

Helpdesk Taglines

1. Jan 31, 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.

2. Feb 2,2020

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.

3. March 2,2020

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.

4. April 3,2020

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.

5. May 4, 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.

6. June 1, 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.

7. July 3, 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!

8. August 3, 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.

9. Sept 1, 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.

10. Oct 1, 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.

11. Nov 1, 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.

12. December 1st, 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 benefits 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!

13. December 16th, 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!

14. Jan 5th, 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>.

15. Feb 3, 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.

16. March 1st, 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.

Accounts Receivable: 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.

17. April 1st, 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!

18. May 1st, 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!

19. **June 1st, 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.

20. July 1st, 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.

21. August 4th, 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.

22. September 1st, 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!

23. October 1st, 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.

24. November 1st, 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!

25. December 1st, 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!