



TRAINING CATALOGUE

(Fall/Winter 2021)

EMPLOYEE MANAGEMENT SOFTWARE (CVC)

Software version CVC51 only

ACCOUNTS RECEIVABLE & TRUST SOFTWARE

(CVC)

Software version ART51

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 *Zoom Meeting* along with the course materials prior to the class.

Classes are approximately 1-3 hours in length. The duration of each webinar may vary depending on the number of participants and the questions asked.

Course fees are listed beside each description of the class, there will be applicable taxes per course. Any number of staff from your organization can attend. 24-Hour cancellation notice is required or you will still be invoiced.

To take advantage of these training courses you must be **using CVC51**.

For the notifications course to include Texting and Voice messaging – Twilio will need to be installed. This feature is also available for just email notifications and would not require a Twilio account.

Space is limited so be sure to register early!

GENERAL COURSES

NOTIFICATIONS (420.00)

A prerequisite of taking the Notification course (if you are wanting to text or voice message) is, you must have your Twilio account set up and ready to use.

Notifications in CVC51 now features the ability to send bulk text messages or a single message to an employee's cell phone from the Shifts to Be Filled or Block Booking pages in Scheduling. This can also be done from the new Communication Hub. CVC51 also offers the users the option to set up multiple user-defined notification types, such as: Vacant Shifts, Vacation/Time Off requests, Skill Set expiry or when upcoming milestones are being reached, like anniversary dates. Notifications can also be sent through email without the use of Twilio.

This class offers a two hour training session with a one hour, one-on-one session to follow the same day, to ensure that everything has been set up in your database to go live with Notifications after this class.

EMPLOYEE SELF-SERVE (140.00)

The Self-Serve area of CVC51 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 CVC51 to view or access their own schedules. This setup is completely secure so users will be able to access only their own profile.

Note: this course introduces the Leave Management feature and how staff can log into self serve and start a leave request with just a few clicks of the mouse.

SETTING UP A NEW OPERATOR (140.00)

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 IN HR AND SCHEDULING (140.00)

Type Blocks are a very simple but powerful concept. CVC 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 CVC51. This simple but powerful feature will help save time in your daily tasks.

BACKGROUND JOBS (140.00) *NEW

Background Jobs are a way to automate many processes so staff don't have to remember, what and when, certain things need to be done. For example, can you imagine not having to manually run the Accruals report after every pay period, and import to Human Resources? A background job can now be set up to do this automatically after each pay period, as well as email you the results of the import. Or, how about having the system 'Process HR Data' to ensure that everything is up to date and emailing a report to inform you of the changes? Examples of the types of jobs that can be created are: Licensing, Skill Sets, Process HR Data, HR Date, HR Number, Import Time Clocks, Process Object Data, Employee Export, Employee Import or Payroll Imports.

EASY CLEAN UP & MAINTENANCE OF CVC51 (210.00) *NEW

Maintaining your database is essential. Isn't it frustrating to pull down a list and see information that hasn't been used in years? For example: pay codes, shifts, items, departments or positions to find that all the non-applicable choices are still there. Or running a calculate period, which seems to be taking forever and finding out that some employees calculate periods are 8 pages long. The list goes on and on. This class will show you how to easily clean up and maintain your database, resulting in more effective and efficient information, saving time and money!

STAFF SCHEDULING COURSES

WHATS NEW IN STAFF SCHEDULING (280.00)

This course will go through new and exciting features that have been added to Scheduling to increase productivity and save on time. Some topics that will be covered are: Follow-up messaging – options to notify employees that a vacancy has been filled. Conditional leave/shift ownership – management options to simplify tracking original assignments. Verify assignments – staff are now able to use Self-Serve and electronically verify their assignments. Consolidation & Vacancies added to the Department Monthly Calendar/Report. New calendar page for Notifications, Notification Type colours, added features to the Notification list page and so much more!

SHIFTS TO BE FILLED (140.00)

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 (140.00)

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.

LEAVE MANAGEMENT (210.00) *NEW

Handling leave requests is now easier than ever. The new Leave Management page allows staff to see what is left in their accrual/time banked balances, to make an informed decision if there is enough time left for their specific request, before even submitting it. Scheduling can see all the information necessary, all on one page, before deciding to approve or decline the request. This page includes, all the submitted requests during a date range, the assignments already scheduled for those requested days, the pool balances for the employee(s) submitting requests, including the current balances, what has been planned so far, and the available balances remaining. Schedulers will also be able to see the coverage for all shifts for that department on the date selected, including if there is anyone else on a leave that same day, and who that person(s) is. Lastly, there are quick links to Shift Handle, Assignment Substitution and Block Booking right at your fingertips, so you don't have to leave this page during the process.

HUMAN RESOURCES COURSES

DATA TEMPLATES IMPORTING/EXPORTING FROM HUMAN RESOURCES (140.00)

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.

HUMAN RESOURCE USER-DEFINED PAGES (140.00)

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 & HOW TO LOCATE INCORRECTLY TERMINATED EMPLOYEES (140.00)

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.

PAYROLL COURSES

WHATS NEW IN PAYROLL (280.00)

This course will show you how to streamline the proportionating feature, ease of batch editing, home page comments/notifications used in payroll, future dated position codes, email pay slips after creating bankdata.lst, adding new items to amounts, a new field called required in items , overriding history dates in reports and the list goes on and on. For some great features that you may not be currently taking advantage of in Payroll.

ADJUSTMENTS (210.00)

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 (140.00)

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 (140.00)

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.

PAYROLL TIME-SAVING TIPS & BEST PRACTICES (210.00)

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 (140.00)

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.

MAINTAIN HEALTH SECTOR COMPENSATION INFORMATION SYSTEM (HSCIS) REPORT & COMMUNITY SOCIAL SERVICES EMPLOYERS' ASSOCIATION (CSSEA) (140.00)

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

Note: BC Only

ACCOUNTS RECEIVABLE COURSE

AR TIPS AND SHORCUTS (140.00)

This course will cover general features of the product which can improve user's proficiency. We will teach you how to navigate the product more efficiently and show some tips to help reduce any errors you may be receiving. We will also cover the new and exciting enhancements that have been recently added. For example: the new email feature, learning how to create multiple entries at once, understanding and creating filters, and much more!

CVC51 Webinar Schedule	Sept	Oct	Nov	Dec
GENERAL				
Notifications <i>**Twilio program must be installed for text and voice messaging</i>		7 th 8:30a –10:30a 1:00p-2:00p to follow	18 th 8:30a –10:30a 1:00p-2:00p to follow	
Employee Self-Serve		28 th 8:30a-9:30a		
Setting up New Operator				
Type Blocks & Filters		28 th 10:30a-11:30a		
Background Jobs	16 th 10:30a – 11:30a			2 nd 8:30a-9:30a
Easy Clean Up & Maintenance of CVC 51		14 th 10:30a-12:00p	4 th 8:30a-10:00a	
STAFF SCHEDULING				
What's New in Scheduling				
Shifts to Be Filled	16 th 8:30a-9:30a			16 th 8:30a-9:30a
Shift Handling		21 st 1:00p-2:00p		
Leave Management	16 th 1:00p-2:30p	21 st 8:30a-10:00a	25 th 8:30a-10:00a	2 nd 10:30a-12:00p
HUMAN RESOURCES				
Data Templates, Import/Export for HR		28 th 1:00p-2:00p		
HR Pages				2 nd 1:00p-2:00p
Terminate Employees & Locate Incorrectly Terminated Employees		21 st 10:30a-11:30a		

CVC51 Webinar Schedule	Sept	Oct	Nov	Dec
PAYROLL				
What's New in Payroll	23 rd 10:30a – 12:30p			9 th 8:30a-10:30a
Adjustments	23 rd 8:30a-10:00a	14 th 1:00p-2:30p		
Report Writer			4 th 10:30a-11:30a	9 th 1:00p-2:00p
Report Menu	23 rd 1:00p-2:00p		4 th 1:00p-2:00p	
PR Tips & Best Practices	9 th 8:30a – 10:00a		25 th 10:30a-12:00p	
Q&U	9 th 10:30a-11:30a			
HSCIS/CSSEA Reporting	9 th 1:00p-2:00p		25 th 1:00p-2:00p	
AR				
Tips & Shortcuts		14 th 8:30a-9:30a		9 th 11:00a-12:00p

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 2021**

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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:	