

# JANUARY 1, 2019 TAX RELEASE GUIDE

**AVANTI VERSION 9.37**

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**Document Release**

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## WHAT IS INCLUDED IN THIS RELEASE?

### 9.37 Avanti Tax Release Guide

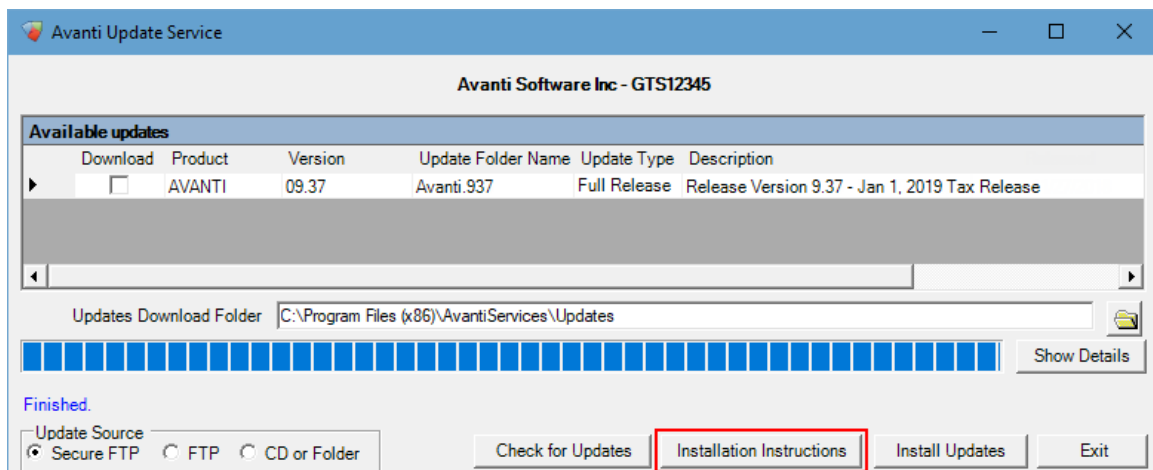
- Outlines the Tax updates effective January 1, 2019
- Includes details of the additional changes included in this release

### Downloadable Avanti software release version 9.37

- Includes complete software installation. Please note that this release supersedes any previous updates/releases.
- The provincial and federal tax updates effective January 1, 2019.
- Minor fixes to improve usability.

## INSTALLING THE UPDATE – APPLICABLE FOR ON-PREMISE CLIENTS

Instructions to install the release are available on the Knowledge Base. Additionally, these instructions can be accessed by selecting 'Installation Instructions' once the update has been downloaded on the Avanti Update Service.



## AVANTI ENHANCEMENT IDEAS

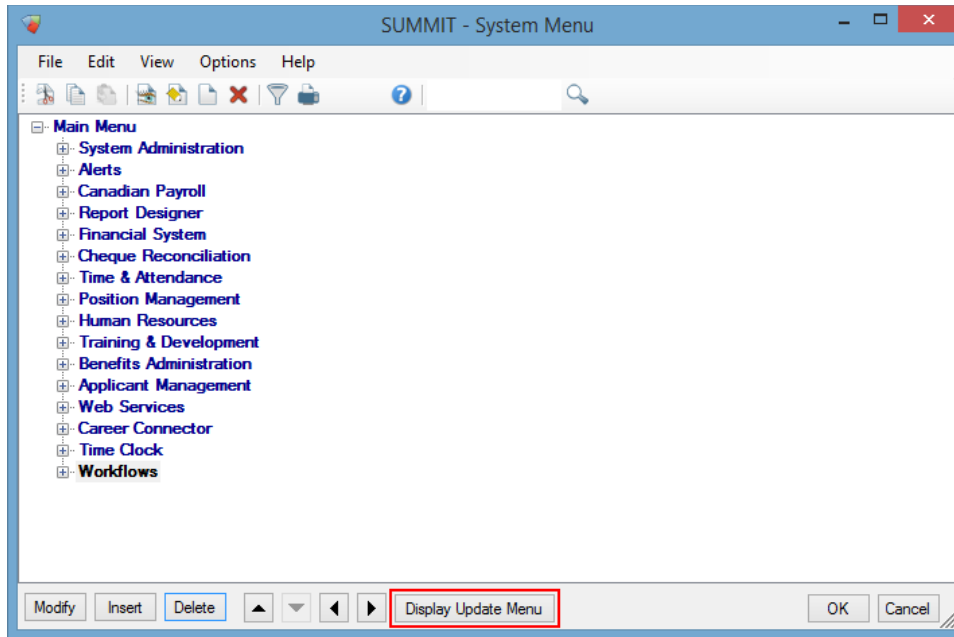
Do you have an idea that could improve Avanti? Avanti now has a link located on the Knowledge Base. To submit an enhancement, click the link and fill out the form.

We appreciate your input on how we can improve the Avanti experience for everyone involved.

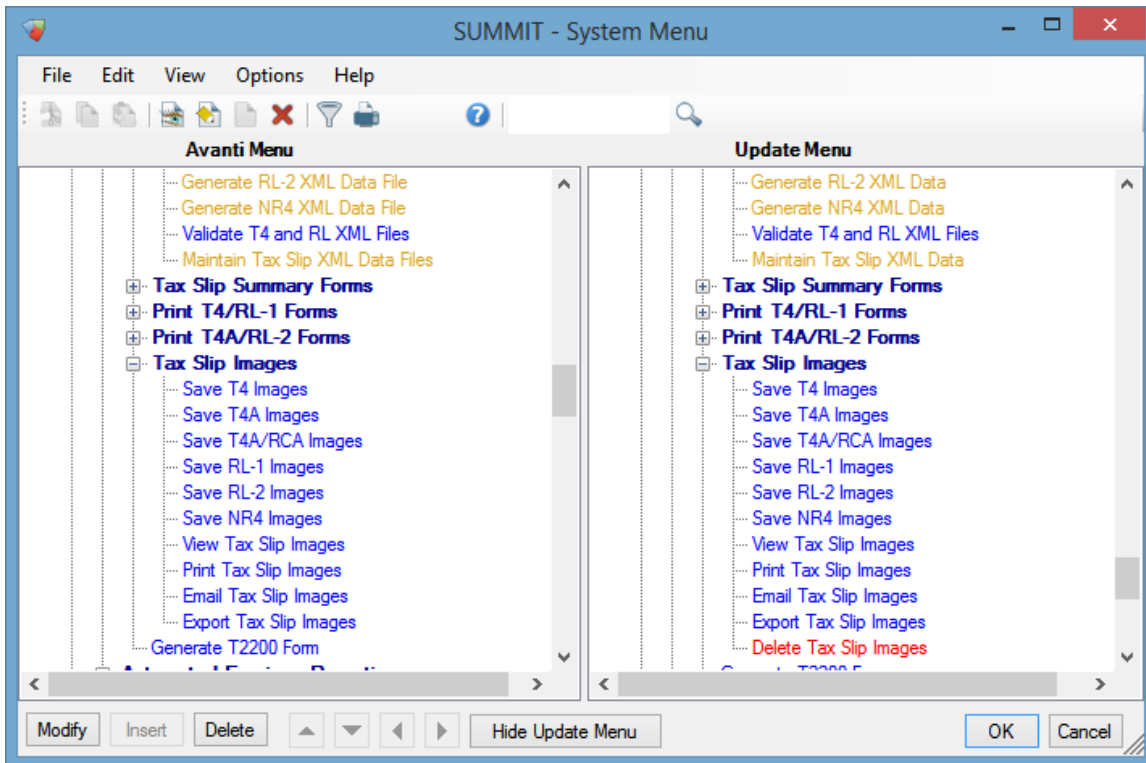
## ADDITIONAL MENU ITEMS

There are no new menu items in the 9.37 Release for System Menu. This is only applicable for clients who wish to install the menu items that were released in a previous version. Clients who do not wish to install the menu items that were previously released can skip to [Canadian Revenue Agency 109<sup>th</sup> Edition Tax Update](#).

Display Update Menu provides the ability to identify menu items that have been released. Menu items can be updated or added by selecting Display Update Menu in System Administration >> System Menu >> System Menu.



When 'Display Update Menu' is selected, an additional column that displays the standard menu items will appear. Once selected, the Show Update Menu button becomes a Hide Update Menu button.



The Avanti Menu column displays all the menu items currently in your system. The Update Menu column displays the standard Avanti menu items. These menu items are colour coded for easy comparison of the menu items. Items that appear in **Red** in the Update Menu are items that are available but are not in the Avanti Menu.

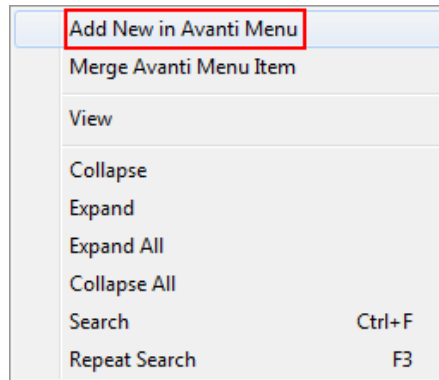
Avanti Menus Colour Coding Legend:

- **Blue** – The menu item is the same in the Avanti Menu and Update Menu. No changes are required.
- **Green** – The menu item does not exist in the Update Menu. This menu item currently exists in the Avanti menu only. It may be a custom program or a manually added program. This is for informational purposes only.
- **Yellow** – This menu item can be found in the Avanti Menu and Update Menu, but there is a discrepancy between the menu items. To identify the difference, right-click on the menu item and select view.
- **Red** – The menu item does not exist in the Avanti menu. This item currently exists in the Update Menu only. It may be a menu item that was made available in a Release that was added to the Avanti Menu.

## ADDING NEW MENU ITEMS INTO THE AVANTI MENU

There are no new menu items in the 9.37 Release for System Menu. This is only applicable for clients who wish to install the menu items that were released in a previous version. Clients who do not wish to install the menu items that were previously released can skip to [Canadian Revenue Agency 109<sup>th</sup> Edition Tax Update](#).

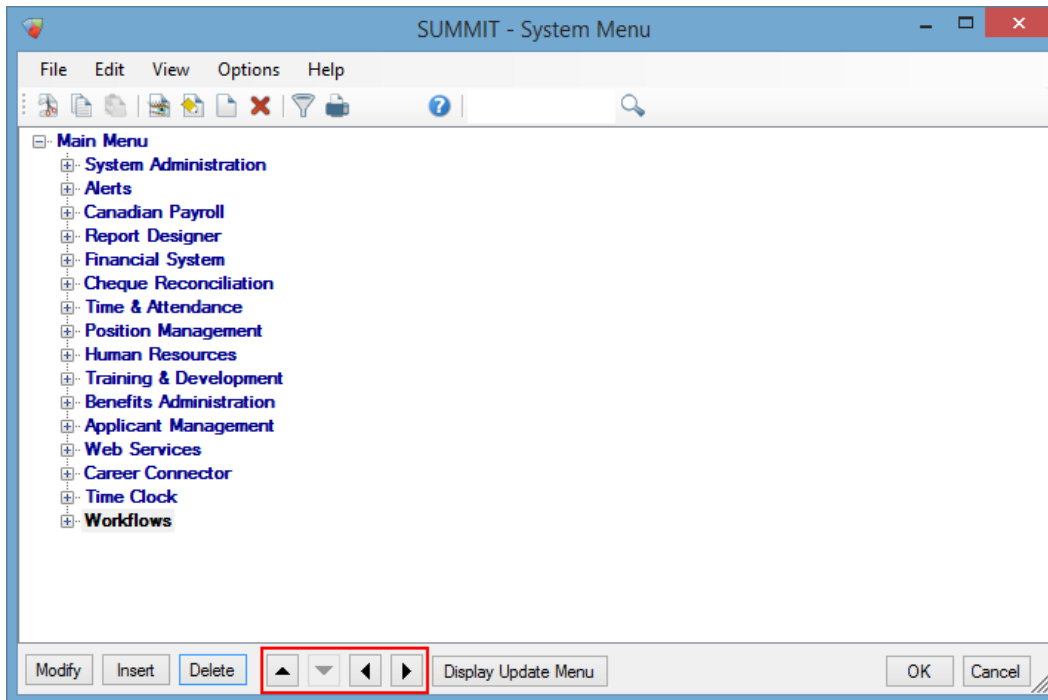
To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select 'Add New in Avanti Menu'. For a menu item to be inserted into the Avanti Menu, it must only appear on the Update Menu. Menu items that only appear on the Update Menu will appear in **red**.







## RE-ARRANGING THE MENU ITEMS

Once the menu item has been added, it can be moved to a different location using the navigation panel available in System Administration >> System Menu >> System Menu.

Please Note: The navigation panel is disabled when Display Update Menu is selected. If Display Update Menu has been selected, please select Hide Update Menu.



-  This button moves highlighted menu item up in the menu.
-  This button moves highlighted menu item down in the menu.
-  This button moves highlighted menu item to the left in the menu.
-  This button moves highlighted menu item to the right in the menu.

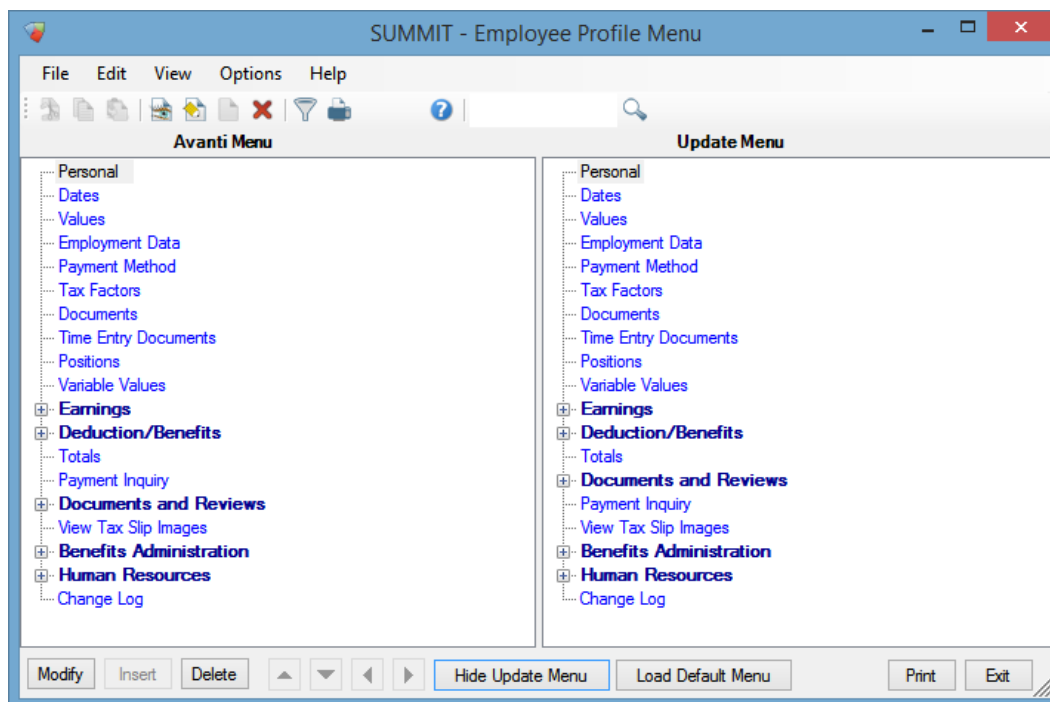


## ADD NEW EMPLOYEE PROFILE MENU ITEMS

There are no new menu items in the 9.37 Release for Employee Profile. This is only applicable for clients who wish to install the menu items that were released in a previous version. Clients who do not wish to install the menu items that were previously released can skip to [Canadian Revenue Agency 109<sup>th</sup> Edition Tax Update](#).

Display Update Menu provides the ability to compare the menu items setup to the standard menu items provided by Avanti. Menu items can be updated or added to the Employee Profile Menu. To access this functionality, select Display Update Menu in System Administration >> System Menu >> Employee Profile Menu. When Display Update Menu is selected, an additional column that displays the standard menu items will appear. Once selected, the Show Update Menu button becomes a Hide Update Menu button.

To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select Add New in Avanti Menu. For a menu item to be inserted into the Avanti Menu, it must only appear in Update Menu. Menu items that only appear on the Update Menu will appear in **red**.

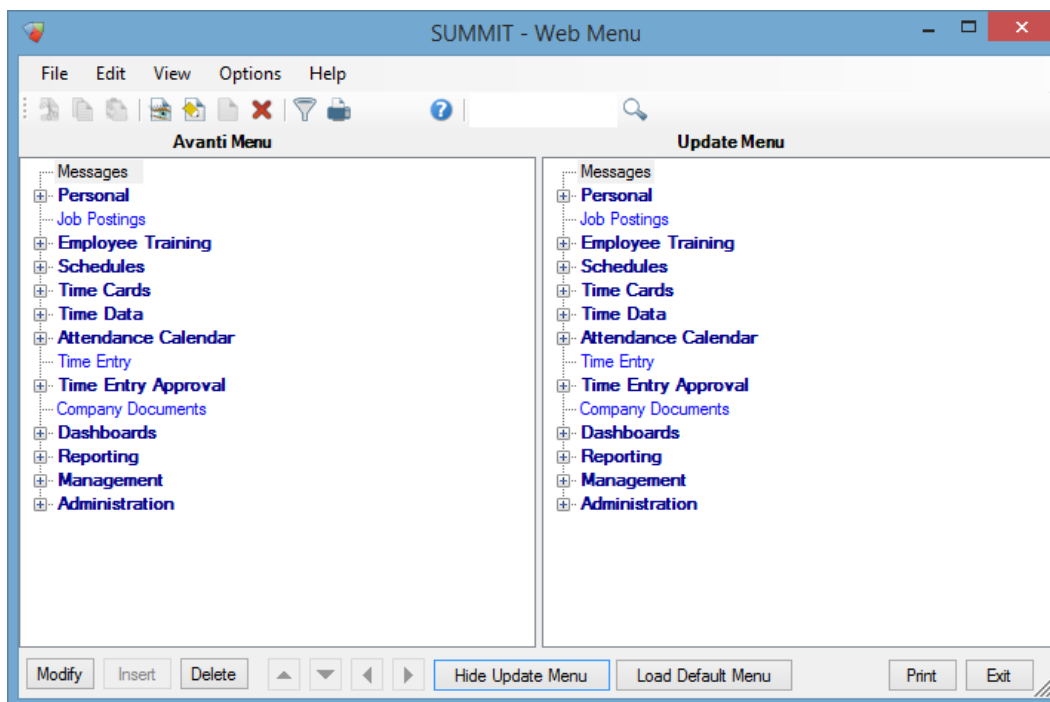


## ADD NEW WEB SERVICE MENU ITEMS

There are no new menu items in the 9.37 Release for Web Services. This is only applicable for clients who wish to install the menu items that were released in a previous version. Clients who do not wish to install the menu items that were previously released can skip to [Canadian Revenue Agency 109<sup>th</sup> Edition Tax Update](#).

Display Update Menu provides the ability to compare the menu items setup to the standard menu items provided by Avanti. Menu items can be updated or added to the Web Menu. To access this functionality, select Display Update Menu in System Administration >> System Menu >> Web Menu. When Display Update Menu is selected, an additional column that displays the standard menu items will appear. Once selected, the Show Update Menu button becomes a Hide Update Menu button.

To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select Add New in Avanti Menu. For a menu item to be inserted into the Avanti Menu, it must only appear in Update Menu. Menu items that only appear on the Update Menu will appear in **red**.



## YEAR END CHECKLIST

Summary of Procedures to be completed before the first Pay run of 2019

- ☐ Earnings and deductions have been reviewed for new tax slip reporting boxes
- ☐ The 2019 Avanti update has been installed (Note: the update can be installed as soon as it is available and pays for 2018 can still be processed)
- ☐ All payroll data has been updated for manual and cancelled cheques
- ☐ Entitlements have been paid out for the current year, if applicable
- ☐ No outstanding payroll batches for the current year
- ☐ Payroll processing has been updated for the last pay of the year
- ☐ Addresses and Social Insurance Numbers have been updated
- ☐ Make a complete backup of your data (Note: All 2018 payroll must be completed)
- ☐ Verify that the 2019 Avanti update has been installed (Note: the update can be installed before or after the pays for 2018 are processed)
- ☐ Employee totals have been initialized
- ☐ Vacation has been initialized (if required)
- ☐ Entitlements have been initialized (if required)
- ☐ G/L Financial Calendar has been inserted
- ☐ New payroll calendars have been created for all pay groups
- ☐ CPP, EI and QPIP rate tables have been verified and changed
- ☐ WCB rates and assessable earnings have been edited
- ☐ Receiver General Reports for 2019 have been inserted
- ☐ Quebec Remittance Reports for 2019 have been inserted
- ☐ All formula based earning or deduction codes with dates have been modified
- ☐ Time and Attendance- insert new Stat Holiday dates
- ☐ Web Services- Company web settings – open to include 2019 dates

Once all of the above steps have been completed in the order given, you are ready to process your first pay for 2019.

Once all the above steps have been completed, you are ready to process your first pay for 2019. The order of these events is very critical. Make sure you complete them in this order.

\*\*\*The Avanti update can be installed at any time **before** the year end process is initiated.

## CANADA REVENUE AGENCY 109<sup>TH</sup> EDITION TAX UPDATE

### FEDERAL TD1 VALUES

If 'Set employee Federal and Provincial 2018 tax factor to 2019 values' is selected in 'Initialize Employee Totals', Avanti adjusts all indexed items to the indicated maximum, according to the CRA, using the January 1, 2019 index factors. Any TD1 values that are not updated will be displayed in the Result Listing once 'Initialize Employee Totals' is complete.

Please note: The amounts will automatically update to the new maximum if the field has the old maximum indicated, except for values that have two maximums for a claim amount.

TD1 claim amounts for 'Spouse or common-law partner amount' and 'Amount for an eligible dependent' have different claims, depending on whether the individual is infirmed. Avanti automatically indexes these amounts to the lesser value. For any employees who qualify for the larger claim amount, the value will have to be manually modified. These amounts can be updated on the Tax Factors tab of the Employee Profile.

If 'Set employee Federal and Provincial 2019 tax factors to zero' is selected during Initialize Employee Totals, all values except Basic Personal Amount will be set to zero.

As per the Canadian Payroll Association, employees are not required to complete a new TD1 form annually unless there are changes to their personal tax credit amounts. Employees who claim additional credits, such as spousal or tuition, should complete a new form:

- each year based on their allowable personal tax credits.
- at any time during the tax year if there is a change to their personal situation.

Federal TD1 Fields	Jan 1, 2019	Jan 1, 2018
Basic Personal	\$12,069	\$11,809
Caregiver amount for infirmed children under age 18	\$2,230	\$2,182
Age amount	\$7,494	\$7,333
Pension Income Amount	\$2,000	\$2,000
Disability Amount	\$8,416	\$8,235
Spouse or common-law partner amount	\$12,069	\$11,809
Spouse or common-law partner amount (Infirmary)	\$14,299	\$13,991
Amount for eligible dependant	\$12,069	\$11,809
Amount for eligible dependant (Infirmary)	\$14,299	\$13,991
Caregiver amount for dependants, spouse or common-law	\$7,494	\$6,986
Caregiver amount for dependant(s) 18+	\$7,140	\$6,986
Indexing Factor	2.2%	1.5%

## CANADA/QUEBEC PENSION PLAN (CPP/QPP)

Avanti adjusts all indexed items to the indicated maximum, according to the CRA, using the January 1, 2019 index factors during year-end initialization. Please note: the amounts will automatically update to the new maximum if the field has the old maximum indicated. If the value is anything other than the old maximum value, the system will not change the amounts automatically.

CPP and QPP Groups can be viewed or modified in Canadian Payroll >> Taxation & Assessment Tables >> CPP/QPP Groups.

As per a proposed amendment to the Canada Pension Plan Regulations, the formula calculating CPP and QPP has been updated for the 2019 tax year. This will affect employees that start work in a different province or territory after working part of the year in Quebec. These changes will ensure sufficient contributions are withheld and will be done automatically by Avanti during payroll processing.

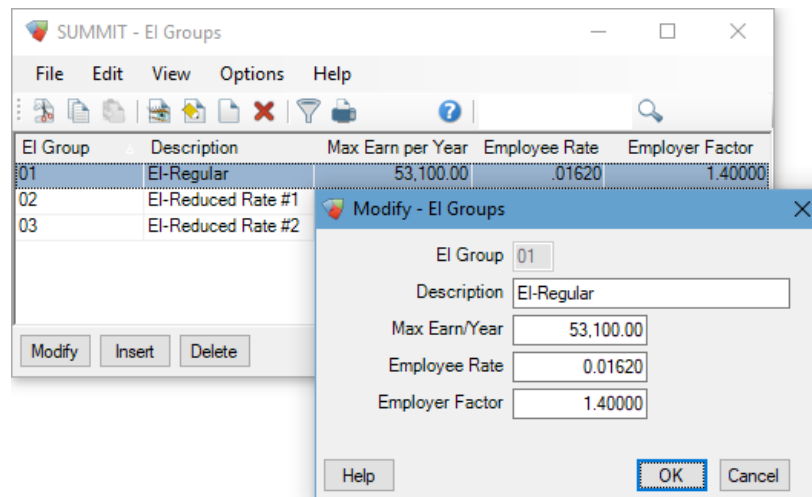
CPP	
Yearly Maximum Pensionable Earnings 2019	\$57,400
Basic exemption	\$3,500
Contribution rate	5.1%
Annual Maximum Contribution (Employee/Employer)	\$2,748.90
Employer contribution factor	1
QPP	
Yearly Maximum Pensionable Earnings 2019	\$57,400
Basic exemption	\$3,500
Contribution rate	5.55%
Annual Maximum Contribution (Employee/Employer)	\$2,991.45
Employer contribution factor	1

## EMPLOYMENT INSURANCE (EI) & QUEBEC PARENTAL INSURANCE PLAN (QPIP)

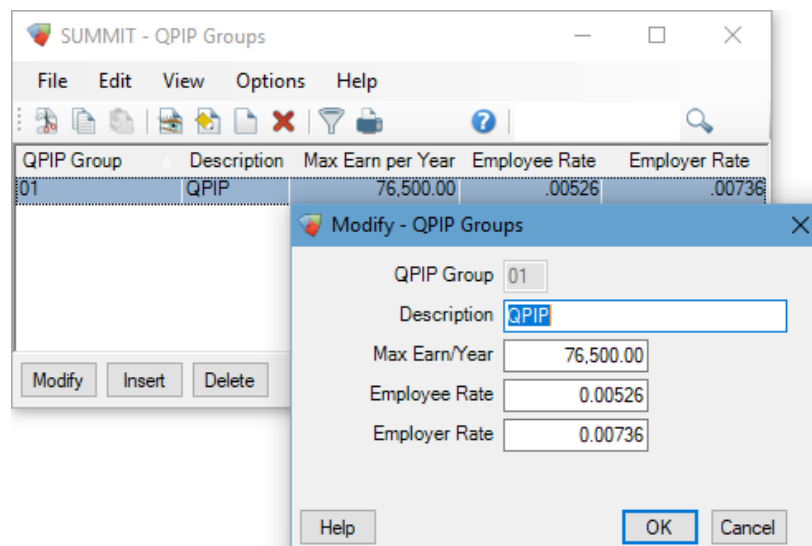
Avanti adjusts all indexed items to the indicated maximum, according to the CRA, using the January 1, 2019 index factors during year-end initialization. Please note that the amounts will automatically update to the new maximum if the field has the old maximum indicated, otherwise, the system will not change the amounts automatically. **Reduced EI Employer factor(s) must be adjusted manually.**

	Federal EI	Quebec EI	QPIP
Annual Maximum Insurable Earnings	\$53,100	\$53,100	\$76,500
Premium/Contribution Rate (Employee)	1.62%	1.25%	0.526%
Premium Rate (Employer 1.4* x Employee EI)	2.268%	1.75%	
Contribution Rate Employer QPIP			0.736%
Annual Maximum Premium (Employee) EI/QPIP	\$860.22	\$663.75	\$402.39
Annual Maximum EI Premium (Employer 1.4* x Employee)	\$1,204.31	\$929.25	
Annual Maximum QPIP contribution (Employer)			\$563.04

Review your Employment Insurance rates in Canadian Payroll >> Taxation and Assessment Tables >> EI Groups to ensure they have been updated.



Review the Quebec Parental Insurance Plan rates in Canadian Payroll >> Taxation and Assessment Tables >> QPIP Groups to ensure they have been updated.



## 2019 WORKER'S COMPENSATION RATES (WCB, WSIB, & CSST)

The maximum assessable earnings are compiled using data that was available at the time of printing this release guide. Please verify and confirm these amounts with the applicable Worker's Compensation provincial office.

Province	Maximum Assessable Earnings
British Columbia	\$84,800
Alberta	\$98,700
Saskatchewan	\$88,314
Manitoba	\$127,000
Ontario	\$92,600
Quebec	\$76,500
New Brunswick	\$64,800
Nova Scotia	\$60,900
Prince Edward Island	\$55,000
Newfoundland and Labrador	\$65,600
Yukon	\$89,145
Northwest Territories	\$92,400
Nunavut	\$92,400

Please note, at the time of publishing, Alberta and Saskatchewan have not published the 2019 maximum assessable earnings.

The Worker's Compensation amounts must be updated manually in Canadian Payroll >> Taxation & Assessment Tables >> Worker's Comp Groups.

During Year End initialization, the current year values are copied to the previous year. Current year values must be adjusted manually.

**SUMMIT - Worker's Comp Groups**

File Edit View Options Help

Group	Description	Rate	Max Earning	Benefit
001	British Columbia	1.80	84,800.00	997 - WCB Regular Assessment
002	Alberta			
003	Saskatchewan			
004	Manitoba			
005	Ontario			
006	Quebec			
007	New Brunswick			
008	Nova Scotia			
009	PEI			
010	Newfoundland & Labrador			
011	Yukon			
012	Northwest Territories			
013	Nunavut			
099	N/A GROUP			

Modify Insert Delete

**Modify - Worker's Comp Groups**

WCB Data Earning WCB Deduction/Benefits WCB

Workers' Comp Group: 001

Description: British Columbia

	Current	Previous Year
Rate per \$100	1.80	1.80
Max Assessable Earnings	84,800.00	82,700.00

Benefit Code: 997 WCB Regular Assessment

OK Cancel

## **2019 PROVINCIAL TD1 VALUES**

If 'Set employee Federal and Provincial 2018 tax factor to 2019 values' is selected during 'Initialize Employee Totals', Avanti adjusts all indexed items to the indicated maximum, according to the CRA, using the January 1, 2019 index factors. Any TD1 values that are not updated will be displayed in the Result Listing once 'Initialize Employee Totals' is complete.

Please note: The amounts will automatically update to the new maximum if the field has the old maximum indicated, except for values that have two maximums for a claim amount.

If 'Set employee Federal and Provincial 2019 tax factors to zero' is selected during 'Initialize Employee Totals', all values except Basic Personal Amount will be set to zero.

### **British Columbia Changes**

As of 2019, British Columbia has dropped the 'Amount for Infirm Dependants Age 18 or older'. If an employee has these values specified on the Tax Factors tab for 2018, the value will be updated to zero.

### **Prince Edward Island**

The income thresholds and personal amounts have not been indexed for 2019. The following amounts have been updated:

- Basic Personal Amount is \$9,160.

- Spouse or common-law partner amount is \$7,780.

- Amount for an Eligible Dependant is \$7,780.

These amounts will automatically update to the new maximum if the employee had the maximum for 2018.



Provincial TD1 Factors January 1, 2019												
	AB	BC	MB	NB	NL	NS	ON	PE	SK	NU	NT	YT
Adjustment Factor	2.4	2.6	2.6	2.2	1.8	0	2.2	0	0	2.2	2.2	2.2
Basic personal	19369	10682	9626	10264	9414	8481	10582	9160	16065	13618	14811	12069
Age amount	5397	4791	3728	5012	6009	4141	5166	3764	4894	10214	7245	7494
Age Supp (NS)	0	0	0	0	0	1465	0	0	0	0	0	0
Senior Supp (Sask)	0	0	0	0	0	0	0		1292	0	0	0
Pension Income	1491	1000	1000	1000	1000	1173	1463	1000	1000	2000	1000	2000
Disability amount	14940	8012	6180	8310	6352	7341	8549	6890	9464	13618	12011	8416
Spousal	19369	9147	9134	8716	7692	8481	8985	7780	16065	13618	14811	12069
Spousal Supp (NS)	0	0	0	0	0	3000	0	0	0	0	0	0
Eligible Dependent	19369	9147	9134	8716	7692	8481	8985	7780	16065	13618	14811	12069
Eligible Dependent Supp (NS)	0	0	0	0	0	3000	0	0	0	0	0	0
Caregiver amount for children under age 18 (SK & YT)	0	0	0	0	0	0	0	0	6094	0	0	2230
Caregiver amount	11212	4674	3605	4848	2990	4898	4987	2446	9464	4910	4910	0
Infirm dependent 18+	11212	0	3605	4847	2990	2798	0	2446	9464	4909	4909	7140
Provincial TD1 Factors July 1, 2018												
	AB	BC	MB	NB	NL	NS	ON	PE	SK	NU	NT	YT
Basic personal	18915	10412	9382	10043	9247	8481	10354	8660	16065	13325	14492	11809
Age amount	5271	4669	3728	4904	5903	4141	5055	3764	4894	9994	7089	7333
Age Supp (NS)	0	0	0	0	0	1465	0	0	0	0	0	0
Senior Supp (Sask)	0	0	0	0	0	0	0		1292	0	0	0
Pension Income	1456	1000	1000	1000	1000	1173	1432	1000	1000	2000	1000	2000
Disability amount	14590	7809	6180	8131	6240	7341	8365	6890	9464	13325	11753	8235
Spousal	18915	8915	9134	8528	7556	8481	8792	6931	16065	13325	14492	11809
Spousal Supp (NS)	0	0	0	0	0	3000	0	0	0	0	0	0
Eligible Dependent	18915	8915	9134	8528	7556	8481	8792	6931	16065	13325	14492	11809
Eligible Dependent Supp (NS)	0	0	0	0	0	3000	0	0	0	0	0	0
Caregiver amount for children under age 18 (SK & YT)	0	0	0	0	0	0	0	0	6094	0	0	2182
Caregiver amount	10949	4556	3605	4743	2937	4898	0	2446	9464	4804	4804	0
Infirm dependent 18+	10949	4556	3605	4743	2936	2798	0	2446	9464	4803	4803	6986

## 2019 QUEBEC TP-1015.3-V VALUES

Avanti adjusts all indexed items to the indicated maximum, as specified by Revenu Québec, using the January 1, 2019 index factors during year-end initialization.

Please note that the following amounts will automatically update to the new maximum if the field has the old maximum indicated, otherwise, the amounts will be indexed:

- Basic Amount
- Amount transferred from one spouse to the other
- Amount for a severe and prolonged impairment in mental or physical functions

All other fields will not change automatically.

Source Deductions Return January 1, 2019	2019	2018
Basic Amount	\$15,269	\$15,012
Amount transferred from one spouse to the other	\$15,269	\$15,012
Amount for other dependants who are 18 or older	\$4,274	\$4,202
Amount for a child under 18 enrolled in post-secondary studies (per term)	\$2,933	\$2,884
Additional amount for a person living alone (single parent family)	\$2,160	\$2,124
Amount for a severe and prolonged impairment in mental or physical functions	\$3,391	\$3,334
Amount for a person living alone	\$1,750	\$1,721
Age amount	\$3,212	\$3,158
Amount for retirement income	\$2,853	\$2,805
Reduction threshold used to calculate net family income	\$34,610	\$34,030
Indexing Factor	1.71%	0.82%

## FEDERAL/PROVINCIAL TAX RATES AND ANNUAL TAXABLE INCOME THRESHOLDS

These tax table changes are included in the Avanti Software update and do not require any user changes.

Federal			Alberta		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	47,630	15.0%	0	131,220	10%
47,630	95,259	20.5%	131,220	157,464	12%
95,259	147,667	26.0%	157,464	209,952	13%
147,667	210,371	29.0%	209,952	314,928	14%
210,371	Over	33.0%	314,928	Over	15%
Federal Indexing Factor for 2019 is 2.2%			Federal Indexing Factor for 2019 is 2.4%		
British Columbia			Manitoba		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	40,707	5.06%	0	32,670	10.80%
40,707	81,416	7.70%	32,670	70,610	12.75%
81,416	93,476	10.50%	70,610	Over	17.40%
93,476	113,506	12.29%	Provincial Indexing factor for 2019 is 2.6%		
113,506	153,900	14.70%			
153,900	Over	16.80%			
Provincial Indexing factor for 2019 is 2.6%					
New Brunswick			Newfoundland & Labrador		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	42,592	9.68%	0	37,591	8.7%
42,592	85,184	14.82%	37,591	75,181	14.5%
85,184	138,491	16.52%	75,181	134,224	15.8%
138,491	157,778	17.84%	134,224	187,913	17.3%
157,778	Over	20.30%	187,913	Over	18.3%
Provincial Indexing factor for 2019 is 2.2%			Provincial Indexing factor for 2019 is 1.8%		
Northwest Territories			Nova Scotia		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	43,137	5.90%	0	29,590	8.79%
43,137	86,277	8.60%	29,590	59,180	14.95%
86,277	140,267	12.20%	59,180	93,000	16.67%
140,267	Over	14.05%	93,000	150,000	17.50%
Provincial Indexing factor for 2019 is 2.2%			150,000	Over	21.00%
			No Indexing		
Nunavut			Ontario		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	45,414	4.0%	0	43,906	5.05%
45,414	90,829	7.0%	43,906	87,813	9.15%
90,829	147,667	9.0%	87,813	150,000	11.16%
147,667	Over	11.5%	150,000	220,000	12.16%
Provincial Indexing factor for 2019 is 2.2%			220,000	Over	13.16%
			Provincial Indexing factor for 2019 is 2.2%		
Prince Edward Island			Quebec		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	31,984	9.80%	0	43,790	15.00%
31,984	63,969	13.80%	43,790	87,575	20.00%
63,969	Over	16.70%	87,575	106,555	24.00%
No Indexing			106,555	Over	25.75%
			Provincial Indexing factor for 2019 is 1.71%		
Saskatchewan			Yukon		
Over	But Not Over	Rate	Over	But Not Over	Rate
0	45,225	10.5%	0	47,630	6.4%
45,225	129,214	12.5%	47,630	95,259	9.0%
129,214	Over	14.5%	95,259	147,667	10.9%
Indexing is Temporarily Suspended			147,667	500,000	12.8%
			500,000	Over	15.0%
			Provincial Indexing factor for 2019 is 2.2%		

## MINIMUM WAGE CHANGES

Recently, some provinces have increased their minimum wages. The amounts will automatically update to the new minimum wage if the old minimum wage is indicated, otherwise, the system will not change the amounts automatically.

Minimum Wages can be viewed or modified in Canadian Payroll >> Taxation & Assessment Tables >> Provincial Tax.

Province	New Minimum Wage	Old Minimum Wage
Alberta	15.00	13.60
Manitoba	11.35	11.15
Saskatchewan	11.06	10.96

## TAX SLIP CHANGES OVERVIEW: EFFECTIVE JANUARY 2019

### T4 SLIP

Please refer to *RC4120- Employers' Guide - Filing the T4 Slip and Summary* for detailed instructions on completing and filing T4 slips.

If you file more than 50 T4 slips for a calendar year, you **must** file the return over the Internet.

Please Note: If your return is more than 150 MB, you can either compress your return or you can split it up so that each submission is no more than 150 MB.

### DISCONTINUED – CODE 37, EMPLOYEE HOME RELOCATION LOAN DEDUCTION

The employee home relocation loan deduction has been eliminated for 2018 and subsequent taxation years.

### DISCONTINUED – CODE 70, MUNICIPAL OFFICER'S EXPENSE ALLOWANCE

Code 70 has been eliminated for 2019 and subsequent taxation years. This is no longer required as non-accountable allowances paid to members of legislative assemblies and certain municipal officers will be fully included in their income.

If the tax slip is being generated for 2018, Code 70 will populate during Extract Employee Tax Slip Data.

If the tax slip is being generated for 2019, Code 70 will not be populated during Extract Employee Tax Slip Data. A validation message will occur when Extract Employee Tax Slip and Validate Tax Slip Data is run.

### T4A SLIP

Please refer to *RC4157- Deducting Income Tax on Pension and Other Income, and Filing the T4A Slip and Summary* for detailed instructions on completing and filing T4A slips.

If the total number of T4A slips you file is more than 50 slips for the same calendar year, you have to file them over the Internet.

Please Note: If your return is more than 150 MB, you can either compress your return or you can split it up so that each submission is no more than 150 MB.

### NEW CODE – 128, VETERANS' BENEFITS ELIGIBLE FOR PENSION SPLITTING

The amounts received for a retirement income security benefit paid to the individual under Part 2 of the Veterans Well-being Act.

## **RL-1 SLIP**

Please refer to *RL-1.g-v Guide for Filing the RL-1 Slip – Employment and Other Income* for detailed instructions on completing and filing RL-1 slips.

If you are filing more than 50 RL-1 slips, you **must** transmit your RL-1 slip data online in an XML file.

## **DISCONTINUED – L-5, DEDUCTION FOR A HOME RELOCATION LOAN**

The additional information for code L-5, 'Deduction for a home relocation loan' has been removed from the RL-1 slip because the deduction for a home relocation loan has been eliminated.

## **DISCONTINUED – A-8, DEDUCTION FOR POLICE OFFICERS**

Code A-8, 'Deduction for police officers' has been discontinued. This amount will now be included in A-7, Canadian Forces personnel and police deduction. During Extract Employee Tax Slip Data, Deduction/Benefit Codes with A-8 selected for RL-1 Box will populate Box A-7.

## **RL-2 SLIP**

Please refer to *RL-2.g-v Guide for Filing the RL-2 Slip – Retirement and Annuity Income* for detailed instructions on completing and filing RL-2 slips.

## **NEW – BOX A-1**

If all or part of the payment made to an Indian under an RPP is situated on a reserve or premises, enter "A-1" in a blank box followed by the amount that is situated on a reserve or premises.

## **NR4 SLIP**

Please refer to *T4061- NR4 – Non-Resident Tax Withholding, Remitting, and Reporting* for detailed instructions on completing and filing NR4 slips.

If you file more than 50 NR4 slips for a calendar year, you **must** file the return over the Internet.

## **T4A-RCA SLIP**

Please refer to *T4041- Retirement Compensation Arrangements Guide* for detailed instructions on completing and filing T4A-RCA slips.

## AVANTI SYSTEM MODIFICATIONS OVERVIEW

### EXTRACT EMPLOYEE TAX SLIP DATA

Benefits or Deductions with codes 30 to 88 selected for the T4 Box on the T-Slips tab of Deduction/Benefits Codes will populate the Tax Slip boxes during Extract Employee Tax Slip Data.

These values will populate regardless of whether Taxable Federal is selected on the Benefit Assessment Section of the Deduction Data tab of the Deduction/Benefit Code.

If one of these codes is selected for the T4 Box, but the Taxable Federal is not selected, a message similar to the following will be displayed when Extract Employee Tax Slip Data is run.

SUMMIT - Extract Employee Tax Slip Data

Tax Year: 2018

Tax Slip Groups

Tax Slip Group	Description	Slip Type	Business No	QC Employer Id	Date Extracted	Extracted By	Last Modified	Mod
<input checked="" type="checkbox"/> 0002	T4	T4	123456789RP0002	0000000000RS0000	10-Dec-2018	ELIZABETH	10-Dec-2018	ELIZ
<input type="checkbox"/> 0004	RL2	RL2	0000000000RP0000	1234567892RS0000			10-Dec-2018	ELIZ
<input type="checkbox"/> 0005	RL-1	RL1	0000000000RP0000	1234567892RS0000			10-Dec-2018	ELIZ
<input type="checkbox"/> 0006	NR4	NR4	123456789RP0001	0000000000RS0000			10-Dec-2018	ELIZ
<input type="checkbox"/> 0007	T4A-RCA	T4A-RCA	123456789RP0001	0000000000RS0000			10-Dec-2018	ELIZ

☒ ☐ ☐ Show Only Not Extracted

☒ Extract From History ☐ Extract From Previous Year

Results

Group 0002 - T4. Extract from history.

Employee: 000000001 - DARRYL P FRIESEN - Benefit is included in T4 box 36 but Deduction/Benefit code 700 is not defined as taxable.

Employee: 000000001 - Darryl P Friesen

## **T4 REVIEW LISTING**

The pay frequency from the last pay of the tax year will be used to determine the pay frequency used in the T4 Review Listing. This ensures that changes to employee pay frequency for the new tax year will not affect the T4 Results Listing.

Previously, 'Pay Period Per a Year' on the Basic Setup tab of the Pay Group would be used to determine the pay frequency.



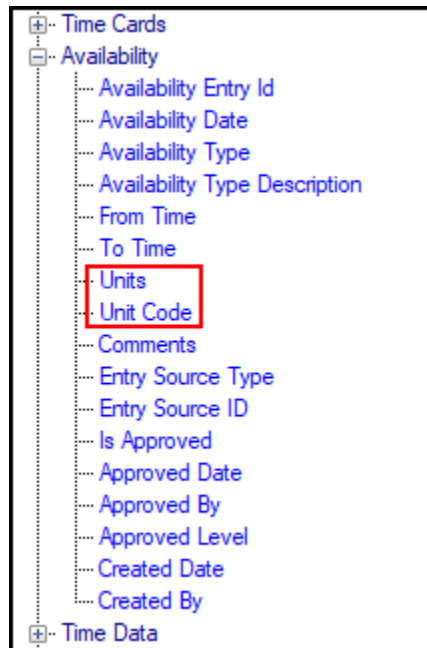
## REPORT DESIGNER - NEW REPORT SOURCES

**Benefits:** There are new report sources to assist with report designing.

Clients with Time & Attendance

Availability >> Units

Availability >> Unit Code



## PAYROLL DATA ENTRY– PRINT COMMENTS

**Benefits:** Comments on Payroll Data Entries can now be included on the report.

'Print Comments' has been added to the Print in Payroll Data Entry. If selected, the comments from the payroll data entry will be included in the report.

The screenshot shows the 'SUMMIT - Payroll Data Entry' window with the 'Batch selection' tab active. The window has tabs for 'Report Defaults', 'Page Layout', 'Printer Setup', and 'Cover Page'. The 'Batch selection' area contains a table with columns: Batch No, Entered By, Pay Ending Date, and Description. One row is visible with Batch No 925, Entered By AVANTIUSER, and Pay Ending Date 24-Nov-2018. Below the table, there are checkboxes for 'Print Comments' (checked and highlighted with a red box) and 'Page Break On Employee' (unchecked). The 'Order By' dropdown is set to 'Employee Number'. At the bottom, there are buttons for 'Save Settings', 'Restore Defaults', 'Print Preview' (highlighted with a blue box), 'Print', and 'Cancel'.

When 'Print Comments' is selected, the report will appear similar to the following:

12-Dec-2018 11:24		Avanti Software Inc. Payroll Data Entry Listing December 12, 2018						Report 25625 Page 1	
Batch: 925, 926									
Date	Week	Earning Code	Units	Per	Rate	Earning	G/L Type	GL Group/Account	Benefit Group
000000001 Friesen, Darryl P Pay Group: 002									
15-Nov-2018	1	290		Amount	95.550	95.55	Group	0002	
Dinner with client ABC									
Total Employee Earnings:						95.55			
Total Earnings:						95.55			

## PENDING LEAVE REPORT – PAY GROUP SELECTION

**Benefits:** Now employees included in the report can be filtered by pay group.

A Pay Group selection has been added to the Pending Leave Report which provides the ability to select the pay groups that will be included in the report.

The screenshot shows the 'SUMMIT - Pending Leave Report' window with the 'Pay Groups' tab selected. The 'Pay Groups' section contains a list of pay groups with checkboxes: 002 (Full Time Bi-Weekly), 003 (Casual Bi-Weekly), 004 (Full Time -Quebec), 010 (Semi-Monthly), 011 (Contract - Semi-Monthly), 020 (Executive), and 099 (Non Employee Group). The 'Order By' section has radio buttons for 'Employee Number' and 'Employee Name' (selected). The 'Employee Selection' section has radio buttons for 'All' (selected) and 'Range'. The 'Range' section has 'From' and 'To' fields with values '000000000' and '000000000' respectively. There are also checkboxes for 'Exclude Data After' (with a date of '15-Nov-2018'), 'Exclude Schedule Entries', and 'Page Break On Employee'. At the bottom, there are buttons for 'Save Settings', 'Restore Defaults', 'Print Preview', 'Print', and 'Cancel'.

To only display the active Pay Groups, right-click in the Pay Group selection and select 'Only Active'.

The screenshot shows the 'SUMMIT - Pending Leave Report' window with the 'Pay Groups' tab selected. A right-click context menu is open over the '004 Full Time -Quebec' pay group, showing the option 'Only Active' with a checkmark. The 'Pay Groups' section contains a list of pay groups with checkboxes: 002 (Full Time Bi-Weekly), 003 (Casual Bi-Weekly), 004 (Full Time -Quebec), 010 (Semi-Monthly), 011 (Contract - Semi-Monthly), 020 (Executive), and 099 (Non Employee Group). The 'Order By' section has radio buttons for 'Employee Number' and 'Employee Name' (selected). The 'Employee Selection' section has radio buttons for 'All' (selected) and 'Range'. The 'Range' section has 'From' and 'To' fields with values '000000000' and '000000000' respectively. There are also checkboxes for 'Exclude Data After' (with a date of '15-Nov-2018'), 'Exclude Schedule Entries', and 'Page Break On Employee'. At the bottom, there are buttons for 'Save Settings', 'Restore Defaults', 'Print Preview', 'Print', and 'Cancel'.

## FINANCIAL SYSTEMS – PROJECT TIME EXPORT

**Benefits:** Project Time previously exported and marked as processed can now be exported again.

'Show All Pay Runs' has been added to Project Time Export which provides the ability to select pay runs which have previously been exported and marked as processed.

A pay run has been marked as processed if Yes is selected for 'Do you want to mark exported batch(es) as processed' once the pay run(s) are exported.

Previously, pay runs that had been exported and marked as processed could not be exported again.

The screenshot shows the 'SUMMIT - Project Time Export' window. It contains a 'Pay Run Selection' table with columns: Description, Entered Date, Accounting D, Acc. Year, Acc. Period, Run #, Pay Ending Date, Payroll Year, Pay Period, and E. The table lists several pay runs, including '004 Full Time -Quebec' and 'Pay Grps: 010, 011, 020, 099'. Below the table, there are two checkboxes, a dropdown menu for 'Export Type' set to 'Diamond - Project Data Export', and a checkbox labeled 'Show All Pay Runs' which is checked and highlighted with a red box.

	Description	Entered Date	Accounting D	Acc. Year	Acc. Period	Run #	Pay Ending Date	Payroll Year	Pay Period	E
<input type="checkbox"/>	004 Full Time -Quebec	01-Oct-2018	31-Oct-2018	2018	10	809	04-Oct-2018	2018	21	E
<input type="checkbox"/>	Pay Grps: 010, 011	01-Oct-2018	31-Oct-2018	2018	10	810	15-Oct-2018	2018	19	E
<input type="checkbox"/>	Pay Grps: 010, 011, 020, 099	01-Oct-2018	31-Oct-2018	2018	10	812	31-Oct-2018	2018	20, 10	E
<input type="checkbox"/>	004 Full Time -Quebec	01-Oct-2018	31-Oct-2018	2018	10	824	18-Oct-2018	2018	22	E
<input type="checkbox"/>	004 Full Time -Quebec	01-Oct-2018	31-Oct-2018	2018	10	826	04-Oct-2018	2018	21	E
<input type="checkbox"/>	004 Full Time -Quebec	01-Oct-2018	30-Sep-2018	2018	9	814	06-Sep-2018	2018	19	E
<input type="checkbox"/>	Pay Grps: 010, 011	01-Oct-2018	30-Sep-2018	2018	9	815	15-Sep-2018	2018	17	E
<input type="checkbox"/>	Pay Grps: 010, 011, 020, 099	01-Oct-2018	30-Sep-2018	2018	9	817	30-Sep-2018	2018	18, 09	E
<input type="checkbox"/>	004 Full Time -Quebec	01-Oct-2018	31-Aug-2018	2018	8	819	09-Aug-2018	2018	17	E

☒ ☐ ☒ Show All Pay Runs

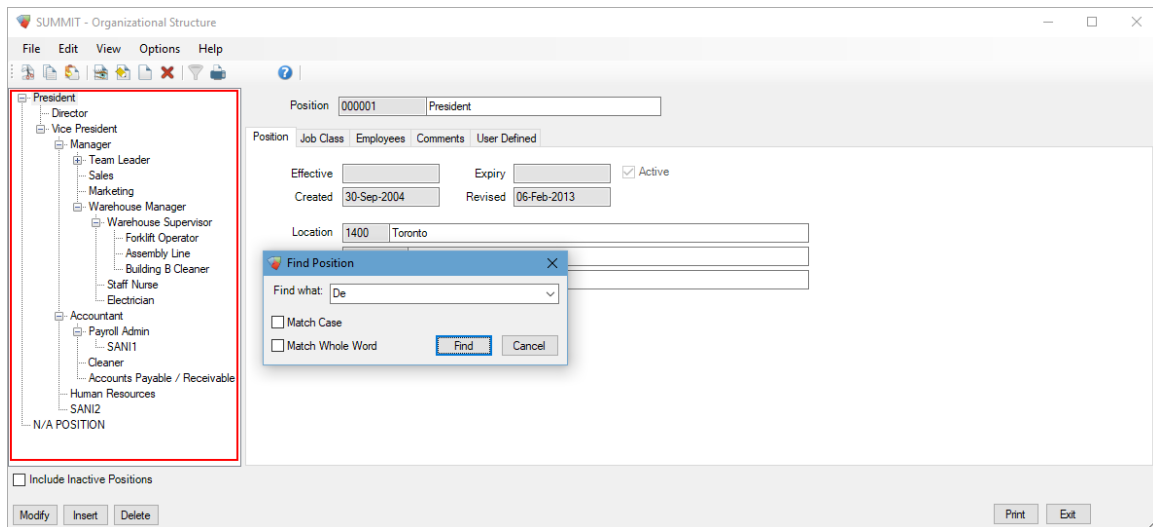
Export Type: Diamond - Project Data Export

## POSITION MANAGEMENT - ORGANIZATION STRUCTURE – FIND

Only applicable for clients with Position Management. Clients who do not have Position Management can skip to the next [Section](#).

**Benefits:** Accessing the desired position is now easier and more efficient.

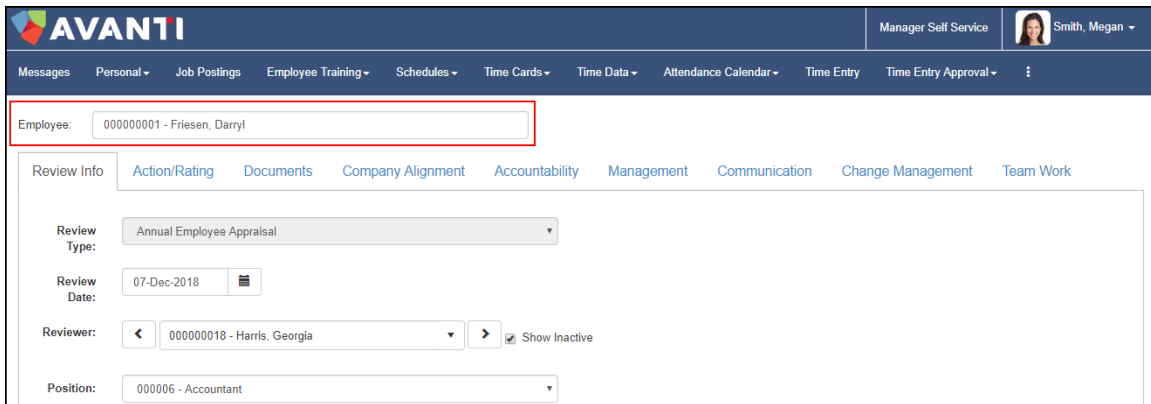
Find has been added to Position section which provides the ability to search the positions in the Organization Structure. To access the Find feature, select 'Ctrl' and 'F' simultaneously. To find the next matching position, select F3.



## WEB SERVICES – EMPLOYEE DISPLAYED ON APPRAISALS

Only applicable for clients with Web Services. Clients who do not have Web Services can skip to the [Tax Slip Processing Checklist](#).

The name and number of the employee will now be displayed at the top of the screen when an appraisal is being added or edited on the Avanti Self-Service Portal.



The screenshot displays the Avanti Self-Service Portal interface. At the top, the Avanti logo is on the left, and the user's name 'Smith, Megan' is on the right. Below the header is a navigation bar with various menu items: Messages, Personal, Job Postings, Employee Training, Schedules, Time Cards, Time Data, Attendance Calendar, Time Entry, and Time Entry Approval. The main content area shows the 'Employee' field at the top, which is highlighted with a red box and contains the text '000000001 - Friesen, Darryl'. Below this is a 'Review Info' tab, and a 'Review Type' dropdown menu is set to 'Annual Employee Appraisal'. The 'Review Date' is '07-Dec-2018'. The 'Reviewer' field shows '000000018 - Harris, Georgia' with a 'Show Inactive' checkbox. The 'Position' field is set to '000006 - Accountant'.

## TAX SLIP PROCESSING CHECKLIST

- ☐ Go to Modify Transmitter Data and set the information for the year.
- ☐ Go to Modify Tax Slip Groups and create tax slip groups for the year (these can be copied from the previous year automatically by the system). You will need at least one tax slip group for each business number.
- ☐ Go to Extract Employee Tax Slip Data and extract all tax slip groups (this can be done over and over until all data has been extracted correctly, the file will always overwrite with each extraction).
- ☐ Go to Import External Tax Slip Data if required (this function is used to import pension adjustments, all T4 adjustments, or for bringing in third party T4 data).
- ☐ Make all adjustments to T4's.
- ☐ Go to Validate Tax Slip Data and validate all T4 data for the year.
- ☐ Go to Review listings and review all employee T4 data before printing T4's. All T4 box data should be validated for accuracy of the T4's. The Receiver General report should be used along with all documents sent to CRA to validate source deductions. Separate reports can be made in Report Designer to validate Taxable benefits and any other T4 box requirements.
- ☐ Go to Print T4's and print off all T4s, T4As, RL1s and RL2s (if applicable).
- ☐ Go to Tax Slip Summary Forms and print off summaries to validate all T4 info and balance to CRA.
- ☐ Go to Generate XML Data File and create all data files. (the transmit file can also be made)
- ☐ Go to Maintain Tax Slip XML Files and create the XML files to transmit. (if the file has not be created under Generate CML Data File)
- ☐ Once files are created they are sent via the internet to the CRA or Revenu Québec.
- ☐ Go to Tax Slip Images and save all tax slips to images, print tax slips from images.

## AVANTI SUPPORT

**Phone:** 1.800.660.0464  
**Local (Calgary):** 403.225.2366  
**E-mail:** [support@avanti.ca](mailto:support@avanti.ca)  
**Web site:** [avanti.ca](http://avanti.ca)

### AVANTI 2018/2019 HOLIDAY HOURS

December 25, 2018	Closed
January 1, 2018	Closed

### USEFUL LINKS

**Canadian Payroll Association:** [payroll.ca](http://payroll.ca)

#### Government Websites

Canada Revenue Agency	<a href="http://cra-arc.gc.ca">cra-arc.gc.ca</a>
Human Resource Skills & Dev Corp	<a href="http://hrsdc.gc.ca">hrsdc.gc.ca</a>
Revenu Québec	<a href="http://revenuquebec.ca">revenuquebec.ca</a>

#### Workers' Compensation Websites

Alberta	<a href="http://wcb.ab.ca">wcb.ab.ca</a>
British Columbia	<a href="http://worksafebc.com">worksafebc.com</a>
Saskatchewan	<a href="http://wcbsask.com">wcbsask.com</a>
Manitoba	<a href="http://wcb.mb.ca">wcb.mb.ca</a>
Ontario	<a href="http://wsib.on.ca">wsib.on.ca</a>
Quebec	<a href="http://csst.qc.ca">csst.qc.ca</a>
New Brunswick	<a href="http://worksafenb.ca">worksafenb.ca</a>
Newfoundland	<a href="http://whscc.nf.ca">whscc.nf.ca</a>
Nova Scotia	<a href="http://wcb.ns.ca">wcb.ns.ca</a>
PEI	<a href="http://wcb.pe.ca">wcb.pe.ca</a>
NWT/Nunavut	<a href="http://wcb.nt.ca">wcb.nt.ca</a>
Yukon	<a href="http://wcb.yk.ca">wcb.yk.ca</a>