



Instructions create task

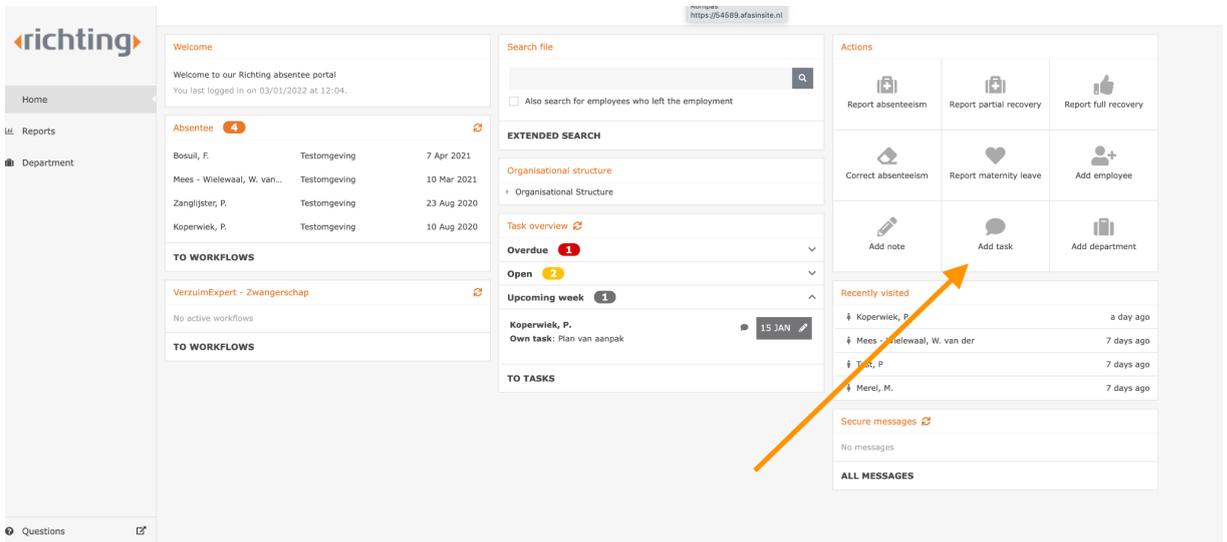


Instructions create task

Within the absenteeism files, working with tasks is a handy way to keep an overview of your work. In addition to the tasks dictated by the Eligibility for Permanent Incapacity Benefit Act (Wet verbetering poortwachter, in Dutch), you can also add your own assignments to an absenteeism dossier. These instructions will show you how to do that. There are two ways to create a task:

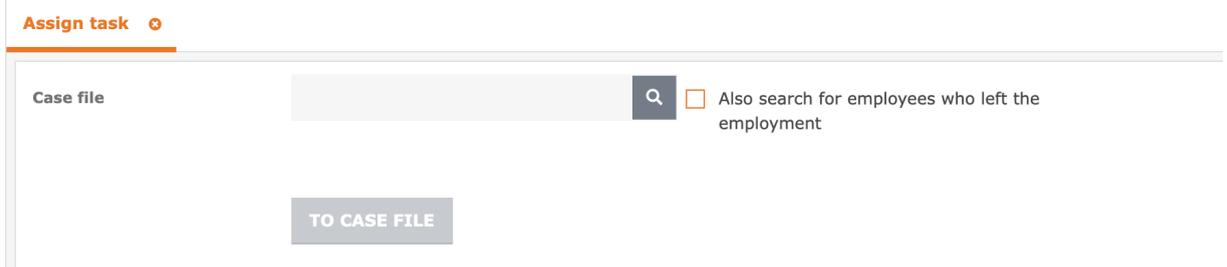
Option 1

Click on 'Add task' in the 'Actions' section on the homepage:



The screenshot shows the Richting portal homepage. On the right side, under the 'Actions' section, there is a grid of buttons. An orange arrow points to the 'Add task' button, which is located in the second row, second column of the grid. Other buttons in the grid include 'Report absenteeism', 'Report partial recovery', 'Report full recovery', 'Correct absenteeism', 'Report maternity leave', 'Add employee', 'Add note', and 'Add department'.

You will be redirected to the screen shown below where you can search for the employee's dossier:



The screenshot shows the 'Assign task' screen. At the top, there is a search field labeled 'Case file' with a magnifying glass icon. To the right of the search field is a checkbox labeled 'Also search for employees who left the employment'. Below the search field is a button labeled 'TO CASE FILE'.

- Enter the employee's name in the search field. Tick the box 'Also search for employees who left employment' if the employee is no longer employed by our client.
- The employee's name will appear in a separate window. By clicking on the name, it will be selected in the dossier field.
- Then, click on the button 'To case file'. You will be redirected to the screen shown below:

File: Koperwiek, P. o

Testomgeving » Administratie » Koperwiek, P.

Allocate assignment

* The situation Add assignment

Call applies to workflow * Ziekte (WVP): 2020-08-10 - Heden (nr: 402650) ▼

Date * 4-1-2022 📅

Mark as important

Select assignment type * Select assignment type ▼

Select an executor * E. Zonneveld ▼

Description assignment *

Explanation for the assignment *

Number of days for execution 1

CANCEL ADD ASSIGNMENT

Advice
 Enter an assignment to a VX us
 click on Add assignment

- Call applies to workflow: Then, select a relevant illness period.
- Date: If necessary, enter today's date.
- Mark as important: Tick the box 'Mark as important', if the assignment is important.
- Select assignment type: You should always select 'Free own assignment' from the drop-down menu.
- Description assignment and explanation for the assignment: Enter a description of the command and elaborate in the field below.
- Number of days for execution: Adjust the number of days needed to execute.
- Then, click on 'Add assignment'. The assignment and date will now be included in your task overview.

74 Own assignment test

04 Jan 2022 05 Jan 2022 🗑️

Note: you can edit the task by clicking on the notepad on the right. Click on the trash can icon to delete the task.

Option 2

Option 2 adds the assignment via the 'Task overview' section on the homepage. From there you will be directed to the employee's dossier. Subsequently, click on the task that belongs to the dossier in the 'Task overview' section on the homepage:

Click on 'Actions' to add a task to the employee's dossier:

You will be redirected to the screen shown below:

Click on 'Maak een taak aan'. You will then be redirected to the 'Allocate assignment' window. Follow the steps as described on page 2 from here.