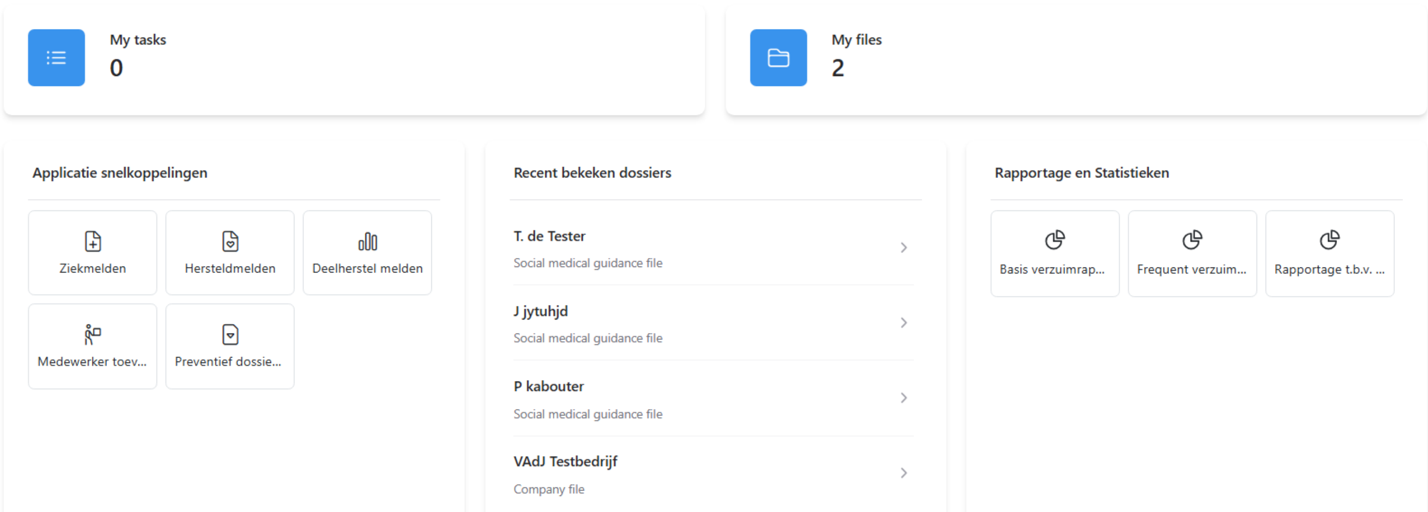
2.2 Navigation menu (left)

The menu on the left contains all the main functions of the portal:

1. **Dashboard** – The overview screen (where you are now)
2. **Scheduled appointments** - All scheduled absence interviews (→ see H6)
3. **My tasks** - Your open tasks (→ see H4)
4. **My files** - All absenteeism files (→ see H5)
5. **Reports** - Absenteeism reports and analyses (→ see H7)
6. **Clients** - Overview of all employees (→ see H3)

2.3 Dashboard widgets

Widgets are interactive blocks on your dashboard that give you quick access to key functionalities.



2.3.1. "My Tasks" widget (top left)

What will you see:

- The number of open tasks

What can you do:

- Click on the widget for the full task overview
- → **For more information, see Chapter 4**

2.3.2. "My files" widget (top right)

What will you see:

- The number of active absenteeism files

What can you do:

- Click on the widget to access all files
- Click on "Overview" for extensive list
- → **For more information, see Chapter 5**

2.3.3. Widget "Application Shortcuts" (left) (Applicatie Snelkoppelingen)

This widget provides quick access to the most commonly used actions:

1. Starting a sickreport (Verzuimtraject starten)

- To register a new sick report
- → **See Section 8.1 for explanation**

2. Register recovery (Hersteld melden)

- To report that an employee has recovered
- → **See Chapter 8.2 for explanation**

3. Register partial recovery (Deelhersteld melden)

- For partially recovered employees
- For example: working in an adapted position or reduced hours
- → **See Chapter 8.3 for explanation**

4. Add employee (Medewerker toevoegen)

- For manually adding a new employee
- → **See Chapter 3.2 for explanation**

5. Start a prevention file (Preventief dossier toevoegen)

- For preventive files (no absenteeism)
- Focused on prevention instead of absenteeism guidance

TIP: Click on a tile to instantly start the action without navigating through menus.

2.3.4. Widget "Recently viewed files" (Recent bekeken dossiers) (centre)

What will you see:

- Files you have recently opened
- With name and type of file

What can you do:

- Click on a file to go directly back to that file
- Saves search time for regularly used files

2.4.4. Widget "Reporting and Statistics" (Rapportages en statistieken) (right)

What will you see:

- Shortcuts to the most important reports

Available shortcuts:

1. **Basic absenteeism reporting (Basis verzuimrapportage)** - Standard key figures
2. **Frequent Absence Report (Frequent verzuim)** - Identifies frequent absentees
3. **Reporting for absenteeism insurer (Rapportage t.b.v. verzuimverzekeraar)** - For your insurer

What can you do:

- Click on a report to generate it immediately
- → **For full explanation, see Chapter 7**

2.4 Quick Search

Where to find it:
At the top of the screen, centrally located

What to look for:

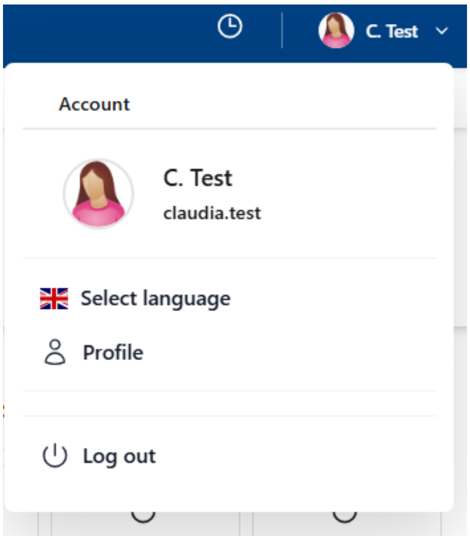
- Specific employees (clients)
- Companies or departments
- Files

How does it work:

1. Click in the search bar
2. Type your search term
3. Press Enter or click the search icon
4. Results appear instantly

TIP: Use quick search when you want to quickly find a specific employee or case without navigating through menus.
→ **See also:** Chapter 8.7 - Quickly Find an Employee

2.5 Managing Your Account



Access:
Click on your profile image or username in the top right.

Account-menu opties:

1. Select language
- Icon: Dutch flag
- To change the portal language
- Default set to Dutch
- Available languages are shown in the menu

2. Profile
- Access your personal profile settings
- Here you can change:
  - Contact details
  - Password

3. Log out
- Securely log out of the employer portal

SECURITY TIP: Always log out when you're done, especially in shared workspaces or away from your own device.

Summary Chapter 2:
- Dashboard is your central workspace
- Navigation menu on the left gives access to all functions
- Widgets provide quick access to tasks, records, and actions
- Quick search helps you find information quickly
- Account menu at the top right for personal settings

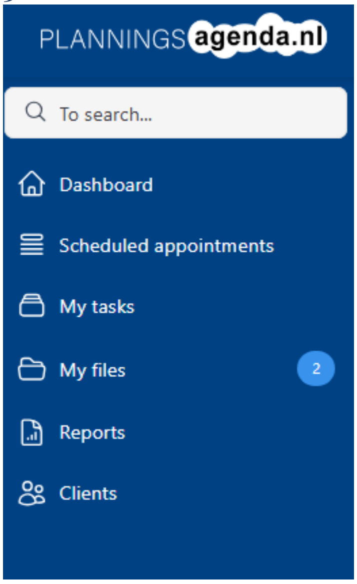
Next steps:
- Go to Chapter 3 to learn how to work with employee data
- Or jump to Chapter 4 to get started with tasks right away

See:
- **Chapter 4** - Performing tasks
- **Chapter 5** - Absenteeism files
- **Chapter 8** - Quick Actions

Part 2: Daily work

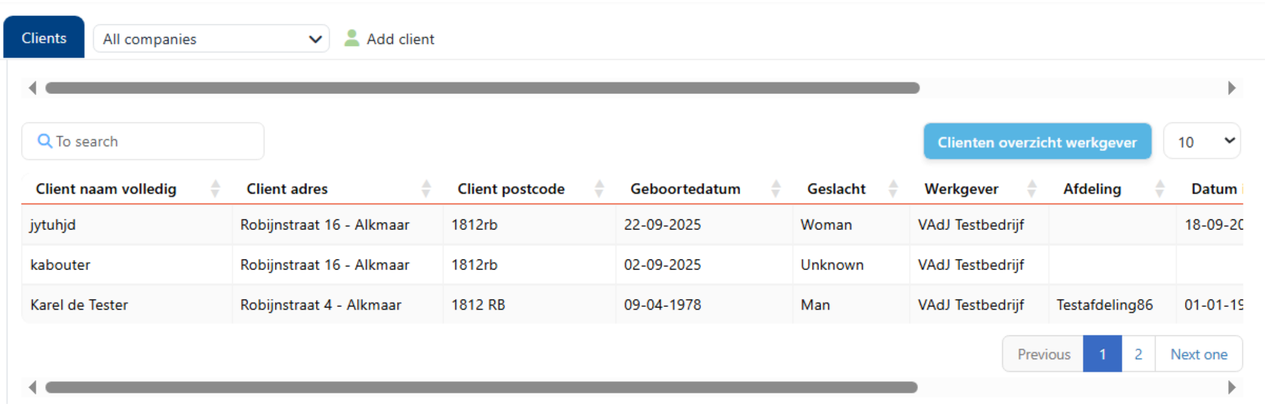
3. Search and find employees

3.1 Access to the client overview



From the navigation menu:
- Click on "Clients" in the menu on the left

What is the difference with "My files"?
- **Clients:** All employees (also without absenteeism)
- **My files:** Only employees with an absence file
- **→ See also: Section 3.4 and Appendix C**



3.1.1 Search for a specific employee

Method 1: Use Search Bar

1. Click in the search bar at the top left of the screen
2. Type the name of the employee
3. Or type the employee number
4. Results are filtered instantly

Method 2: Sort by column

1. Click on a column header (e.g. "Client naam compleet")
2. The list is sorted (ascending/descending)
3. Click again to reverse the sorting direction

Method 3: Filter by Company

1. Use the "All companies" drop-down menu at the top
2. Select the desired company or location
3. Only employees of that company are shown

3.1.2 Information in the overview

The table shows the following columns:

1. **Client Name Full (Client naam volledig)** - Full Name
2. **Client address (Client adres)** - Residential address
3. **Client Postal Code (Client postcode)** - Postal Code
4. **Date of birth (Geboortedatum)** - Date of birth
5. **Gender (Geslacht)** - Male/Female/Unknown
6. **Employer (Werkgever)** - Name of organization
7. **Department (Afdeling)**- Department where employee works

8. **Startdate employment (Datum in Dienst)** - Start date of employment
9. **Date of termination of employment (Datum uit Dienst)** - End date (if applicable)

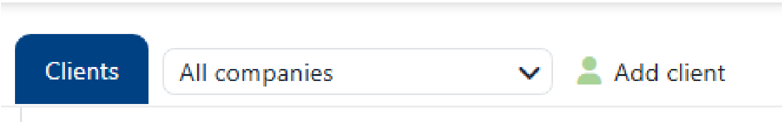
TIP: Click on an employee to open the full profile and any files.

3.2 Add new employee

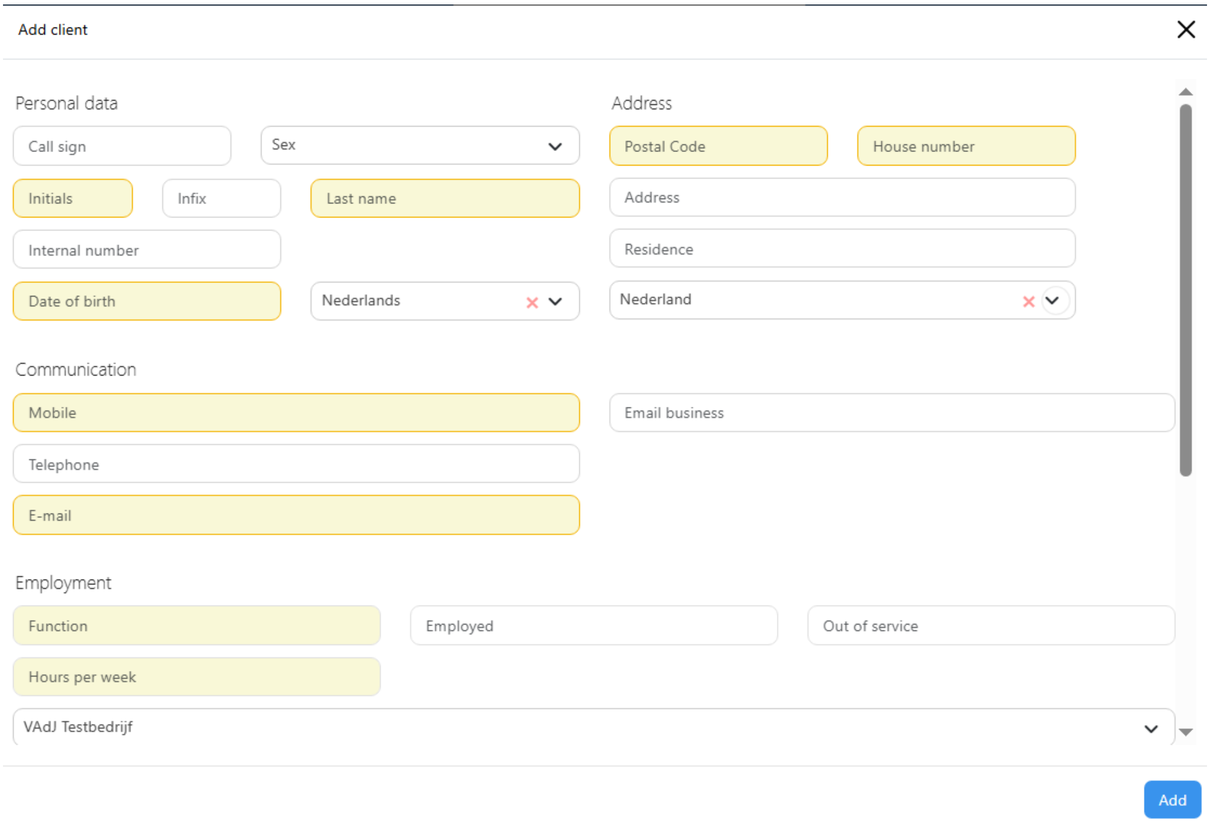
Use "Add Client" when:
- A new employee wasn't automatically added through the link
- You want to manually register an employee

NOTE: In organizations with an HR link, employees are normally added automatically.

Add employee – Step by step



Step 1: Open the form
- Click on "Add client" (person icon) at the top right via the tab "Clients"
- An entry form will open



Step 2: Fill in the form
Required fields (highlighted in yellow):

- First name
- Last name
- Date of birth
- Gender
- Employer/company
- Date in service

Step 3: Check the data

- Double-check that all required fields have been filled in
- Check that the data is correct
- Date of birth and name are especially important for identification
- Email address is important for correspondence / invitations to the client portal

Step 4: Save

- Click on "Add" at the bottom
- The employee is added to the system
- You will return to the client overview
- The new employee is now visible in the list

TIP: Fill in as many fields as possible, including the optional ones. This makes communication and identification easier later on.

3.3 View and edit employee data

3.3.1. Viewing employee data

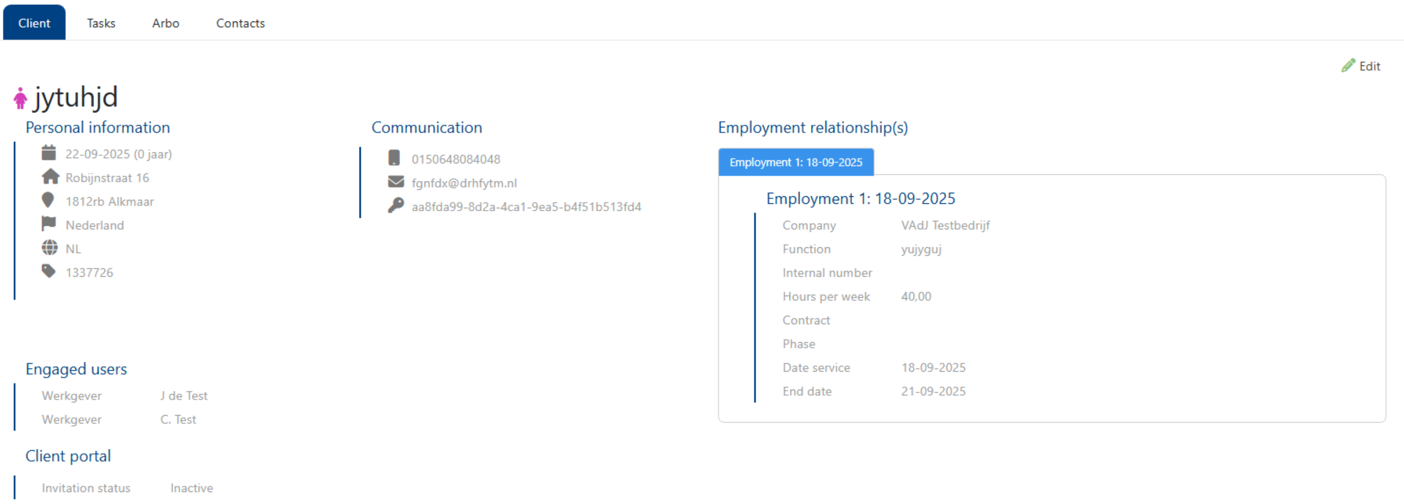
Method 1: Via the client overview

1. Find the employee in the overview (see 3.1)
2. Click on the name of the employee
3. The employee profile opens

Method 2: Via a file

1. Open an absence file (see Chapter 5)
2. Click on the "Client" tab
3. All personal data is shown

3.3.2. What information do you see?



The employee profile shows:

Personal data:

- Full name (including prefixes)
- Date of birth and age
- Gender
- Address
- Contact details (phone, email)

Employment relationship(s):

- Employer/company
- Section
- Function
- Employee number
- Contracturen
- Date in service
- Date of termination of employment (if applicable)

Engaged user

- Who has access to this employee file
- For example: which managers, HR employees

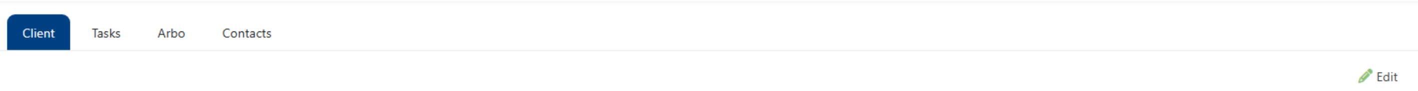
Client portal status:

- Whether the employee has been invited to the employee portal
- Invitation status

3.3.3. Editing employee data

Access:

1. Open the employee profile (see above)



2. Click on **"Edit" in the top right corner**

What can you change:

- All personal data
- Contact details
- Employment details
- Department and function

Be careful when changing:

- Name and date of birth: double-check for changes
- Date of termination of employment: only enter in case of actual termination of employment
- Contractures: keep current for correct calculations

Save:

1. Make the changes
2. Click on "Save"
3. The data is updated in the system

NOTE: For organizations with an HR connection, data is automatically synchronized. Manual changes can be overwritten on the next sync.

3.4 Difference: Clients vs My Files

Many users are confused at first about the difference between these two menu items. Here it is explained:

Clients (this chapter)
What will you see:

- ALL employees of your organization
- Also employees without absenteeism
- Also employees who have recovered
- New employees too

When to use this:

- Searching and/or editing data
- Add new employee
- Reporting employees out of employment
- Checking data

See: This chapter (H3)

My files

What will you see:
- Only employees with an (active) absence file
- Current absenteeism processes
- No employees without absenteeism

When to use this:
- Monitoring absenteeism guidance
- Open and edit files
- Check absence status
- View documents and appointments

See: Chapter 5 - Absenteeism files

Summary Chapter 3:
- "Clients" shows ALL employees
- You can search by name, employee number or sorting
- Add new employees via "Add client"
- View and edit data from the employee profile
- Difference with "My files": there only employees with absenteeism

Next steps:
- Go to Chapter 4 for working with tasks
- Or to Chapter 5 for working with absenteeism files
- Or to Chapter 8.1 for reporting an employee sick

See:
- Chapter 5.5 - Client information in the file
- Chapter 8.7 - Finding a Representative Quickly
- Annex C - Terminology

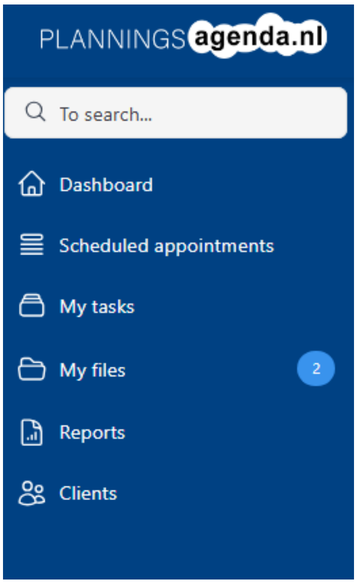
4.1 Your task overview

What are tasks?
Tasks are actions that you must perform within the absence process. Tasks can be:

Automatically generated:
- Based on the Gatekeeper Improvement Act (WVP)
- Based on alerts
- For example: "Draw up a Plan of Action"
- For example: "Attention! Frequent absenteeism" in case of repeated absenteeism

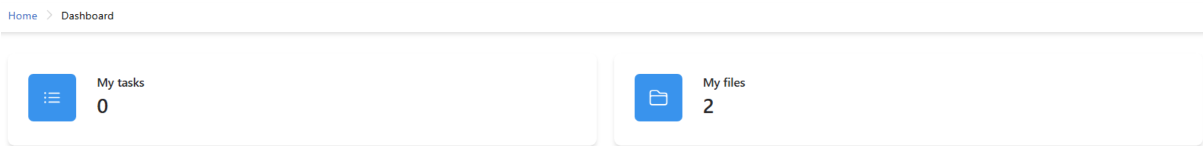
Manually added:
- By yourself (see 4.4)
- By professionals from Van Altena and de Jongh
- For example: "Send flowers"
- For example: "Submit document"

4.1.1. Access to the task overview



From the navigation menu:

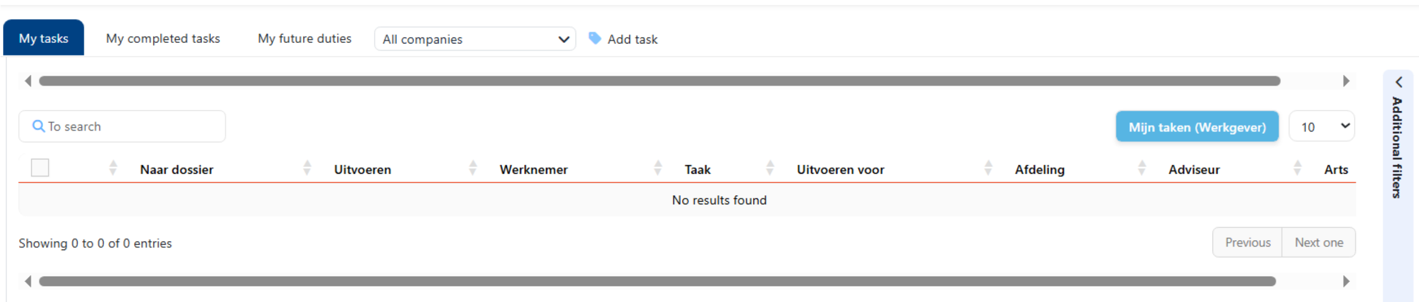
- Click on "My tasks" in the menu on the left



From the dashboard:

1. Click on the "My Tasks" widget
2. Click on "Overview"

4.1.2. Tabs in the task overview



At the top of the screen, you'll see four tabs:
1. My tasks (active)

- All tasks assigned to you
- Both outstanding and late
- This is the default view

2. My completed tasks

- Tasks you've already completed
- Useful for looking back: what have I done?
- With date of completion

3. My future duties

- Tasks scheduled for a later date
- Not yet started
- Helps with planning ahead

4. All companies (dropdown)

- Filter by specific organizations
- Useful if you manage multiple businesses
- Click on the drop-down arrow to select

4.1.3. Information in the To-Do Table

The table contains the following columns (from left to right):

1. **Checkbox** - For bulk actions (multiple at once)
2. **Link icon (Naar dossier)** - To the complete file
3. **Run (play button) (Uitvoeren)** - Start the task immediately
4. **Client (Werknemer) -** Name of the employee
5. **Task (Taak) -** Description of what you need to do
6. **Execute Before** - Deadline
7. **Department (Afdeling) –** Department the employee works for
8. **Advisor** - Name of the advisor
9. **Physician** – Name of the occupational health doctor

TIP: Pay attention to the "**Execute by" column** – this is your deadline. Tasks that exceed this date will be given the status **"Overdue".**

4.2 Filtering and searching tasks

Search your tasks
Search bar (top left):

1. Click in the search bar
2. Type what you're looking for:
   - Name of an employee
   - Task name (e.g. "Plan of Action")
   - Company
3. The list is filtered instantly

Sort by column

How to sort:

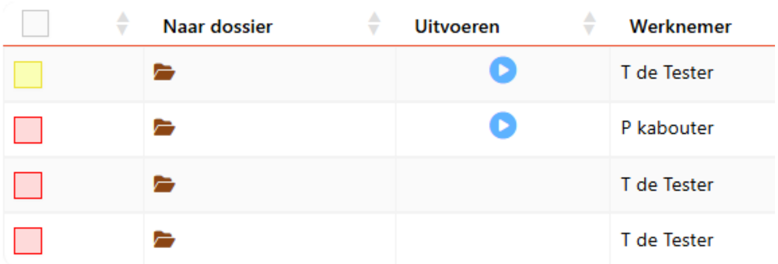
1. Click a column header (for example, ''Execute by")
2. The list is sorted (ascending/descending)
3. Click again to reverse the sorting direction
4. An arrow in the column header shows the sorting direction

Useful sorts:

- By Deadline: Sort by "Execute by" to see priorities
- By employee: Sort by "Client" to group tasks by person
- By Status: Sort by "Status" to see overdue tasks first

4.3 Performing a task (step-by-step)

Start task from the overview



Method 1: Via the play button

1. Find the task in your task overview
2. Click on the blue play button in the **"Uitvoeren" column**
3. The task opens in a new window

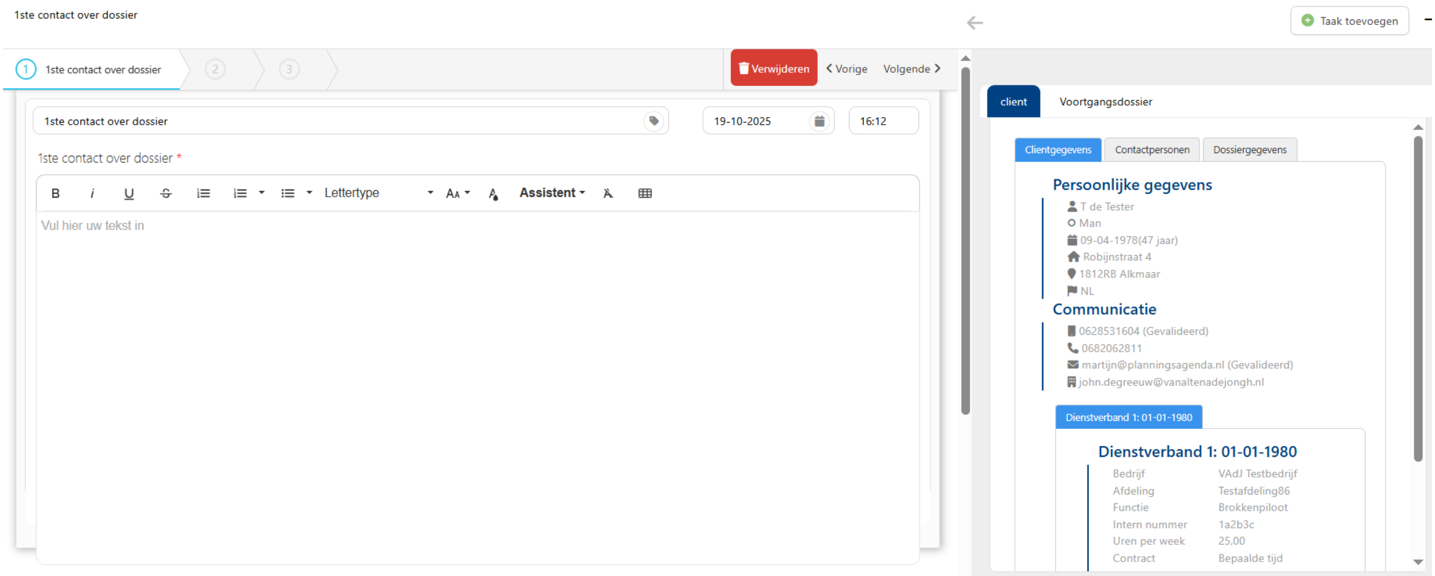
Method 2: Via the file

1. Click on the folder icon in the column **"Naar dossier"**
2. You go to the complete file
3. There you can also see the task (see H5.6)

TIP: Use the play button for quick execution. Use the folder icon if you first want to see more context in the file.

4.3.1. The task execution screen

When you click on the play button, a structured screen opens:



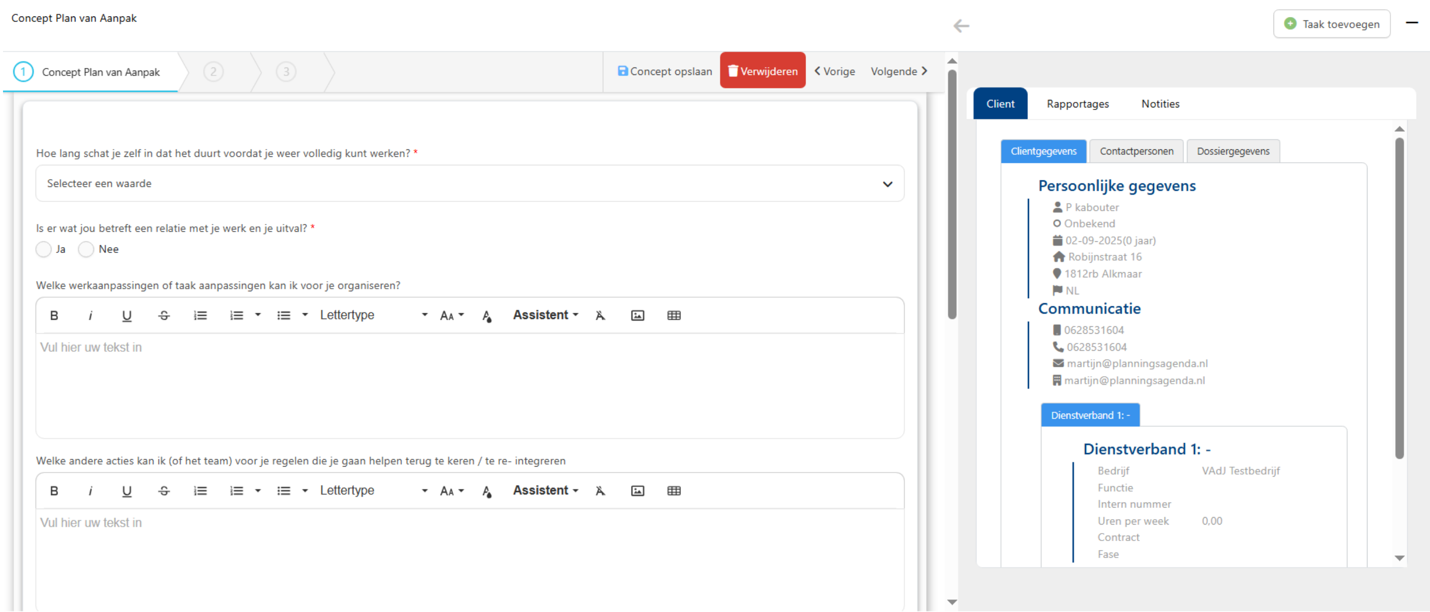
Left: Task form

- Numbered steps (Step 1, Step 2, Step 3, etc.)
- Step-by-step instructions
- Input fields or selections
- Sometimes auto-populated fields

Right side: Client information

- All relevant details of the employee
- Contact information readily available
- Employment details
- No need to switch between screens

Example: Implementing a Concept Plan of Action



Step 1: Answer questions

- You will see a wizard with questions
- For example:
  - How long do you estimate it will take before you can work fully again?
  - As far as you are concerned, is there a relationship with your work and your dropout?
  - What work adjustments or task adjustments can I organize for you?
- Fill in the questions or select options

Step 2: Checking and supplementing

- Your answers are automatically processed in a form
- Check that everything is filled in correctly
- Adjust if necessary

Step 3: Verification and saving

- Last check: is everything correct?
- Click on **"Save"**
- The task is marked complete
- The document appears in the file

Save and complete task

Save button:

- At the top right of the task screen
- Click to save the task
- The task disappears from **"My Tasks"** (or goes to "Completed Tasks")

4.4 Adding a task yourself

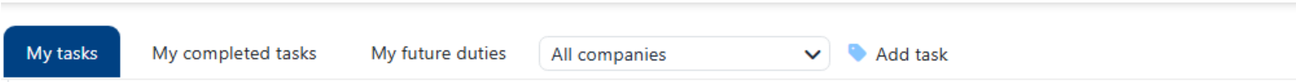
When do you add a task yourself?

Use this feature for:

- **Personal reminders** - For example: sending flowers, sending cards
- **Organization-specific actions** - Tasks that are common within your organization
- **Follow-up after interviews** - Agreements from consultation with employee
- **Administrative tasks** - Deliver documents, apply salary reduction

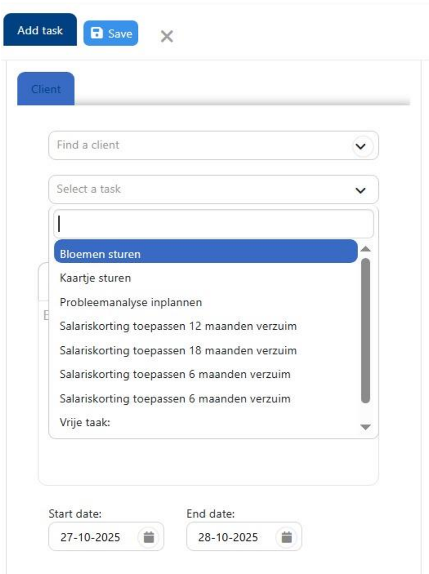
TIP: Tasks you add help you not to forget anything in the guidance. They appear in your task summary just like automatic tasks.

Add Task - Step by Step



Step 1: Open the form

- Click on "Add task" (label icon) in the top right corner of the task overview
- A side panel opens

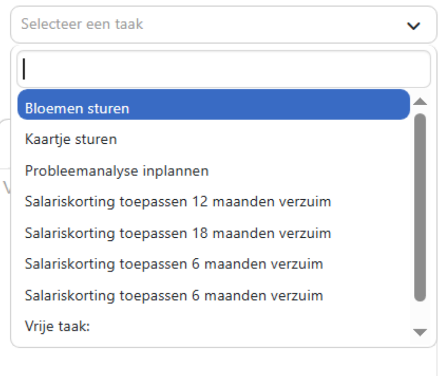


Step 2: Select the employee

1. Click on the "**Find a client" field**
2. Type the name of the employee
3. Or click the drop-down arrow and select
4. The employee is selected

Step 3: Select a task

1. Click on the "**Select a task" field**



2. A list of predefined tasks appears:
   - Send flowers (Bloemen sturen)
   - Send card (Kaartje sturen)
   - Schedule Problem Analysis (Probleemanalyse inplannen)
   - Apply salary reduction for 18 months of absence (Salariskorting toepassen 18 maanden)
   - Apply salary reduction for 12 months of absence (Salariskorting toepassen 12 maanden)
   - Apply salary reduction 6 months of absence (Salariskorting toepassen 6 maanden)
   - Free task (Vrije taak): (for own description)
   - Provide WIA documents (reintegration report) (WIA documenten aanleveren)
3. Select the desired task

TIP: Choose "Vrije taak:" if your desired task is not listed. You can then enter a description yourself.

Step 4: Set Dates

1. Start date: When can the task be performed?
   - Click in the "Start Date" field
   - Choose a date via the calendar
2. End date: What is the deadline?
   - Click in the "End date" field
   - Choose a date via the calendar
   - Must be later than start date

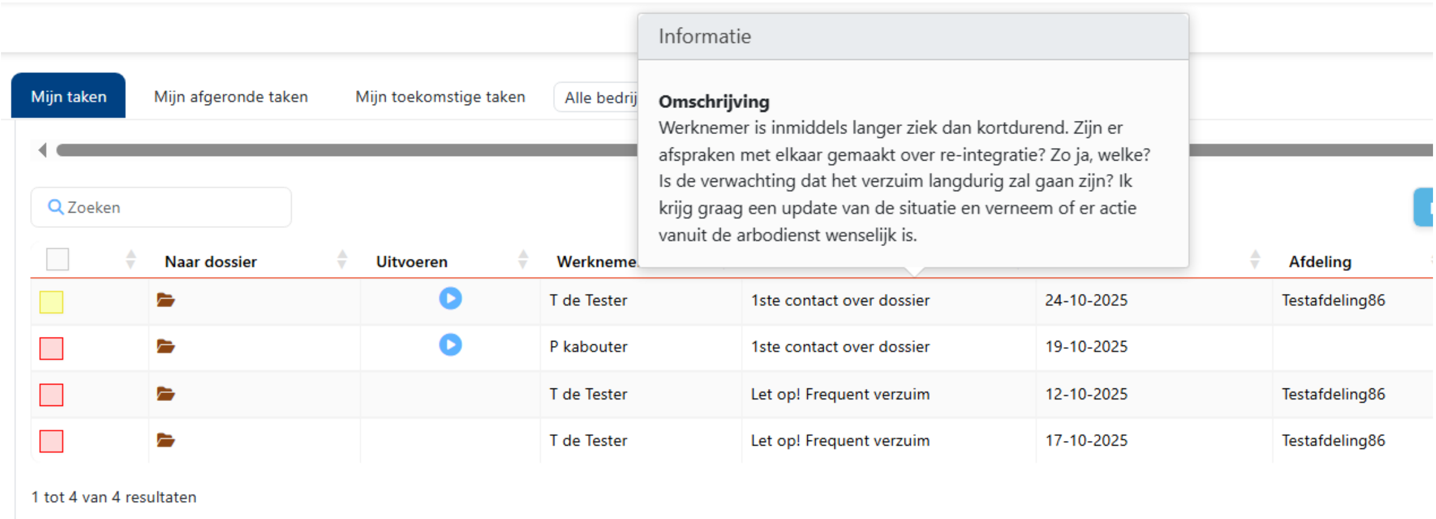
Step 5: Save

1. Check that all fields are filled in
2. Click on "Save" (blue button at the top)
3. The task is added
4. You will now see the task in your task overview

Annul:

- Click on the cross in the top right corner
- The task is not saved

4.5 Instructions for tasks (hover function)



What is the hover function?

When you hover your mouse over a task (without clicking), an information pop-up will automatically appear with additional details.

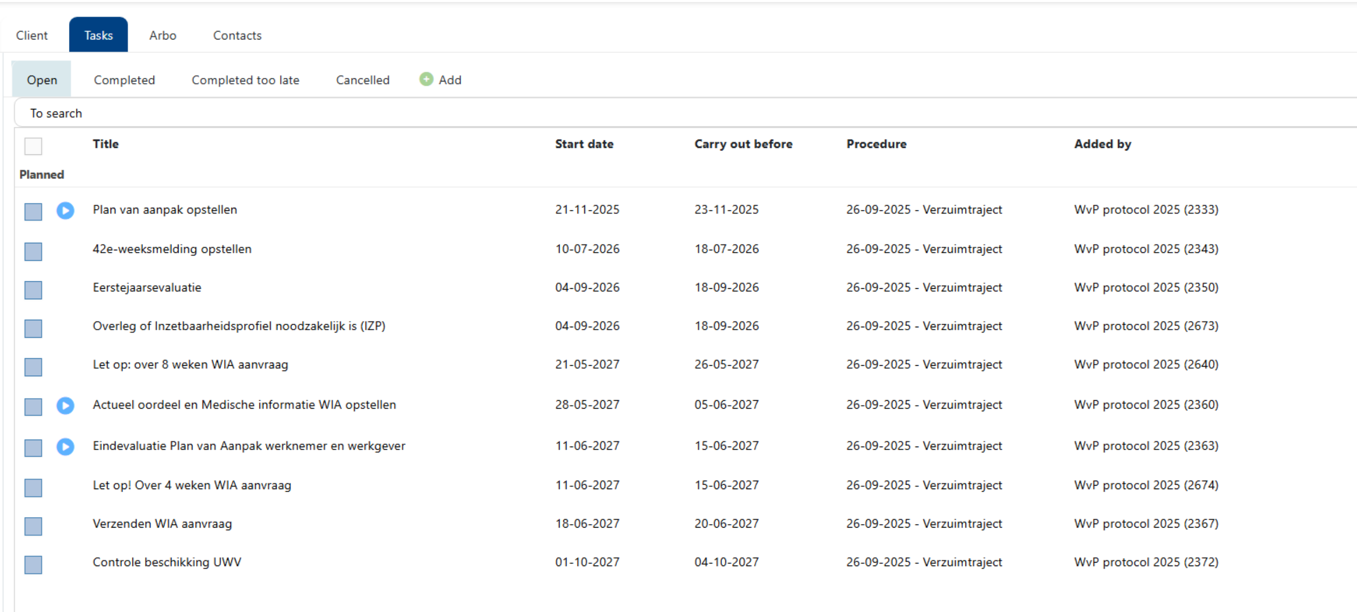
What do you see in the pop-up?

Description: A detailed description of the task with:

- **What you need to do** - Concrete actions
- **How to do it** - Step-by-step instructions
- **Where you find information** – For example, "Click on the blue output button"
- **Purpose of the task** - Why is this important?
- **Help available** - Contact us with questions

TIP: Always hover over a task before performing it. The instructions can contain useful tips that make the job easier.

4.6 Tasks within a file



Title	Start date	Carry out before	Procedure	Added by
Planned				
Plan van aanpak opstellen	21-11-2025	23-11-2025	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2333)
42e-weeksmelding opstellen	10-07-2026	18-07-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2343)
Eerstejaarsevaluatie	04-09-2026	18-09-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2350)
Overleg of Inzetbaarheidsprofiel noodzakelijk is (IZP)	04-09-2026	18-09-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2673)
Let op: over 8 weken WIA aanvraag	21-05-2027	26-05-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2640)
Actueel oordeel en Medische informatie WIA opstellen	28-05-2027	05-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2360)
Eindevaluatie Plan van Aanpak werknemer en werkgever	11-06-2027	15-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2363)
Let op! Over 4 weken WIA aanvraag	11-06-2027	15-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2674)
Verzenden WIA aanvraag	18-06-2027	20-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2367)
Controle beschikking UWV	01-10-2027	04-10-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2372)

Important: You can manage tasks not only via **"My tasks",** but also directly from an absence file.

Where can you find tasks in a file?

- Open an absence file (see Chapter 5)
- Click on the **"Tasks" tab**
- There you will see all tasks specific to that employee

What's the difference?

- **"My tasks"** (this chapter): all tasks of all employees
- **"Tasks"** in file: Only tasks of that specific employee

When do you use which one?

- Use **"My tasks"** for daily overview and prioritization
- Use "Tasks in File" when working on a specific matter

→ **See Chapter 5.6 for a detailed explanation of tasks within a dossier**

Summary Chapter 4:

- "My tasks" shows all your tasks centrally
- Tasks can be automatic (WFP) or manual
- Run via play button, instructions via hover
- Add your own tasks for reminders
- Tasks also visible per file (see H5.6)

Next steps:

- Go to Chapter 5 to get to know absenteeism files
- Or to Chapter 8 for practical scenarios

See:
- **Chapter 5.6** - Tasks within a file
- **Chapter 8** - Quick Actions for Common Tasks
- **Annex B** - Quick reference

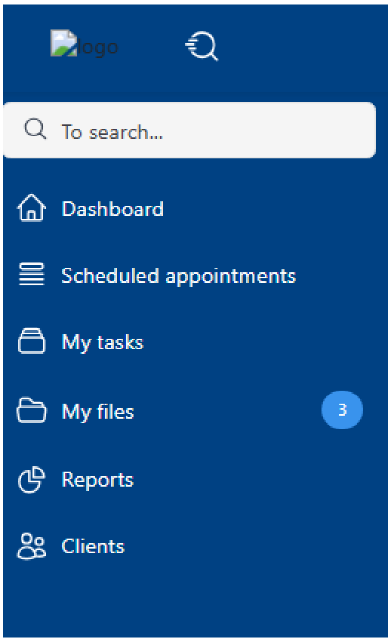
5. Absence Files – Complete Guide

5.1 Opening a file overview

What is an absenteeism file?

An absenteeism file contains all information about the absenteeism guidance of an employee:
- Route data (sick reports, recovery reports)
- Documents (action plans, feedbacks)
- Appointments with professionals
- Voortgangsnotities
- Communication

5.1.1. Access to the file overview

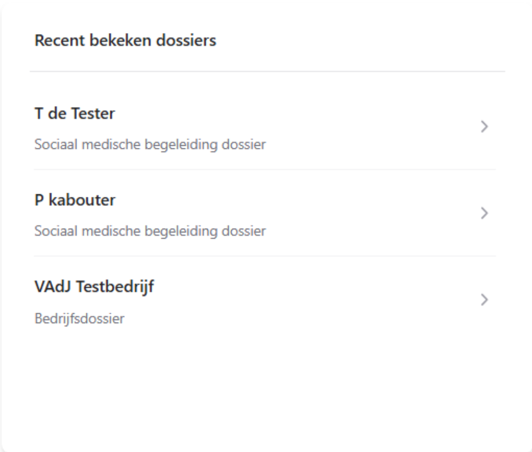


From the navigation menu:

- Click on "My files" **in the menu on the left**

From the dashboard:
1. Click on the "**My files" widget**
2. Click on **"Overview"**

Via Recently Viewed:



- On the dashboard, click on a matter under **"Recently viewed files"**
- Directly to the last opened file

5.1.2. What do you see in the file overview?

A table with all active absence files and the following information:
Columns (from left to right):

1. **Client** - Employee Name
2. **Client id** - Employee number/unique number
3. **Trajectory** - Type of guidance (Absenteeism trajectory, Prevention, etc.)
4. **First day of illness** - Start date of absence
5. **A.O.%** - Disability rate
6. **AWI** - Work & Employability Advisor (your permanent contact person)
7. **Responsible doctor** - Company doctor in case of complex absenteeism
8. **Employer** - Name of organization
9. **Last activity** - When was the last time something happened in the file
10. **Last appointment** - Date of recent consultation
11. **With whom?** - Which professional
12. **Number of weeks until EWT** - Time to End of Waiting Time (104 weeks from sick leave)

Difference with "Clients"
Important repetition:

- My files (here): Only employees with absenteeism
- Clients (H3): All employees (also without absenteeism)

→ **See also: Chapter 3.4 for a complete overview of differences**

5.2 Filtering and searching in files

Basic filtering

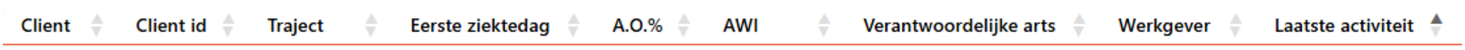
Filter by company:

1. Use the "All companies" drop-down menu at the top
2. Type the first 3 letters of the company
3. Select the desired company
4. Only files from that company are shown

Search for a specific file

To use the search bar:

1. Click in the search bar at the top left
2. Type what you're looking for:
    - Employee Name
    - Employee number (Client id)
    - Part of a name
3. Results are filtered instantly



Sort by column

Useful sorts:

1. By last activity (Laatste Activiteit): See which files need attention
2. On first day of illness (Eerste ziektedag): Identify long-term sick people
3. By sick: See which deadlines are approaching
4. By name: Alphabetical overview

How to sort:

- Click a column header
- An arrow shows the sorting direction
- Click again to flip

5.2.1. Additional Filters - Advanced Filtering

Access:

- Click on "Additional filters" in the top right corner
- A side panel with filter options will appear

Available filters:

1. Number of days since last appointment

- Example: "More than 30 days"
- Identifies files that may need attention

2. Number of days since last file activity

- Example: "More than 14 days"
- Flags files without recent updates

3. Number of weeks to end date based on lead time

- Example: "Less than 2 weeks"
- Helps with planning and follow-up

4. Company

- Select specific companies or departments
- Multiple companies possible at the same time

5. Involvement

- Filter by engaged professional
- For example: all files of advisor X

6. Document present based on template

- Search for files with specific documents
- Example: "All files WITH Plan of Action"
- Or: "All files WITHOUT Plan of Action"

7. File manager

- Filter by the responsible professional
- Overview per supervisor

8. Start date

- Filter by start date of absence

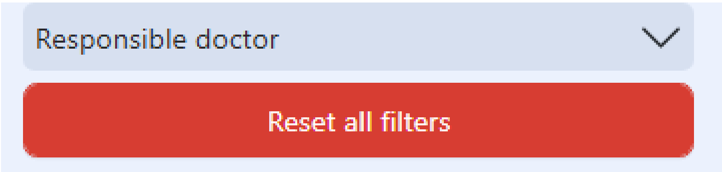
9. Route type

- Filter by type of route
- Options: Absenteeism process, Prevention, etc.

10. Responsible doctor

- Filter by which company doctor
- In complex cases with doctor involvement

5.2.2. Reset all filters



To remove all filters at once:

1. Scroll down the filter panel
2. Click on the red "**Reset all filters" button**
3. The overview shows all files again

TIP: Reset filters regularly to avoid missing files due to active filters.

5.3 Opening a file

Open file - different routes

Route 1: Via "My files"

1. Go to the file overview (see 5.1)
2. Click on the name of the employee
3. File opens

Route 2: Via "Recent bekeken"

1. Go to the dashboard (see 5.1)
2. Click on a file under "Recently viewed files"
3. Directly to the file

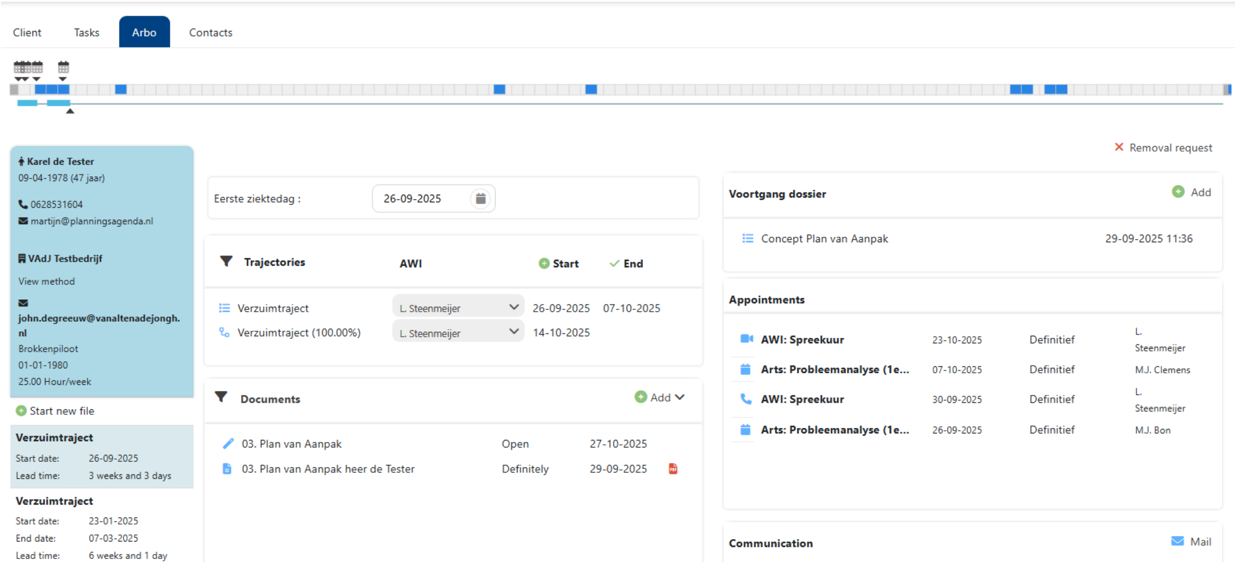
Route 3: Via a task

1. Go to **"My tasks"**
2. Click on the folder icon next to a task
3. The corresponding file opens

Route 4: Via "Clients"

1. Go to "Clients"
2. Find the employee
3. Click on the name
4. If there is an active file, it will be shown

5.3.1. Employee file



When you open a file, you will see four tabs at the top:

1. Client

- Personal data of the employee
- Contact
- Employment details
- **→ See 5.5 for details**

2. Tasks

- All tasks for this specific employee
- Open, completed, cancelled
- **→ See 5.6 for details**

3. Arbo

- Absenteeism guidance and trajectories
- Documents and progress
- Appointments and communication
- This is the main tab - **covered in 5.4 to 5.12**

4. Contacts

- Persons involved in this case
- Executives, HR, professionals
- **→ See 5.11 for details**

5.4 Working with the WVP Timeline

What is the WVP timeline?

At the top of each active file, you will see a colored bar: the Gatekeeper Improvement Act timeline. This visualizes where the employee is in the legal absenteeism process.

What do the colors and symbols mean?
Black triangle (at the bottom of the bar):

- This is today
- Show where you are now in the journey

Colored blocks on the timeline:

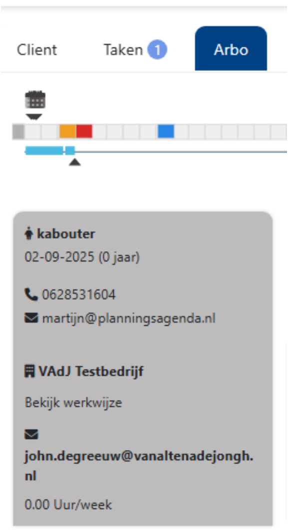
- Important moments according to the WVP
- Deadlines for actions
- Milestones in the process

Color codes:

- Blue: Scheduled tasks
- Orange: Tasks or deadlines that are overdue

TIP: Check the timeline regularly to see if there are any important moments coming up soon. Orange blocks mean: action required!

5.5 Client information in the file



Left: The client card

On the left side of each open file, you will see the client card with all the important information.

Personal data

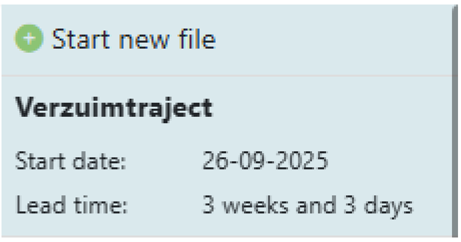
What will you see:

- **Name:** Full name of employee
- **Date of birth**: with age in parentheses
- **Phone:** Mobile or landline number
- **E-mail:** E-mail address employee

Employer information

What will you see:

- **Company:** Name of the organization
- **View method**: Link to agreements with this employer
- **Contact:** E-mail from your regular contact person at Van Altena en de Jongh
- **Contracture:** 0.00 Hours/week (or actual number)



Active absenteeism process

What will you see:

- **Start date:** When did the current absenteeism start?
- **Lead time:** How many weeks and days has the employee already been sick?

"Start new file" button:

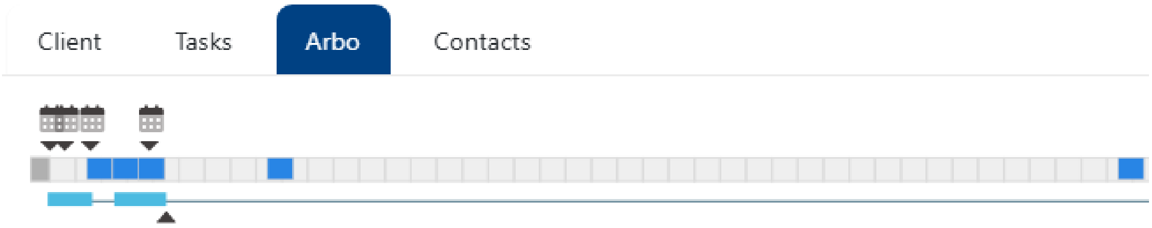
- For a new sick report
- For example, when recovery is reported and later sick again
- → See Chapter 8.1 for reporting sick

Absenteeism history

Among the active data:

- List of previous absenteeism processes of this employee
- With start date and end date
- Click on an old track to open that file

5.6 Tasks within a file



Access to tasks in the file

1. Open an absence file
2. Click on the "Tasks" **tab at the top**
3. You will see all tasks specific to this employee

Difference with "My tasks" (Chapter 4)
"My tasks" in navigation menu:

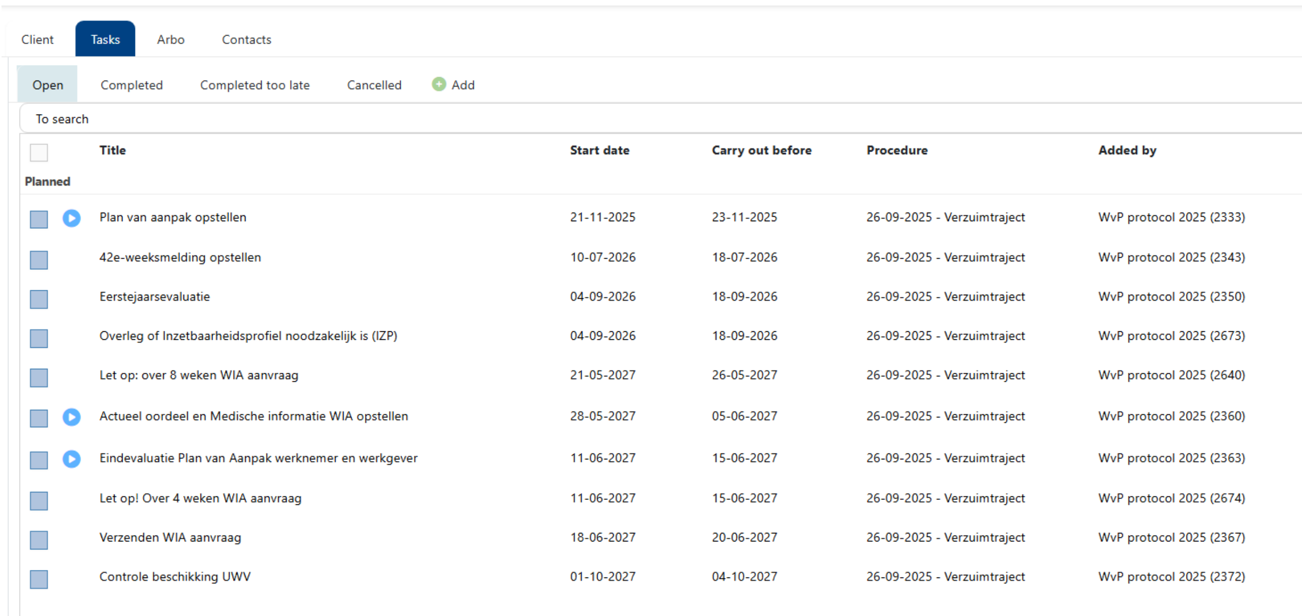
- All tasks of all employees together
- Overview of all your work
- Useful for daily prioritization

"Tasks" in a file:

- Only tasks of this specific employee
- Focused overview per person
- Useful when working on a single file

→ For general task explanations, see Chapter 4

5.6.1. What do you see in tasks (file)?



Title	Start date	Carry out before	Procedure	Added by
Planned				
Plan van aanpak opstellen	21-11-2025	23-11-2025	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2333)
42e-weeksmelding opstellen	10-07-2026	18-07-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2343)
Eerstejaarsevaluatie	04-09-2026	18-09-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2350)
Overleg of Inzetbaarheidsprofiel noodzakelijk is (IZP)	04-09-2026	18-09-2026	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2673)
Let op: over 8 weken WIA aanvraag	21-05-2027	26-05-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2640)
Actueel oordeel en Medische informatie WIA opstellen	28-05-2027	05-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2360)
Eindevaluatie Plan van Aanpak werknemer en werkgever	11-06-2027	15-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2363)
Let op! Over 4 weken WIA aanvraag	11-06-2027	15-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2674)
Verzenden WIA aanvraag	18-06-2027	20-06-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2367)
Controle beschikking UWV	01-10-2027	04-10-2027	26-09-2025 - Verzuimtraject	WvP protocol 2025 (2372)

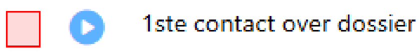
Four category tabs:

1. **Pending** - To be done
2. **Completed** - Already completed
3. **Completed too late -** Was too late but now done
4. **Cancelled** - No longer relevant

Table of columns:

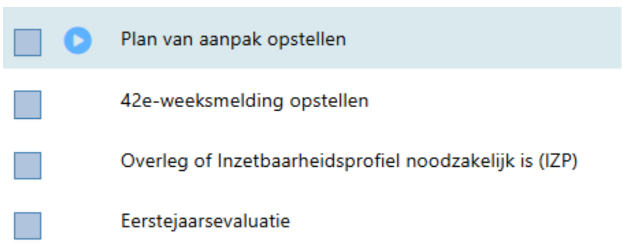
- Checkbox (for bulk actions)
- Play Button (Run)
- Customer
- Job description
- Run from/before
- Status
- Added by (protocol)

Perform tasks from the file



Method 1: Perform a single task

1. Click on the blue play button on the task
2. The task opens (see H4.3 for detailed explanation)
3. Complete the steps
4. Save

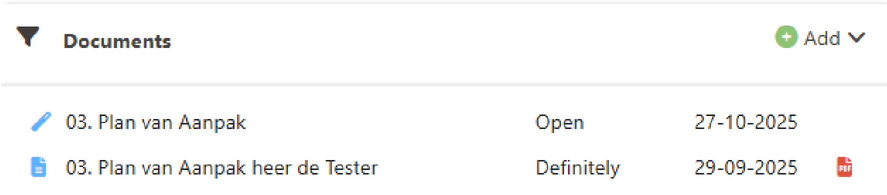


Method 2: Complete multiple tasks at once

1. Tick multiple tasks with the checkboxes
2. Click on a bulk action button at the top
3. For example: **"Finish selected tasks"**
4. Confirm the action

TIP: Use bulk actions to work efficiently on many small tasks such as "Document viewed" or "Note added".

5.7 Documents in the file



Where can you find documents?

1. Open an absence file
2. Stay in the **"Arbo " tab**
3. Scroll to the "**Documents" section** (center of the screen)

5.7.1 Viewing Documents

What you see in the Documents List:

- Document name
- Status - Draft or Final
- Date - When added/modified

To open a document:

1. Click on the document name
2. The document opens in a new tab or window
3. You can read, print or download the document
4. Close the window to return to the file

5.7.2 Adding Documents (via Wizard)

When to use "Add Document"? For creating structured documents such as:

- Concept Plan of Action
- Plan of Action
- Evaluation Plan of Action

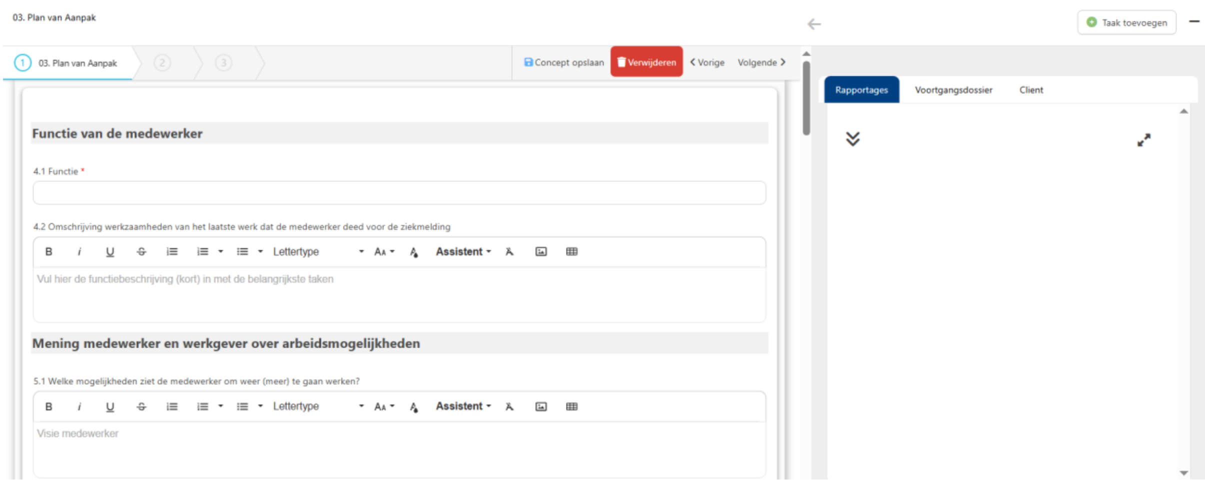
Step by step:

Step 1: Click on "Add"

- In the "**Documents" section**
- Click on the green **"Add" button** at the top right

Step 2: Select document type A drop-down menu will appear with options:

- Concept Plan of Action (Concept plan van aanpak)
- Plan of Action (Plan van aanpak)
- Evaluation Plan of Action (Evaluatie Plan van Aanpak)



Step 3: Select the desired document
- Click the document type you want to create
- A wizard/form will open

Step 4: Fill out the form
- The wizard will guide you through all the steps
- Fill in questions and fields
- Use the instructions at each step
- Click **"Next"** to continue

Step 5: Review and save
- Final check-up: is everything correct?
- Click on **"Save"**
- The document is added to the file

Difference with performing a task:
- This is the same action as via "My tasks" (H4)
- Only now you start from the file
- The result is the same: a document in the file

→ For detailed explanation wizard: see Chapter 4.3

5.7.3 Uploading your own documents

When to use **"Upload documents"?** For adding your own files.

Step by step upload:

Step 1: Click on "Add"

- In the "Documents" section
- Click on the green "Add" button

Step 2: Choose "Upload Documents"
- Choose "upload" at the bottom of the dropdown menu
- Or a separate "**Upload" button**

Step 3: Select File
- Click on **"Choose file"** or drag the file into the field
- Navigate to your file on the computer
- Select the file

- Click **"Open"**

Step 4: Confirm upload
- Check that the correct file is selected
- Click on "Upload" or "Save"
- The file is added to the file

After uploading:
- The document appears in the Documents List

PLEASE NOTE: Only upload documents that are relevant to absenteeism guidance. Be mindful of privacy – don't share unnecessary personal information.

5.8 Tracking Progress (Voortgang dossier)

What is "File progress"? (voortgang dossier)

In the section "Progress of the file" (on the right side of the file) you will see all updates, notes and communication listed chronologically. This is the "logbook" of absenteeism guidance.

What do you see in the progress?
- Concept Plan of Action
- Questions for the company doctor - Your questions to the doctor
- Advisor question – your questions to the advisor
- Employer Notes - Your own notes

For each item you can see:
- **What**: Title/type of the update
- **When:** Date and time
- **By whom:** Which user added it

TIP: Check the progress regularly to see if there are any new feedback from professionals. This will keep you up-to-date on the guidance.

5.8.1 Adding a Concept Plan of Action (Concept Plan van Aanpak)

What is the Concept Plan of Action? The Concept Plan of Action is a first version of the Plan of Action, usually around week 2. It helps you and the employee to talk about:
- Work and workload
- Possible adjustments
- Expectations about recovery
- First reintegration agreements

Adding a Concept Plan of Action - step by step:

Step 1: Click on "Add"
- In the section "Progress file" (Voortgang dossier)
- Click on the green "Add" button at the top right

Concept Plan van Aanpak

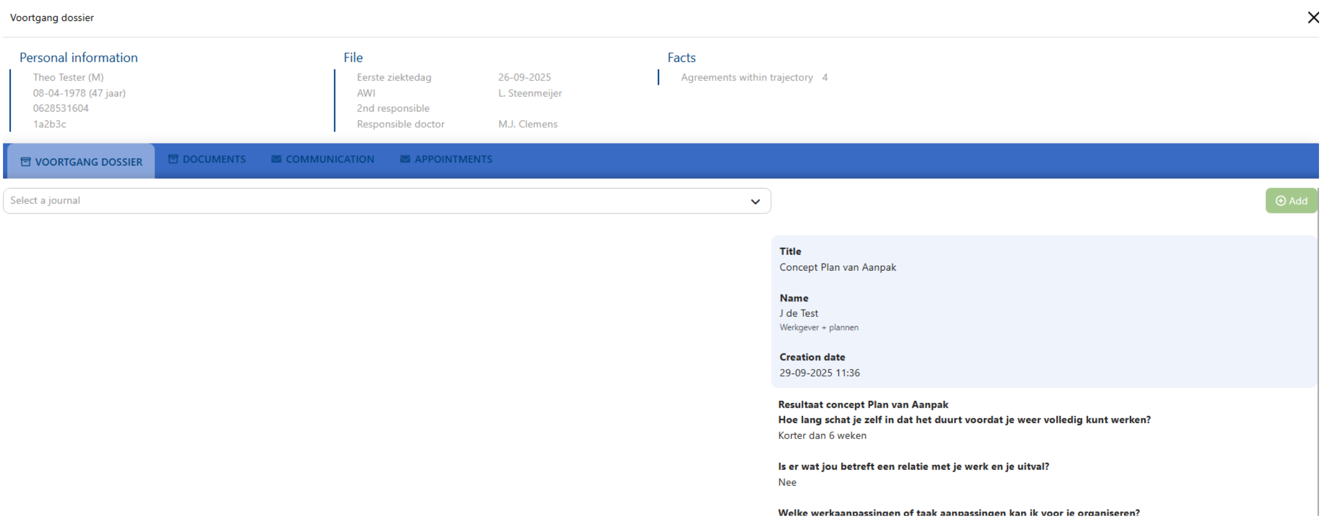
03. Plan van Aanpak

04. Evaluatie Plan van Aanpak

Upload

Step 2: Select journal type

- Click the drop-down menu
- Choose "Concept Plan of Action"



Step 3: Go through the wizard - A structured wizard with questions will open

- Answer the questions as completely as possible
- Use information from conversation with employee
- Be realistic and concrete
- Click **"Next"** to continue

Step 4: Check

- Your answers will be processed automatically
- Check that everything is correct
- Adjust as needed

Step 5: Save

- Click on **"Save"**
- The Concept of Requirements is added
- It appears under "Progress file" (Voortgang dossier)
- And also under "Documents"

After saving:

- The professional can see the concept
- Can serve as a basis for final Plan of Action
- Employee can view it (if shared)

TIP: Use the Concept Plan of Action as a guideline for a constructive conversation. It helps to make structured agreements.

5.8.2 Adding a question (Vraagstelling)

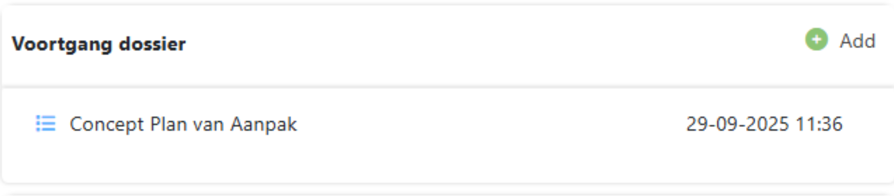
What is a question? A question is a message to the company doctor or advisor with:

- Questions about the guidance
- Request for opinion
- Signals you want to share
- Ambiguities that need clarification

When to use this:

- Before a consultation: help professionals prepare themselves
- When in doubt about reintegration options
- In the event of changes in the situation
- When you need specific advice

Adding a question – step by step:

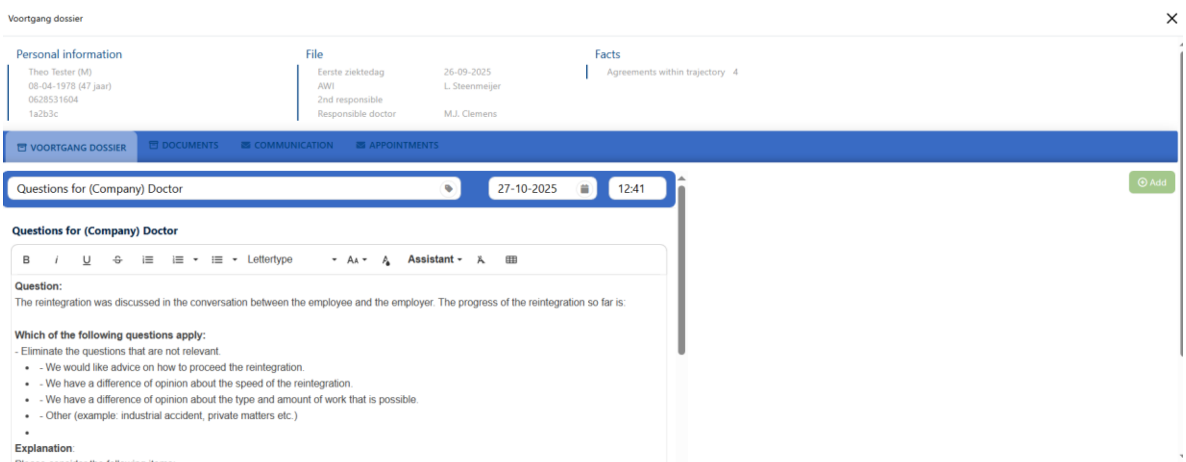


Step 1: Click on "Add"

- In the section "Progress file" (Voortgang dossier)
- Green "Add" button

Step 2: Select journal type Choose from:

- "Vraagstelling Bedrijfsarts" (Dutch)
- "Question Occupational Health Physician" (English)
- "Question Advisor" (for AWI/advisor)



Step 3: Formulate your question A text field will appear. Fill in:

- Clear question
- Relevant context/background
- Specific points you want advice on
- Any concerns or signs

Step 4: Save

- Click on **"Save"**
- The question is added
- The professional receives a notification
- Your question will be dealt with at the next consultation

After saving:

- You can see the question at **"Progress file" (Voortgang dossier)**
- The professional sees these in his/her system
- After the consultation, there will be feedback (see 5.8)

TIP: Be specific in your question. The more specific the question, the more targeted the advice.

5.8.3 Adding Notes

What is an employer note? A free note to share with the professionals.

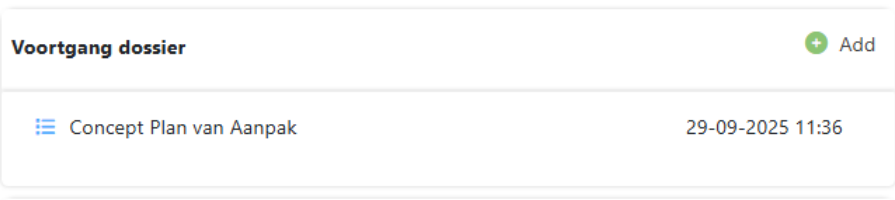
Use this for:

- Status updates
- Important developments
- Agreements made with employee
- Signals that are relevant
- Practical information

When to use this:

- After a conversation with the employee
- In the event of changes in work or circumstances
- To keep professionals informed
- For future reference

Add note - step by step:

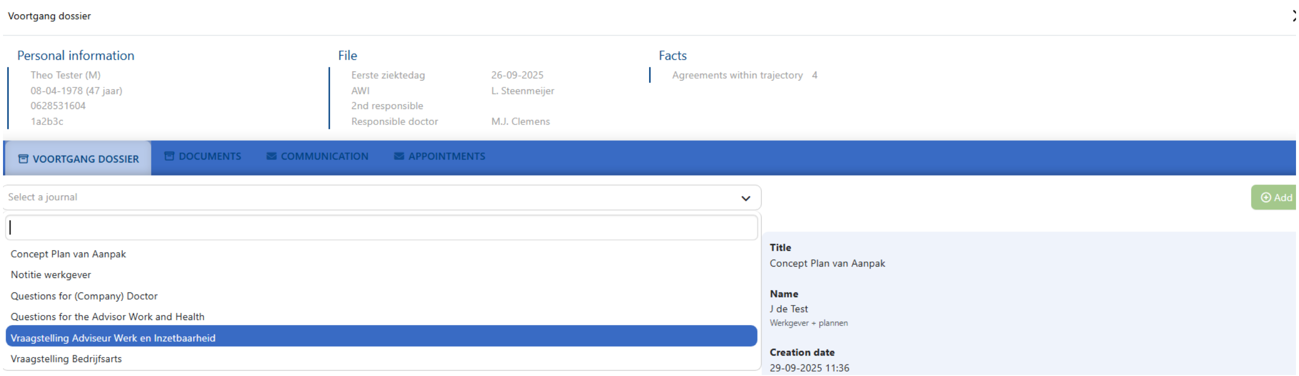


Step 1: Click on "Add"

- In section "Progress file" (Voortgang dossier)
- Green button at the top right

Step 2: Select journal type

- Choose "Employer note" (Notitie Werkgever)



Step 3: Write your note A text field will appear. Fill in:

- Clear title/subject (if requested)
- Full Note
- Relevante details
- Date of event (if different from today)

Step 4: Save

- Click on **"Save"**
- The note is added
- Appears under **"Progress file"**
- Professional can read it

Privacy consideration:

- Only share professionally relevant information
- No unnecessary private details
- Focus on work-related aspects

TIP: Use notes to give professionals a complete picture. This helps them to give better advice and to guide the employee optimally.

5.9 Viewing appointments

Where can you find appointments in the file?

1. Open an absence file
2. Stay in the "**Arbo" tab**
3. Scroll to the "Appointments" section (on the right, under "Voortgang Dossier")

What do you see in the appointment list?

Per appointment:

- **Type:** For example, "AWI: Consultation hours", "Telephone contact", "Company doctor: Consultation"
- **Date and time:** When does the appointment take place?
- **Status**
- **Professional:** Name of consultant/doctor

Difference with "Scheduled appointments" (Chapter 6)
"Appointments" in a file (here):

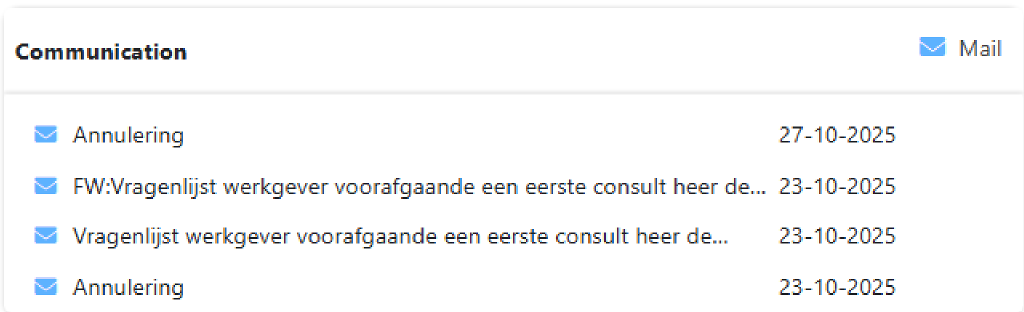
- Only appointments of this specific employee
- Both past and future
- Complete historical overview

"Scheduled appointments" in navigation menu:

- All appointments of all employees
- Future appointments only
- Calendar view for your schedule

→ See Chapter 6 for full appointment review

5.10 Communication with employee



Where can you find communication?

1. Open an absence file
2. Tab **"Arbo"**
3. Scroll all the way down
4. Section ''Communication''

What is the communication section?

Here you can see all the automatic e-mail messages that have been sent from Scheduling Calendar to the employee. This gives you insight into what information the employee has received.

Types of messages
1. Signal - Document placed in file
2. Invitation client portal
3. Invitation consultation
4. Reminders

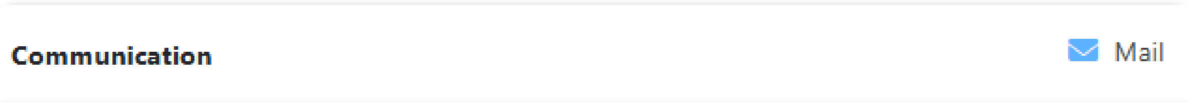
Why is this useful?

1. Check what the employee has received
- Employee calls: "I didn't receive an invitation"
- You can check: sent or not?
- With date and time

2. Overview of communication
- Complete view of all messages
- Prevents miscommunication
- Helps with questions or complaints

3. Troubleshooting
- Employee: "I can't log in"
- Check: has an invitation been sent?
- If not: send it out again
- If so: check spam folder

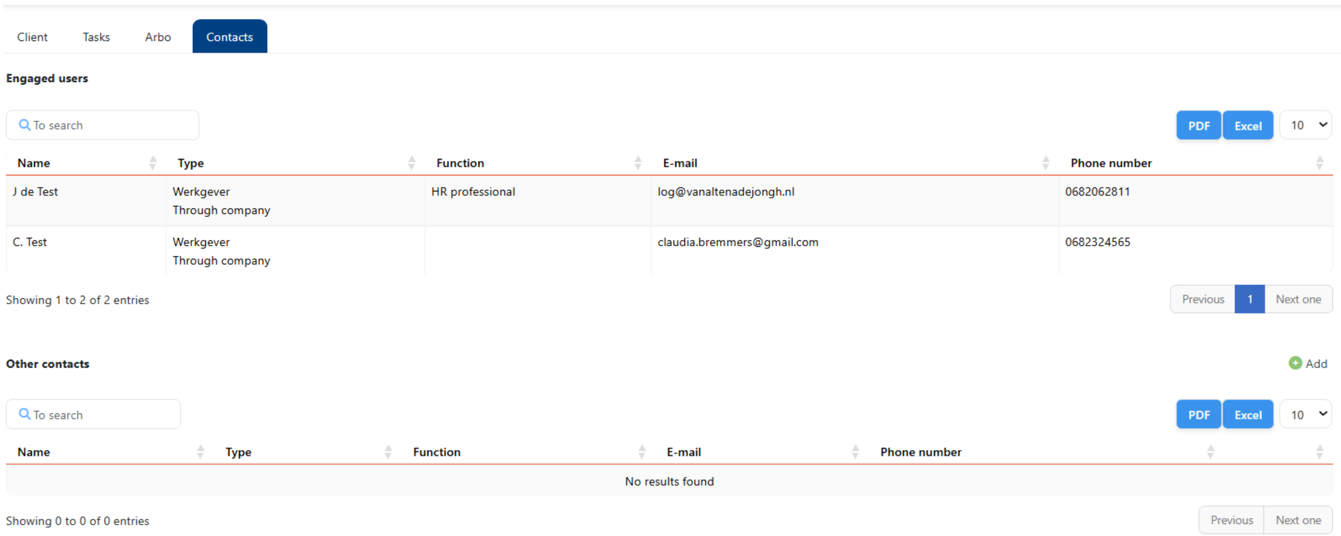
5.10.1. Sending mail to employee



"Mail" button (top right in the section):
- Click on this to send a message to employee
- An e-mail function opens
- Fill in subject and message
- Send

5.11 Contacts

Access to contacts
1. Open an absence file
2. Click on the "Contacts" **tab at the top**



Who do you see in contacts?

Engaged users:

- Managers - Employee's direct supervisor
- HR staff - P&O contact person
- Professionals Van Altena and de Jongh:
  - Work & Employability Advisor (AWI)
  - Company doctor
  - Possibly other professionals

By contact:

- Name
- Function/role
- Email address
- Telephone number
- Additional information

5.12 Delete file

When do you delete a file?

Use this feature ONLY if:

- Incorrect sick report (e.g. wrong employee)

DO NOT use with:

- Regular recovery notification (use "Recovery" notification)
- Completed process (files are automatically archived)
- Privacy request from employee (contact privacy officer)

Submit a deletion request

Where to find it:
- Open the file to be deleted
- At the top right, you will see "**Delete request"** (red cross icon)

Step by step:

Step 1: Click on "Delete Request"
- Red cross icon at the top right
- Opens a form

Step 2: Give reason
- Fill in why the file should be deleted
- Be specific and clear
- For example: "Wrong employee reported sick, should be Jan Jansen instead of Jan Pietersen"

Step 3: Send request
- Click on "Send" or "Submit Request"
- The request goes to the application manager of Van Altena and de Jongh

Step 4: Wait for approval
- The application administrator checks the request
- Check whether there are any documents in the file
- Check whether the request is justified
- Decision: approve or reject

After approval:
- The file is permanently deleted
- You will receive a confirmation
- The file cannot be retrieved

In case of rejection:
- You will receive an explanation why not
- Possible alternative solution
- For example: closing a file instead of deleting it

Summary Chapter 5:
- Absenteeism files are the heart of absenteeism guidance
- WVP timeline shows where you are in the process
- All information in one place: client, tasks, documents, progress, appointments
- Adding documents via wizard or upload
- Track progress through notes and questions
- Communication overview shows what employee has received
- Deletion only in case of incorrect registration

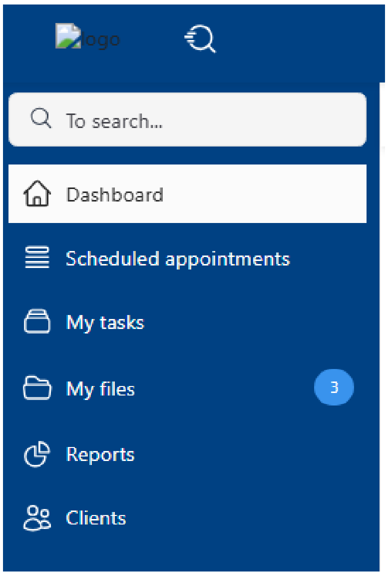
Next steps:
- Go to Chapter 6 for appointment management
- Or to Chapter 8 for practical scenarios

See:
- Chapter 3.4 - Difference between clients and cases
- Chapter 4.6 - Tasks within a file
- Chapter 6 - Managing appointments
- Chapter 8 - Quick Actions

6. Manage appointments

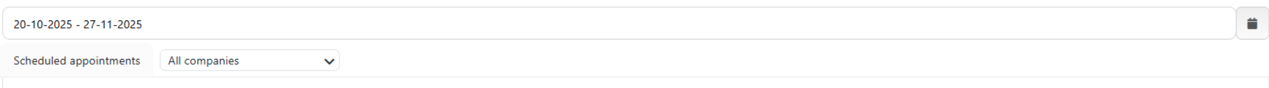
6.1. Overview of scheduled appointments

Access to scheduled appointments



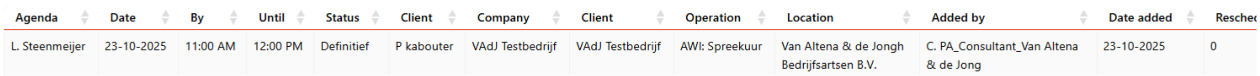
From the navigation menu:

- Click on "Scheduled appointments" **in the menu on the left**



What do you see in the overview?

A table with all future appointments of all your employees.

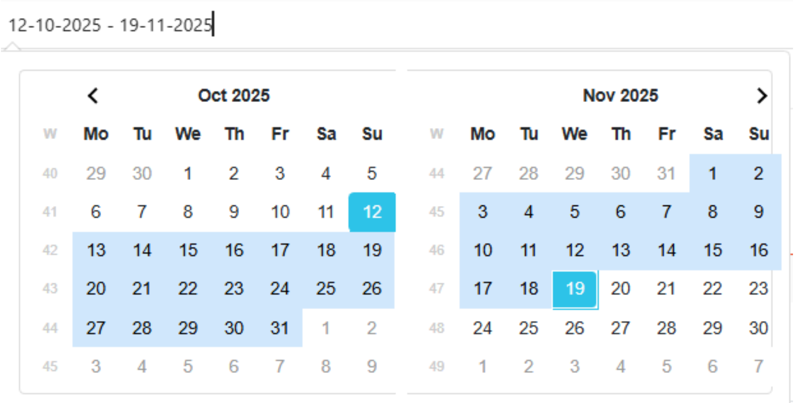


Agenda	Date	By	Until	Status	Client	Company	Client	Operation	Location	Added by	Date added	Resche
L. Steenmeijer	23-10-2025	11:00 AM	12:00 PM	Definitief	P kabouter	VAdJ Testbedrijf	VAdJ Testbedrijf	AWI: Spreekuur	Van Altena & de Jongh Bedrijfsartsen B.V.	C. PA_Consultant_Van Altena & de Jong	23-10-2025	0

Columns in the table:

1. **Date and time** - When does the appointment take place
2. **Client -** Name of the employee
3. **Status -** Final, Scheduled, Provisional
4. **Company -** Which organization does the employee work for
5. **Type -** Type of appointment (First consultation hour, Telephone contact, etc.)
6. **Transaction -** What happens (e.g. "Drawing up an action plan")
7. **Location -** Where the appointment takes place
8. **Scheduled by -** Who made the appointment
9. **Scheduled on -** When is the appointment scheduled

6.2 Filtering appointments by date/period



Select period
Set Date Range:

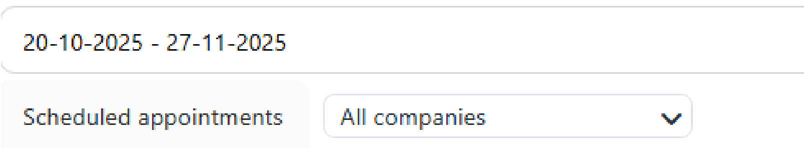
1. At the top of the overview, you will see date fields
2. Click on the first field for start date
3. Select a date via calendar
4. Click on the second field for end date
5. Select a date
6. The overview adjusts automatically

Filter by Specific Date

One day view:

1. Use the date filter
2. Set start and end date to the same day
3. For example, both on 15/10/2025
4. Result: Only appointments on October 15

Filter by company



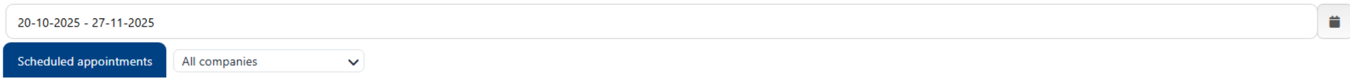
Select specific company:

1. Use the filter **"All companies"** or **"Company/BV"**
2. Click the drop-down menu
3. Select the desired company
4. Only appointments from that company are shown

TIP: Combine date and company filters for specific overviews. For example: "All Company X appointments this week"

6.3 To a file from an appointment

Direct access:



1. Click on the name of the employee in the appointment overview
2. Complete file opens
3. You will see all the information about that employee
4. **→ See Chapter 5 for working with files**

Difference: Appointments overview vs Appointments in file

"Scheduled appointments" (this chapter):

- All appointments of all employees
- Central agenda for your organization
- Future appointments only
- Planning tool

"Apointments" in a file (H5.9):

- Only appointments from THAT employee
- Past and future
- Historical overview
- Part of file information

→ For appointments in a specific file: see Chapter 5.9

Summary Chapter 6:

- "Scheduled appointments" shows all upcoming consultations
- Filtering by date, period and company possible
- Useful for planning and preparation
- Click on name to go directly to the file
- Difference with appointments in file: central overview here

Next steps:

- Go to Chapter 7 for reports
- Or to Chapter 8 for practical scenarios

See:

- Chapter 5.9 - Agreements in a file
- Chapter 5.8.2 - Preparing the question

Part 3: Reporting and analytics

7. Generate reports

7.1 When do I use which report?

Overview of available reports

Planning agenda offers various standard reports. Below you can read when to use which report.

1. Up-to-date absenteeism overview per employee

When to use:

- For current status of all sick employees
- Daily or weekly management
- Quick overview: who is sick and for how long

What's in it:

- Names of all sick employees
- Start date of absence (first day of illness)
- Number of days/weeks sick
- Absenteeism rate
- Partial recovery information
- Contacts

Ideal for:

- Managers who want a daily overview
- HR for up-to-date figures

2. Basic absenteeism report employer

When to use:

- For regular reporting (monthly/quarterly)
- Absenteeism figures for management
- Comparison with previous periods

What's in it:

- Absenteeism rate
- Absenteeism frequency
- Average duration of absence
- Number of sick reports
- Trends over time

Ideal for:

- Managementrapportages
- Board meetings
- HR-dashboards
- Periodic evaluations

3. Frequent absenteeism report

When to use:

- When frequent absenteeism is detected
- For preventive policy
- Analysis of absenteeism patterns

What's in it:

- Employees with multiple sick reports
- Number of reports per person
- Time period of notifications
- Recognizing patterns (e.g. always Monday)
- Duration per notification

Ideal for:

- Developing prevention policies
- Conversations with frequent absentees

- Identifying underlying problems
- Gerichte interventies plannen

4. Reporting for absenteeism insurer

When to use:

- For your absenteeism insurer
- Contractual obligations
- Evaluation by insurer
- Claims of declaraties

What's in it:

- Specific information for insurer
- Often quarterly or annually
- According to insurer format
- Detailed information per file
- Total overviews

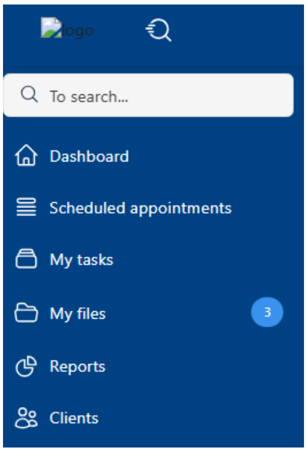
Ideal for:

- Meeting insurance requirements
- Evaluations by insurer
- Basis for determining contributions
- Contract extensions

TIP: Check with your insurer what reporting frequency and format they require. Some insurers have specific requirements.

7.2 Overview of available reports

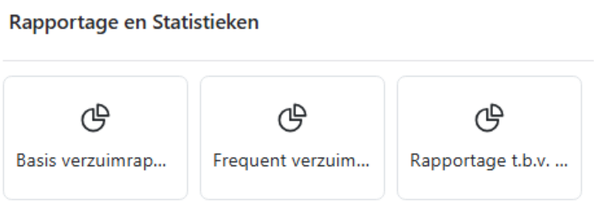
7.2.1. Access to reports



From the navigation menu:

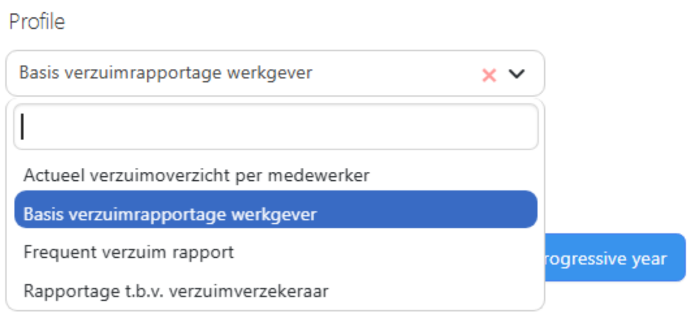
- Click on "Reports" **in the menu on the left**

From the dashboard:



- Go to the "**Reporting and Statistics"** (Rapportage en Statistieken)
- Choose the report you want

7.2.2. Selecting Reporting



Step 1: Open the reporting screen

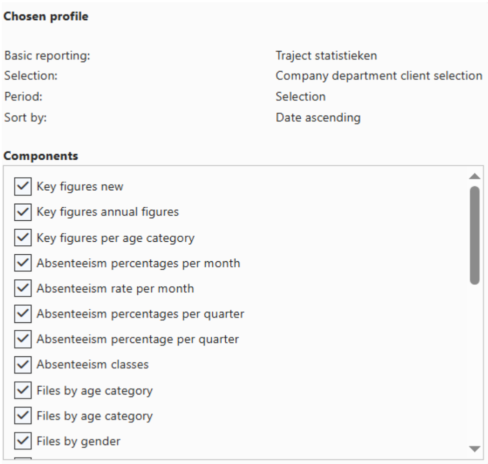
- You'll see a "**Select a profile"** drop-down menu

Step 2: Choose your report Click on the drop-down menu and select:

1. Up-to-date absenteeism overview per employee (Actueel verzuimoverzicht per medewerker)
2. Basic employer absenteeism report (Basis verzuimrapportage werkgever)
3. Frequent absenteeism report (Frequent verzuim rapport)
4. Reporting for absenteeism insurer (Rapportage t.b.v. verzuimverzekeraar)

Step 3: Select the right filters

- After selecting a profile, select a date range
- After this, select the company or companies for which you want to generate the report



- You can also check or uncheck parts of the report
- **See 7.3. for more information about the configuration**

7.2.3. Recently generated reports'

Right side of the screen:

- List of previously created reports
- With date and time of creation
- For example:
  - Frequent absenteeism report - 10-07-2025 22:28
  - Report for absenteeism insurer - 10-07-2025 22:28

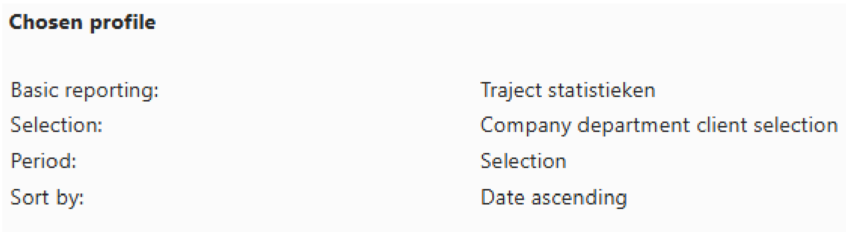
Reuse:

- Click on a previous report to reopen
- Saves time with the same reports on a regular basis
- Compare with previous periods

7.3 Configuring Reporting

After selecting a report, you can adjust your report via the control panel.

Chosen profile - Basic settings

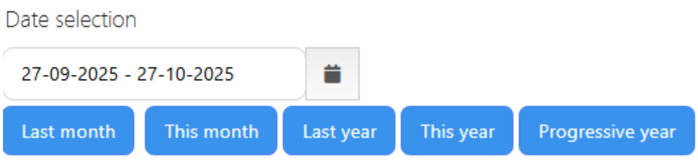


At the top right, you'll see your settings:
Basic reporting:

- Reporting type
- Shows the focus of the report

Selection:

- Which companies/departments are included
- For example: "Company selection"



Period:

- Time period for reporting
- Options: Last month, this month, last year, this year, rolling year

TIP: For comparisons: generate the same report for different periods (e.g. Q1, Q2, Q3, Q4).

Select parts

Chosen profile

Basic reporting:	Traject statistieken
Selection:	Company department client selection
Period:	Selection
Sort by:	Date ascending

Components

- [x] Key figures new
- [x] Key figures annual figures
- [x] Key figures per age category
- [x] Absenteeism percentages per month
- [x] Absenteeism rate per month
- [x] Absenteeism percentages per quarter
- [x] Absenteeism percentage per quarter
- [x] Absenteeism classes
- [x] Files by age category
- [x] Files by age category
- [x] Files by gender

Default settings:

- All relevant columns are checked
- This gives a complete report

Adapt:

1. Scroll through the list of available columns
2. **Uncheck** what you don't need
3. **Check** what you want to add extra

TIP: Start with all columns checked. Download the report and view it in Excel. Then decide which columns you really need and generate again with fewer columns.

7.4 Generating and downloading reports

7.4.1. Generating Reports

After configuration:

Step 1: Check settings

To generate

Chosen profile

Basic reporting:	Traject statistieken
Selection:	Company department client selection
Period:	Selection
Sort by:	Date ascending

Step 2: Click on "Generate"

- Green button at the top right
- The system makes the reporting

Step 3: View reporting

- The report appears

Cancel | Verzuimrapportage Excel | Verzuimrapportage PDF | Verzuimrapportage per mail

Date printout:	27-10-2025 (14:26:51)	**Filters**		**Selection**
Period:	27-09-2025 / 27-10-2025	File type:	Sociaal medische begeleiding dossier	J jytuhjd
Profile:	Basis verzuimrapportage werkgever	Sex:	M,V,X,O	P kabouter
Selection:	Company department client selection	Trajectory type:	Verzuimtraject	W. een Swa
Sort by:	Date ascending	Safety net:	Yes,no	T. Tester
				T. Tester
				P kabouter
				J jytuhjd
				W. een Swa

Sex	Number of employees	Fte	Notifications	Files	Trajectories	Calendar days	Days of absence	Report frequency	Average duration	Percentage
M	1	0,66	1	1	2	31	15,79	11,77	0	77,42%
V	0	0	0	0	0	31	0,00	0	0	0
O	1	0	2	1	2	31	0,00	23,55	19,00	0
Total	2	0,66	3	2	4	31	15,79	17,66	19,00	77,42%

Reporting information at the top

The generated report shows:

Top left corner:

- **Printout date:** When created
- **Period:** Which time period
- **Profile:** What type of reporting
- **Selection:** Which companies
- **Sort by:** Date

Upper right corner:

- **Filters applied:** Which filters are active (e.g. "File open: Now open")
- **Selection:** Which companies

7.4.2. Download report

Cancel | Verzuimrapportage Excel | Verzuimrapportage PDF | Verzuimrapportage per mail

Download to Excel:

Step 1: Click on the download button

- Top right: green button **"Current absence overview Excel"** (Verzuimrapportage PDF)
- With download icon

Step 2: Save file

- The Excel file is downloading
- Standaard in uw Downloads-map
- File name often contains date and type

Step 3: Open in Excel

- Open the file
- All data state in Excel
- You can now further analyze, filter, create charts

7.4.3. Cancel reporting

During viewing:

- Click on **"Cancel"** (red icon top right)
- Or click on the cross
- You will be returned to the reporting selection screen
- Unsaved changes are lost

Summary Chapter 7:

- Four standard reports available
- Choose the right reporting for your goal
- Configure period, columns and companies
- Generate and view on-screen
- Download to Excel for analysis

Next steps:

- Go to Chapter 8 for practical scenarios
- Or repeat specific reports you need

See:

- Appendix A - FAQ about reports
- Annex B - Quick reference

Part 4: Common Actions

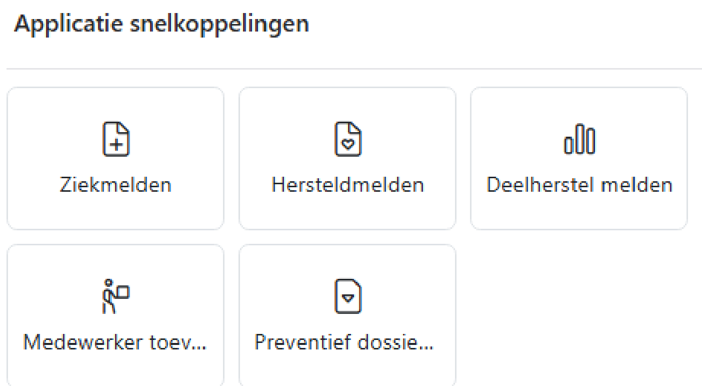
8. Quick Actions – Practical Scenarios

In this chapter you will find step-by-step explanations for the most common actions in your daily work.

8.1 Reporting an employee sick

Step-by-step reporting sick

Step 1: Start the sick report

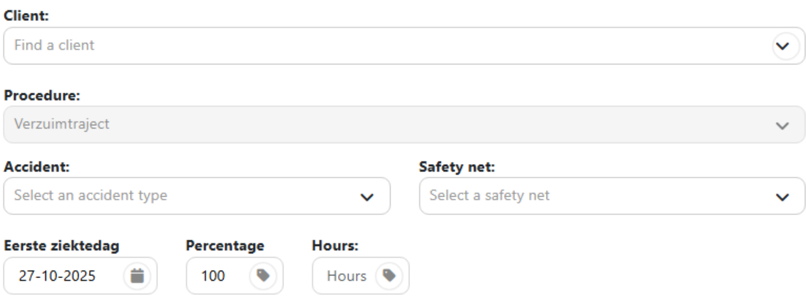


Via dashboard (fastest):

1. Go to the dashboard
2. Click on the widget "Application shortcuts" (Applicatie snelkoppelingen)
3. Click on the **"Report sick" tile** (Ziekmelden)

Step 2: Fill in the sick report details

A form will appear with the following fields. You fill in all of these.



Step 4: Save and confirm

1. Check all entered data
2. Click on **"Save"**
3. The absence file is created

Step 5: Immediately after reporting sick

What happens automatically:

- Absence file is created
- WVP timeline start
- First tasks are generated (e.g. "Week 2: Draft PoA")

8.2 Report an employee recovered

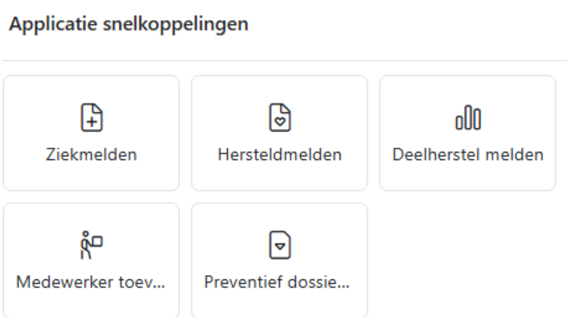
When to use it

- Employee has fully recovered
- Can resume all work
- Normal hours working again

NOTE: For partial recovery: see 8.3 Partial recovery

Step-by-step reporting recovered

Step 1: Start recovery notification

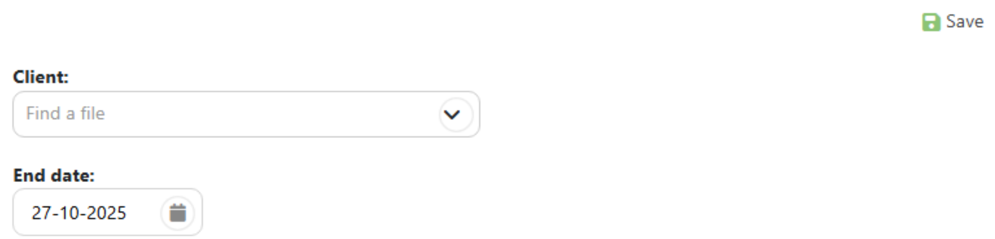


Via dashboard:

1. Go to dashboard
2. Widget "Application Shortcuts" (Applicatiesnelkoppelingen)
3. Click on **"Report recovery"** (Hersteld melden)

Step 2: Fill in recovered data

1. You are looking for the right employee in the field **"Search for a file"** (Zoek een dossier)



2. You select the employee and choose a recovery date
3. You choose to save.
4. The recovery notification is saved.

Step 3: After recovery notification
What happens automatically:

- Absence file is closed
- End of trajectory is registered
- Any open tasks will be cancelled

Common situations
Situation 1: Employee is working again but is not yet 100%

- DO NOT use "Report Restored"
- Use **"Partial Recovery"** (Deel hersteld melden) (see 8.3)
- For example: works 50% or custom tasks

Situation 2: Employee resumes and immediately drops out again

- Sign off recovery first
- Then new sick report (8.1)
- System recognizes if it is a re-notification

8.3 Registering Partial Restoration
What is partial recovery?

Partial recovery means that an employee:

- Can work partially (e.g. 50% of the hours)
- Do adapted work (lighter tasks)
- Still in guidance is
- Builds up to full recovery

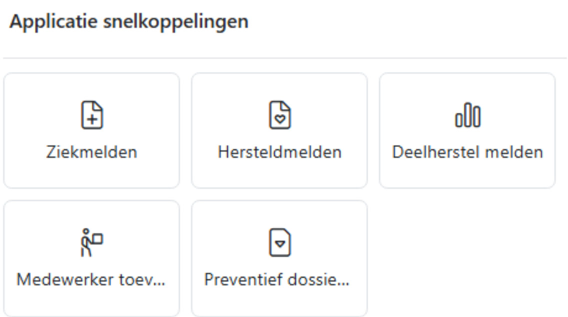
When to use partial recovery
Examples:

- Employee with back problems works 4 hours/day instead of 8 hours

- Employee builds up from 2 to 4 to 8 hours

IMPORTANT: In the event of partial recovery, the absence file remains OPEN. The employee is still in counseling. This differs from full recovery (8.2).

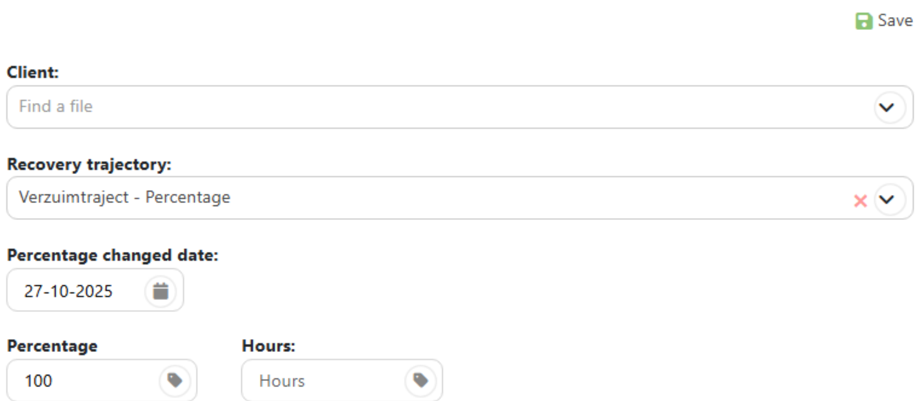
Step-by-step partial recovery



Step 1: Start partial recovery registration
Via dashboard:

1. Dashboard
2. Widget "Application Shortcuts"
3. Click on **"Partial Recovery"** (Deelherstel melden)

Step 2: Fill in partial restore information



1. You select the right employee at **"Find a file"**
2. You choose the date on which the partial restoration takes effect
3. You enter the percentage or number of hours for which you report your employee recovered.
4. You save the notification.

Step 3: After registration
What happens:

- Partial restoration is registered in file
- WVP timeline continues
- Absenteeism file remains open
- Employee is still under supervision

8.4 Reporting maternity leave (WAZO)

What is WAZO?

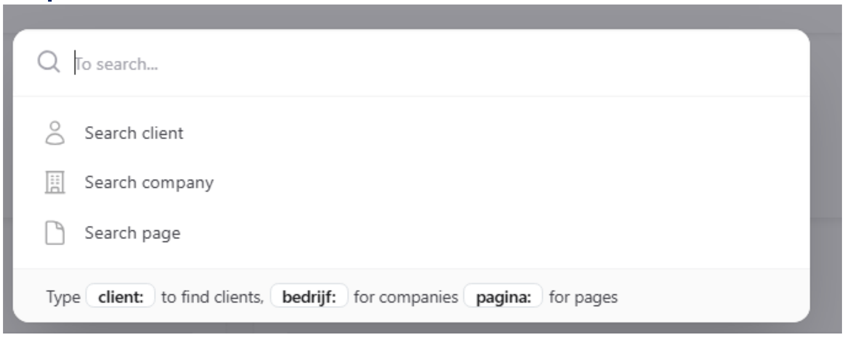
WAZO stands for Work and Care Act. In Planning Calendar, this is used specifically for **maternity leave**.

When do you use WAZO report?

- Employee goes on maternity leave
- At least 4-6 weeks before due date

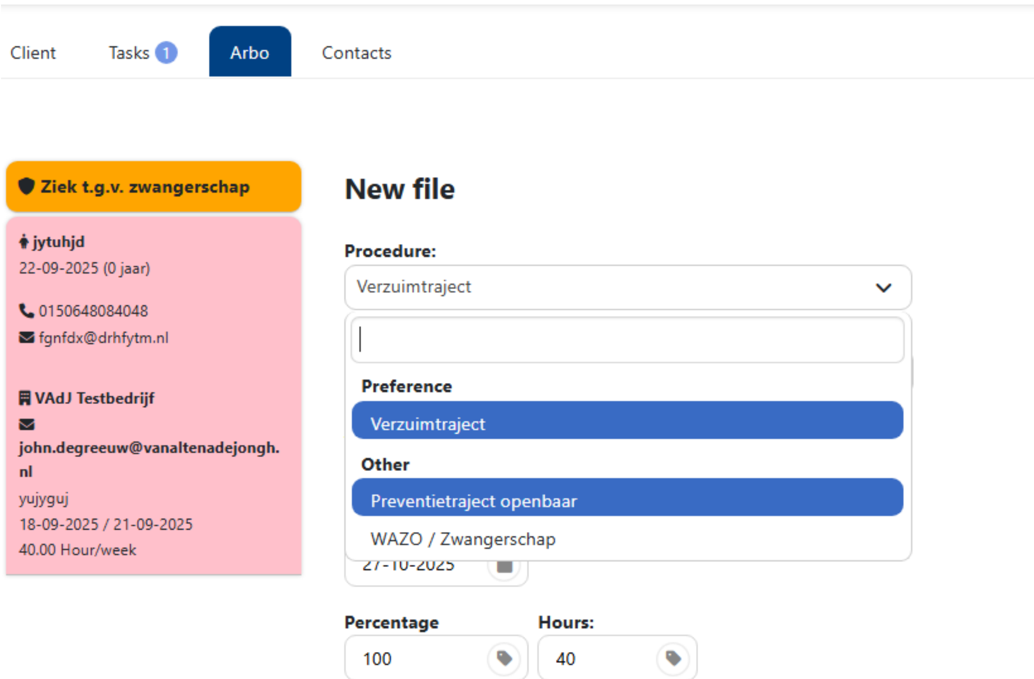
Step-by-step WAZO reporting

Step 1: Start WAZO notification



Via dashboard:

1. Search for your employee via the search bar on the homepage
2. Your employee's file opens



3. Select the **"Arbo"** tab You will automatically see the option to start a new file.
4. Choose "WAZO/Pregnant" **for the trajectory** and select the correct start date.
5. Click **"Save"**

Step 2: After WAZO notification
What happens:
- WAZO is registered (no absenteeism file!)

8.5 Asking a question to the company doctor or advisor
Quickly add a question
When to use this:
- You need work-related advice
- Doubts about reintegration options
- Questions for the upcoming consultation hour
- Ambiguities in guidance

Fastest route
Step 1: Open the file
1. **"My files"**
2. Click on employee name

Step 2: Add questions
1. Scroll to "Progress file" (right)
2. Click green button **"Add"**
3. Select "Question Occupational Physician" or "Question Advisor Work and Employability" (formerly Advisor Work and Health) in dropdown
4. Type your question clearly and specifically
5. Click "Save"
6. Professional sees your question and deals with it at the next consultation.

→ For detailed explanations, see Chapter 5.8.2

8.7 Quickly find an employee
Different ways to search
Method 1: Quick Search (Fastest)
1. Top screen: search bar
2. Type employee name
3. Press Enter
4. Results appear
5. Click on name

Method 2: Through Clients
1. Click "Clients" in menu
2. Use search bar
3. Click on name

Method 3: Via My files (only in case of active absence)
1. Click "My files"
2. Use search bar
3. Click on name

Method 4: Recently viewed (very fast with regular employees)
1. Go to Dashboard
2. Widget "Recently viewed files"
3. Click directly on name

TIP: For employees you watch often: use "Recently viewed" - this is the fastest!

→ For advanced search functions, see Chapter 3.1

Summary Chapter 8:

- Reporting sick via dashboard widget "Reporting sick"
- Report recovered at full recovery (100%)
- Partial recovery in the event of partial work (file remains open)
- Reporting WAZO for maternity leave (no sick leave!)
- Add questions to "Progress file"
- Multiple ways to find employees

Next steps:

- Use this chapter as a reference
- Go to the Attachments for FAQ and quick reference

See:

- All mentioned chapters for detailed explanations

Attachments

Appendix A: Frequently Asked Questions (FAQ)

General

Q: I forgot my password, what now?
A: On the login page, click on "Forgot Password". You will receive an email with instructions on how to set a new password.

Q: My authenticator app no longer works, how do I log in now? A: Use your backup codes that you saved during setup. Out of backup codes? Contact verzuimapplicatie@vanaltenadejongh.nl

Q: Can I use Planningsagenda on my mobile? A: Yes, Planningsagenda is responsive and works on mobile devices via the browser. There is also a separate app for executives called ''Planningsagenda.nl''. You can find these in the Apple store and Google Playstore.

Employees and files

Q: Why can't I find a staff member in "My files"? A: "My files" only shows employees with active absenteeism. Search "Clients" for all employees. See Chapter 3.4.

Q: Can I delete a file? A: Only in case of incorrect registration via "Deletion request" (see H5.12). Normal closure is done via "Herstelmelden".

Q: How do I add a new employee that wasn't created automatically? A: Via "Clients" > "Add Client". See Chapter 3.2. First check whether employee already exists to avoid duplicate creation.

Q: An employee has recovered but drops out again within a week. Is this a new notification? A: First report recovery (H8.2), then report sick again (H8.1). The system registers this as a re-notification and keeps statistics.

Tasks

Q: I see a task but don't understand what to do. Where can I find an explanation? A: Hover your mouse over the task – an information bubble will appear with instructions (see H4.5). Or click the play button - the wizard will guide you through the steps.

Q: Can I delete a task? A: Usually not yourself. Tasks automatically follow the WVP protocol. If you have any questions about tasks, please contact your advisor at Van Altena en de Jongh.

Q: I completed a task late, what now? A: Perform the task anyway. The status is recorded as "Completed late". In the event of structural late tasks, discuss with your advisor how you can prevent this.

Q: How do I add a custom task for a personal reminder? A: Via "My tasks" > "Add task" or via "Add task" in the file. See Chapter 4.4.

Documents

Q: I can't open a document, what's wrong? A: Check if you have a PDF reader installed. Try downloading the document and opening it locally. Still not working? Contact your IT department.

Q: Can I delete a document from a file? A: Only if you are authorized to do so. Deleted documents cannot be recovered. When in doubt: consult with verzuimapplicatie@vanaltenadejongh.nl

Q: What file types can I upload? A: Mainly PDF, Word (.doc, .docx) and images (.jpg, .png). PDF is recommended for optimal compatibility.

Reports

Q: My report doesn't show any data, what's wrong? A: Check that your filters are set correctly. Check the period, company selection and any other filters. See Chapter 7.3.

Q: How do I compare data from different time periods? A: Generate the same report for different periods and download both to Excel. In Excel, you can compare them side by side.

Q: Can I save a report for later? A: Yes, download to Excel and save locally. Recently generated reports also remain available in the system (on the right side of the reporting screen).

Privacy and Security

Q: Who can see my files? A: Authorized users only: you, other HR employees and/or managers (if authorized) and professionals of Van Altena en de Jongh. See "Contacts" per file.

Q: Is Planningsagenda GDPR-proof? A: Yes, Planningsagenda meets all GDPR requirements and is ISO 27001/NEN 7510 certified. All data is securely stored in the Netherlands.

Q: What happens to data after the contract ends? A: Medical data are kept by Van Altena en de Jongh in accordance with legal periods. See your contract for specific agreements.

Q: Can I share login details with colleagues? A: NO, absolutely not. Each user has their own login credentials. This is important for security and traceability.

Technical problems

Q: The system is slow, what can I do? A:
- Check your internet connection
- Close other browser tabs
- Delete browsercache and cookies
- Try a different browser

Q: I get an error message when saving, what now? A:
- Check that all required fields have been filled in
- Please try again
- Log out and back in
- Screenshot the error message
- Contact verzuimapplicatie@vanaltenadejongh.nl with screenshot

Q: The page won't load, what can I do? A:
- Refresh the page (F5)
- Wis cache en cookies
- Probeer incognitomodus
- Check if www.planningsagenda.nl is available

- Contact your IT department

Contact in support
Q: Who can I call if I have questions about the system? A: Technical questions: verzuimapplicatie@vanaltenadejongh.nl Substantive questions about guidance: your regular advisor from Van Altena en de Jongh.

Q: Where can I learn more about Planning Calendar? A: On www.planningsagenda.nl and in this manual. For organization-specific appointments: contact your advisor.

Appendix B: Where can I find what? - Quick reference

Most common actions

What do you want to do?	Where can you find it?	Chapter
Log in	www.planningsagenda.nl > Log in	H1.1
Employee reporting sick	Dashboard > Widget > Reporting Sick	H8.1
Report employee recovered	Dashboard > Widget > Manufacturer Report	H8.2
Register partial recovery	Dashboard > Widget > Partial Restore	H8.3
Reporting WAZO (pregnancy)	Report dashboard > widget > WAZO	H8.4
Find an employee	At the top > Search bar	H8.7
Add employee	Clients > Add Client	H3.2
Open file	My files > Click name	H5.3
Perform task	My Tasks > Play button	H4.3
Add task	My Tasks > Add Task	H4.4
Upload documents	Add a file > documents >	H5.7.3
Question to company doctor	Add file > progress >	H5.8.2
Add Note	Add file > progress >	H5.8.3
View appointments	Scheduled appointments (menu)	H6.1
Create a report	Reports > Select type	H7
Change password	Account Menu > Profile	H2.5
Log out	Account menu > Sign out	H2.5

Where can I find information about an employee?

What are you looking for?	Where can you find it?	Chapter
Contact details	Clients > Click Name OR File > Client Tab	H3.3, H5.5
Absence status	My Files > Overview	H5.1
Absenteeism history	File > Left Down	H5.5
Ongoing tasks	Dossier > Tabblad Tasks	H5.6
Documents	File > Occupational Health & Safety tab > Documents	H5.7

What are you looking for?	Where can you find it?	Chapter
Progress guidance	File > Tab Health & Safety > File Progress	H5.8
Appointments	File > Occupational Health & Safety tab > appointments	H5.9
Communication history	File > Tab Occupational Health & Safety > Communication	H5.10
Committed professionals	Dossier > Contacts tab	H5.11
Employment details	Clients > Click Name OR File > Client	H3.3, H5.5

Navigation menu – What can you find where?

Menu-item	What will you find there?	Chapter
Dashboard	Overview, widgets, shortcuts	H2
Scheduled appointments	All future consultations	H6
My tasks	All your tasks (all employees)	H4
My files	All active absenteeism files	H5
Reports	Absenteeism figures and analyses	H7
Clients	All employees (even without absenteeism)	H3

Dashboard widgets – Quick access

Widget	What does it do?	Chapter
My tasks	Number of open tasks	H2.3, H4
My files	Number of active files	H2.3, H5
Application shortcuts	Reporting sick, Reporting Restored, etc.	H2.3, H8
Recently viewed files	Quickly back to recent files	H2.3
Reporting and Statistics	Shortcuts to reports	H2.3, H7
My Tasks - Statistics	Visual overview of task status	H2.3, H4

Tabbladen file

Tab	What will you find there?	Chapter
Customer	Personal and employment data	H5.5
Tasks	All tasks for this employee	H5.6
Arbo	Trajectories, documents, progress, agreements	H5.4-5.10
Contacts	Stakeholders in this case	H5.11

Appendix C: Terminology explanation

A

Application shortcuts Widget on dashboard with quick access to common actions such as reporting sick and reporting recovery.
AWI - Work & Employability Advisor , formerly Work and Health Advisor (AAG). Your regular contact person at Van Altena and de Jongh for absenteeism guidance.
A.O.% - Disability percentage Percentage that indicates how much someone cannot (yet) work. 100% = fully disabled, 50% = can work halfway.

C

Client Employee/employee. In Scheduling Calendar, the term "client" is used for all people in the system.
Client portal The employee portal where sick employees can log in to see their own file, appointments and documents.
Draft Status of a document that is not yet final. For example, "Concept Plan of Action" in week 2.

D

Dashboard The home screen after logging in with overview and widgets for quick access.
Partial recovery Situation in which an employee can work part-time (e.g. 50% of the hours or adjusted tasks). File remains open.
Final Status of an approved document. For example, "Plan of Action final" after week 6.
File Collection of all information about the absenteeism guidance of an employee: trajectories, documents, agreements, progress.

E

First day of illness The first day that an employee is sick. Starting point for all WVP calculations.
EWT - End of Waiting Period 104 weeks (2 years) after first day of illness. Time at which WIA inspection may follow.

F

Frequent absenteeism Employee who is regularly ill, even if the periods are short. For example, 4x or more in a year.

H

Notification of recovery Registration that an employee has fully recovered and can work 100% again. Close the absence file.

M

MFA - Multi-Factor Authentication Extra layer of security when logging in: in addition to password, also a code from authenticator app.
My Files Menu item and widget that only shows employees with active absence. Difference with "Clients" (see C).

P

Plan of Action (PvA) Mandatory document from week 6 with agreements on reintegration. First draft (week 2), then final (week 6).

Protocol Automated rules that create tasks according to the Gatekeeper Improvement Act. For example, "WvP protocol 2025".

R

Reintegration Process of returning to work during or after illness. Can be done gradually through partial recovery or immediately upon full recovery.

T

Tasks Actions that must be performed in the absence process. Automatically generated by WVP protocol or manually added.
Feedback Report from a professional after a consultation with an employee. Contains advice and next steps.
Type of trajectory Type of guidance. For example: Absenteeism process, Prevention file, WAZO.

V

Question Message to the company doctor or advisor with questions about the guidance. Helps professional prepare for consultation.
VWO - Data processing agreement Contract containing agreements about the processing of personal data in accordance with the GDPR.

W

WAZO - Work and Care Act that regulates various forms of leave. In Planning Calendar specifically used for maternity leave.
Widget Interactive block on the dashboard with information or quick access to functions.
WVP - Gatekeeper Improvement Act that regulates the reintegration process with mandatory steps and deadlines. Runs from week 0 (sick leave) to week 104 (EWT).
WVP timeline Visual representation at the top of each case that shows where the employee is in the WVP process.

Z

Reporting sick Registration that an employee is sick. Start an absence file and the WVP timeline.

Need help?

- **Technical questions:** verzuimapplicatie@vanaltenadejongh.nl
- **Substantive questions:** Your permanent advisor work and employability

Good luck with Planningsagenda!
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