TRAINING CATALOGUE

(Spring/Summer 2023)

EMPLOYEE MANAGEMENT SOFTWARE (CVC)

Software version CVC51

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 this 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 half an hour to 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.

For the **notifications course** to include Texting and Voice messaging – A 'Pay as you Go' Twilio account will need to be acquired. Please work with the Twilio Support team to get the account set up. 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 (450.00)

A prerequisite of taking the Notification course (if you are wanting to text or voice message) is, you must have contacted Twilio to get a 'Pay as you Go' account set up and ready to use. *** This includes testing the account to ensure you are receiving messages. There is a test option within your Twilio account. Troubleshooting your account is to be done with the assistance of the Twilio support desk.

Notifications in CVC51 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 (150.00)

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.

MOBILE APP (150.00)

This is not just another app! The new ComVida Mobile App is an excellent resource for employee's to quickly view schedules, and it also has the ability for them to Clock In or Clock Out, if desired. During this 30-minute course, you will receive the tools needed to set up the app for use and be able to implement it immediately. We will also discuss the benefits for Scheduling, Human Resources and Payroll personnel. Everyone in the organization will benefit from this free Mobile App!

TYPE BLOCKS & FILTERS IN HR AND SCHEDULING (150.00)

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 (150.00)

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.

STAFF SCHEDULING COURSES

PAY RULES & ASSIGNMENT APPROVAL (300.00)

This course will teach you how to automate Scheduling with the new Pay Rules and Assignment Approval pages. Pay Rules provide complete flexibility to manage exceptions including Overtime, Breaks, Hours and Days Off, Premiums, Guaranteed Hours, Banked Hours and Clock In/Out exceptions. The ability to automatically approve assignments, and/or Freeze only Approved Assignments is also available. The Assignment Approval page will display warnings when any of these rules are not met. Anyone can take advantage of these amazing features, however clients that use a time tracking device will benefit the most!

SHIFTS TO BE FILLED & SHIFT HANDLING (150.00)

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.
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 (225.00)

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.

EASY CLEAN UP & MAINTENANCE FOR SCHEDULING & NOTIFICATIONS (150.00)

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 and/or rotations to find that all the non-applicable choices are still there? Or list of notifications that is not completed? The list goes on and on. This course will show you how to easily clean up and maintain your database, resulting in more effective and efficient information, saving time and money!

HUMAN RESOURCES COURSES

DATA TEMPLATES IMPORTING/EXPORTING including TERMINATING EMPLOYEES (150.00)

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.
We 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.

HUMAN RESOURCE USER-DEFINED PAGES (150.00)

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.

ADDING NEW EMPLOYEE, SETTING UP A NEW OPERATOR and SECURITY GROUPS (150.00)

There are several areas that can be configured for an employee and/or operator's access. Adding employee and incorporating operator's login and security is easy and simple. 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 Security rights and what impact they have.

PAYROLL COURSES

WHATS NEW IN PAYROLL & PAYROLL TIME-SAVING TIPS & BEST PRACTICES (300.00)

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.
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.

ADJUSTMENTS (225.00)

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 (150.00)

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 (150.00)

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.

EASY CLEAN UP & MAINTENANCE FOR HR & PAYROLL & MAIN SETUP (225.00)

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: items, departments and/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 course will show you how to easily clean up and maintain your database, resulting in more effective and efficient information, saving time and money!

Q & U - QUALIFIED AND UNQUALIFIED EMPLOYER EI (150.00)

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) (150.00)

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 (150.00)

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	June	July	August
GENERAL			
Notifications **_Twilio program must be installed for text and voice messaging_**	8th 8:30a-10:30a . 1:00p-2:00p to follow	13th 8:30a –10:30a 1:00p-2:00p to follow	3rd 8:30a –10:30a 1:00p-2:00p to follow
Employee Self-Serve	1st 10:30a-11:30a		10th 1:00p-2:00p
Mobile App	Upon request		
Type Blocks & Filters	1st 1:00p-2:00p		
Background Jobs	15th 10:30a-11:30a	20th 11:00a-12:00a	10th 8:30a-9:30a
STAFF SCHEDULING			
Pay Rules & Assignment Approval	22nd 1:00p-3:00p	20th 8:30a–10:30a	10th 10:30a-12:30p
Shifts to Be Filled/Shift Handling	15th 8:30a – 9:30a		17th 10:30a- 11:30a
Leave Management	22nd 10:30a-12:00p	27th 8:30a-10:00a	17th 8:30a-10:00a
Easy Clean Up & Maintenance for Scheduling & Notifications	22nd 8:30a – 9:30a		31st 1:00p-2:00p
HUMAN RESOURCES			
Data Templates, Import/Export plus Terminate an Employee	29th 8:30a-9:30a	27th 1:00p-2:00p	
HR Pages	29th 10:30a-11:30a	27th 10:30a-11:30a	
Adding New Employee, Setting up New Operator and Security Groups	1st 8:30a-9:30a		17th 1:00p-2:00p

CVC51 Webinar Schedule	June	July	August
PAYROLL			
What's New, Tips & Best Practices	29th 1:00p-3:00p		24th 8:30a-10:30a
Adjustments	15th 1:00p-2:30p	6th 8:30a – 10:00a	31st 10:30a-12:00a
Report Writer		20th 1:00p-2:00p	24th 11:00a-12:00p
Report Menu		6th 1:00p-2:00p	24th 1:00p-2:00p
Easy Clean Up & Maintenance for HR, Payroll & Main Setup		6th 10:30a-12:00p	31st 8:30a-10:00a
Q&U	Upon request		
HSCIS/CSSEA Reporting	Upon request		
AR			
Tips & Shortcuts	Upon request		

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 alternate dates & times and we will do our best to accommodate your request.

ComVida Corporation
Webinar Course Registration Form
Spring/Summer 2023

#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:

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

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