



CHECKLIST

2023 Year-End Prep

IMPORTANT NOTES:


- ✓ Please complete this Year-End Prep List before moving on to the Year-End Process List.
- ✓ Complete the steps in order.
- ✓ If you want to get ahead of your Year-End, you can complete this checklist prior to receiving the Avanti Tax Update in December.
- ✓ Be sure to balance your Year-End before processing your final pay. This can be done before or after running the final pay of Year-End.
[Read more >](#)
- ✓ For clients in the Implementation Process, your Implementation Specialist can assist you with any questions you may have.


Year-End Toolkit

Everything you need for 2023 year-end


avanti.ca/year-end-resources


- ☐ 1 Create your enhanced CPP and QPP Deduction/Benefit codes and add them to your employees. [Read more >](#)
- ☐ 2 Review Earnings and Deduction/Benefit codes to ensure that your Tax, CPP, EI, QPIP and QPP (for Quebec employees) compliance codes are marked correctly for compliance.
[Read more >](#)

 **Tip:** If you have enough time, double check that the tax slip boxes are set correctly on codes. [Read more >](#)
- ☐ 3 Review the accumulators on your Earning, Deduction, and Benefit codes. [Read more >](#)
- ☐ 4 Verify that 'Employment Status' is correctly indicated on Terminated Employee profiles. (These can be used to retain Terminated Employees during the initialization process).
[Read more >](#)
- ☐ 5 Verify that all time cards and time data entries have been processed. [Read more >](#)

 **Tip:** This is only applicable to clients using time & attendance.

- ☐ 6 Verify that all 2023 manual and cancelled payments are processed and updated.
[Read more >](#)
- ☐ 7 Verify that all entitlements have been paid out for the current year (if applicable).
[Read more >](#)

 **Tip:** This is only needed if your entitlement year aligns with the calendar year.
- ☐ 8 Verify that there are no outstanding payroll batches for the current 2023 year.
[Read more >](#)
- ☐ 9 Ensure that payroll processing has been updated for the last pay for the 2023 year.
[Read more >](#)

 **Tip:** This includes any bonus, off cycle, or adjustments for the 2023 payroll year.
- ☐ 10 Make a complete backup of your data.
[Read more >](#)

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