

The daily schedule will run from 9am up to 5pm with breaks at 10:30am and 2:30pm. There will be a one hour lunch break at 12pm. The last day may run shorter depending on the topics not yet covered. The username and password to log into the software is **admin** and **admin**. The topics to be covered are as follows:

- Configuration**
  - Changing your password
  - User Settings – Configuring accounts, email settings
  - Software Settings
  - Street / Address Settings (including Clean Up)
  - Custom Diet Settings
  - Default Lookups
  - Signatures Management
  - Linking to a database
  - Current Database Users
  
- Accessing your members / clients**
  - Searching and filtering
  - Editing existing client data**
    - General Information, establishing spouse and parent relations*
    - Children / COPH – linking and unlinking members together
    - Income – Employment, Self-Employment, Other Monthly Incomes
    - Budget / Calculations
      - Advances & Vouchers
      - Therapeutic Diets
      - Hydro Account Setup
      - Assistance Type settings
      - Budgets – Adding, Viewing, Updating, Printing
    - Active Measures – Basic information, history of activities / supports / results*
    - Notes / Tasks – Case Notes, To-Do, Carry Forward, Action Plan
    - Transaction History – viewing, voiding, un-voiding
    - SD01 & SD04 – entry of basic data to be used on the forms

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- Forms & Letters**
  - Forms
    - SD01 – Application For Income Assistance
    - SD03 - Income
    - SD04 – Budget & Decision
    - SDSN – Special Needs
    - SDCOPH – Children out of parental home
    - ROFE – Record Of Funeral Expenses
    - Financial Assessment Form
  - Letters
    - SF1 to SF13
    - COPH Notifications
    - Validation Of Claim Of Residency Letter
    - Legal Aid Confirmation Letter
    - Correctional Institution Release Form Letter
- Tenant Profile** – who is living at the same address and on assistance
- Verifications**
  - Entering the various verifications you have completed on each person’s information
  - Generating a spreadsheet for compliance checks
- Files**
  - Adding documents, images, PDFs, etc. to an individual
  
- Quick Calculation**
- Monthly Variable Allowance Batch Entry**
  - Using as part of the budget or as a separate batch payment
  - Importing Manitoba Hydro Spreadsheets
- Personal Care Services Calculator**
  - Accessing different rates, guides and manuals
- Mass Emailing Tool** – Use your emailing method to mass send notifications to clients with email
- Bulk Advances/Vouchers** – save time entering a standard advance/voucher for multiple clients
- 3<sup>rd</sup> Party Verification Tool** – this function lets you see if there are any issues with account numbers
- Hydro Account Manager** – this function lets you easily change hydro account information
- Vendors** – Adding, Editing, Deleting
- Adjustment (Journal Entries)** – Correcting Journal Entries, Deposits, etc.
- Bank Reconciliation** – *clearing payments, deposits, miscellaneous debits/credits*

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- Payment Functions**
  - Advances & Vouchers
    - Approving
    - Processing Vouchers
    - Processing Advances
  - Client Payments
    - Approving
    - Processing
  - Exception Payments
    - Client
    - Vendor
    - Vendor on behalf of Client
  - Vendor Payments
    - Processing Vendor Payments – from client budgets or manually entered
    - Producing Vendor Letters
  - Card Payments Processing & Submission
  - Direct Deposit Processing & Submission
  - Void Payments
  - Reprinting Cheques
  - Generate Account Postings Batch File
  - Export Payments To SAGE

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**Reports / Forms**

**Client Management**

- |   |  |
|---|--|
| <input type="checkbox"/> To-Do List                             | <input type="checkbox"/> Disability Status                   |
| <input type="checkbox"/> Listings                               | <input type="checkbox"/> Therapeutic Diets                   |
| <input type="checkbox"/> Labels                                 | <input type="checkbox"/> Age Demographics                    |
| <input type="checkbox"/> Envelopes                              | <input type="checkbox"/> Identify Potential Problems         |
| <input type="checkbox"/> Tenant Profile                         | <input type="checkbox"/> Custom Letters                      |
| <input type="checkbox"/> Family Snapshot                        | <input type="checkbox"/> Active Measures Entry Details       |
| <input type="checkbox"/> Case Notes/To-Do/Carry Fwd/Action Plan | <input type="checkbox"/> Budget Statistics                   |
| <input type="checkbox"/> Address History                        | <input type="checkbox"/> Presence In Community Signing Sheet |
| <input type="checkbox"/> Marital Status History                 | <input type="checkbox"/> Duplicated Client Information       |
| <input type="checkbox"/> Verification Spreadsheet               |  |

**Accounting / Financial**

- Transaction Listing Report
- Cheque Listing Report
- Card Payment Batch Report
- Direct Deposit Batch Report
- Voucher Listing Report
- Claimant Signature Log Sheet
- Approval Listing Report For Client Payments
- Approval Listing Report For Advances/Vouchers
- Vendor Paid Direct Information

**Administrative**

- Income Assistance Report (#455897) – Quarterly and Monthly options, 2019-2020 Draft
- WOP / ASARET Project Application Form
- T5007 – Reports, Forms, Electronic
- Monthly Reports – Various
- Manage Periods – locking a month when it is done

**Bulk Forms**

**Blank Forms**

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- Housing Module**
  - Streets / Roads
    - Expanding / Collapsing the list
    - Importing From Income Assistance Addresses
    - Properties
      - Residents
    - Work Orders
      - Adding, Editing and Deleting
      - Generating a Work Order
      - Generating a History Report of all Work Orders
    - Inventory
      - Adding, Editing and Deleting
      - Generating an Inventory List
    - Files
      - Adding and Deleting
      - Opening a file entry
- Tools**
  - Checking For Updates
  - Transferring your database for technical support purposes
  - Backing Up Your Data
    - Using our backup service and/or using your removable device
  - Utilities
    - Clean Up Addresses
    - Clean Up School Names
    - Clean Up Basic Client Information
    - Update Active Measures Statistics For Locked Budgets
    - Compacting your database
- Miscellaneous System Functions**
  - Mass Replacement Tool
  - Letter Editor

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- Help**
  - History of Changes
  - User Guide
  - Instructional Guides
  - Menu Templates
  - Rate Tables
  - Policy & Procedures – Current and previous
  - Income Assistance Related Websites & Resources
  - Acronyms
  - TeamViewer
    - Support vs Meeting
    - Updating your TeamViewer software
  - Client Directory Update Form
  - Send Us An Email
  - Request A Call Back
  - Contact Information
    - Indigenous Services Canada
    - Tribal Council
    - Tribal Council - First Nations
    - Software Related
- Adding clients into the system – hands-on entry on your own (time permitting)**
- Wrap Up**