

ComVida Corporation

Filing T4 / T4A Slips and Year End Procedures for 2018

Class document

December 2018

Contents

ComVida Corporation	1
Contents	2
Filing T4 and T4A Slips for 2018.....	3
1.1 Generating T4 and T4A data	4
1.2 Printing and Emailing T4 and T4A Slips.....	7
1.3 Exporting T4 and T4A slips	8
1.4 Other filing methods	10
1.4.1 Year-end Online Forms.....	10
1.4.2 T4 Web forms.....	10
1.5 Filing deadline and penalties	11
Year-end Procedures for 2018.....	12
1.6 Prior to Year End	12
1.7 At Year End	18
Year-End/New Year Checklist.....	25

Filing T4 and T4A Slips for 2018

ComVida[®] EMS 4.2 provides two main filing methods – paper or electronic submission. The electronic method will create an XML file which can be sent to the CRA through the internet. The CRA requires mandatory electronic filing in XML format when employers file more than 50 (per slip type) T4, T4A, etc.

The employee always receives two copies of his/her T4/T4A regardless of how the employee files tax slips with the CRA. One copy is retained by the employer for a minimum of six completed years.

If you are submitting T4s and/or T4As for more than one Employer's Account Number (Business Number), then you must repeat steps 1.1 to 1.2 for each Employer's Account Number.

Note: All payments with a pay date in 2018 are to be reported on T4 slips for 2018 regardless of when the pay period occurred in which the work was performed. This means that a pay period ending in December 2018 with a pay date in January 2019 must be set up as pay period 1 of 2019. The last pay period of 2018 must be paid in 2018 in order to correctly report on the T4 slips.

1.1 Generating T4 and T4A data

1. Click **Tools** | **T4/T4A** | **Generate T4 Slips**

The screenshot shows the 'Generate T4 Slips' window. It has a blue header bar with the title 'Generate T4 Slips'. Below the header, there are three main sections: 'Employee', 'Options', and 'Summary Information'. The 'Employee' section has four radio buttons: 'All', 'Employee', 'Employee Type Block', and 'Payroll Type Block'. The 'Options' section has several fields: 'Year' (2018), 'Payroll Account' (106990906RP0001), 'Data Type' (Original), 'Amendment' (1), 'EI Class' ((All)), and 'Empl Type Code (Box 29)'. The 'Summary Information' section has two sub-sections: 'Proprietor Social Insurance Numbers' and 'Employer's Contributions'. The 'Proprietor Social Insurance Numbers' section has two input fields labeled '1:' and '2:'. The 'Employer's Contributions' section has two sub-sections: 'Canada Pension Plan' and 'Employment Insurance'. Each sub-section has a 'Value' field (INCUIR), an 'Item From' field (7220 - CPP ER), and an 'Item To' field (7220 - CPP ER). At the bottom right of the window are two buttons: 'Generate' and 'Cancel'.

- In the Employee section, select the employees for whom slips are to be generated. This can be all employees, a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.
- In the Options section, select the Year (2018), the Payroll Account #, the Data Type (Original), the EI Class (Q or U, if applicable) and the Employment Code for Box 29 (if applicable).
- In Summary Information, enter the Proprietor SINs (if applicable). Employer's Contributions has two item ranges for the employer CPP and EI which automatically calculate during the generate T4 Slips process. Select EI ER item corresponding to EI Class. The Total Employer CPP and Total Employer EI values can still be edited in the T4/T4A Company Info page
- Click **Generate**.
- The T4 Summary Report will be displayed, which you can print for review. T4 information can also be reviewed on the T4 Slips page.

- Repeat step 1 for each additional Payroll Account #, making the appropriate selections in Payroll Account, EI Class and EI ER items

2. Click **Tools | T4/T4A | Generate T4A Slips**

Generate T4A Slips

Employee

☐ All

☒ Employee: ZZTEMP, FT (ZZTEMP-FT)

☐ Employee Type Block: ???-???-???-??? ...

☐ Payroll Type Block: ???-???-???-??? ...

Options

Year: 2018

Payroll Account: 106990906RP0001

Data Type: ☒ Original ☐ Amendment: 1

EI Class: (All)

Recipient Business Number (Box 013):

Summary Information

Proprietor Social Insurance Numbers

1:

2:

Employer Registered Pension Plan Numbers

1:

2:

3:

Generate **Cancel**

- In the Employee section, select the employees for whom slips are to be generated. This can be all employees, a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.
- In the Options section, select the Year (2018), the Payroll Account #, the Data Type (Original) and the EI Class (Q or U, if applicable).
- In Summary Information, enter the Proprietor SINs (if applicable) and the Employer RPP Numbers (if applicable).
- Click **Generate**.
- The T4A Summary Report will be displayed, which you can print for review. T4A information can also be reviewed on the T4A Slips page.
- Repeat step 2 for each additional Payroll Account #, making the appropriate selections in Payroll Account, EI Class and EI ER items

3. Review T4 / T4A data on the **T4 Slips** page and/or the **T4A Slips** page

#	Year	Payroll Acct #	Amend	Code	Submitted	Box 14	Box 16	Box 17	Box 18
X	2018	123456789 RP001		AABJE/L	<input type="checkbox"/>	4,272.75	151.80		
X	2018	123456789 RP001		ADAM/E	<input type="checkbox"/>	1,509.90	73.62		
X	2018	123456789 RP001		ANDER/D	<input type="checkbox"/>	1,524.90	68.82		
X	2018	123456789 RP001		ASHL/H	<input type="checkbox"/>	2,284.80	53.12		
X	2018	123456789 RP001		BROWN,C	<input type="checkbox"/>	2,285.98	99.82		
X	2018	123456789 RP001		CONN/S	<input type="checkbox"/>	5,250.45	199.90		
X	2018	123456789 RP001		CRET/M	<input type="checkbox"/>	5,819.10			
X	2018	123456789 RP001		DANB/R	<input type="checkbox"/>	8,593.73	358.73		
X	2018	123456789 RP001		FRAN/T	<input type="checkbox"/>	6,127.65	243.34		
X	2018	123456789 RP001		GOGO/T	<input type="checkbox"/>	5,148.45	194.89		

- Every T4 / T4A slip generated can be viewed on these pages.
- Click **Print** to print a summary of one or all slips.

Print T4 Slips

Employee

☐ All

☐ Employee: Ashley, Henrietta (ASHL/H)

☐ Employee Type Block: ???-???-???-???

☐ Payroll Type Block: ???-???-???-???

Options

Year: 2018

Payroll Account: 123456789 RP001

Data Type: ☐ Original ☐ Amendment: 1

EI Class: (All)

Format

☐ Summary

☐ Employer (1 Copy)

☐ Employee (2 Copies)

☐ Print 2nd Page (Box Descriptions)?

Print Email Cancel

1.2 Printing and Emailing T4 and T4A Slips

T4 and T4A slips can be printed and emailed as many times as necessary. To print and/or email the T4 slips (or T4A slips), click **Print** on the **T4 Slip** page (or T4A Slip page), or click **Tools | T4/T4A | Print/Email T4 Slips** (or Print/Email T4A Slips).

Print T4 Slips

Employee

- ☒ All
- ☐ Employee: Ashley, Henrietta (ASHL/H)
- ☐ Employee Type Block: ???-???-???-???
- ☐ Payroll Type Block: ???-???-???-???

Options

Year: 2018

Payroll Account: 123456789 RP001

Data Type: ☒ Original ☐ Amendment: 1

EI Class: (All)

Format

- ☒ Summary
- ☐ Employer (1 Copy)
- ☐ Employee (2 Copies)

☐ Print 2nd Page (Box Descriptions)?

Print Email Cancel

- In the Employee section, select the employees for whom slips are to be printed or emailed.
- In the Options section, select the Year (2018), the Payroll Account #, the Data Type (Original) and the EI Class (Q or U, if applicable).
- In the Format section, select **Summary** to print a summary of the slips for verification purposes. Select **Employer (1 Copy)** to print the employer's copy (1 slip per employee, 2 slips per page). Select **Employee (2 Copies)** to print the employee copy (2 slips per employee per page). Put a check mark next to **Print 2nd Page (Box Descriptions)** if you wish to print the second page for each employee.
- The Print button will print the slips and present them in report viewer. The Email button will print the slips and also email them to the **Pay Slip Email Address** on the HR Bank Accounts page. Note: the **Email** button is only available when **Employee (2 Copies)** is selected.

1.3 Exporting T4 and T4A slips

1. On the **T4/T4A Company Info** page, edit each 2018 entry to ensure that all the required information has been entered.
 - Some information, such as Employer and Transmitter names and addresses, is already entered for you. The Employer's Contributions for CPP and EI will appear as entered in the Generate T4 Slips dialog (see step 1 in section 1.1).
 - The Transmitter Num is the transmitter number assigned by CRA. If left blank, it will default in the XML file to the generic transmitter number MM555555.
 - Enter the contact information for the Technical Contact (Tech Name, Tech Area Code, Tech Phone, Tech Email) and Accounting Contact (Acct Name, Acct Area Code, Acct Phone). You must provide both a Technical contact and an Accounting contact. Normally they will be the same person, e.g. the person who prepared the T4s is the technical contact, and the person who normally does Payroll is the accounting contact.
Note that the Tech Phone and Acct Phone must be entered in the format of 3 numeric, followed by (-) and 4 numeric, e.g. 333-4444.
2. Click the **Export** button, or **Tools | T4/T4A | Export T4/T4A Slips**

Export T4/T4A Slips

Options

Year: 2018

Payroll Account: Payroll Account All ☒
123456789 RP001
987654321 RP002

Data Type: ☐ Original ☒ Amendment: 1

Cancel Slips: ☐

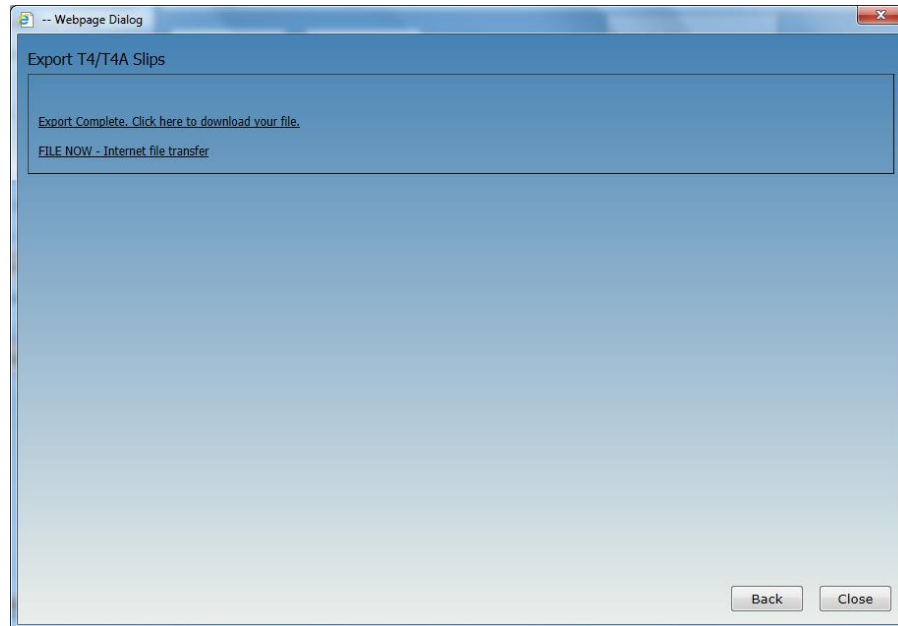
Validate Export File: ☒

Please review the Transmitter and Employer addresses in the T4/T4A Company Info page before exporting.


Export Cancel

- Note the message reminding you “Please review the Transmitter and Employer addresses in the T4/T4A Company Info page before exporting”.
- In the Options section, select the Year (2018), the Payroll Account or All, and the Data Type (Original).

- Click **Export**.



- If any errors are detected, an error report will be generated. You will have to fix the errors before continuing.



ComVida Community Living
201 - 319 Governors Court
New Westminster, BC, Canada
V3L 5S5

Submission - Exception Report

CVCCL PR

Year: 2014

Type	Code	Error
T4	ASHL/H	Address Postal Code cannot be blank
T4	SMIT/J	Address City cannot be blank
T4	SMIT/J	Address Province cannot be blank
T4	SMIT/J	Address Postal Code cannot be blank

- If there are no errors, click on **Export Complete. Click here to download your file.** The XML file will be displayed.
- Save the file so it can be uploaded to CRA.

Sample XML File:

```
<?xml version="1.0" encoding="UTF-8"?>
- <Submission xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="layout-topologie.xsd">
  - <T619>
    <sbmt_ref_id>2014XML</sbmt_ref_id>
    <rpt_tcd>0</rpt_tcd>
    <trnmtr_nbr>MM555555</trnmtr_nbr>
    <trnmtr_tcd>3</trnmtr_tcd>
    <summ_cnt>1</summ_cnt>
    <lang_cd>E</lang_cd>
    - <TRNMTR_NM>
      <l1_nm>CVCCCL</l1_nm>
    </TRNMTR_NM>
    - <TRNMTR_ADDR>
      <addr_l1_txt>319 Governors Court</addr_l1_txt>
      <cty_nm>New Westminster</cty_nm>
      <prov_cd>BC</prov_cd>
      <cntry_cd>Can</cntry_cd>
      <pstl_cd>V3L5S5</pstl_cd>
    </TRNMTR_ADDR>
    - <CNTC>
```

- Click **FILE NOW – Internet file transfer** if you have your CRA login information and are ready to upload the file immediately. This link takes you to the CRA Internet file transfer website.



1.4 Other filing methods

1.4.1 Year-end Online Forms

CRA has a number of forms that can be filled out online and then printed for submission of the paper copy. These forms include T4, T4 Summary, T4A, and T4A Summary. The paper method of filing can be used when there are not more than 50 slips.

1.4.2 T4 Web forms

This filing option can be used, effective January 2016, to file 1 to 100 original or amended T4 slips. You will need a compatible browser to complete, print, and submit a T4 information return. Detailed instructions are provided on the web page, and computer requirements are detailed on the CRA web site.

<http://www.cra-arc.gc.ca/esrvc-srvce/rf/t4-wbfrms/menu-eng.html>

1.5 Filing deadline and penalties

The deadline for filing the CRA T4 and T4A returns is by the last day of February following the taxation year being filed. If you fail to meet the above deadlines, your employer will be liable for a penalty (a minimum penalty of \$100 and a maximum penalty of \$7,500, based on number of slips). You can avoid these penalties by filing by the last day of February, even though you may have to send amendments or corrections at a later date. Note that if the last day of February is a Saturday or Sunday, then the slips are due the next business day.

The deadline for filing 2018 T4's will be Thursday, February 28, 2019

Year-end Procedures for 2018

1.6 Prior to Year End

1. Generate T4 Summary data. *This is an optional step and is for checking purposes only.*

Click Tools | T4/T4A | Generate T4 Slips

The screenshot shows the 'Generate T4 Slips' window. In the 'Employee' section, 'Employee:' is selected with a dropdown showing 'ZZTEMP, FT (ZZTEMP-FT)'. In the 'Options' section, 'Year:' is set to 2018, 'Payroll Account:' is 106990906RP0001, 'Data Type:' has 'Original' selected, 'EI Class:' is (All), and 'Empl Type Code (Box 29):' is empty. The 'Summary Information' section shows empty fields for 'Proprietor Social Insurance Numbers'. Under 'Employer's Contributions', both 'Canada Pension Plan' and 'Employment Insurance' have 'Value:' set to INCUYR, 'Item From:' set to 7220 - CPP ER, and 'Item To:' set to 7220 - CPP ER. The 'Generate' and 'Cancel' buttons are at the bottom right.

- Select the employees for whom you want to generate T4 slips, the Year (2018), the Payroll Account (Business Number), the Data Type (Original), the EI Class, if applicable, and the Employment Code for Box 29, if applicable.
- Employer's Contributions has two item ranges for the employer CPP and EI which automatically calculate during the generate T4 Slips process. Select ER EI item corresponding to EI Class. The Total Employer CPP and Total Employer EI values can still be edited in the T4/T4A Company Info page
- Click Generate
- The T4 Summary Report will be displayed, which you can print for review. T4 information can also be reviewed on the T4 Slips page.
 - Repeat this step for each additional Payroll Account #, and making the appropriate selections in Payroll Account, EI Class and EI ER items

2. Generate the T4A Summary. *This is an optional step and is for checking purposes only.*

Click Tools | T4/T4A | Generate T4A Slips

Generate T4A Slips

Employee

- ☐ All
- ☐ Employee: ZZTEMP, FT (ZZTEMP-FT)
- ☐ Employee Type Block: ???-???-???-???
- ☐ Payroll Type Block: ???-???-???-???

Options

Year: 2018

Payroll Account: 106990906RP0001

Data Type: ☐ Original ☐ Amendment: 1

EI Class: (All)

Recipient Business Number (Box 013):

Summary Information

Proprietor Social Insurance Numbers

1: - - - - -

2: - - - - -

Employer Registered Pension Plan Numbers

1: - - - - -

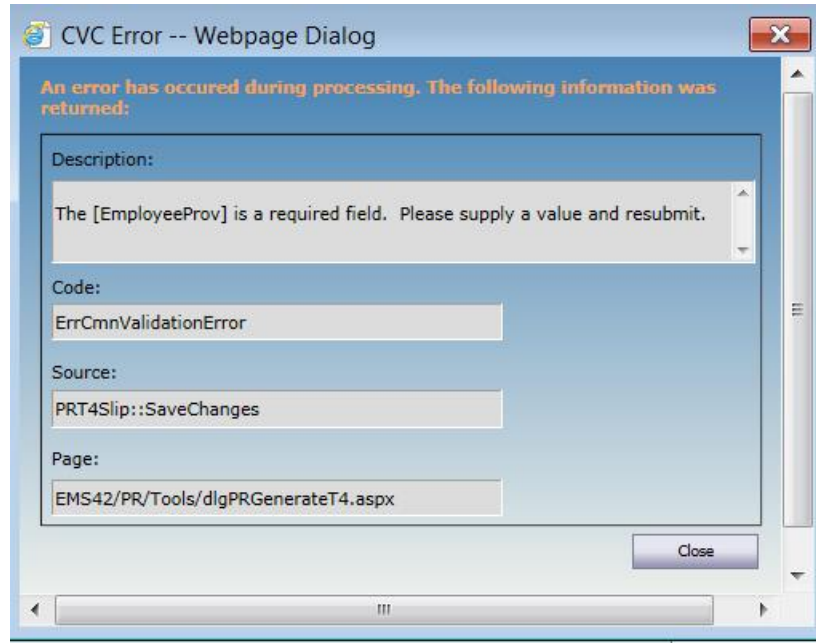
2: - - - - -

3: - - - - -

Generate Cancel

- Select the employees for whom you want to generate T4A slips, the Year (2018), the Payroll Account (Business Number), the Data Type (Original), and the EI Class, if applicable.
- Click Generate
- The T4A Summary Report will be displayed, which you can print for review. T4A information can also be reviewed on the T4A Slips page.
- Repeat this step for each Payroll Account #, and if adjustments are required.
 - Repeat step 1 for each additional Payroll Account #, making the appropriate selections in Payroll Account, EI Class and EI ER items

- The Employee Province is a required field to Generate T4s/T4As. If the following error message is returned check the Work Profile II page in HR. Ensure that Tax Province is correct and update as required.
- Also check that employee address is completed correctly.




- Repeat steps 1 and 2 to generate T4's and T4A's

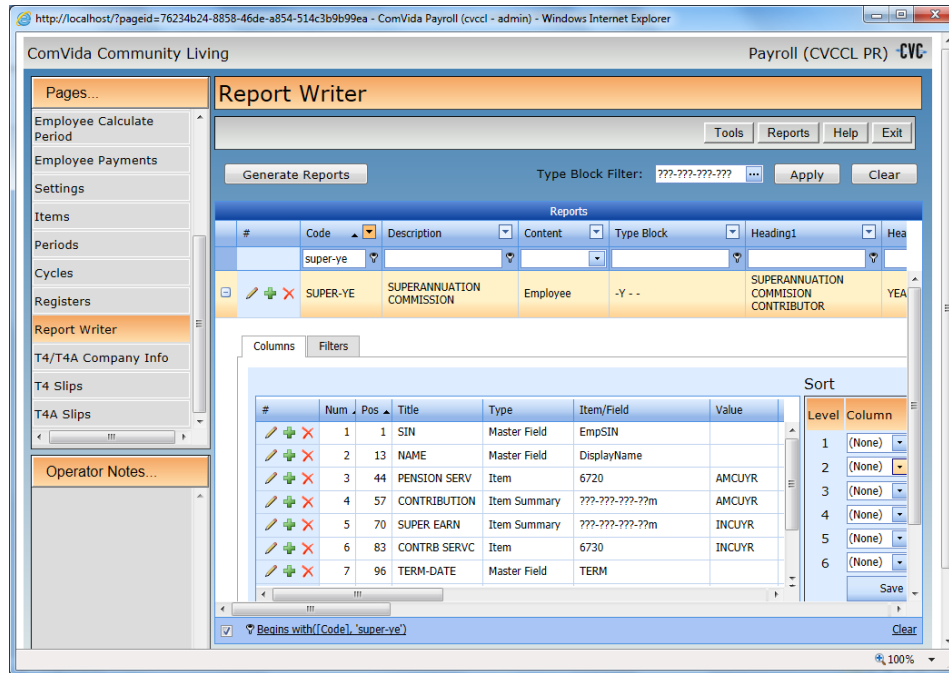
Review the T4s and T4As and make any adjustments. It is easier to fix them in the current year rather than after you've initialized into the New Year.

*Reminder: Steps 1 and 2 are optional, but they are **strongly** recommended.*

Tip: Data Templates can be used to export required fields such as tax province, address fields and S.I.N. for verification and update.

3. Update and print the MPP (Superannuation) Year-end report (SUPER-YE)
(Applicable to B.C. only)

- a) In the Report Writer, select the **SUPER-YE** report and click the blue plus symbol  to expand the report.



b) Check the report's Column settings

- If your Payroll is still in 2018 and you are checking the 2018 MPP then the **Value** in the Report Layout has to show AMCUYR or INCUYR (CUYR indicates current year).
- If your Payroll is in 2019 and you're checking the 2018 MPP then the **Value** has to show AMLAYR or INLAYR (LAYR indicates last year). You will need to change all lines to either AMLAYR or INLAYR.

c) Check the report's Filter settings (click the Filter tab)

- If the Columns tab has AMCUYR and INCUYR, then the Test Criteria in the Filter tab has to have AMCUYR (not AMLAYR) in Value as well.



Hint: You may want to have two SUPER-YE reports: Current and Last with the correct Value column and Filter settings respectively to save the trouble of changing CU to LA or vice versa.

d) Print and review the report. Make any necessary adjustments in Payroll.


Note: This step is for employers who contribute to the **BC Pension Plan**. It is optional, but it is strongly recommended.

4. Setup the Pay Period Schedules




In the **Periods** page, expand the 2018 Payroll Year, click to go to the last page, and verify that the final pay period of 2018 has **Year** as the **End Type**.























Periods							
#	Year	Period	Alias	Start Date	End Date	Length	End Type
 	2018	26	201826	09/Dec/2018	22/Dec/2018	14	Year

Add the pay period schedule for 2019. Click the green plus symbol () to add.

- Enter the **Start Date** of the first pay period of the year and the **End Date** of the last pay period of the year.
- Enter the number of **Periods** (26 or 27), the **Fiscal End Month** (3) and put a check mark in **Adjust Fiscal Begin**.
- Click the green checkmark  to OK the adjustment

Pages...		Periods						
Employee Adjustments		Filters... Active						
Employee Calculate Period		Tools Reports Help Exit						
Employee Payments								
Settings								
Periods								
Cycles								
Items								
Registers								
Report Writer								
T4/T4A Company Info								
T4 Slips								
T4A Slips								
Operator Notes...								

#	Year	Description	Start Date	End Date	Periods	Fiscal End	Adjust Fiscal
  	2019	Payroll Year 2019	23/Dec/2018	21/Dec/2019	26	3	<input checked="" type="checkbox"/>

Periods									
#	Year	Period	Alias	Start Date	End Date	Length	End Type	Created By	Cre
 	2019	1	201901	23/Dec/2018	05/Jan/2019	14	X	Administrator, ComVid	22
 	2019	2	201902	06/Jan/2019	19/Jan/2019	14	X	Administrator, ComVid	22
 	2019	3	201903	20/Jan/2019	02/Feb/2019	14	X	Administrator, ComVid	22
 	2019	4	201904	03/Feb/2019	16/Feb/2019	14	X	Administrator, ComVid	22
 	2019	5	201905	17/Feb/2019	02/Mar/2019	14	X	Administrator, ComVid	22
 	2019	6	201906	03/Mar/2019	16/Mar/2019	14	X	Administrator, ComVid	22
 	2019	7	201907	17/Mar/2019	30/Mar/2019	14	X	Administrator, ComVid	22
 	2019	8	201908	31/Mar/2019	13/Apr/2019	14	X	Administrator, ComVid	22
 	2019	9	201909	14/Apr/2019	27/Apr/2019	14	X	Administrator, ComVid	22
 	2019	10	201910	28/Apr/2019	11/May/2019	14	X	Administrator, ComVid	22
 	2019	11	201911	12/May/2019	25/May/2019	14	X	Administrator, ComVid	22

- The system will automatically determine the Start and End Dates of all pay periods. All rows will be red, with an **End Type X**. Edit each period to indicate the **End Type** (Period, Month, Quarter or Year).

Note: All payments with a pay date in 2018 are to be reported on T4 slips for 2018 regardless of when the pay period occurred in which the work was performed. This means that a pay period ending in December 2018 with a pay date in January 2019 must be set up as pay period 1 of 2019. The last pay period of 2018 must be paid in 2018 in order to correctly report on the T4 slips.

5. If your organization uses the HSCIS or CSSEA extracts, make sure to run these reports for the final 2018 figures and save the report as well as the submission file.

ComVida has found that HSCIS and CSSEA will often ask for last years' data at a future time, and running this will allow you to submit the correct data to the reporting agency without having to modify records which may have changed between year-end and when the data is requested.

1.7 At Year End

1. Change the **TaxYear** in the Settings page. **TaxYearAvailable** indicates the latest tax tables that have been loaded and **TaxYear** is the one currently being used by your system. Update 2018B to **2019A** in **TaxYear**.

Note: This step must be performed before the Calculate Period is done prior to Pay Period 1 of 2019

2. Click **Tools | Initialize Period**

Initialize Period will cycle the cumulative figures for 2018 from the "current year" fields (CuYr) to the "last year" fields (LaYr) in the Employee **Amounts** page.

3. Update the Cycles

In the **Cycles** page, any cycles which occur monthly or less frequently than every pay period (e.g. MONTH, BMONTH, EMONTH) must be verified to ensure that there is a "1" under **Occurs** for each applicable pay period. The Cycle code is used in item configuration to identify which pay periods items will calculate.

4. Update TD1 personal tax exemptions in the **Payroll Numbers** page in HR

- a) Update the **CLAIM** field if the employee has changed his/her federal claim amount for the year 2019.
- If the employee is claiming the basic personal amount (i.e. Federal Claim code 1 = \$12,069 for 2019), leave the **CLAIM** field as **0**.
 - If the employee is not claiming the basic personal amount, then enter the actual dollar amount of the employee's 2019 personal exemptions (as shown in Total Claim Amount in line 13 of TD1 - 2019 Personal Tax Credits Return).
- b) For those employees who have completed a provincial TD1 form (e.g. TD1BC 2019 British Columbia Personal Tax Credits Return), update the **PRVCLAIM** field if the total claim amount for year 2019 has changed.
- If the employee is claiming the following basic personal amount (i.e. code 1) leave the **PRVCLAIM** field as **0**.

Note that as of 11/22/2018 none of the 2019 TD1 values for any provinces have been published. Please refer to the TD1 forms when they are released for basic exemption amounts




Province	Basic Exemption
BC	10,682
ON	10,582
AB	19,369
SK	16,065
MB	9,626
NS	See form

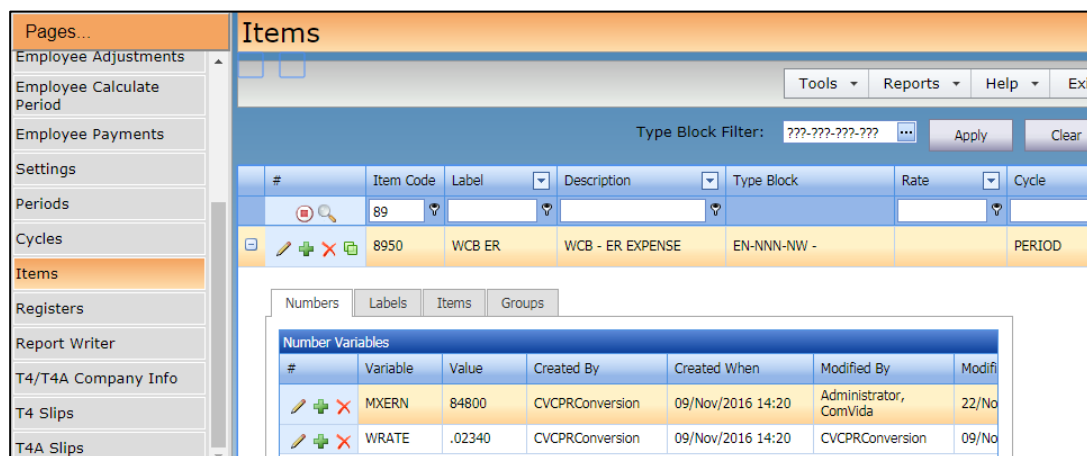
- If the employee is not claiming the basic personal amount, then enter the actual dollar amount of the employee's 2019 personal exemptions (as shown in Total Claim Amount in line 12 of TD1BC 2019 British Columbia Personal Tax Credits Return, TD1ON 2019 Ontario Personal Tax Credits Return, TD1AB 2019 Alberta Personal Tax Credits Return, TD1SK 2019 Saskatchewan Personal Tax Credits Return, TD1MB 2019 Manitoba Personal Tax Credits Return, or TD1NS 2019 Nova Scotia Personal Tax Credits Return).

Tip: Updates to personal Tax exemptions, **CLAIM** and **PRVCLAIM** fields, can be made prior to the first payroll of 2019. Future dated changes must be processed via **Tools //Process HR data**.

5. Update **Items** for any values that may have changed

a) WCB (WSIB) Employer Contribution item (usually item #8950)

- i) In the Items page, select the WCB (WSIB) Employer item and click the small plus symbol  to expand the item.
- ii) Select the Numbers tab and click the pencil  to edit the maximum assessable earnings in MXERN, and the rate in WRATE.
- iii) Click the green checkmark  to save the change






- iv) If you have more than one WCB (WSIB) employer item, you will need to update each of them to reflect the changes

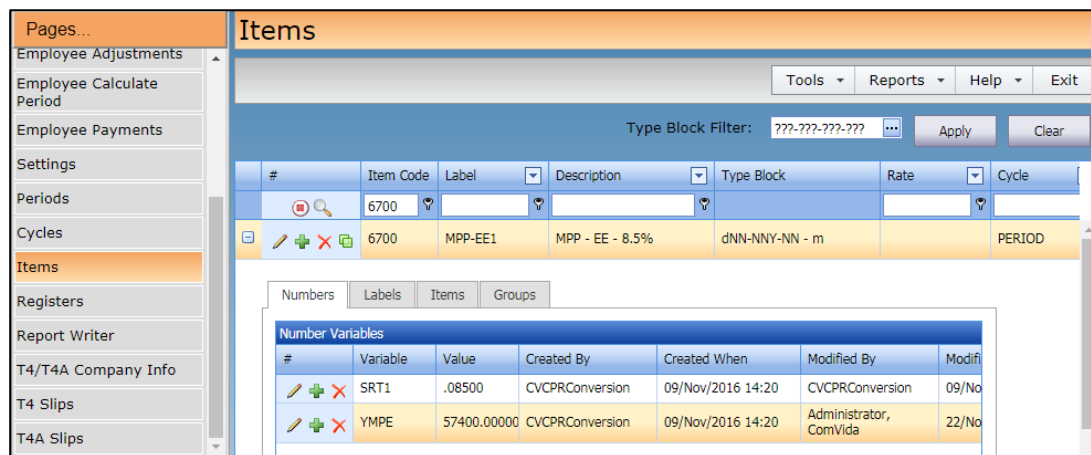
Note: The maximum assessable earnings (MXERN) for 2019:



Province	Max Assessable
BC	84,800
ON	92,600
AB	<i>See Note*</i>
SK	88,314
MB	127,000
NS	60,900



Note that Alberta has removed the cap on worker's compensable earnings as of September 1st 2018, and the new legislation does not make reference to whether a maximum assessable earnings amount will be kept or not.

b) **MPP (superannuation)** items (usually items #6700 & 6701)
(Applicable to B.C. only)

- i) In the Items page, select the first MPP item (e.g. 6700) and click the small plus symbol  to expand the item.
- ii) Select the Numbers tab and click the pencil  to edit the yearly maximum pensionable earnings in **YMPE** to \$57,400 for the year 2019.
- iii) Click the green checkmark  to save the change



#	Variable	Value	Created By	Created When	Modified By	Modified
	SRT1	.08500	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/No
	YMPE	57400.00000	CVCPRConversion	09/Nov/2016 14:20	Administrator, ComVida	22/No

- iv) In the Items page, select the second MPP item (e.g. 6701) and Select the Numbers tab and click the pencil  to edit the yearly maximum pensionable earnings in **YMPE** to \$57,400 for the year 2019.
- v) Click the green checkmark  to save the change

- c) If required, update the Vacation Accrual Prior and Vacation Accrual Current Items (usually items # 8550 & 8560). On the Numbers tab, the number assigned to **BREAK** must be the pay period number at which the Vacation Accrual Current will roll over into the Vacation Accrual Prior to start accumulating for the new vacation year.

E.g. If vacation accrues on a July 1, 2018 through June 30, 2019 cycle and July 1, 2019 falls in pay period 14, then BREAK must be defined as BREAK = 14.00000. This way all vacation hours accrued up to period 13 will roll over into the Vacation Accrual Prior item and the Vacation Accrual Current item will start accruing from period 14.

If the value currently assigned to the variable BREAK is incorrect for the 2019 payroll, update the pay period number assigned to BREAK in both vacation accrual items (i.e. both prior and current accrual items).

- d) If you have two Employer EI rates, you must update your EI qualified item (usually item #7050 or 7060) and put in the **new qualified rate** in the Numbers tab.

ComVida Community Living Payroll (CVCCL PR) -CVC-

Pages... Items

Tools Reports Help Exit

Type Block Filter: ???-???-???-??? Apply Clear

#	Item Code	Label	Description	Type Block	Rate	Cycle
70						
7050	EI ER U	EI -EMPLOYER UNQUALIFIED 1.4	E -NNN-N -E			PERIOD
7060	EI ER Q	EI EMPLOYER QUALIFIED 1.296	E -NNN-N -E			PERIOD

Numbers Labels Items Groups

Number Variables

#	Variable	Value	Created By	Created When	Modified By	Modified
	URATE	1.29600	CVCPRConversion	30/Sep/2011 09:08	Ander, Sonia	02/Dec/2011

Operator Notes...

Begins with([Item Code], 70) Clear

- e) You must also update your EI DIFF item (usually item #7090) in the Numbers tab.

*Note: **DIFF** = the difference between the new reduced rate and 1.4
Either DIFF or 5/12 has to be entered as a negative number.*

ComVida Community Living Payroll (CVCCL PR) -CVC-

Pages... Items

Employee Amounts

Employee Transactions

Employee Adjustments

Employee Calculate Period

Employee Payments

Settings

Periods

Registers

Cycles

Report Writer

T4/T4A Company Info

T4 Slips

Operator Notes...

Items

Tools Reports Help Exit

Type Block Filter: ???-???-???-??? Apply Clear

#	Item Code	Label	Description	Type Block	Rate	Cycle
7080	EI EK Q		1.296	EN-NNN-N-E		PERIOD
7090	EI DIFF		EI DIFF (1.4 - 1.296) PAYABLE	EN-NNN-N -		PERIOD

Numbers Labels Items Groups

#	Variable	Value	Created By	Created When	Modified By	Modified When
5/12		.41667-	CVCPConversion	30/Sep/2011 09:08	CVCPConversion	30/Sep/2011 09:08
DIFF		.10400	CVCPConversion	30/Sep/2011 09:08	Ander, Sonia	02/Dec/2011 09:08

Begins with [Item Code], 70' Clear

- f) Update the items for **BC Medical Services Plan**:

British Columbia will be eliminating MSP Premiums at the end of 2019 and is replacing the MSP Premiums with the Employer's Health Tax, similar to how other provinces operate.

In 2019, both MSP Premiums and Employer's Health Tax amounts will have to be paid.

The rates for MSP Premiums for 2019 will be the same as 2018:

Single: \$37.50/month
Couple/Family: \$75.00/month

- g) Create an employee item for **BC Employers' Health Tax (EHT)** tracking and attach it to all employees:

It may be of benefit for organizations to create a payroll item to track the EHT expense amount for individual employees so that it may be reported to appropriate government agencies.

Specifically, agencies which are using the HSCIS Extract will require this item as HSCIS has already instructed this amount to be reported as part of field D69 on the HSCIS Report.

It is likely that organizations which are a part of CSSEA will receive a similar instruction.

This must be done for Pay Period 1 of 2019 for payroll to calculate the expense amount properly.

It is important to note that it is impossible to determine the exact expense amount via a payroll calculation, as there are corporate exemption amounts to be taken into account when calculating the amount payable. Due to this, the correct EHT premium will need to be calculated by your accounting department as they will have all the pertinent EHT rules to work with and the payroll can supply the EHT gross required for the calculation of the premium amount.

A specific communication with regards to the BC Employers' Health Tax will be forthcoming in December, 2018 and recommended instructions for incorporating into your payroll will be sent at that time.

Additional information about EHT can be found at the following link:

<http://www2.gov.bc.ca/gov/content/taxes/employer-health-tax/employer-health-tax-overview>

- h) Update any other items that require changes effective January 1, 2019.

Year-End/New Year Checklist

START-UP	ACTION TO BE TAKEN	DONE
	Create year-end reference file	<input type="checkbox"/>
	Determine which forms will be required (T4, T4A, RL-1, NR4)	<input type="checkbox"/>
	Download guides and forms from CRA	<input type="checkbox"/>
	Download guides and forms from RQ	<input type="checkbox"/>
	Hold year-end meeting with stakeholders (IT, HR, Finance)	<input type="checkbox"/>

BALANCE & RECONCILE	ACTION TO BE TAKEN	DONE
	Balance payroll tax account remittances to payroll register	<input type="checkbox"/>
	Reconcile payroll bank account for outstanding entries to payroll	<input type="checkbox"/>
	<ul style="list-style-type: none"> Manual cheques Void/cancelled cheques 	<input type="checkbox"/>
	Update any manual or cancelled cheques to payroll	<input type="checkbox"/>
	Conduct self-PIER audit of CPP/QPP, EI and QPIP deductions	<input type="checkbox"/>
	Remit outstanding CPP/QPP, EI and QPIP with or before final remittance for tax year	<input type="checkbox"/>
	Run test T4/RL-1 slip and summary report	<input type="checkbox"/>
	Balance T4/RL-1 report to payroll register – validate earnings and deductions are report in correct boxes	<input type="checkbox"/>
	Ensure accurate social insurance numbers are reported	<input type="checkbox"/>
	Update WCB/CSST awards reimbursed to employer	<input type="checkbox"/>

PENSION ADJUSTMENT	ACTION TO BE TAKEN	DONE
	Validate pensionable earnings per company plan document	<input type="checkbox"/>
	Calculate pension adjustment	<input type="checkbox"/>
	RPP registration number reporting in Box 50 for all plan members	<input type="checkbox"/>
	Reporting of taxable refunds if necessary	<input type="checkbox"/>

TAXABLE BENEFITS	ACTION TO BE TAKEN	DONE
	Taxable benefits reported each pay when received or as enjoyed	<input type="checkbox"/>
	Process taxable benefit adjustments eg. Company car benefits	<input type="checkbox"/>
	Validate benefits are reported in all required boxes on tax slips	<input type="checkbox"/>

This document in its entirety and any extract thereof is confidential and contains proprietary information of ComVida Corporation and/or its affiliates or subsidiaries and may contain information that is privileged and protected from disclosure by law. It is intended only for the use of the individual or organization to whom it was expressly provided by ComVida Corporation. Do not copy, reproduce or publish, in whole or in part, without the express written consent of ComVida Corporation.

FILING PROCEDURES	ACTION TO BE TAKEN	DONE
	Choose filing method (paper, on-line, XML)	<input type="checkbox"/>
	Make note of filing deadlines and penalties for non-compliance	<input type="checkbox"/>
	Establish policies & procedures for amending or cancelling slips	<input type="checkbox"/>
	File slips and summaries with CRA	<input type="checkbox"/>
	File slips and summaries with RQ	<input type="checkbox"/>

JURISDICTIONAL REPORTING	ACTION TO BE TAKEN	DONE
	Employer health tax returns	<input type="checkbox"/>
	Workers compensation annual reconciliation/return	<input type="checkbox"/>
	Northwest Territories / Nunavut Payroll Tax return	<input type="checkbox"/>
	RQ annual summary <ul style="list-style-type: none"> Commission des normes du travail (CNT) Workforce Skills Development and Recognition Fund (WSDRF) Complete Formulaire Declaration des activités de formation (Quebec employers who pay WSDRF are required to complete) 	<input type="checkbox"/>

YEAR-END ACCOUNTING	ACTION TO BE TAKEN	DONE
	Year-end accruals	<input type="checkbox"/>
	Reconcile all payroll related GL accounts	<input type="checkbox"/>
	Validate earnings and deductions are charged to correct GL cost center account	<input type="checkbox"/>

TAXABLE BENEFITS	ACTION TO BE TAKEN	DONE
	Taxable benefits reported each pay when received or as enjoyed	<input type="checkbox"/>
	Process taxable benefit adjustments eg. Company car benefits	<input type="checkbox"/>
	Validate benefits are reported in all required boxes on tax slips	<input type="checkbox"/>

SET-UP FOR NEW PAYROLL YEAR	ACTION TO BE TAKEN	DONE
	Review payroll calendar for payroll processing/pay day conflicts (Statutory holidays etc.)	<input type="checkbox"/>
	Weekly or bi-weekly pay frequency watch for 53/27 pay year <ul style="list-style-type: none"> • how will CPP/QPP exemption be handled • are any taxable benefits or deductions affected 	<input type="checkbox"/>
	Distribute new payroll cut-off schedule to HR, timekeepers, managers & Supervisors and union if necessary	<input type="checkbox"/>
	Carry forward balances <ul style="list-style-type: none"> • vacation accruals • banked overtime • unused sick days (if carry forward allowed) • outstanding loans payable • garnishment balances 	<input type="checkbox"/>
	Update TD1 basic annual exemption	<input type="checkbox"/>
	Remind employees to file new TD1 for additional tax credits	<input type="checkbox"/>
	Remind commission employees to file new TD1X / TP1015.R.13.1-V	<input type="checkbox"/>
	Communicate new year CPP/QPP, EI and QPIP statutory deductions rates and maximums	<input type="checkbox"/>

[illegible]