

Welcome!

We'll be starting shortly

AVANTI

AVANTI

Skill-Up with Avanti

Tax Slip Processing Checklist

Agenda

- Overview of the Tax Slip Processing Checklist
- Step-by-step instructions for easy tax slip processing
- Explore handy resources
- Q&A session

Additional Tax Slip Processing Support

AVANTI



Mastering Tax Slip Processing in Avanti

January 17, at 11:00 AM MDT (90 Mins) Paid

Exclusive, step-by-step demonstration of the Tax Slip process within the Avanti system

To Register go to Avanti.ca/skillup



Need more 1:1 Support?

Sessions are available from January 8th - February 23rd (75mins) Paid

We are offering a limited number of Premium Specialist sessions for **Tax Slip Guidance**.

If you are interested in registering, please contact your **Account Manager** or reach out to success@avanti.ca

The Client Care Team

> Everyone who makes support possible

AVANTI



Marlo



Mia



Matt



Court



Dorothy



Marianne



Nicole



Ken



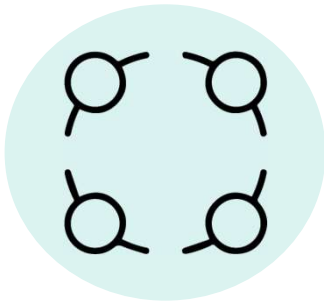
Amanda



Lindsay

How to get the most out of this session

AVANTI



Follow along with us

If you have access to more than one screen, feel free to have the **Tax Slip Checklist** open to follow along with us!

We also encourage you to open your test database and test the steps as we go.



Session Duration

Today's session is **30 mins**.

The recording of today's session will be posted to our Learning Hub after the webinar at **learn.avanti.ca**.



Ask questions

Please ask any questions in the Q&A area and we will respond.

Missed the answer to your question? Not to worry, we will be posting a full Q&A response sheet in our **Help Centre** after the webinar.

eCPP2/eQPP2 Code Setup

> Ensure your Calc. steps are correct

AVANTI



The image displays two screenshots of the 'Modify - Deduction/Benefit Codes' window, illustrating the setup for eCPP2/eQPP2 codes. A green arrow points from the 'Calc. step' field in the top window to the 'Calc. step' field in the bottom window.

Top Window: Canada Pension Plan

- Code: 501 - 000
- Full Name: Canada Pension Plan
- Short Name: CPP
- Type: CPP
- Charitable Reg:
- Pension Reg: 0000000
- Effective: 0 Mths after seniority date
- Gen. Frequency: Every Pay Period
- Calc. step: 6
- Active: ☒
- Active for Off-Cycle: ☒
- Track Life-To-Date: ☒
- Suppress printing benefit on statement: ☐
- Suppress processing if results in negative pay: ☐

Bottom Window: Canadian Pension Plan Enhance

- Code: 505 - 000
- Full Name: Canadian Pension Plan Enhance
- Short Name: eCPP2
- Type: eCPP2
- Charitable Reg:
- Pension Reg:
- Effective: 0 Mths after seniority date
- Gen. Frequency: Every Pay Period
- Calc. step: 6
- Active: ☒
- Active for Off-Cycle: ☒
- Track Life-To-Date: ☒
- Suppress printing benefit on statement: ☐
- Suppress processing if results in negative pay: ☐
- Leave Entitlement: ☐
- FIFO: ☐



Let's get started!

Before we begin

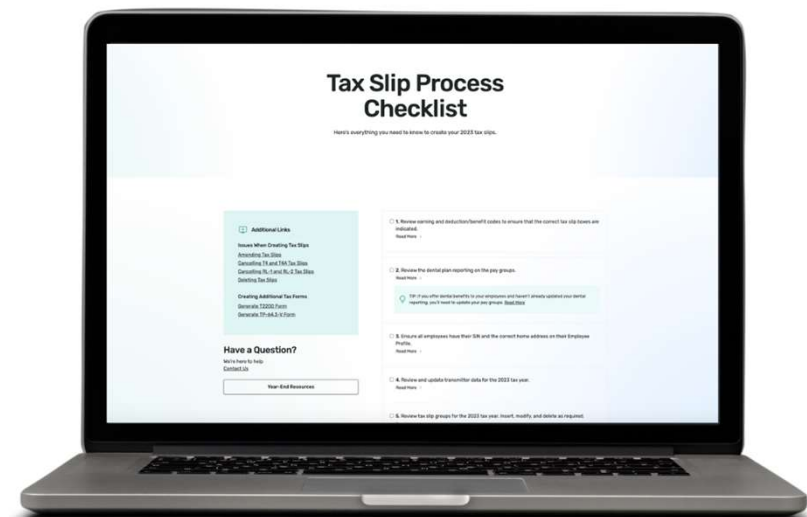
> How to follow along with us

AVANTI

Follow along with us!

Tax Slip Process Checklist:

- ✓ Everything you need to create your 2023 tax slips
- ✓ **Avanti.ca/tax-slip-process-checklist**
- ✓ Open the page and follow along with our presentation.



Review Tax Slip Boxes on Earning/Deduction Codes

> Step 1

AVANTI

The screenshot shows a Microsoft Excel spreadsheet titled "Client Care - Earning Codes". The spreadsheet has columns A through X. A red box highlights the range M14:W14. A context menu is open over this range, showing options like "Export to Excel", "Export to OneDrive", "Copy", "Paste", "Format", "Delete", "Insert", "Print", and "Exit".

EarningCo Name	TaxCode	TaxGroup	Type	ActiveCoc	OffcycleA	PercentOf	CopExem	ElExempt	ElExempt	QpipExem	T4Box	T4aBox	RLBox	RL2Box	RL2Incom	Nr4Incom	Nr4Exem	T4aRcaBo	RoeBlk17	RoeBox17	Step
001-000	Regular E	00		1	Y	Y	100.0000	N	N	N	14	099	A	Z	AUTRE	00		00	N	R00	1
001-001	Reg Earn-100			1	Y	Y	100.0000	N	N	N	14	099	A	Z	AUTRE	00		00	N	R00	1
001-002	Reg Earn-00			1	Y	Y	100.0000	N	N	N	14	099	A	Z	AUTRE	00		00	N	R00	1
001-003	Reg Earn-00			1	Y	Y	100.0000	N	N	N	14	099	A	Z	AUTRE	00		00	N	R00	1
001-004	Reg Earn-100			1	Y	Y	100.0000	N	N	N	14	099	A	Z	AUTRE	00		00	N	R00	1

Review Dental Plan Report on Pay Groups

> Step 2

AVANTI

- Under Canadian Payroll > Employer Payroll Tables > **Pay Groups**, click the **Print** Button
- The generated report will have details on how each Pay Group is set up for dental benefits
- Pay Groups can be adjusted at this point if anything is incorrect

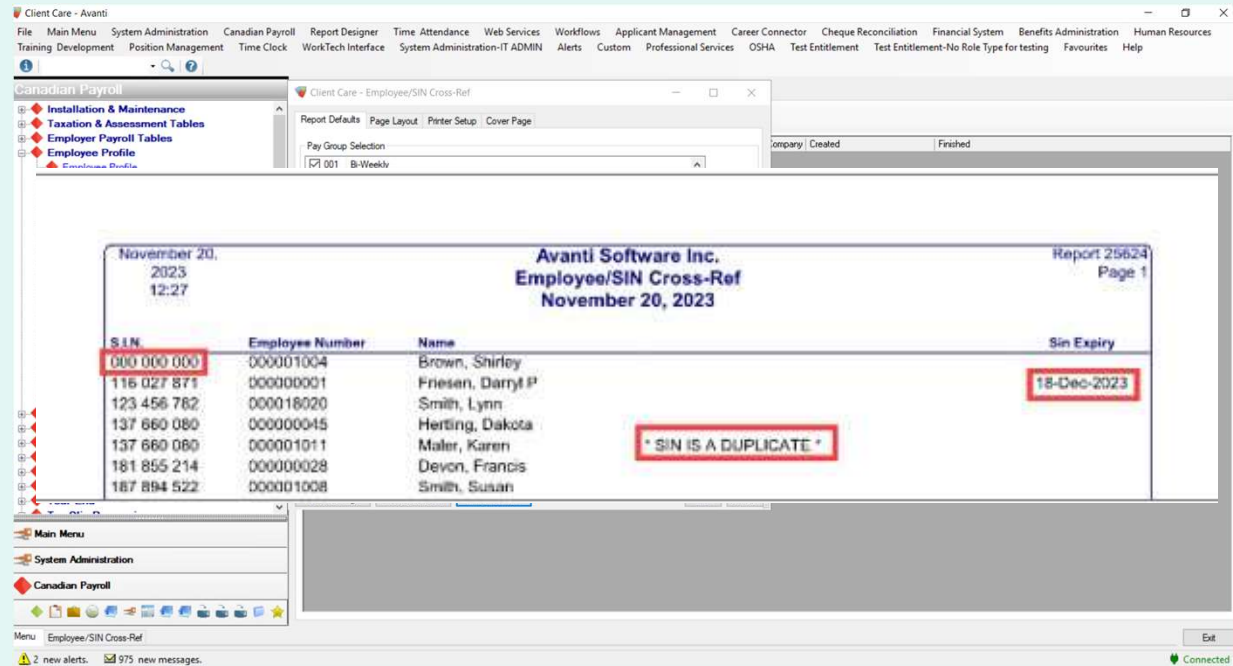
January 02, 2024 08:18		ATLAS - Testing Global Pay Groups January 02, 2024						Report 25611 Page 1	
Pay Group	Hrs / Day	Days / Week	Wks / Year	Mths / Year	Pay / Year	Groups EI	CPP	Bank	Business No
001 Bi-Weekly Dental Benefits 2 - Payee (T4/T4A):	8.000	5.000	52.000	12.000	26.000	01	01	02	123456789RP0000
002 Monthly - Reduced EI - HO Dental Benefits 1 - No dental insurance or coverage of any kind (T4/T4A):	8.000	5.000	52.000	12.000	12.000	02	01	02	121212789RP0001
003 Semi - Monthly - Evening Shift Dental Benefits 1 - No dental insurance or coverage of any kind (T4/T4A):	8.000	5.000	52.000	12.000	24.000	01	01	06	123456789RP0003
004 Bi-Weekly-Web Time Entry-Exp Accrual Dental Benefits 1 - No dental insurance or coverage of any kind (T4/T4A):	8.000	5.000	52.000	12.000	26.000	01	01	01	123456789RP0000
005 Monthly-Excel Dental Benefits 1 - No dental insurance or coverage of any kind (T4/T4A):	8.000	5.000	52.000	12.000	12.000	01	01	01	123456789RP0000

Review SIN and Mailing Address for Employees

> Step 3

AVANTI

- Run the **Employee/SIN Cross-Ref Report** to verify all SINs as required
- Found in Canadian Payroll > Employee Profile
- Confirming employee addresses via contact email is the best option to ensure anyone who has moved has the correct address marked to receive tax slips (if they are to be printed and mailed)



Review and Update Transmitter Data

> Step 4

- Insert a new entry for the upcoming tax year to be processed in **Modify Transmitter Data**
- Canadian Payroll > Tax Slip Processing
> Modify Transmitter Data
- Review all data to ensure that it is correct
- Transmitter ID for CRA can be entered as the same value as the previous year
 - If you need a Quebec Transmitter ID and do not have one, please contact Revenu Québec directly

The screenshot shows a software window titled "Modify - Modify Transmitter Data". The fields are as follows:

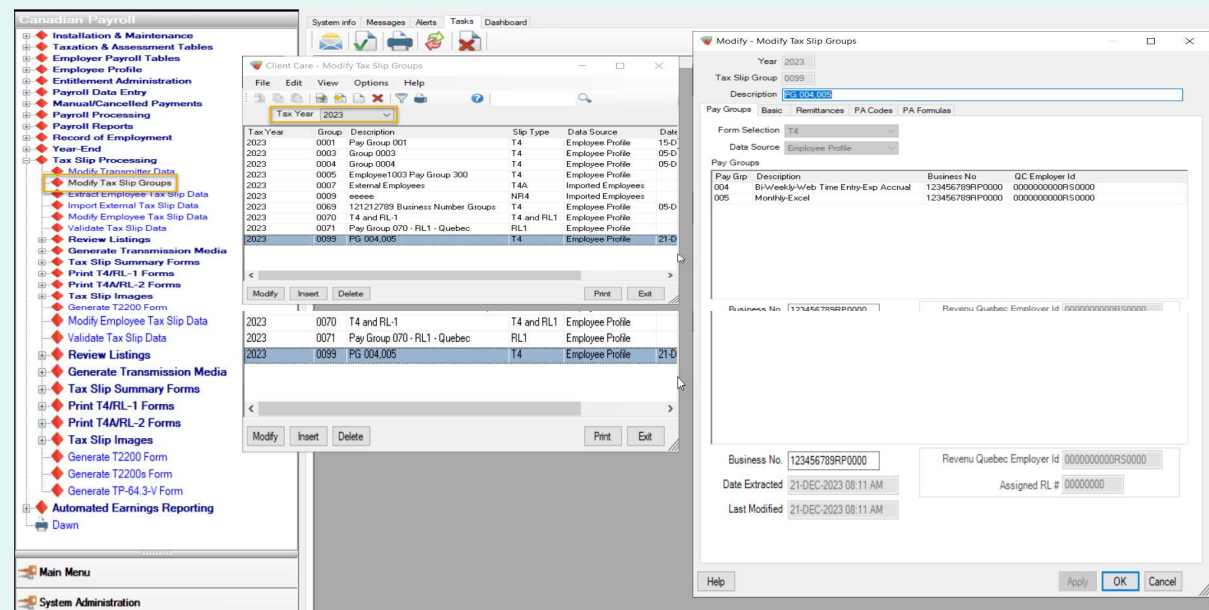
- Tax Year:** 2023
- Employer Name:** ATLAS - Canadian Payroll
- Address:** 123 World Way-Canadian Payroll, World Ave. - CP
- City:** Calgary
- Province:** AB (dropdown menu showing Alberta)
- Country:** CAN
- Postal Code:** T2A 4P2
- Transmitter Type:** Submit on behalf of others (dropdown menu)
- Transmitter ID:** MM000000
- Contact Person:** Susan - CP Smith - CP
- Phone:** 403 123 - 4567 ext. (empty)
- Language:** English (dropdown menu)
- E-Mail:** care@avanti.ca
- Revenu Québec section:**
 - Transmitter ID:** NP000000
 - Enterprise Number:** (empty)

Buttons at the bottom include "Help", "OK", and "Cancel".

Review Tax Slip Groups

> Step 5

- In **Modify Tax Slip Groups** found in Canadian Payroll > Tax Slip Processing > Modify Tax Slip Groups, you can copy your tax slip groups from the previous year, or insert new ones as required
- The upcoming tax slip year will only appear if you have completed the previous step (creation of transmitter data for the tax year)
- Pension adjustment calculations for box 52 can be set up here



Extract Tax Slip Data

> Step 6

- Extract Employee Tax Slip Data in Canadian Payroll > Tax Slip Processing
- Always Extract from History, unless advised otherwise by Avanti Implementation.
- Results listing will notify you if any specific employees require additional review

Tax Year: 20

Tax Slip Groups

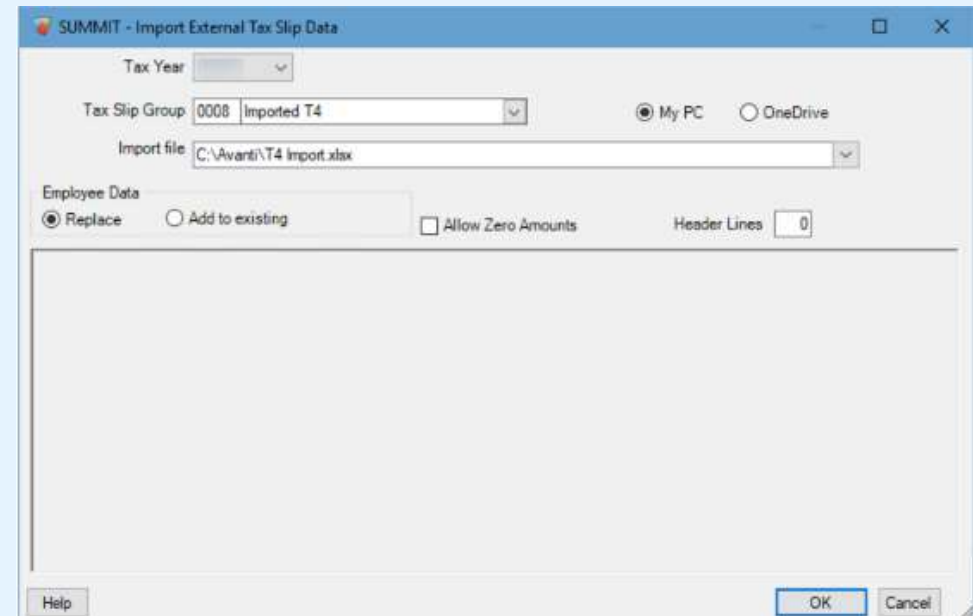
Tax Slip Group	Description	Slip Type	Business No	QC Employer Id	Date Extracted	Extracted By	Last Modified	Mo
0001	T4	T4	123456789RP0001	0000000000RS0000				AV
0002	T4 - 0002	T4	123456789RP0002	0000000000RS0000				AV
0003	T4A	T4A	123456789RP0001	0000000000RS0000				AV
0005	RL1	RL1	000000000RP0000	1234567892RS0000				AV

☒ ☐ ☐ Show Only Not Extracted
☒ Set terminated employees to no dental insurance/coverage
☒ Extract From History ☐ Extract From Previous Year

Import External Tax Slip Data

> Step 7

- You can import tax slip adjustments with **Import External Tax Slip Data**
- You can also import external employees and create their tax slips using Avanti
- The article attached to this step has details on exactly how to create the import file for Avanti
- Steps for **including Box 45 (Dental)** adjustments are included in this article as well



Import Pension Adjustment Data

> Step 8 (Optional)

- This step is only required if the pension adjustment calculations in step 5 are not set up (or if minor adjustments need to be made)
- Import file creation steps are the same as step 7

Review Employee Tax Slip Data

> Step 9

- In **Modify Employee Tax Slip Data**, you can review and adjust your employee's 2023 information before it populates their tax slips
- Review of information on an individual/spot check basis
- You can adjust:
 - Mailing address,
 - Personal information
 - Individual box values

Modify - Modify Employee Tax Slip Data

Tax Slip Group: 0001

Employee: 000000023 SAMSON, JAMES

Employment Province: BC - British Columbia

Basic | T4 | T4 Other Info | Change Log

Last Modified: []

Surname: SAMSON

Given Name: JAMES

Initial: []

Address: 123 4 Ave

City: Toronto

Prov/State: ON - Ontario

Country: CAN

Postal Code: M4W 5T5

SIN: 123456782

Location: 1301 - Brandon

Language: ☒ English ☐ French

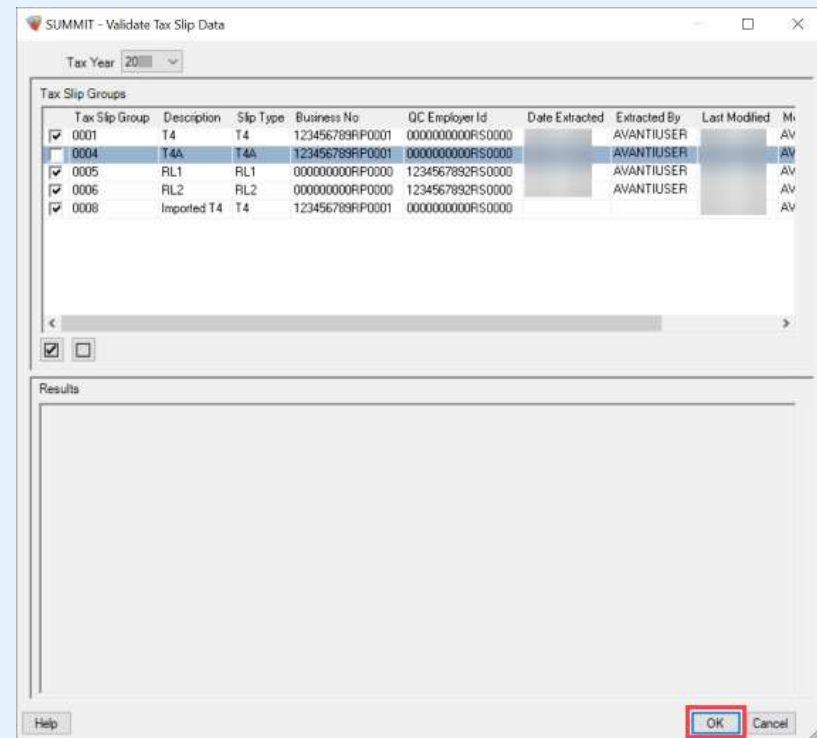
Help Apply OK Cancel

Validate Tax Slip Groups

> Step 10

AVANTI

- Validation can be completed per Tax Slip Group
- 2 different message colours can appear
 - Red** messages need to be fixed before proceeding to the next step
 - Blue** messages are simply warnings and can be ignored
- “Employer SIN” messages can be ignored unless your company is a sole proprietorship

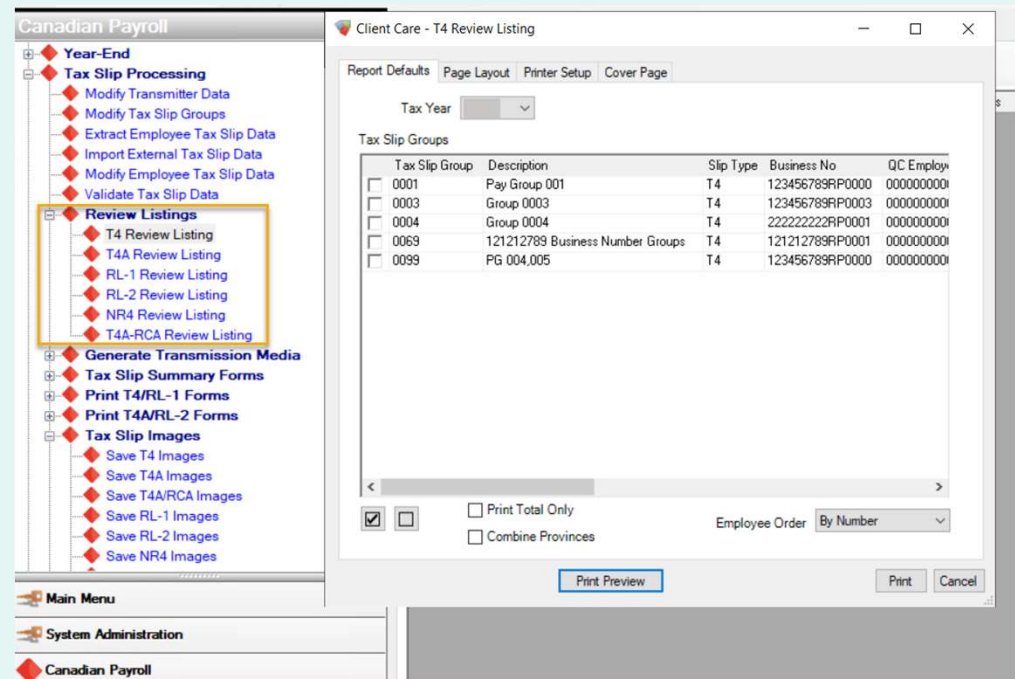


Print Tax Slip Review Listings

> Step 11

AVANTI

- Use the **Review Listings** in tandem with existing reports in your system to confirm all data is correct
- Found in Tax Slip Processing > Review Listings
- If balancing was not completed before starting your tax slip process, this step will be where you complete any balancing or reconciliation



Final Adjustments to Tax Slip Data

> Step 12

- This step is for making **final adjustments to tax slip data**, including re-extracting tax slip data as needed



TIP: If you re-extract for a tax slip group, any changes you made to the tax slips will be overwritten. You will need to make your adjustments again.

Print RL-1 Summary

> Step 13 (Quebec Only)

- Employees in **Quebec** will require additional review using the RL-1 Summary alongside the other tax slip summary reports
- Adjustments are made the same way as T4/T4A adjustments
- Open **Print RL-1 Summary**. Found in **Canadian Payroll > Tax Slip Processing > Tax Slip Summary Forms**.

Client Care - Print RL-1 Summary

Tax Year

Quebec Identification Number 0000000000RS0000

RL-1 slips submitted On paper

Output Folder C:\Users

OK Cancel

Generate Transmission Media

> Step 14

AVANTI

- All tax slip transmission media needs to be generated and saved outside of Avanti to send to CRA or RQ
- Found in Canadian Payroll > Tax Slip Processing > **Generate Transmission Media**
- Select Original Data as the Data Type unless you are specifically running a cancellation or amended data set (only applicable if you have already sent original data to CRA or RQ)

Tax Year: [dropdown]
Slip Type: T4
Data Type: Original data
Data file name: RCTT4001.xml
Submission id: 12345678

☐ Created After Last XML Generation Date
☐ Created On Or After
☒ All

Tax Slip Group	Description	Slip Type	Business No	QC Employer Id	Last Slip Modification	Modified By	Xml Generate
0001	T4	T4	123456789RP0001	0000000000RS0000		AVANTIUSER	Original data
0002	T4	T4	123456789RP0002	0000000000RS0000		AVANTIUSER	Original data

☒ ☐ Show Only Not Generated

Results

Help OK Cancel

Submit Transmission Media to CRA

> Step 15

AVANTI

This step is completed outside of Avanti via CRA Web



Save Tax Slip Images

> Step 16

- Found in **Canadian Payroll > Tax Slip Processing > Tax Slip Images**
- Saving tax slip images makes them available for employee access on the Web Portal (if this access has been made available to them)
- Images can also be reviewed on employee profiles after they have been saved

SUMMIT - Save T4 Images

Details | **Data Filter**

Tax Year: []
 Slip Type: T4
 Data Type: Original file
 Employees: ☒ All ☐ Range From: [] To: []
☒ Print Emp No
☒ Print Location
☒ Print Delivery Code

Tax Slip Groups

Tax Slip Group	Description	Slip Type	Business No	QC Employer Id	Last Slip Modification	Modified By	Xsl Generated Type
0001	T4	T4	123456789RP0001	000000000RS0000		AVANTIUSER	Original file
0002	T4	T4	123456789RP0002	000000000RS0000		AVANTIUSER	Original file

Results

Help Save Exit

Print or Email Tax Slips

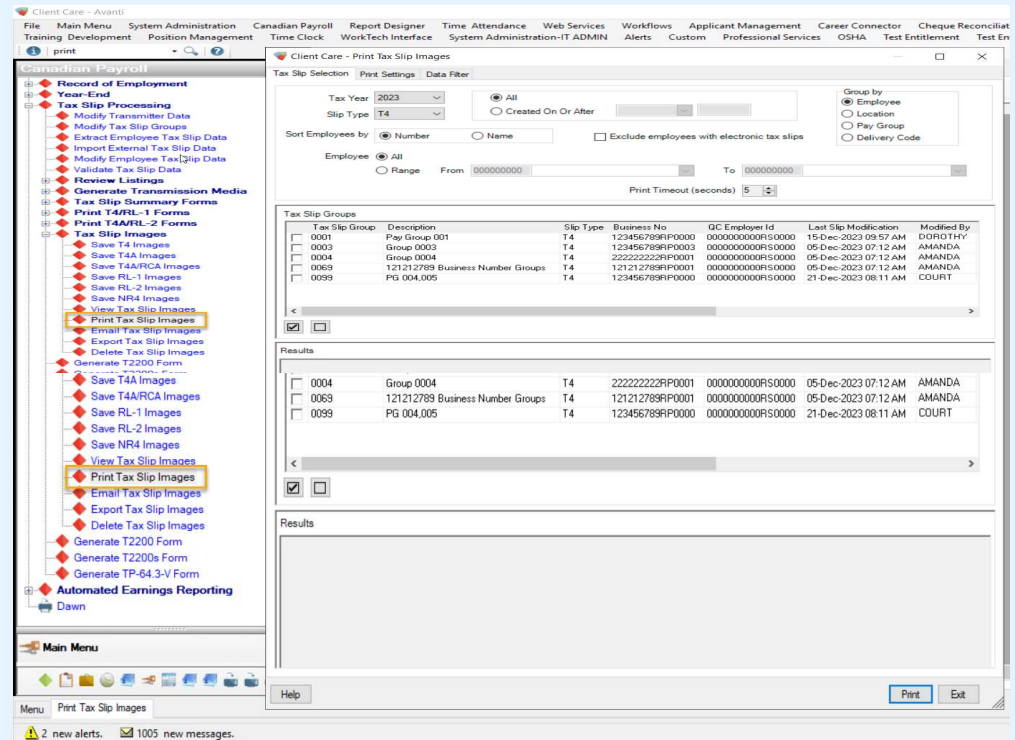
› Step 17

AVANTI

Either option may be required if your Web Portal is not set up for viewing tax slips

How to Print

- Open **Print Tax Slip Images** in Canadian Payroll > Tax Slip Processing > Tax Slip Images
- Printing can be filtered by Tax Slip Group or a range of employees



Print or Email Tax Slips

> Step 17

How to Email

- To email tax slips to your employees, they must have either a **Tax Slips** or **Primary (Default)** email, and **Electronic Tax Slips** must be selected on the Personal tab of their profile
- Open **Email Tax Slip Images** in Canadian Payroll > Tax Slip Processing > Tax Slip Images

The screenshot shows the 'SUMMIT - Employee Profile' window for employee 'Fleeting, Susan'. The 'Personal' tab is selected, showing fields for Surname, Given Name, Birth Date, Age, SIN, Language, Gender, Marital Status, Address, City, Province, Country, Postal Code, Phone (Work, Home, Cell), and E-Mail (Primary, Pay Statement, Alert, Home, Work, Tax Slips). The 'Electronic Tax Slips' checkbox is checked. The 'Email Tax Slips' checkbox is also checked. The 'Email Tax Slips' checkbox is checked.

Providing Tax Slips to Terminated Employees

› Step 18

AVANTI

- This step is depending on access given to terminated employees
- If terminated employees still have access granted to Web Portal, they may be able to access via the web
- Otherwise, mailing or emailing tax slips is necessary

The screenshot shows the 'Client Care - Employee Profile' window. The 'Personal' tab is selected, and the employee information for 'Smith, Ann' is displayed. The 'Electronic Tax Slips' checkbox is highlighted with a red box.

Field	Value
Surname	Smith
Given Name	Ann
Initial	
Preferred Name	
Prev. Surname	
Address	007 Swift Ave3, SW
City	Calgary3
Province	AB Alberta
Country	CAN
Postal Code	T1Y4P2
Phone (Home)	
Phone (Cell)	
Birth Date	18-Nov-1957
Age	66
SIN	000000000
Language	English
Gender	Male
Pronouns	
Marital Status	Married
Smoker	<input type="checkbox"/>
Enable Web Services	<input checked="" type="checkbox"/>
Electronic Tax Slips	<input checked="" type="checkbox"/>
Avanti User Id	ASWIFT



Q&A

Thank you to those who submitted a question!

Additional Tax Slip Process Resources

> Here's everything you need and additional resources to help create your 2023 tax slips

Issues when creating tax slips:

- ✓ Amending Tax Slips
- ✓ Cancelling T4 and 14A Tax Slips
- ✓ Cancelling RL-1 and RL-2 Tax Slips
- ✓ Deleting Tax Slips

Creating additional tax forms:

- ✓ Generate T2200 Form
- ✓ Generate TP-64.3-V Form

Additional resources:

- ✓ Pension Adjustment Formulas
- ✓ Dental Benefits Reporting in Avanti

Quick Recap

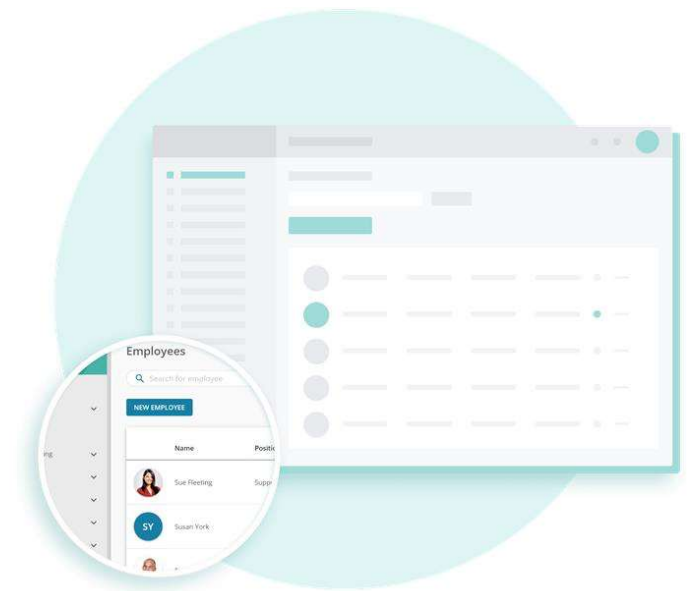
> Key takeaways from today's session

AVANTI

So, what did we learn today?

You should now know:

- ✓ Reviewing both earning and deduction codes to ensure that they have the correct tax slip boxes indicated
- ✓ Confirming accurate information such as SIN number using the Employee/SIN Cross-Ref Report
- ✓ How to save tax slip images and then print or electronically deliver them to active and terminated employees





We would love your feedback!

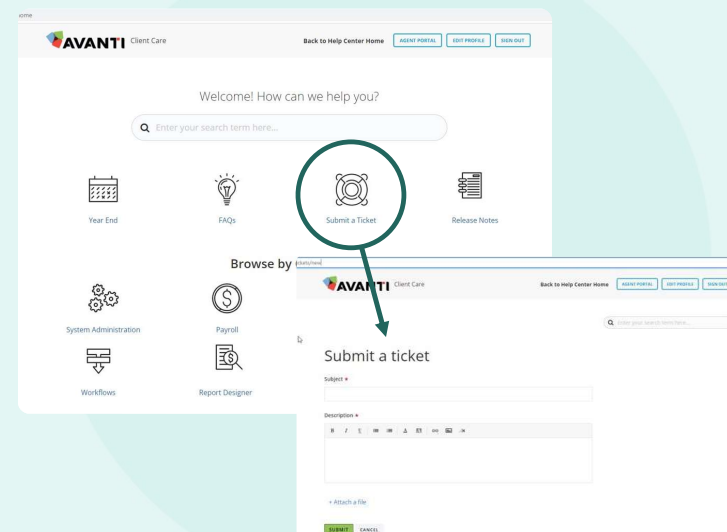
You will receive a short survey after the webinar, and we would really appreciate you providing your feedback.

Submit Your Help Ticket

> How to request help from Client Care

If you need additional support, visit the Client Care Support Portal at **help.avanti.ca**

- ✓ Click the **Submit a Ticket** icon
- ✓ Fill in the necessary information about the issue you are currently experiencing
- ✓ Browse the articles for step-by-step solutions



AVANTI

avanti.ca/skillup

Thank you

Join us for our next webinar:

> **Mastering Tax Slip Processing in Avanti**
January 17, at 11:00 AM MDT