

ComVida Corporation

Filing T4 / T4A Slips and Year End Procedures for 2024

Class document

Software Version: CVC51

December 2024

Contents

ComVida Corporation.....	1
Contents	2
Filing T4 and T4A Slips for 2024	3
1.1 Generating T4 and T4A data	4
1.2 Printing and Emailing T4 and T4A Slips	8
1.3 Exporting T4 and T4A slips	10
1.4 Publishing T4 Slips to Self-Serve	12
1.5 Other filing methods.....	12
1.5.1 Year-end Online Forms.....	12
1.5.2 T4 Web forms	13
1.6 Filing deadline and penalties.....	13
Year-end Procedures for 2024	14
1.7 Prior to Year End.....	14
1.8 At Year End.....	23
1.9 Municipal Pension Plan (Applicable to BC Employers licensed for the MPP Extract).....	28
Year-End/New Year Checklist.....	30

Filing T4 and T4A Slips for 2024

ComVida® CVC51 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 5 (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 2024 are to be reported on T4 slips for 2024 regardless of when the pay period occurred in which the work was performed. This means that a pay period ending in December 2024 with a pay date in January 2025 must be set up as pay period 1 of 2025. The last pay period of 2024 must be paid in 2024 in order to correctly report on the T4 slips.*

In the example below, the pay period covers the range of December 15th, 2024 through December 28th, 2024. Because the payment will occur on January 3rd, 2025, this should be set up as pay period 1 of 2025:

DEC 2024		DEC 15-28 2024 is really PP1 2025!!!				
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	*PAY DAY* 20	21
22	23	24	25	26	27	28
29	30	31	JAN 1	JAN 2	*PAY DAY* JAN 3	JAN 4

1.1 Generating T4 and T4A data

1. Click Tools | T4/T4A | Generate T4

Employee Code	Display Name	Department	Unit	Position	Cost Centre	Status	Type Block	PR Type Block
AABJEL	Aabjerg, Lise	DU - Dunbar	/	APTSW - Adult PT Support Worker	/	Active	U B- AF-Q -	A Q-FY - E -
ADAM,E	Adam, Evelyn	HA - Harvey	/	APTSW - Adult PT Support Worker	/	Active	H B- AF-Q -	A - -FD -
ADAM,B	Adams, Bryan	DE - Dempster	/	CFTSW2 - Child FT Support Worker Step 2	/	Active	D B- Ac-U - S	A U-P - D -
ALVAR,F	Al Varez, Freddie	CA - Carson	/	AFTSW - Adult FT Support Worker	/	Active	A B- AF-Q -	A Q-FY - E -
ALAJ,S	Alajane, Sylvie	DU - Dunbar	/	FTMAW - Full Time Night Awake	/	Active	U B- AF-Q - M	A Q-FY - D -
ANDER,S	Anderson, Sophia	ADMIN - Administration	/	Gr0955 - Grade 9 - Step 5	/	Active	a C- Ac-Ux -	A Q-FY - D -

- In the Employee Criteria section, select the employees for whom slips are to be generated. This can be a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.

IMPORTANT: To generate T4 slips for ALL EMPLOYEES, click on the **Type Block** field and make sure the values are **???-???-???-???**

- Select the Year (2024), the Payroll Account #, the Data Type (Original), the EI Class (Q or U, if applicable) and the Employment Code for Box 29 (if applicable).
- Dental Care Plan Coverage (Box 45) – ensure that the HR field which tracks the Dental Care Coverage code is selected. By default, it is “PR_CDCPCvg” and employee values can be updated on the Payroll Numbers page within Human Resources.

- In Summary Information, enter the Proprietor SINs (if applicable), and ensure the correct CPP and EI items are selected based on your payroll database's settings.
- Regardless of CPP2 contributions, item 7222 is not to be included in the Employer's Contributions within the Summary Information. It will be automatically included in the summary during calculations for item 7220.

IMPORTANT: Under the Employer's Contributions section, ensure that the Value selected aligns the desired year for the T4s you are wishing to generate based on the pay period you are currently in.

If you are wanting to generate 2024 T4s:

- a) If ComVida is still in a 2024 pay period, select the INCUYR (current year) values
 - b) If ComVida has been initialized to a 2025 pay period, select the INLAYR (last year) values
- Click **Load Slips**.
 - The T4 Results 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**

Employee Criteria

Employee Filter: Type Block: ???-??-??-?? PR Type Block: ???-??-??-??

Employee Code	Display Name	Department	Unit	Position	Cost Centre	Status
AABJE/L	Aabjerg, Lise	CI - Community Inclusion	/	CRMgr - Community Resources Mgr	Youville	Active
ADAM/E	Adam, Eve	CI - Community Inclusion	/	ExDir - Executive Director	/	Active
ALAJ/S	Alajane, Sylvie	CI-Day	/	CSW104 - Community Support Wrker Grid 10	/	Active
ANDER/S	Anders, Sonia	CI-LS - Community Inclusio	/	CRMgr - Community Resources Mgr	/	Active
ANDER/D	Anderson, Darlene	CI-IL - Community Inclusio	/	CSW104 - Community Support Wrker Grid 10	/	Active

Year: 2024 - 2024 Payroll Year

Payroll Account: 123456789RP0001

Data Type: Original Amendment

Amendment #: 0

EI Filter:

Recipient Business Number (Box 013):

Dental Care Plan Cvg (Box 015): PR_CDCPCvg

Summary Information

Proprietor's Social Insurance Numbers

1:

2:

Employer Registered Pension Plan Numbers

1:

2:

3:

- In the Employee Criteria section, select the employees for whom slips are to be generated. This can be a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.



IMPORTANT: To generate T4 slips for ALL EMPLOYEES, click on the **Type Block** field and make sure the values are **??-??-??-??**



- Select the Year (2024), the Payroll Account #, the Data Type (Original) and the EI Class (Q or U, if applicable).
- Dental Care Plan Coverage (Box 015) – ensure that the HR field which tracks the Dental Care Coverage code is selected. By default, it is “PR_CDCPCvg” and employee values can be updated on the Payroll Numbers page within Human Resources.
- In Summary Information, enter the Proprietor SINs (if applicable) and the Employer RPP Numbers (if applicable).
- Click **Load Slips**.
- The T4A Results 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 **Payroll|T4 Slips** page and/or the **Payroll|T4A Slips** page

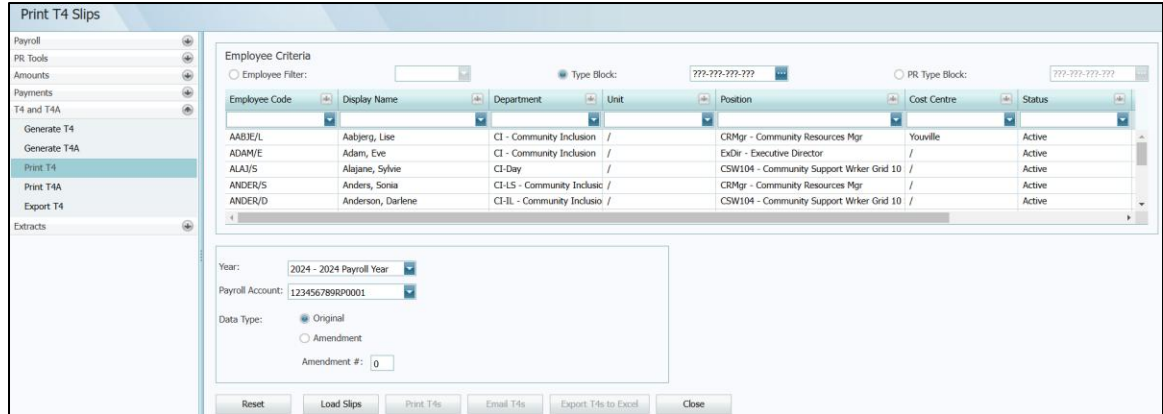
T4 Slips											
Year: 2023											
Business Num	Employee Code	Amended	Submitted	Employee Type Code	Box14	Box16	Box17	Box18	Box20	Box22	Box24
123456789RP0001	ALAJ/S		<input type="checkbox"/>		39,204.04	2,140.39		637.61		4,349.58	39,114.04
123456789RP0001	ANDER/S		<input type="checkbox"/>		35,429.04	1,916.14		576.09		4,540.42	35,339.04
123456789RP0001	ARAG/C		<input type="checkbox"/>		34,222.50	1,844.09		556.47		3,868.91	34,132.50
123456789RP0001	ARBU/W		<input type="checkbox"/>		55,244.42			900.59		9,129.68	55,254.42
123456789RP0001	ATEL/L		<input type="checkbox"/>		33,425.48	1,796.50		543.30		3,934.14	33,335.48
123456789RP0001	BAILE/W		<input type="checkbox"/>		41,042.62	2,249.73		667.50		4,692.70	40,952.62
123456789RP0001	BAKS/A		<input type="checkbox"/>		38,669.72	2,108.64		628.74		4,256.80	38,579.72
123456789RP0001	BALI/B		<input type="checkbox"/>		34,452.00	464.40		560.16		3,730.86	34,362.00
123456789RP0001	BLAN/N		<input type="checkbox"/>		28,894.40			469.52		2,553.23	28,804.40
123456789RP0001	CALD/W		<input type="checkbox"/>		36,037.08	1,951.96		585.92		3,778.69	35,947.08

- Every T4 / T4A slip generated can be viewed on these pages.
- Click the **Print Report** icon in the upper-left  to open the **Print T4 Tool**, which will allow you to print a summary of all slips.
Should you wish to review an individual slip, clicking the  icon on the row of the employee will load the T4 slip for that individual employee.

Section 1.2 will explain how to print or e-mail the T4 and T4A Slips for the whole organization.

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 Report**  on the **T4 Slip** page (or T4A Slip page), or click **Tools | T4/T4A | Print T4** (or Print T4A).



Employee Code	Display Name	Department	Unit	Position	Cost Centre	Status
AABJE/L	Aabjerg, Lise	CI - Community Inclusion	/	CRMgr - Community Resources Mgr	Youville	Active
ADAM/E	Adam, Eve	CI - Community Inclusion	/	ExDir - Executive Director	/	Active
ALAJ/S	Alajane, Sylvie	CI-Day	/	CSW104 - Community Support Worker Grid 10	/	Active
ANDER/S	Anders, Sonia	CI-IS - Community Inclusion	/	CRMgr - Community Resources Mgr	/	Active
ANDER/D	Anderson, Darlene	CI-IL - Community Inclusion	/	CSW104 - Community Support Worker Grid 10	/	Active

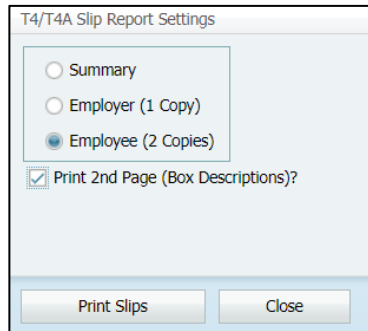
- In the Employee section, select the employees for whom slips are to be printed or emailed.

IMPORTANT: To ensure you will select ALL EMPLOYEES, click on the Type Block field and make sure the values are ???-??-??-??



- Select the Year (2024), the Payroll Account #, and the Data Type (Original), and click on **Load Slips**
- The results will appear and you may select **Print T4s** or **Email T4s**

- Select **Print T4s**, and the **T4/T4A Slip Report Settings** box will appear:



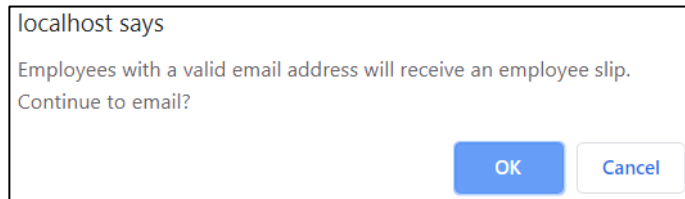
The screenshot shows a dialog box titled "T4/T4A Slip Report Settings". It contains three radio button options: "Summary", "Employer (1 Copy)", and "Employee (2 Copies)". The "Employee (2 Copies)" option is selected. Below these options is a checked checkbox labeled "Print 2nd Page (Box Descriptions)?". At the bottom of the dialog are two buttons: "Print Slips" and "Close".

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.

- Select **Email T4s**, and you will be asked to confirm whether you wish to e-mail the T4s slips at this time:



The screenshot shows a confirmation dialog box with the text "localhost says" at the top. Below that is the message "Employees with a valid email address will receive an employee slip. Continue to email?". At the bottom right are two buttons: "OK" and "Cancel".

Selecting OK will e-mail the slips to the **Pay Slip Email Address** on the HR Bank Accounts page.

1.3 Exporting T4 and T4A slips

IMPORTANT: Once you have Exported T4 or T4As in the system, this action CANNOT be undone in order to maintain proper audit controls. Only Export the T4s or T4As once are you sure that you will not have any additional payroll adjustments to enter into the system for the applicable tax year.

1. On the **Payroll | T4 Summary** page, edit each 2024 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. When you are ready to export the T4 Submission File, Select **Tools | T4/T4A | Export T4:**

Export T4/T4A Slips

Payroll

PR Tools

Amounts

Payments

T4 and T4A

Generate T4

Generate T4A

Print T4

Print T4A

Export T4

Extracts

Year: 2024 - 2024 Payroll Year

Payroll Account: 123456789RP0001

Data Type: Original Amendment

Amendment #: 0

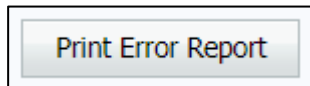
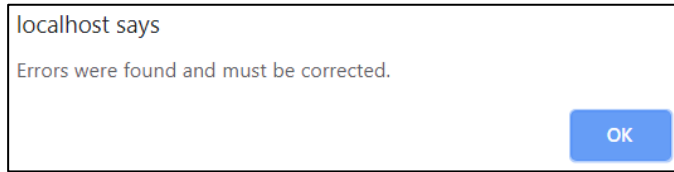
Cancel Slips:

Validate Export File:

Please review the Transmitter and Employer addresses in the T4 Summary page before exporting.

Reset Load Export Download Export File

- Note the message reminding you “Please review the Transmitter and Employer addresses in the T4 Summary page before exporting”.
- In the Options section, select the Year (2024), the Payroll Account or All, and the Data Type (Original).
- Click **Load**.
- If any errors are detected, an error report will be generated. You will have to fix the errors before continuing. You will find it useful to print the Error Report:

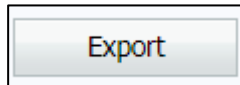


Payroll T4 Export Errors		
Type	Code	Message
		Transmitter City cannot be blank
		Technical Contact's Name cannot be blank
		Technical Contact's Area Code cannot be blank
		Technical Contact's Phone Number cannot be blank
		Technical Contact's Email cannot be blank
		Accounting Contact's Name cannot be blank
		Accounting Contact's Area Code cannot be blank
		Accounting Contact's Phone Number cannot be blank
		Payroll Account is invalid, it must be in the form '123456789RP0000'

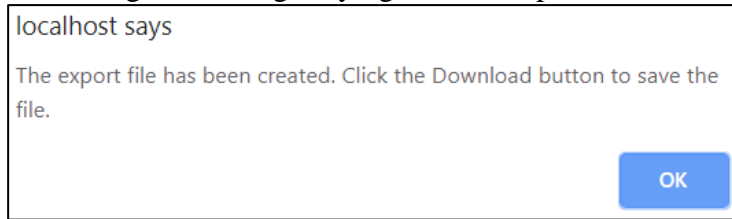
Original
Payroll Account#: 123456789 RP0001
T4/T4A Year: 2019

Number of Errors: 9

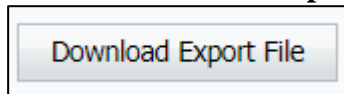
- If there are no errors, click on **Export**.



- You will get a message saying that the export file has been created:

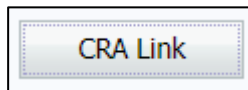


- Click on **Download Export File**:



- You will now be prompted to save the XML file by your browser, or the file will be downloaded to the downloads folder specified by your browser. This file may be uploaded to CRA at your convenience.

- Click on **CRA Link** 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 Publishing T4 Slips to Self-Serve

Note that ComVida will **automatically** publish the T4 Slips to the Self-Serve section, however this will only occur **after** the XML file has been exported from ComVida by performing the steps outlined in Section 1.3 above.

This allows you to Generate the T4s as many times as necessary to make year-end adjustments, without the risk of your employees accidentally downloading a T4 from a draft run.

No modifications to any security settings are necessary.

1.5 Other filing methods

1.5.1 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 5 slips.

1.5.2 T4 Web forms

This filing option can be used 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.

1.6 *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 to pay a penalty for late filing. 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 2024 T4's will be Friday, February 28th, 2025.

Year-end Procedures for 2024

1.7 Prior to Year End

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

Click Tools | T4 and T4A | Generate T4

Employee Code	Display Name	Department	Unit	Position	Cost Centre	Status	Type Block	PR Type Block
AABJEL	Aabjerg, Lise	DU - Dunbar	/	APTSW - Adult PT Support Worker	/	Active	U B- AF-Q -	A Q-FY - E -
ADAM,E	Adam, Evelyn	HA - Harvey	/	APTSW - Adult PT Support Worker	/	Active	H B- AF-Q -	A - FD -
ADAM,B	Adams, Bryan	DE - Dempster	/	CFTSW2 - Child FT Support Worker Step 2	/	Active	D B- Ac-U - S	A U-P - D -
ALVAR,F	Alvarez, Freddie	CA - Carson	/	AFTSW - Adult FT Support Worker	/	Active	A B- AF-Q -	A Q-FY - E -
ALAJ,S	Aljane, Sylvie	DU - Dunbar	/	FTNAW - Full Time Night Awake	/	Active	U B- AF-Q - M	A Q-FY - D -
ANDER,S	Anderson, Sophia	ADMIN - Administration	/	Gr0955 - Grade 9 - Step 5	/	Active	a C- Ac-Ux -	A Q-FY - D -

- In the Employee Criteria section, select the employees for whom slips are to be generated. This can be a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.

IMPORTANT: To generate T4 slips for ALL EMPLOYEES, click on the **Type Block** field and make sure the values are **???-???-???-???**

Type Block: ???-???-???-???

- 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 Summary page.

- In Summary Information, enter the Proprietor SINs (if applicable), and ensure the correct CPP and EI items are selected based on your payroll database's settings.
- Regardless of CPP2 contributions, item 7222 is not to be included in the Employer's Contributions within the Summary Information. It will be automatically included in the summary during calculations for item 7220.

IMPORTANT: Under the Employer's Contributions section, ensure that the Value selected aligns the desired year for the T4s you are wishing to generate based on the pay period you are currently in.

If you are wanting to generate 2024 T4s:

- a) If ComVida is still in a 2024 pay period, select the INCUYR (current year) values
 - b) If ComVida has been initialized to a 2025 pay period, select the INLAYR (last year) values
- Dental Care Plan Coverage (Box 45) – ensure that the HR field which tracks the Dental Care Coverage code is selected. By default, it is “PR_CDCPCvg” and employee values can be updated on the Payroll Numbers page within Human Resources.
 - Click **Load Slips**
 - The T4 Results 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

If payroll adjustments to employee profiles are made after T4 generation has occurred, T4 slips must be re-generated for the slips to reflect the adjustments entered into the system.

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

Click Tools | T4/T4A | Generate T4A Slips

- In the Employee Criteria section, select the employees for whom slips are to be generated. This can be a selected employee, or a group of employees using the Employee Type Block or the Payroll Type Block.

IMPORTANT: To generate T4 slips for ALL EMPLOYEES, click on the **Type Block** field and make sure the values are **???-???-???-???**



- Dental Care Plan Coverage (Box 015) – ensure that the HR field which tracks the Dental Care Coverage code is selected. By default, it is “PR_CDCPCvg” and employee values can be updated on the Payroll Numbers page within Human Resources.
- Click **Load Slips**
- The T4A Results will be displayed, which you can print for review. T4A information can also be reviewed on the T4A Slips page.
- Repeat step 1 for each additional Payroll Account #, making the appropriate selections in Payroll Account, EI Class and EI ER items. If payroll adjustments are made after generating T4As, they must be generated again.

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.*

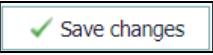
Tip: Data Templates can be used to export required fields such as tax province, address fields and S.I.N. for verification and update.

3. Setup the Pay Period Schedules

In the **Setup | Periods** section, select the 2024 Payroll Year, click to go to the last entry, and verify that the final pay period of 2024 has **Year** as the **End Type**.









26	202426	14	Year	01/Dec/2024	14/Dec/2024	20/Dec/2024
----	--------	----	------	-------------	-------------	-------------

Add the pay period schedule for 2025. 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** (24, 26 or 27), the **Fiscal End Month** (March) and put a check mark in **Adjust Fiscal Begin**.
- Click on 

The system will automatically determine the Start and End Dates of all pay periods.

IMPORTANT: Edit each period to indicate the **End Type** (Period, Month, Quarter or Year). These settings affect the monthly and quarterly amounts.

Periods						
 	Year	Description	# of Periods	Start Date	End Date	Fiscal End Month
 	2025	2025 Payroll Year	26	15/Dec/2024	13/Dec/2025	March
 	2024	2024 Payroll Year	26	17/Dec/2023	14/Dec/2024	March
 	2023	2023 Payroll Year	26	18/Dec/2022	16/Dec/2023	March

2025 Periods							
#	Period	Alias	# of days	End Type	Start Date	End Date	Pay Date
	1	202501	14	Period	15/Dec/2024	28/Dec/2024	03/Jan/2025
	2	202502	14	Period	29/Dec/2024	11/Jan/2025	17/Jan/2025
	3	202503	14	Month	12/Jan/2025	25/Jan/2025	31/Jan/2025
	4	202504	14	Period	26/Jan/2025	08/Feb/2025	14/Feb/2025
	5	202505	14	Month	09/Feb/2025	22/Feb/2025	28/Feb/2025
	6	202506	14	Period	23/Feb/2025	08/Mar/2025	14/Mar/2025
	7	202507	14	Quarter	09/Mar/2025	22/Mar/2025	28/Mar/2025
	8	202508	14	Period	23/Mar/2025	05/Apr/2025	11/Apr/2025

Note: All payments with a pay date in 2025 are to be reported on T4 slips for 2025 regardless of when the pay period occurred in which the work was performed. This means that a pay period ending in December 2025 with a pay date in January 2026 must be set up as pay period 1 of 2026. The last pay period of 2024 must be paid in 2024 in order to correctly report on the T4 slips.

It is **STRONGLY** recommended that you ensure that your pay period calendar is set correctly **BEFORE** you process any pay periods for the next year. Failure to do so will result in the CPP exemption being applied incorrectly. This is especially important for anyone with a bi-weekly payroll frequency.

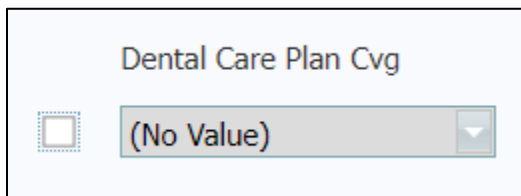
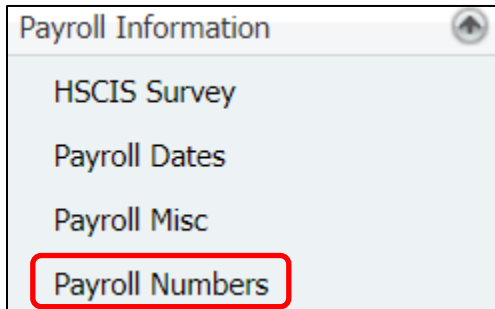
In the example below, the pay period covers the range of December 14th, 2025 through December 27th, 2025. Because the payment will occur on January 2nd, 2026, this should be set up as pay period 1 of 2026:

DEC 2025		DEC 14-27 2025 is really PP1 2026!!!				
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	*PAY DAY* 19	20
21	22	23	24	25	26	27
28	29	30	31	JAN 1	*PAY DAY* JAN 2	JAN 3

4. Review your Dental Care Measures Act codes

It is required for employers to report whether dental care for an employee (or their spouse and/or dependents) is being offered based on their employment status as of December 31st of the current year. This status needs to be completed in a new T4 Box (Box 45) and is maintained within ComVida.

The new field which determines the associated claim codes resides within **Human Resources**, on the **Payroll Numbers** page. It is called “Dental Care Plan Cvg”:



Note that the field can be re-located to a different HR Page should you wish for it to reside somewhere else.

The claim code options you can select from are:

Code	Description
1	No dental insurance or coverage of any kind
2	Payee
3	Payee, spouse and dependent children
4	Payee and their spouse
5	Payee and their dependent children

For the 2024 tax year, completion of this field is mandatory. It was optional for 2023.

The code you select needs to reflect the coverage that the employee COULD be entitled to **as of December 31st, 2024**. This does **not** mean what benefit level that the employee is currently enrolled in (if any), but what coverage is available to them as per their position within the organization, and the benefits group plan (or health benefit spending account) they have access to.

This box is required to be completed for every employee, including terminated staff. This means that when an employee leaves the organization, their claim code needs to be set to “1” unless they were provided coverage as of December 31st, 2024. This needs to be maintained for future hires and terminations.

Example 1: An employee qualifies for a dental coverage plan for only themselves, but has chosen not to enroll in the group coverage because they are already adequately covered on their spouse’s benefit plan.

Claim code 2 should be chosen for this employee; the plan offers them coverage as an individual and they have elected not to pursue it.

Example 2: An employee leaves the organization on December 19th, 2024. While they were part of the organization, they were fully covered for themselves, their spouse, and their dependents on the dental group plan:

- a) If the employee maintains coverage for the duration of the month through December 31st, 2024, then claim code 3 should be chosen.
- b) If the employee’s coverage ended the same day of their employment termination (December 19th, 2024), then claim code 1 should be chosen.

Example 3: An employee is single without any dependents. This employee is enrolled in the “Single” dental coverage provided by the employer, but if they had a spouse or dependents, those individuals would qualify for coverage based on the group plan available to the employee.

Claim code 3 should be chosen for this employee; the fact that they are single and that the employer pays a single rate for them means the coverage is still accessible to the employee should their familial situation change.

Updating the system values for multiple employee records can be done via Excel, using the Data Templates function within ComVida.

5. If your organization uses the HSCIS or CSSEA extracts, make sure to run these reports for the final 2024 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.

1.8 At Year End

1. Change the **TaxYear** in the Setup | Settings page.

The **TaxYearAvailable** indicates the latest tax tables that have been loaded into the system. You will not be able to adjust this value.

The **TaxYear** represents the tax tables currently being used by your system. Update 2024A to **2025A** in **TaxYear** **only when you are ready to move to Pay Period 1 in 2025 and will not make any further changes in 2024.**

Settings			
	Group  	Setting  	Value 
 	5	TaxYear	2025A

Note: This step must be performed before the Calculate Period is done prior to Pay Period 1 of 2025

Updating the TaxYear will update the tax tables for the CPP, EI and TAX items, and all information such as Exemption Amounts are included in the tax release for these 3 calculations.

2. Click **Tools | Initialize Period**

Initialize Period will cycle the cumulative figures for 2024 from the "current year" fields (CuYr) to the "last year" fields (LaYr) in the Employee **Amounts** page.

3. Update the Cycles

In the **Setup | 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.

For semi-monthly pay frequencies, cycles tied to the time of the month (such as “Beginning of the Month” & “End of the Month”) will not change.

For bi-weekly pay frequencies, these frequencies can change yearly & depend on when your 3-period months occur. Ensure that these Cycles match your payroll calendar as these typically effect items such as benefit expenditures.

Cycles							
	Code	Description	# of Occurrences	Active	Created By	Created When	Modified By
	BMONTH	BEGINNING OF THE MONTH	12	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Smith, Mary
	EMONTH	END OF THE MONTH	12	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Smith, Mary
	PERIOD	EVERY PAYPERIOD	26	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Administrator, ComVida
	YEAR	YEARLY CYCLE	1	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion

BMONTH Occurrences							
#	Period	Occurs	Active	Created By	Created When	Modified By	Modified When
	1	1	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	2	0	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	3	1	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	4	0	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	5	1	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	6	0	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	CVCPRConversion	09/Nov/2016 14:20
	7	0	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Smith, Mary	21/Mar/2019 11:02
	8	1	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Smith, Mary	21/Mar/2019 11:02
	9	0	<input checked="" type="checkbox"/>	CVCPRConversion	09/Nov/2016 14:20	Smith, Mary	21/Mar/2019 11:02

4. Update TD1 personal tax exemptions in the **Payroll Numbers** page in HR
- a) Update the **CLAIM** field if the employee has changed their federal claim amount for the year 2025.
- If the employee is claiming the basic personal amount (i.e. Federal Claim code 1 = **\$16,129** for 2025), 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 2025 personal exemptions (as shown in Total Claim Amount in line 13 of TD1 - 2025 Personal Tax Credits Return).
- b) For those employees who have completed a provincial TD1 form (e.g. TD1BC 2025 British Columbia Personal Tax Credits Return), update the **PRVCLAIM** field if the total claim amount for year 2025 has changed.
- If the employee is claiming the following basic personal amount (i.e. code 1) leave the **PRVCLAIM** field as **0**.

Province	Basic Exemption
BC	\$12,932
ON	\$12,747
AB	\$22,323
SK	\$18,991
MB	\$15,969
NS	\$11,744

- If the employee is not claiming the basic personal amount, then enter the actual dollar amount of the employee's 2025 personal exemptions (as shown in Total Claim Amount in line 12 of TD1BC 2025 British Columbia Personal Tax Credits Return, TD1ON 2025 Ontario Personal Tax Credits Return, TD1AB 2025 Alberta Personal Tax Credits Return, TD1SK 2025 Saskatchewan Personal Tax Credits Return, TD1MB 2025 Manitoba Personal Tax Credits Return, or TD1NS 2025 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 2025.

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

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

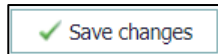
i) In the **Setup | Items** page, select the WCB (WSIB) Employer item and

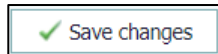


click the following symbol to modify the item.

ii) Edit the maximum assessable earnings in the MXERN, and the rate in WRATE.

8950 - WCB - ER EXPENSE Settings						
Variables						
	Type	Variable	Number Value	Value	Item Value	
	Item	EARNY		AMCUYR	8950 - WCB ER	
	Item Group	EXPEN		AMCUPD		
	Item Group	GROSS		AMCUPD		
	Number	MXERN	121500			
	Item	WCBYR		INCUYR	8950 - WCB ER	
	Number	WRATE	.02345			



iii) Click on  to save the changes.

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 2025:

Province	Max Assessable
BC	\$121,500
ON	\$117,000
AB	Not Published
SK	\$104,531
MB	\$167,050
NS	\$76,300

- b) If required, update the Vacation Accrual Prior and Vacation Accrual Current Items (usually items # 8550 & 8560). Update 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, 2024 through June 30, 2025 cycle and July 1, 2025 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 2025 payroll, update the pay period number assigned to BREAK in both vacation accrual items (i.e. both prior and current accrual items).

- c) 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**:

7060 - EI EMPLOYER QUALIFIED 1.272 Settings				
Variables				
+	Type	Variable	Number Value	Value
X	Item	UICEE		AMCUPD
X	Number	URATE	1.272	

- d) You must also update your EI DIFF item (usually item #7090):

*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.*

7090 - EI DIFF (1.4 - 1.272) PAYABLE Settings				
Variables				
+	Type	Variable	Number Value	Value
X	Number	5/12	.41667-	
X	Number	DIFF	.128	
X	Item	UICEE		AMCUPD

- e) Update any other items that require changes effective January 1, 2025.

1.9 Municipal Pension Plan (Applicable to BC Employers licensed for the MPP Extract)

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

- a) In the **Setup | Reports**, select the **SUPER-YE** report and click  icon to open the report settings.

Columns							
	Number	Position	Title	Column Type	Item/Field	Item Filter	Column Value
	1	1	SIN	Master Field	SIN		
	2	15	NAME	Master Field	LastName		
	3	45	PENSION SERV	Item	6720		AMLAYR
	4	60	CONTRIBUTION	Item Summary		???-???-???-??m	AMLAYR
	5	75	PENSION EARN	Item Summary		???-???-???-??m	INLAYR
	6	90	CONTRB SERVC	Item	6730		INLAYR
	7	105	TERM-DATE	Master Field	TermDate		

- b) Check the report's Column settings

- If your Payroll is still in 2024 and you are checking the 2024 MPP then the **Value** in the Report Layout has to show AMCUYR or INCUYR (CUYR indicates current year).
- If your Payroll is in 2025 and you're checking the 2024 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 (the  icon)

- If the Column Values have AMCUYR and INCUYR, then the Filter Value in the Test Criteria section 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 col. umn and Filter settings respectively to save the trouble of changing CU to LA or vice versa.

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

Note: Running the report at year-end is optional, but it is strongly recommended.

2. Method 3 Calculations

If your organization has been told it needs to be using Method 3 for MPP Pensionable Service calculations for some or all of your plan members, a separate communication from HelpDesk will be forthcoming with instructions on how to complete this task.

If payroll adjustments need to be performed in order to properly calculate the Pensionable Service amount, you are **not required** to complete these adjustments prior to advancing to Pay Period 1. Any adjustments required can be made in the 2025 payroll year & will not affect employee payments in any way.

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"/>

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"/>

