Helpdesk Taglines in Program Order

ComVida Corporation
September 2026

GENERAL

February 2020

Tip 2: Position/ Transactions rate changes - add future changes.
In CVC 5.1 Payroll |Setup | Positions, select the Position with the rate change, copy the code, and key in the effective date with the new position rate. When scheduling is transferred to payroll if the effective date falls within that period the rate will be updated automatically.
In CVC 5.1 Accounts Receivable | Setup | AR Transaction Codes, select the transaction code with the change of daily rate from the drop down, copy the transaction code, and key in the effective date with the new rate. When advanced billing is run if effective date falls with that month the new rate will be updated automatically.

April 2020

Tip 4: Use NOTIFICATIONS to contact your staff on any important bulletins
Stay easily connected with your staff! Using NOTIFICATIONS in CVC to email, call or text all or a group of your employees is a simple yet a very powerful tool!
This is a great way to contact all your staff and keep them updated on any COVID-19 announcements, or any other issues, at the touch of a few buttons.
Contact Helpdesk for more details or to coordinate a training session to get you started.

September 2020

Tip 9: Have you checked out the Support tab at the top right-hand corner of CVC 5.1? Depending upon where you are in the program you will find the Setup User Guide, HR User Guide, Scheduling User Guide and Payroll User Guide. Wonderful source of information! Grab a cup of coffee or tea, prop your feet up and read away.

May 2021

Tip 18: Have you heard about our amazing **Background Jobs** in CVC5.1? These are jobs that can be set up to run automatically and can alert a single user or a group of users when specific milestones have been reached for an employee(s). HR Date fields or Number fields can be used to send an alert of an anniversary date, or which staff fall between a range for Seniority hours and could potentially qualify for a wage increase, or even Skill set expirations and much more!
Spring/Summer classes are underway. Don't miss out, make sure to sign up now and learn all there is to know about CVC 5.1 HR, SS, PR and ART. Learn quick and easy tips and techniques to make your job easier!

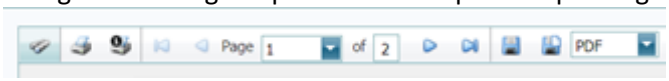
June 2021

Tip 19: With each new version of ComVida, there are always lots of new goodies! Make sure you check Security | Security Groups to allow the proper groups to access any of these exciting new feature(s).
Have you checked out our website **www.comvida.com** recently? There are two new videos on our Resources | Learning | Learning Centre page, called Automatic Reminders and Call Outs these are short videos which show you a little of what CVC 5.1 can do! Very powerful stuff!!! Be sure to visit often as new information videos will continue to be uploaded periodically. As well as our past email **Tips** from Helpdesk can also be found on our website under Resources | Helpdesk | Policies and Procedures.
Spring/Summer classes are underway. Don't miss out, make sure to sign up now before they are gone. Learn all there is to know about CVC 5.1 HR, SS, PR and AR, including quick and easy tips and techniques to make your job easier!
ComVida will be **closed** July 2nd, 2021 for ComVida's Staff Appreciation Day.

October 2021

Tip 23: Creating Lookups for Type Block Labels will allow you to choose from a drop down menu which will help trim and group your selection (Main | Setup | Lookups). To have specific reports grouped together, for example, Period, Monthly, Quarterly, Yearly or even ED/Administrator, Managers (name or department), go to Payroll | Setup | Reports, and enter the desired Type Block character. These reports can then be filtered to run at the same time, saving time and ensuring none are missed. If there is an error when printing a report, make sure to check the report code for restricted characters. No special characters are allowed in the report code such as \ / : * ? " < > | % &.
Don't forget to check out our Fall/Winter courses, new and return classes are available! Learn how to use the program effortlessly and efficiently.

July 2022

Tip 32: **H**aving issues using the print icon on top of our printing pages? 

It could be your choice of web browser. These icons will work well with Chrome.
To speed up the HelpDesk replies, a picture is worth a thousand words! Often the HelpDesk needs to see what you see to better assist. A screen shot of your screen can be taken using the print screen button on your keyboard. If you have a multi-display monitor set up, Alt + PrntSc can be pressed to only capture the active window. If you are a Mac user, Command + Shift + 5 is a quick shortcut to use. Open up the email and Ctrl + V to paste it.

August 2022

TIP 33: STOP manually entering Human Resource information into employee profiles! **Data Templates** are the way to go, they are a GREAT easy way to update multiple employees' information using the Employee Export and Employee Import tool in HR. They can be used to compile an Excel spreadsheet of any information that is stored in HR. Simply go to the Home Page | Setup | Data Templates, and add a new template, on the bottom of the screen add all the fields from HR that you want on your spreadsheet. Then from HR | Tools, use the Employee Export tool to extract the information using your new Data Template and save the .csv file.

Manipulate your spreadsheet with the new information, then use the Employee Import tool in HR to update the employee's profile with the new information in the spreadsheet. How ***easy*** is that!!!
For further information on this HR Tool, please see pages 38- 41 of the HR Guide, or send us an email and we will be happy to help.

April 2022

Tip 29: Are those **outstanding** notifications from background jobs and call outs being Accepted/Declined and completed? If your system is acting a bit sluggish this could be the reason. These are saved in memory and when the memory starts to get full your system will slow down. Our course *EASY CLEAN UP & MAINTENANCE* goes into detail on how to keep your database in top notch condition. Check out all of our other courses being offered throughout April-June. If you have not received the Catalogue of courses being offered, please email the helpdesk.

November 2022

Tip 36: Are you on CVC Version 5.1.16.2 yet? Did you hear about the great new features? A new "*Forgot your password*?" link has been added to the sign in page. Staff that log into Self-Serve no longer have to contact management when they forget their log in password. For staff to receive the email, they must have an email address and CommsType of 'Email' added in the HR | Employee Addresses page. A new Legal Name field has been added to the HR | Master, and will be used for all legal documents, like T4's, which leaves a field for preferred names in the system. If you have to update the legal name for lots of your staff, this can be done through a data template export/import. If you leave the legal name blank it will default to the old name fields.
Extra! Extra! Read all about it! There are too many new features to list so check out the CVC What's New document on our website www.comvida.com/product-releases/
Don't forget you can send communication to your employees in one action, add a message on the payroll payslip or use the actual email that sends the payslip (Email **Tip 27**: Feb 2022 ~ also found on our website). A great way to use this feature is to request if employees have any changes to their basic amount on the TD1 and to return the form by Jan 2023.

July 2023

Tip 44: Rate Changes – Super easy and efficient! To add future position rate changes, go to the Main page |Setup | Positions, select the Position with the rate change, ***copy*** the code, and key in the ***effective date*** with the ***new position rate*** and select Save Changes. That's it! The rest of the fields are handled by the program. Do not change any other columns and do NOT delete the old position rates. When scheduling is transferred to payroll if the effective date falls within that period the rate will be updated automatically. You will be set!
"Live in the sunshine. Swim in the sea. Drink in the wild air." — Ralph Waldo Emerson

October 2023

Tip 47: Breaking News! ComVida has announced the release of our latest version (5.1.17.2). Check your emails and make sure to read the 'What's New' document that will be attached to the announcement, to learn about all the fantastic new features.

Included in this release is the new Human Resources audit report! In order to take full advantage of this report, it is *imperative* that the green plus sign ( ) is used when entering information in Human Resources.

April 2024

Tip 53: Looking to communicate effortlessly with your employees? Utilize the Home Page Comments feature on Self Serve! Go to the Main home page, **Setup | Home Page Comments** and add your message! Easy! For more information, use our *Setup User Guide pg. 101*, under the Support menu on the upper right corner of any of the Setup pages.

May 2024

Tip 54: Would you like to increase communication with employees? This month's tip will show you how to display the shift **Assignment Notes** in **Self Serve**! These are messages or reminders, created by the users, specific to individual shift assignments. Turn on this feature by going to **Staff Scheduling | Setup | Settings** from the Main home page. Locate the **PersShowAllAssignmentNotes** setting and change the value to **Yes** and save. More information located in Scheduling | Support | CVC 5.1 Scheduling User Guide 2.8 Assignment Notes on page 16.

May 2025

Tip 66: Dealing with Payroll or Scheduling challenges can be tedious, especially when it results in repeated exchanges for information. To expedite the process, ensure you provide Helpdesk with the following:

- For Payroll concerns: Please send the **complete** Calculate Period report for the employee and the pay period in question.
- If an item is giving you a problem: Attach the **Detailed item report** for the specific item, along with a **Summary** report for all items.
- For GL discrepancies: Include the complete **GL report** for the period, identify the accounts you're having issues with, and steps you took to find the problem(s).
- For Scheduling issues: Be sure to include the **Employee's Name, Shift(s),** and **Working Date(s)** that are causing concern.

If you called the Helpdesk and received our voicemail, please do leave a message — we're likely assisting another client and we'll get back to you as soon as we are available!

Don't forget our **CVC User Guides**. They're easy to find in any ComVida module under the Support menu. Perusing these user guides is also a good way to find changes to the program you may not be aware of yet.

Thanks for helping us help you!

August 2025

Tip 69: Have you heard the news? Our online Learning Portal has been launched! It features 30 complimentary video sessions designed to spark curiosity and support your growth. Whether you're looking to brush up on skills or explore new topics, there's something for everyone. To

get started, visit https://www.comvida.com/learning-portal/, submit your registration request for approval, and we will send you a confirmation email once your registration is complete.

April 2026

Tip 77: Did you know that ComVida supports Two-Factor Authentication (2FA)? With the rise in cybersecurity threats, we strongly recommend enabling this feature to enhance your account security.
It adds an extra layer of protection by requiring a second verification step during login to prevent unauthorized access.
To enable this feature: **Main Home | Setup | Company Settings | TwoFactorEnabled** by setting it to **True**.

- Important: Ensure all user emails or phone numbers are filled in before turning this on to prevent lockouts.
- Emails must have the Comms Type of Email and Phone number must have the Comms Type of Text.
- When logging in, you can choose your method: Select Email or Text (Twilio setup required for Text).
- Add Flexibility: Use the **TwoFactorsRememberDays** setting to stay logged in on trusted devices for a set period.

To learn more, check out *ComVida Application Suite 5.1.18.8 – What's New*.

August 2026

Tip 81: The Ultimate Time-Saver! Save valuable time by using this hidden gem!
Click the **grey drop-down arrow** in any column header to select **multiple** specific Employees, Departments, Units, Positions, Cost Centres, or Statuses all at once!
Why you'll love it:

- Batch Calculate Periods: Select any group of employees at once and review their balances in a flash.
- Works Across ComVida Modules: Look for the handy grey drop-down arrow throughout the application whenever you want to tailor your results.

Give it a try today and enjoy a faster, easier workflow!

HUMAN RESOURCES

November 2023

Tip 48: Did you know you can store images in Human Resources? From the Home Page | Setup | Fields, add new Fields with the Type column 'Image'. Then Setup | Pages, create a new Page, and add those Fields (remember to update permissions in Security to allow access) or add the Fields to an existing user-defined page. Within the HR page, upload the saved image, and Voilà! Easy, Peasy!!! **Note** There is a new Image field added to the HR | Skill Sets page allowing you to upload pictures of certificates etc. WOW!!!
Common file types of jpg, jpeg, gif, or png up to 4mg in size, can be added to Image fields.

April 2025

Tip 65: The **HR Master Page** nicely condenses and displays 26 columns of essential information for employees, including *Last Modified By* and *Last Modified When*. The column headers or drop-down arrows can sort any specific information. Alternatively, an Employee Filter can be set to select particular groups of employees, enabling you to see information at a glance. When updating fields on the Master Page, the changes will be recorded with "Today's Date', so it is recommended to update the Department, Unit, Position and/or Cost Centre fields from the Work Profile pages to ensure the correct Effective Date is recorded for the change(s) to take place.

SCHEDULING

June 2020

Tip 6: Make Scheduling even easier with our new **'Verify Assignment'** feature! With the correct security, staff will be able to log on to their Self Serve and verify their assignments. Schedulers will be able to see if and when the shift(s) were verified, alleviating the need for reports. If needed, the Assignment List report will show the verified information.

November 2020

Tip 11: The time is upon us to **Generate** schedules for the coming year not only for the supervisors but your self serve employees now they will know when they are working! This is a simple process by going to Scheduling | Tools | Global Generate. This will allow you to generate for all employees that have an open Rotation Assignment without having to generate them one by one. Set the Generate Assignments To date (which normally would be Dec 31st.) Select your Employee Criteria, select Generate, click Ok and your results grid will be displayed. The Print Report option is available to keep a copy for your records. For more information on the Global Generation tool, please see the CVC51 Scheduling User Guide, pages 93-94 under the Support menu.

July 2021

Tip 20: The **Shifts To Be Filled** page is one of the most versatile and powerful pages in Scheduling. Are you using this to cover your vacant shifts? All the information you need in order to fill a shift is nicely displayed on this one page, including the ability to customize and add columns with fields from Human Resources! This page ***even*** allows you to notify and call out the appropriate employees, all with a few clicks of your mouse. Notifications use email, voice mail and/or text messaging, eliminating the need to physically call each employee. This one feature alone can save hours of work!!! This page does it all.

August 2021

Tip 21: In CVC 5.14 an exciting ***Leave Management*** feature is now available! Before submitting a leave request, staff will be able to log in and look at their *Leave Management* page to see all of

their leave balances including what is pending and what is remaining. Schedulers will be able to either approve or decline a request as they can see not only the employees' leaves balances and their assignments, but also coverage for the entire department for the requested day(s). Making an informed decision will be a snap as all this information is nicely summarized on the *Leave Management* page. Then, if that isn't enough, Schedulers can automatically notify the employee of their decision. Once all the pieces have been set up, Leave Requests will be super quick and easy to handle, you will be amazed with all the time that is saved! Keep an eye on emails from ComVida HelpDesk for course offerings coming this September.

December 2021

Tip 25: Can you believe it is December already? As the end of the year is quickly approaching, we want to remind you to generate your schedules for 2022. Did you know that this can be done easily by running the Global Generation under the Tools menu in Scheduling? This alleviates the need to generate for each individual employee. For complete instructions read page 100 of the Scheduling User Guide.
Payroll Year end courses are back, register soon as certain dates are sold out.
Safe, Healthy and Happy Holidays to all!

December 2022

Tip 37: Don't forget about your year-end for Scheduling. Have you run your Global Generation to assign rotations for 2023? Have you gone to the Home Page | Setup | Holidays and added 2023? How about updating your Leave Management Dates to 2023 in Scheduling | Setup | Settings? Along with year-end comes the holiday season. Our ComVida family extends the warmest and safest wishes for you and yours throughout the festive season and next year!

February 2023

Tip 39: There are many tools available in ComVida that you may not be aware of! Did you know that there is one for **Statutory Holidays?** This tool will allow you to change all working shifts to pay stat overtime *easily* without having to change the schedule one by one for each employee. From the Scheduling application, select Tools | Statutory Days, simply select the Holiday Date. If there are Overnight shifts, there is an option to 'Split Hours Worked on the Holiday' and if needed, 'Keep original work date'. How awesome is that? Then under the Pay Code section, click the green plus icon and 'Replace' RegPay with Stat1@5 and choose Save Changes. Clicking the 'Load' button will allow you to review the results. If there are no further changes required, click 'Process'. If more information is required regarding this tool, please review the Scheduling User Guide found under the 'Support' menu, Section 6.8 on Page 104, or contact ComVida HelpDesk.

April 2023

Tip 41: Are you using the **Stat Not Worked** tool in the Scheduling application? This tool will automatically calculate Stat pay and create an assignment for those entitled employees. How great is that? All the details are in CVC51 Scheduling User Guide page# 100, Section 6.7 Stat Not Worked. If that didn't get you excited enough, we now offer the ability to set up **Stat Not Worked** as a Background Job for each Stat Holiday.

May 2023

Tip #42: Do you ever need to change or add a new pay code to an existing shift? Super easy! Create the new pay code **Scheduling |Setup | Pay Codes**. Edit the Shift by adding/changing the code in Shift Details, **Scheduling | Setup | Shifts** (3rd icon beside the shift code – shift details). This will apply the new pay code when the shift is assigned.
But what about shifts that are already assigned? We got a trick for you!
All you need to do is run **Tools | Shift Handle**, select the edited **Shift**: and **To:** the same shift and the system applies the changed shift details for you automatically. Remember to select dates **From:** current period start date **To:** end date of generated schedules. Also, choose all active employees so that you capture all the shift assignments.
Another fine tip from the Helpdesk team!

June 2023

Tip #43: Are you missing the balances showing up in the Leave Balances section of your Leave Management Page? It could be you are missing a field in Home | Setup | Leave Management Types called Balance Field. Make sure this field is set to display the field name that is attached to your Accruals or Time Banks page. Refer to Home|Setup|Pages for details. Simple!
Summer is a-coming! " In early June the world of leaf and blade and flowers explode, and every sunset is different." John Steinbeck

August 2023

Tip #45: Ending a *Scheduled Rotation*. Always end a Shift Rotation when an employee terminates or moves to a new posting. When ending an employee's rotation in scheduling, the end date should be the **last day of work** for the employee. Ensure that you check the Employee Annual page to delete any subsequent shifts that may remain from performing any shift handling. If you added a rotation in error, (oops!) always end it 1 day before the start date, otherwise, it will be active for 1 day and will cause your system to mark this rotation as open. **NEVER** use the same rotation start and end dates as this will leave the rotation as active, and will cause issues when the global generation tool is used near the end of the year, as it looks at all active rotations to generate assignments.
Remember, nothing should ever be deleted before contacting HelpDesk first. If rotation assignments are deleted from this page, there will no longer be a history of previous rotation assignments. Avoid unwanted side effects by maintaining your rotations the right way! Have we mentioned before we have two wonderful courses to help you out with this? *Easy Clean UP & Maintenance for Scheduling & Notifications* and *Easy Clean UP & Maintenance for HR, Payroll & Main Setup.* Contact Helpdesk to register.

September 2023

Tip 46: Are you aware that the Assignment List report in Scheduling can show both Verified assignments and Approved Assignments? In order to see these options in the report criteria, your scheduling settings must be set up correctly. **Scheduling | Setup | Settings**, *ShowVerifiedInAssignments* and *ShowApprovedInAssignments* should be set to 'Yes' or 'True'. If either of these settings say 'No' or 'False', the Assignment List report criteria will not contain the options for Verified or Approved. Make sure to review section 5.4 of the Scheduling User Guide to learn about all the settings.

"Fall has always been my favorite season. The time when everything bursts with its last beauty, as if nature had been saving up all year for the grand finale." – Lauren DeStefano

June 2024

Tip 55: Processing Leave Requests in Leave Management is much faster now when you use the Auto-Process feature when Accepting a request! In **Scheduling | Setup | Settings** find the setting called *LeaveMgmtProcessShiftChanges* and set it to Yes or True. This will eliminate the process of Shift Handling when requests are Accepted. More information located in Scheduling | Support | CVC 5.1 Scheduling User Guide 3.4 Leave Management starting on page 26.

August 2024

Tip 57: Did you know that the system can automatically carry forward shift details when an employee is approved on a leave? Enabling the *Inherit details* setting on your Leave Shifts such as Vacation and Sick will keep the details of the employee's original shift with the leave shift when Shift Handled. Find Vacation and Sick Shifts in **Scheduling | Setup | Shifts,** scroll to the right, put a check under *Inherit Details* and, witness the magic unfold when you Shift Handle. More information is located in Scheduling | Support | Scheduling User Guide chapter 6.2 Shift Handle, starting on page 91.

September 2024

Tip 58: Did you know that Staff Scheduling can help you compare budgeted hours to actual hours? Shift Frequency/Coverage is not only used to show shifts that need to be filled but it also shows the Totals of Actual vs. Required hours and employees, for any shift on the Weekly Budget page, allowing you to see your organization's service levels in **real time**. Additionally, it is part of the Leave Management and Vacancy Management areas, so that users can make informed decisions when scheduling absences and filling vacant shifts. Managers also appreciate the information they get from the Schedule Report with Budgeted hours included, it's fabulous!

You can update Frequency/Coverage requirements in the shift setup and should maintain them as often as the needs of the department change.

Find **Shift Frequency** ( ) in **Scheduling | Setup | Shifts.** More information is located in **Scheduling | Support** Scheduling User Guide; Chapter 5.1 Shift Setup page, starting on page 70.

November 2024

Tip 60: Knowledge is power! Let your self serve employees know now when they are working next year! It is time to generate the schedules for the coming year! You can generate assignments for all employees that have an open Rotation Assignment all at once. This is a simple process by going to Scheduling | Tools | Global Generate. Set the Generate Assignments 'To' date (typically Dec 31st). Choose your Employee Criteria, select Generate, click Ok and your results grid will be displayed. The Print Report option is available to keep a copy for your records. For more information on the Global Generation tool, please see the Scheduling User Guide, pages 93-94 under the Support menu.

December 2024

Tip 61: The end of the year is fast approaching! It's time to get prepared—here's a quick checklist to guide you:

- Are you signed up for ComVida's popular Year-End Classes yet? Make sure to email your registration today to reserve your spot!
- Have you run your Global Generation, *Scheduling | Tools | Global Generation* to assign Shifts & Rotations for 2025?
- 2025 Holiday dates can be added through *Home Page | Setup | Holidays*.
- Navigate to *Scheduling | Setup | Settings* to update your Leave Management Dates to 2025.
- Have you run the PIER Check tool in *Payroll | Tools |Payroll |PIER Check*?
- Check your T4's now to ensure your values are correct. *Payroll | Tools | T4 and T4A | Generate T4's!* Corrections can be made through the Employee Adjustments page.
- For BC clients only, run your MPP extract to review in *Payroll | Tools | Extracts | MPP Extract.*
- CSSEA and HSCIS extracts, *Payroll | Tools | Extracts | CSSEA/HSCIS*. The extract can be run before year end to download to the Association.

Along with Year-End comes the Holiday Season. Our ComVida family extends the warmest and safest wishes for you and yours throughout the Festive Season and next year!

March 2025

Tip 64: The **Daily Schedules** page is designed to show you who is working. *(Staff Scheduling | Daily Schedules)* . Shifts display in start time sequence but can be filtered multiple different ways. Select the grey drop-down in a column heading to choose one option. Select the column header to sort ascending, selecting it again will sort descending. There is also the Assignment Filter option. The **Daily Schedules** page will display a counted *Hours* column and an optional *Pay Code* column. It's a quick reference to see who is scheduled to work on any chosen day(s). For more information see section 3.1, page 20-21 in the Scheduling User Guide under the Support menu.

July 2025

Tip 68: Tired of overriding shift details every time you assign a non-working shift like **Vacation**, **Sick**, or **Banked Time Taken**? We've got you covered!
Introducing the **Inherit Details** feature in **Scheduling** — your new best friend for error-free shift management!
When **"Inherit Details"** is checked in **Scheduling | Setup | Shifts**, the system does the heavy lifting for you!
The next time **Shift Handle** is used to assign or change to a non-working shift, all the key details from the employee's regular working shift **automatically copy over**, including **Department, Unit, Position, Cost Centre, Start & End Time** and **Total Hours.**
No more guesswork. No more mismatches. Just smooth, consistent scheduling that saves time and reduces errors.

September 2025

Tip 70: Have you ever run into a situation where you need to know the original owner of a shift? We have your back! When using the Shift Handle, Assignment Substitution or Shift Exchange tools, simply check the **'Mark Conditional'** box. This will retain the original owner's name and the date the assignment was changed.
This is visible on the **Shifts to Be Filled**, **Vacancy Management**, and **Weekly Budget** pages, and the feature is further supported with the **Conditional Assignments** report.

More information can be found throughout the Scheduling User Guide, starting on page 92 #8, or contact our Helpdesk.

October 2025

Tip 71: Our 'Data Management' tools are a great way to help maintain your database. These tools are available in multiple applications. Notifications and Call Records can be managed through the Communication Hub. The Data Management tool in Human Resources allows you to delete any unwanted data from any HR fields. From the Scheduling application, Assignments can be deleted or the Assignment Audit Trail can be purged. For further information, visit our User Guides under the Support menu in the desired application, or contact our Helpdesk.

November 2025

Tip 72: Year-end is approaching. Have you run your Global Generation for the 2026 rotations in Scheduling?
To complete this process:

1. Go to Scheduling | Tools | Global Generate.
2. Set the 'To' date to 31/Dec/2026
3. Select the Employee Criteria, then click Generate and OK.
4. Review the results and use Print Report to save a copy.

For more details, refer to pages 122–123 of the Scheduling User Guide, located under the Support menu, or contact our Helpdesk.

January 2026

Tip 74: Updating the **LeaveManagementEndDate** setting is important to ensure the 'Planned' and 'Available' columns in Leave Management show the correct hours.
How to set it up:

- Go to **Scheduling | Setup | Settings**
- Scroll to **LeaveManagementStartDate** and **LeaveManagementEndDate** & enter the appropriate dates

How it works:

- The **LeaveManagement** date settings define the date range of requests that will be visible in Self Serve
- These dates also control the calculation of how many 'Planned' and 'Available' hours are displayed
- If employees are submitting requests in the future, ensure that the **LeaveManagementEndDate** encompasses that date.

For more details, refer to the CVC 51 Scheduling User Guide, page 188, under the Support menu, or visit our Learning Portal to watch the 'Submitting & Managing Leave Requests' video under Staff Scheduling.

Happy New Year, and all the best for 2026!

February 2026

Tip 75: Employee-paid premiums for a Private Health Services Plan (PHSP), such as dental or medical, are eligible medical expenses that can be claimed on the Income Tax and Benefit Return. Including these amounts in **T4 Box 85 (Other Information)** helps employees easily identify and claim their premiums. While optional, Box 85 is a helpful way to support employees during tax season.

To include amounts in Box 85 on the T4:

1. Go to **Setup | Items**
2. Enter **85** in the **T4BoxAM** column
3. Enter the next Note number in the **T4NoteAM** column

May 2026

Tip 78: Use a Colour-Coded Calendar to see at a glance what employees have scheduled when viewing the **Annual** and **Monthly** page in Scheduling.

Assign different colours to shift types such as available days, vacation, sick days, and other leaves.

To implement this feature:

- Go to the **Main Page | Setup | Lookups**
- Navigate to **AssignTypes**
- In the lower window, enter your Assignment types and attach colours.

For detailed, step-by-step instructions, refer to **Lookups** in the **CVC 51 Setup User Guide (starting on page 45)**.

July 2026

Tip 80: Various features in ComVida automatically generate notifications. As part of routine system maintenance, these notifications should be reviewed and closed promptly. The easiest way to manage notifications is through the Communication Hub, accessible via the speech bubble icon in the upper-right corner of any Home page. **Tools → Communications → Data Management .** The selected date range applies to the **Notification Start Date** and **Notification End Date** fields. You can complete (or complete and delete) specific notification types, or process all notification types at once by selecting **"All."** Please note that this feature must be enabled in the Main Security Group in order to view it in the Communication Hub. Contact Helpdesk for any further clarification.

PAYROLL

January 2020

Tip 1: **Need to make a Payroll adjustment in the future? Don't wait... key it in now!**
In Comvida 4.2, select the Pay Period from the drop down and enter the adjustment, click the green check mark to save and return to your current Pay Period again by selecting it from the dropdown menu.
In CVC 5.1, select the Pay Period you would like the adjustment to apply by entering the Period number in the Period field of the new Adjustment. Choose Save Changes to apply.

March 2020

Tip 3: **Comments, the newest feature when managing Adjustments.**
CVC 5.1 Payroll: In Adjustments there is a new column called Comment , now you can document the purpose of all adjustments. Payroll |Employee| Adjustments, a 500 character field that allows for recording the intent of the payroll change.

May 2020

Tip 5: Required field in Items: The check mark in items on the required field, will automatically add the amount to the employee when calculate period is run. This is a wonderful check just in case an employee doesn't have these amounts attached.
For example 6499 (gross earnings), 7000 (EI Ded) , 7400 (income tax) 8299 (total Deductions) ,8950 (WCB) , 9900 (Net pay). Call the helpdesk to go over your item list.

July 2020

Tip 7: Need a standard **report** that **includes multiple/random** Employees / Departments/ Units/Positions/ Cost Centres/Status/Employee Type Blocks or Payroll Type Blocks? Then click the grey dropdown arrow in any of these column header rows. Choose any number of these random fields to create a report required just by you! This new feature can be used in any place you see the grey dropdown arrow in the header. The window can also be resized by clicking and dragging the bottom right corner. No more individual employee calculate periods, click on 10 employees to create the last calculate period you need to run to correct a balance. Try it out today!

August 2020

Tip 8: Be ahead of the game! Now is always a good time to **check your T4's** for the current year. Did you know you can generate T4's as many times as you want? Check the T4's SIN #, address, full employee name, box 26 & 28 earnings and box 40 benefits. Don't forget we have the new PIER report (Tools | PIER Check) that will help you balance CPP and EI employee & employer contributions. Don't wait, have a stress free T4 time.

October 2020

Tip 10: We are all human and mistakes happen but NOW ComVida has made a way to reverse those mistakes in CVC 5.1.12. After Calculate Period if you notice that you created an incorrect Adjustment simply choose the button on the tool bar, this will reverse the adjustment in the current period. The reversal can also be done from previous periods and will apply to the current period. Peace of mind at last.

December 2020

Tip 12: HEAR YE HEAR YE HEAR ALL ABOUT IT! **Year End Courses have started, last class December 16th.** Don't forget to sign up! The beneifts are galore. Walks through all the year end setup, checks out the 4 new 'other' boxes on the T4's, how to- generate, print/email, and export the T4's. Makes year end a breeze. Sign up before it is too late!

December 2020

Tip 13: **REMINDER:** Update to 5.1.13 or 4.2.27 before the end of the year to include the T4 'other' boxes and 2021 tax table. **On behalf of all of us here at ComVida** Merry Christmas, Happy Holidays, Joyeux Noël, and Joyeuses Fêtes to you and your family!

January 2021

Tip 14: Happy New Year! Check those T4 balances! You should notice there are 4 new 'other' boxes 57-60 these amounts come from Calculate Period History. If adjustments were made after those specific pay periods it will not reflect in the month that it could have been meant for. Let us know if you need some help! Don't forget the year end documents are up on our *new* website (check us out!) **http://www.comvida.com/policies-and-procedures.**

February 2021

Tip 15: The **Calculate Period** Report is often overlooked! It is an excellent tool and should not be ignored especially when a new item is added or an old item modified, check the calculation on the item(s) to make sure it is doing exactly as you wish. It is always a good idea to spot check calculate periods check for duplicate items or to check old items to see if they are calculating correctly. If an employee changes from casual to part time or full time, make sure the correct items have been added or ones no longer needed are put on hold in the Employee Amounts. Is the '**Apply HR Defaults'** tool being run every pay period so that Department/Unit/Position/and Cost Centre are set to default? Typically the item range would be from 6499 to 9900, but please note that it may have to be run more than once if you have items above 6499 that auto-calculate...meaning they don't have ENTRY in the formula. An example of this would be item 0799.

March 2021

Tip 16: **Payroll**: Another year and another T4 session finished. Great job! Remember the best time to keep up to date with addresses/province/balances for the T4 is ***now***. At least once a month, generate your T4s and print the Pier report to ensure you are balancing. Correcting adjustments are done quickly and efficiently! Therefore NO surprises at T4 time. Recommendation: Before exporting the pay slip payments file, print out the Balance Report for a quick check for negative balances or any balances that don't look quite right. Making corrections is much simpler before the file has been sent to the bank.

April 2021

Tip 17: Before generating pay slip and/or cheque, always make sure to check the **payment date**. The payment date is shown on the lower right of the payroll screens. Changes can be made

from Payroll | Setup | Settings or from the generate pay slip/cheque screen. If you are running version CVC51, you can also update the payment date under Setup | Periods.
Did you know that in CVC51 *pay slips can be emailed* as many times as you want, even including pay slips from prior pay periods? Ease the hassle of printing pay slips whenever the employee asks for another copy, it's just one click away!

September 2021

Tip 22: Summer is coming to an end…which means T4's are just around the corner. Save time at year end by balancing those T4's now! Tools | T4 and T4A | Generate T4's! Also, it is a great time to Run the PIER report to make sure CPP and EI are correct. Tools | PIER Check...if you don't see it on the menu, double check your Payroll Security group to ensure the Tool has been activated. Adjusting the amounts in the current year will not only correct the T4's but your GL Journal entries for the period will also be correct.
Did anyone mention courses? Our Fall/Winter courses are here! We have 3 new very exciting courses. Check out the Leave Management course. This new module will make handling leave requests a breeze. What about decluttering your database? Take our Easy Clean Up & Maintenance of CVC 51 course. Background Jobs are easy to set up specific task and will automatically notify you of the results, without any work. Watch your emails for announcements on all of our fabulous courses! Looking forward to seeing you!

November 2021

Tip 24: Prep, prep and more prep! It is never too early to start prepping for year End.
Reminder: **Check your T4's** in the current year. Generate T4's under the Tools menu! Check the T4's SIN #, address, and full employee's legal name (changes can be made in HR). Review all the T4 boxes, do any need adjustments? Run T4's as many times as needed until all are correct! Check the CPP and EI deduction and benefit by using the PIER report (Tools | PIER Check).
Fall/Winter courses are in full swing. **Year end** courses are now available for signup! Sign up now so you won't miss out!

January 2022

Tip 26: Happy New Year!!! 2022 has now arrived, which means it is time to start working on T4's. CRA will only allow a Note number to be used one time for T4 boxes that require a Note. For example: All items going to Box 40 could use Note #1, where all items going to Box 66 could be using Note #2. Please run a summary Item List Report from Payroll and ensure that box Note numbers are not duplicated for multiple T4 Boxes. Also remember that the employee's legal name must be used and not their nicknames, this would include any special characters. Create a Data Template using the fields 'FirstName' and 'LastName' and then export from HR under the Tools menu to ensure that there are no) or (etc. in the names.

February 2022

Tip 27: T4 deadline is coming soon, please complete your T4's and submit before the deadline, being ahead of the game is stress free!
Did you know that a default message can be set up in the email when sending your payslips? How great is that? This will let you add a message that will appear in the body of the payslip

email, not directly on the payslips themselves. On the Setup | Registers page, “Payslip Email Body” will allow you to enter a message and can hold as many characters as required.

March 2022

Tip 28: Ever had one of those memory shutdowns where you can’t remember a report code, item code, or how to spell a last name but have a partial name? **ComVida has you covered!** Try the grey key icon found next to the search fields and enter the partial details. There are several options to choose from including: Begins with, Contains, Doesn’t Contain, Ends with, Equals, and Doesn’t Equal. For Example: If you know the last name is McKenzie, but don’t know if it's Mac or Mc, choose ‘Contains’ from the search options and when Kenzie is entered it will list all names with Kenzie embedded, this is such a simple step with great rewards!

May 2022

Tip 30: Our programmers are always improving our product and introducing new and exciting features. Make sure to read the ‘What’s New’ document that is attached to every new release email announcement. Do you know about Pay Rules and Assignment Approval? Has Leave Management been implemented in your organization yet? Are you using the Call out notification system? We currently have courses being offered on all these wonderful topics and many more. We also offer process reviews to work closely with your organization to streamline the workflow and simplify your workload! Please contact us to register or get more information.

June 2022

Tip 31: Need Information and/or Help? Right at your fingertips, locate and read our User guides! They have Tips and step-by-step instructions to perform functions within ComVida (we even have pictures!). In any area of the program, the corresponding User Guide is accessible from the *Support menu on the top right-hand side*. Need to know how to perform an Assignment Substitution? Or Wondering about Security Groups or Operator application access? Or Need to know how to add a field to a Human Resource page? These answers can be found and accessible from any page in the program you are in. Setup, Security, Human Resource, Scheduling and Payroll each have their own User Guide. Bring out the coffee and bonbons, put your feet up on your desk, kick back…and read away!
Hint within any User Guide you can click Ctrl + F on your keyboard to bring up the search box that will allow you to look for a specific topic with no effort.

September 2022

Tip 34: Here is a simple tip for clients that are using our ComVida Payroll application but <u>are not</u> on the EI Premium Reduction Program (using the class code)! Select the checkbox under the *No Duplicates* column on the main screen of items to NOT allow duplicate employee amounts. For instance, 6499, 8299, and 9900. Selecting *No Duplicates* will allow these items to never be duplicated on the employee’s amounts page.
REMINDERS: Everyone likes surprises, but not when it is related to Payroll and inconsistencies with year-end amounts. Catch these anomalies now! Print your *T4 summaries*, and make sure SIN numbers, Addresses, and Tax Provinces are populated for all your employees. Verify that

box 14 and box 26 match. Do a quick check to see that CPP and EI are calculated by running the *Pier Check Report*.
For BC clients only, run your *MPP extract* - How does it look?
Catching any errors now will simplify your process for year-end as it is much easier to make any necessary adjustments in the current year.

November 2022

Tip 36: Phew with two months of Tip reminders your T4's are now in superb shape!
Extra! Extra! Read all about it! There are too many new features to list so check out the CVC What's New document on our website www.comvida.com/product-releases/
Don't forget you can send communication to your employees in one action, add a message on the payroll payslip or use the actual email that sends the payslip (Email **Tip 27**: Feb 2022 ~ also found on our website). A great way to use this feature is to request if employees have any changes to their basic amount on the TD1 and to return the form by Jan 2023.
NEWS FLASH: **Payroll Year End courses** are being offered in December make sure to sign up! Keep your eyes open for the announcement email from our Helpdesk with the course dates and times!

December 2022

Tip 37: As 2022 draws to a close, ComVida is offering our popular Year-End Classes again! Classes are filling up fast, so make sure to email your registration today to reserve your spot!
Our ComVida family extends the warmest and safest wishes for you and yours throughout the festive season and next year!

January 2023

Tip 38: Happy New Year Everyone! Let's start 2023 off right by making sure that T4's are in order, if this hasn't been done already. Print your T4 summaries, and make sure SIN numbers, Addresses, and Tax Provinces are populated for all your employees. Do a quick check to see that there are no surprises with CPP and EI by running the Pier Check Report. Please remember that it is an extremely busy time for us here too at ComVida, and we are trying our best to get back to all of you in a timely manner. Your patience is appreciated!
Welcome to 2023!

December 2023

Tip 49: As 2023 draws to a close, ComVida is offering our popular Year-End Classes again! Classes are filling up fast, so make sure to email your registration today to reserve your spot!

Here are some quick year-end items we want to highlight:

- Have you run your Global Generation, Scheduling | Tools | Global Generation to assign shifts & rotations for 2024?
- Have you gone to the Home Page | Setup | Holidays and added the 2024 dates?
- Have you updated your Leave Management Dates to 2024 in Scheduling | Setup | Settings?
- Have you printed your T4 Summary, Payroll | T4 summary and checked those boxes?

- For BC clients only, run your *MPP extract* to review in Payroll | Tools | Extracts | MPP Extract.
- CSSEA and HSCIS extracts, Payroll | Tools | Extracts | CSSEA/HSCIS. Extract can be run at year end to download to the Association.
  Catching any errors now will simplify your process for year-end as it is much easier to make any necessary adjustments in the current year.

  These items and many more, including the significant changes to T4 requirements and CPP Enhancements, are included in our year-end course. Ensure that you sign up so that you don't miss anything!

  Along with year-end comes the holiday season. Our ComVida family extends the warmest and safest wishes for you and yours throughout the festive season and next year!

January 2024

Tip 50: Happy New Year! Let's start 2024 by making life a little easier. Bypass emailing Payslips and T4's, use Self-Serve!!!! That way your employees can view or print them at any time, all on their own. Contact HelpDesk for assistance.
CSSEA Members: Send your CSSEA extract in *January.* Make sure the CSSEA survey page (in HR) has been updated. Print your CSSEA report (last year) to check it out. Next, run the CSSEA extract, hot off the press, voila! Upload to CSSEA and remove this task from your list for another year!

February 2024

Tip 51: Some tips from ComVida for balancing T4s:

- Box 14 does not equal Item 6499 or any specific Item Type Block.
- Box 14 includes both earnings and **taxable benefits**, such as Grp Life, AD&D, and/or RRSP.
- To check which items are included in Box 14, go to Payroll | Setup | Items scroll to column 'T4BoxAM' and click the grey dropdown arrow to select Box 14 and review the list. Repeat these steps for column 'T4BoxIN' and Box 40.
- Ensure that all items designated for Box 40 have the same Note number in the 'T4Note**IN**' or 'T4Note**AM'** columns.

  Remember to sign up with the Government of Canada to access your secure ROE Web Portal. To access ROEs within ComVida, go to Payroll | Tools | Payroll | Export ROE. This will create a .blk file that can be uploaded to the Web ROE. It's that simple!

March 2024

Tip 52: Another fantastic feature is the ability to set a **password for T4 and Pay Slip emails**. Employees can secure their information by independently entering a password on Self Serve. You simply add the "EmailAttachmentPwd" field into any HR and/or Self Serve page. Alternatively, you can generate a new page and incorporate this field into both HR and Self Serve sections in **Setup | Pages** from the Main home page. Following the standard process for new page creation, ensure to enable security rights if it's a newly established page.

July 2024

Tip 56: Did you know there's an easy-to-use tool within payroll that helps ensure employee profile changes get updated in payroll Employee Amounts"? That's what the **Apply HR Defaults** tool (Payroll | Tools | Amounts) does & we recommend you run this tool at the beginning of every pay period! Here are some helpful hints while using Apply HR Defaults:

- Ensure that the Item Range is set to 6499-9900
    - Note that you may need to run this more than once if you have items prior to 6499 that auto-calculate, such as Vacation % for Casual or Stat item 0799.
- Choose "Replace" for any Department, Unit, Position or Cost Centre changes
- Choose "Duplicate" for any EI Class changes
- Finalize your selections by choosing "Save Changes" and then selecting "Apply"

It is really important to keep the Employee Amounts clean so that accurate labour costing information reaches your General Ledger. The **Apply HR Defaults** tool makes this quick and easy to do! (CVC Payroll User Guide – Page 63)

October 2024

Tip 59: Anxious about T4's? Relax! Do you know that anytime is a good time to **check your T4's** for the current year, and T4's can be generated as many times as you want? You can check the T4's SIN #, address, full employee name, box 26 & 28 earnings and box 40 benefits long before the end of the calendar year.
Don't forget we have the PIER report (Tools | PIER Check) that will help you balance CPP and EI employee & employer contributions. Don't wait, have a stress free T4 time. For more information, go to the Payroll User Guide, T4 Info on pages 44 & 45, and T4 generating and printing on pages 89 – 94, under the Support menu.

January 2025

Tip 62: ***Happy New Year!*** 🎉
Welcome to 2025! It's time to get started on T4 preparations. Here are some reminders:

1. **CRA Note Numbers for T4 Boxes**:

Each Note number can only be used once for T4 boxes that require a Note.
For example: Use Note #1 for items assigned to Box 40.
Use Note #2 for items assigned to Box 66
Run a Summary Item List Report from *Payroll | Reports | Setup | Items* to ensure there are no duplicated Note numbers across different T4 boxes.

2. **Employee Legal Names on T4's**:

T4's display employees' legal names, not their preferred names.
Create a Data Template with the fields 'FirstName' and 'LastName', then export the data from *HR | Tools | Employee Export*. Review the names and ensure that there are no special characters like brackets, asterisks or ampersands etc.

February 2025

Tip 63: Reminder: WorkSafeBC has published an updated version of Assessment Practice Directive 5-245-2(A) - Assessable Payroll, effective January 1, 2024. ***The stated presumption that***

standard employment earnings can generally be computed based on box 14 and/or box 71 of the T4 statement issued, whereas the previous practice directive allowed certain benefits to be excluded. There are some exclusions (Pay in lieu notice) for the assessment earnings; if you are in doubt, call WSBC. We have a document that will help you update your item(s); don't hesitate to get in touch with the Helpdesk if required.

June 2025

Tip 67: Did you know that the 'Set Amounts' tool can be used to apply bulk changes to employee Amounts for all or selected employees and items? Navigate to Amounts | Set Amounts from the Tools menu in the Payroll application.
From there, choose the appropriate **Employee Criteria**, select the relevant **Items**, and then pick the desired **Set Action**—such as Set Blank, Set Default, **Set Hold**, **Clear Hold**, or **Create Amount**—by selecting the corresponding radio button.
For more information, refer to **page 58** of the Payroll User Guide."

December 2025

Tip 73: Now is the time to review payroll and adjust current-period amounts to ensure accurate T4 slips and General Ledger (GL) entries.

- Run the PIER report (Tools → PIER) to confirm accurate CPP and EI calculations.
- Verify key employee data—SINs, addresses, tax provinces, and legal names (update via the HR module).
- Generate T4s as needed to confirm balances (Tools → T4 and T4A → Generate T4s).
- Export T4s only once before submitting to the CRA (unless filing amendments).

News Flash**:**
Year-end Payroll courses are available in December. Register early for expert support and a smooth year-end.
BC Clients Only**:**

- For CSSEA and HSCIS, run extracts at year-end via Payroll → Tools → Extracts → CSSEA/HSCIS.
- Run and review your MPP extract via Payroll → Tools → Extracts → MPP Extract.

Season's Greetings to you and your family

March 2026

Tip 76: Remember to run Payroll | Tools | Amounts | **Apply HR Defaults** at the start of every pay period (not automatic) to ensure HR updates flow to Payroll and maintain accurate GL labour costing.
Item Range: 6499–9900

- Re-run if auto-calculated items exist before 6499 (e.g., Vac % 4302, Stat 0799)

Options:

- **Replace** → Dept/Unit/Position/Cost Centre changes
- **Duplicate** → EI Class changes

Click **Save Changes**, then **Apply**.
See CVC Payroll User Guide, p. 63.

Jun3 2026

Tip 79: Bank Account page: Did you know that employees have the flexibility to divide their direct deposit across multiple bank accounts? Employees can choose to deposit a specific dollar amount or a percentage of their net pay in up to 5 different accounts. It's a simple, set-it-and-forget-it way to build savings without lifting a finger.
For more details, see Bank Accounts in the HR User Guide (starting on page 39, section 4.10).

Tip 82: Enhance pay slip transparency by including additional items such as overtime, bonuses, reimbursements, contributions, deductions, health benefits, banked time, and accruals.
Providing this level of detail ensures employees have a clear and accurate understanding of their total earnings, benefits covered, and outstanding time owed, while also strengthening trust in your payroll process.
To implement this feature:

- Navigate to **Payroll** | **Setup** | **Items**.
- Locate the column headers **Slip Section, Slip Period Column, Slip Year Column, and Slip Pool Column.**
- Update the appropriate items with the necessary information.

For more detailed information about these column headers, please review the PR51 Payroll User Guide, starting on page 120.

ACCOUNT RECEIVABLE

March 2021

Tip 16: Before running the PAP, run the Balance Report to check out the outstanding balance. This makes it easy to capture any discrepancy before running the PAP.