CVC ComVida Corporation
SOFTWARE SOLUTIONS THAT FIT

TRAINING CATALOGUE
(Fall/Winter 2018)

EMPLOYEE MANAGEMENT SOFTWARE (EMS)
Human Resources, Staff Scheduling, Payroll & Employee Self-Serve
Software version EMS 4.2 or higher

ACCOUNTS RECEIVABLE & TRUST SOFTWARE (AR/T)
Accounts Receivable and Trust Accounting systems
Software version AR/T 5.0 or higher

GENERAL LEDGER & ACCOUNTS PAYABLE (GL/AP)
General Ledger and Accounts Payable system
Software version FMS 4.1 or higher

REGISTRATION

To register for a course, please send an email to helpdesk@comvida.com with the class webinar registration form attached (last page of document).

We will email the link for accessing the webinar via *GoToMeeting* along with the course materials prior to the class.

Classes are approximately 1 hour in length. The duration of each webinar may vary depending on the number of participants and the questions asked.

Let us know if the dates and times offered are not convenient and we can attempt to schedule an alternate time.

Fee is $140 plus applicable taxes per course and any number of staff from your organization can attend. 24-Hour cancellation notice is required.

Note that due to the course's length of 1.5 hours, the T4 Balance & Reconciliation course fee is $200.

To take advantage of the EMS training courses you must be **using EMS 4.2 or higher**.

For Accounts Receivable & Trust courses you must be **using AR/T 5.0 or higher.**

For General Ledger & Accounts Payable courses you must be **using FMS 4.1 or higher.**

Space is limited so be sure to register early!

PAYROLL COURSES

ADJUSTMENTS

Adjustments are used to adjust employee details for items that are calculated automatically through the setup of the item formula. Payroll deductions, employee benefits and accruals, such as sick and vacation time entitlements, are examples of automatic calculations. This course will review several scenarios to help you understand what types of adjustments are needed, when they are needed, and how to enter them.

REPORT WRITER

The Report Writer tool allows the user to create reports containing selected information about employees and calculated payroll amounts. This course will show you how to interpret the report setup, copy and modify reports, use filters and sorting as well as the more advanced features available in the Payroll Report Writer.

PAYROLL REPORTS MENU

Pre-defined and custom reports are accessed through the Reports menu in Payroll. The reports can be viewed on screen, printed to a PDF, or exported to a variety of formats. This course will show you how to generate the standard payroll reports. We will review filtering, sorting options, and how to utilize these reports to aid you in the processing and auditing of payroll.

RECORD OF EMPLOYMENT

This course will teach you how to export the ROE from EMS and upload the ROE online to Service Canada. The Service Canada requirements for ROE submission have changed in 2016, and this course will cover the new ROE generation and submission process.

PAYROLL TIME-SAVING TIPS & BEST PRACTICES

This course will show you some great time-saving features that you may not be currently taking advantage of in Payroll. These will help you to minimize data entry and ensure accurate payroll record keeping. We will demonstrate how to use some of the payroll tools and show you some shortcuts to help maximize productivity.

Q & U - QUALIFIED AND UNQUALIFIED EMPLOYER EI

This course is designed for clients with multiple CRA Business numbers. We will show you how to properly move employees from Unqualified to Qualified status (or vice versa) in order to ensure that Employer EI is being calculated at the prescribed rate and that other crucial payroll items tied into an employee's Qualified/Unqualified status are functioning properly. This will help minimize common errors that can impact net pay and ensure that T4s are processed correctly.

HEALTH SECTOR COMPENSATION INFORMATION SYSTEM (HSCIS) REPORT

The purpose of this course is to assist organizations in the maintenance and auditing of HSCIS employee information for the purposes of reporting to the Health Employers Association of BC (HEABC) from EMS. This course is designed for the user responsible for HSCIS reporting. We will review the setup, maintenance, and generation of HSCIS information to be reported to the HEABC.

Note: This course and document assumes that your organization is converted to the HSCIS Extract for EMS 4.2 that was released with the EMS 4.2.1.5 update in June 2015 and requires a separate conversion at no additional charge for clients who are already licensed for HSCIS Reporting with ComVida. If you have not been converted to the EMS 4.2 HSCIS Extract, please contact the HELPDESK to schedule a conversion.

T4'S – BALANCE AND RECONCILIATION ($200)

The purpose of this course is to show clients how to generate T4s and T4A's and balance them to your CRA Remittances prior to the end of the year in order to help organizations get a head start on their year-end procedures. We will also review several common scenarios where discrepancies have occurred, and demonstrate how to make the correct Employee Adjustments in order to correct these errors.

STAFF SCHEDULING COURSES

SHIFTS TO BE FILLED

The Shifts to Be Filled page in Staff Scheduling displays the Shifts that are under-covered on the Working date, that is, the Shifts where additional coverage is required and those employees who are available to provide the Shift with full staff coverage. This course is designed for anyone responsible for scheduling. We will go over all of the steps required for covering shifts. We will teach you how to effectively use the Shifts to Be Filled page with all the new features and enhancements.

SHIFT HANDLING

Sometimes it may be necessary to change an employee's assignment because it has changed since the rotation was generated. This may be because of many reasons, including sickness, a vacation request, or the needs of the business have changed. At those times, a Shift Handle will need to be performed, so the assignment will reflect the change. This course is for the user(s) that would update schedules. Typically, this would be Schedulers or Managers, but it is open to anyone interested. We will show you how to make changes to schedules to reflect the correct assignments using all three methods of Shift Handling.

HUMAN RESOURCES COURSES

DATA TEMPLATES IMPORTING/EXPORTING FROM HUMAN RESOURCES

Data Templates are used to define the layout of an import or export file by identifying which fields are being imported or exported and their location in the file. Employee data can be imported and exported through Human Resources. This course will demonstrate how powerful the import and export feature can be. With the use of data templates, data can easily be imported or exported. Data from Payroll, such as Time Bank balances, can be imported to HR.

HR PAGES

Human Resources allows for the complete tracking of unlimited employee information. The user-defined pages can be set up to meet your organization's specific requirements based on Collective Agreements, Government Employment Standards, and Employment Policies. This course will teach users how to create their own custom HR pages. Anything that is currently being tracked manually in Excel or on paper can be tracked electronically on a custom page. This allows the user the capability to run reports and track information easily.

TERMINATING EMPLOYEES

This course will walk through the procedure to terminate an employee. We will also show you how to make sure that all currently terminated employees were terminated correctly. This will ensure that your active employee count is up to date and accurate.

GENERAL COURSES

EMPLOYEE SELF-SERVE

The Personal Information area of EMS is available to all employees with a user ID and password. This area displays your detailed information from HR, including notifications, as well as your scheduled assignments in a Monthly or Annual view. This course is designed for those organizations who wish to alleviate the phone calls to the Scheduling office by having staff log onto EMS to view or access their own schedules. This setup is completely secure so users will be able to access only their own profile.

NOTIFICATIONS

Notifications in EMS allow employees to have a recorded two-way conversation with Supervisors, Department Heads and other staff regarding topics such as Scheduling changes for vacation requests, hours worked and other reasons; HR updates such as expiring skill sets, upcoming reviews and Events such as meetings, policy changes or general announcement. This course was designed to teach users how to use the Notification functionality to send two-way communications between Supervisors, Department Heads and other staff.

SETTING UP A NEW OPERATOR

The Operator page in HR combines multiple pages of security into one page. There are several areas that can be configured for an employee. This course is designed for the user responsible for setting up new operators of the system. In this class, we will explain all fields in the Operator Page and what impact they have.

TYPE BLOCKS & FILTERS

Type Blocks are a very simple but powerful concept. EMS allows users to select groups of Scheduling, Payroll and HR data that are of a common "type." Selection of groups of data of a common type is based on the "Type Block." The most commonly used method of specifying selection criteria is the "Filter." This course will show users how to set up and use Filters in EMS. This simple but powerful feature will help save time in your daily tasks.

ACCOUNTS RECEIVABLE & TRUST COURSES

BILLING CYCLE, RECEIPTING AND STATEMENTS

This course will demonstrate in detail the billing cycle available in the Accounts Receivable module. How to set up clients for recurring billing, inputting mid-month billing adjustments, and using the daily rates to automatically calculate recurring charges added or ended mid-month. We will also cover the receipting process, creating and printing receipts as well as how to properly set up clients and/or their contacts to receive printed statements.

AR TIPS AND SHORCUTS

This course will cover general features of the product which can improve a user's proficiency in the product and help navigate the product more efficiently and reduce frustration and errors. Areas covered include:

- Filters & Sorting
- Client Notes
- Batch Copying
- Bulk Transaction Entry
- Batch Reversals
- Reports Overview
- Save Changes

These Accounts Receivable courses are not scheduled at specific times for this course cycle. If you are interested in a session please contact the helpdesk at helpdesk@comvida.com so that we may schedule a mutually agreeable time to run a course for your organization.

GENERAL LEDGER & ACCOUNTS PAYABLE COURSES

SETUP & MANAGEMENT OF ONLINE PAYABLES

This course will cover the management of online payables in the system. Areas covered will include: Setting up the payment register & payables journal information, adding bank account information for suppliers, managing pay advice recipients in supplier records, as well as generating and the payments and exporting the bank data file for upload to your financial institution.

These General Ledger and Accounts Payable courses are not scheduled at specific times for this course cycle. If you are interested in a session please contact the helpdesk at helpdesk@comvida.com so that we may schedule a mutually agreeable time to run a course for your organization.

EMS 4.2 Webinar Schedule	September	October	November
PAYROLL			
Adjustments	27th – 10:30a		22nd – 8:30a
Report Writer	27th – 8:30a	25th – 10:30a	
Payroll Reports Menu		11th – 10:30a	1st – 1:00p 29th – 8:30a
Record of Employment		11th – 8:30a	1st – 10:30a 29th – 1:00p
Payroll Time Saving Tips & Best Practices		25th – 1:00p	22nd – 10:30a
Q & U - Qualified & Unqualified Employer EI		25th – 8:30a	
HSCIS Report	27th – 1:00p		22nd – 1:00p
T4s – Balance & Reconciliation		11th – 1:00p	1st – 8:30a 29th – 10:30a
STAFF SCHEDULING			
Shifts to be Filled	13th – 8:30a 13th – 10:30a		
Shift Handling			8th – 8:30a 8th – 10:30a
HUMAN RESOURCES			
Data Templates Importing/Exporting from Human Resources		18th – 10:30a 18th – 1:00p	
HR Pages	20th – 10:30a 20th – 1:00p		
Terminating an Employee			8th – 1:00p 15th – 8:30a
GENERAL			
Employee Self-Serve		4th – 1:00p 18th – 8:30a	
Notifications	13th – 1:00p 20th – 8:30a		
Setting up a new operator		4th – 8:30a 4th – 10:30a	
Type blocks and filters			15th – 10:30a 15th – 1:00p
ACCOUNTS RECEIVABLE & TRUST			
Billing Cycle, Receipting & Statements	Contact Us	Contact Us	Contact Us
AR Tips & Shortcuts	Contact Us	Contact Us	Contact Us
GENERAL LEDGER & ACCOUNTS PAYABLE			
Setup & Management of Online Payables	Contact Us	Contact Us	Contact Us

Note: All courses listed above are in Pacific Time. If none of the course times are suitable for your organization, feel free to send us a request along with an alternate date & time and we will do our best to accommodate your request.

ComVida Corporation
Webinar Class Registration Form
Fall/Winter 2018

#327 – 555 Sixth Street
New Westminster, BC V3L 5H1

Phone: 604-540-4400 ext. 0
Fax: 604-540-4020
Email: helpdesk@comvida.com

Bill To:

Please fill out the section below with your course selections from the prior page and attendee information:

Class	Date & Time	Price	Attendee(s)	Email address(es)

	Sub-Total:	
	GST (5%):	
	Total:	