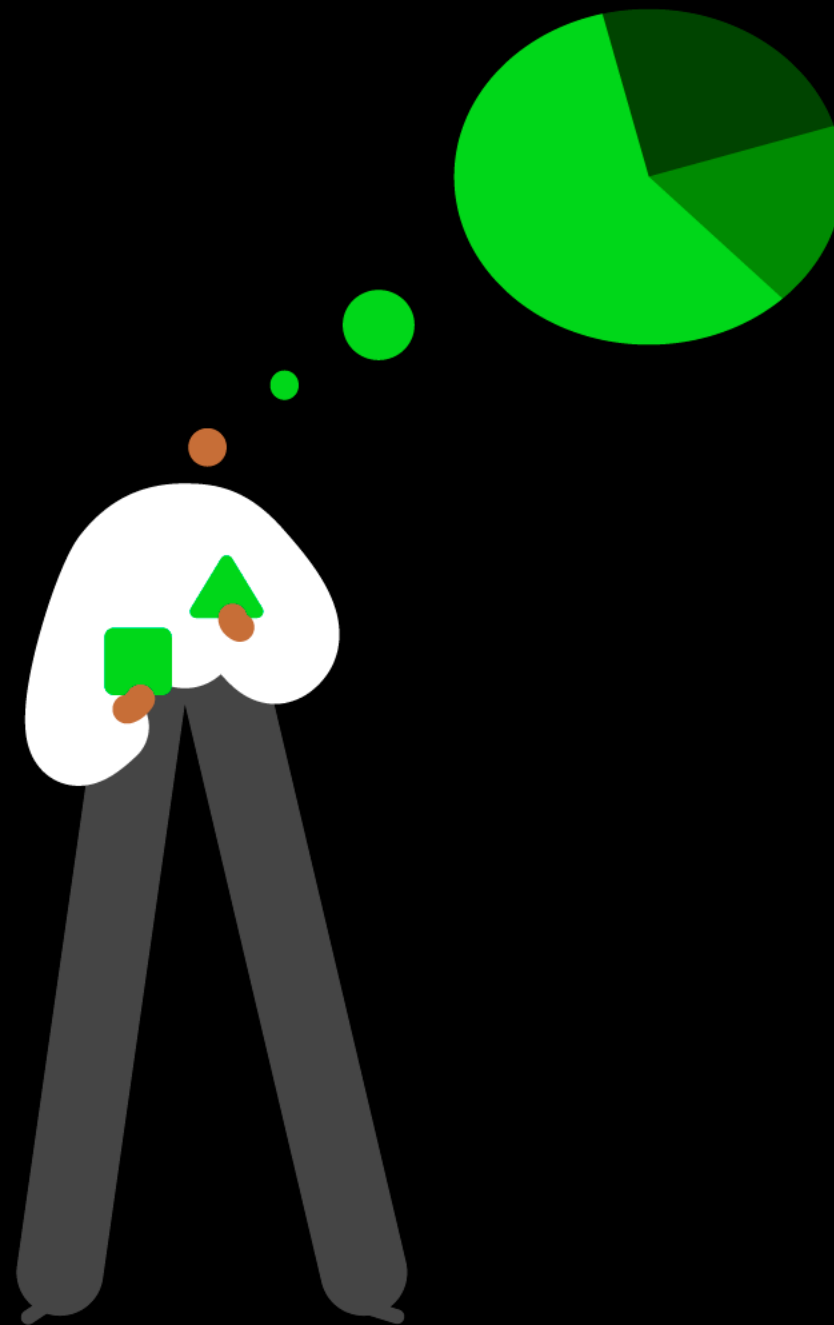


# Sage Cloud Payroll year-end webinar

Payroll year-end overview

Sage



# Meeting Tips

## Things to consider for this webinar:

- Participant mics are muted
- Post your questions in our Q&A section, to be addressed during the session and at the end
- Stay tuned on Sage's Community Hub.
- Sage support cannot provide tax advise, consult with tax advisor or tax consultant



# Agenda

- Purpose of year-end
- Canada Revenue Agency (CRA) requirements and deadlines
- Reconcile Payroll information
- Prepare Tax slips
- Best practices for year-end payroll
- Tools and resources

Sage



# Purpose of year-end

- Reconcile your company payroll information
- Prepare Tax slips
- File your slips and return information

# CRA requirements

## ➤ Forms to file:

- T4 slips (employees)
- RL-1 (Quebec)

## ➤ Deadlines:

- Slips to employees: Feb 28
- CRA submission: Feb 28

# Reconcile Payroll information

- Update your company's information
  - Business number
  - Business trading name
- Update your employee's information:
  - Social Insurance number
  - Address



Trading name **(Needed for submissions)**

Sage Company trading name

CRA payroll number **(Needed for submissions)**

Enter your company's CRA number.  
Typically 9 digits followed by 2 letters  
for the type of account.

SIN number **(Needed for submissions)**

Enter the employee's Social Insurance number. This will be 9 numbers consisting of one-digit region number followed by an eight digit serial number.

Date of birth \* ↔ Synced with HR

01/01/1970



Employee type **(Needed for submissions)**

# Reconcile Payroll information

- **Tax and other expense adjustments**
  - Use if you need to adjust taxes or other expense type manually
- **Tax year end recalculations**
  - Use to resolve differences between required and reported amounts for CPP, QPP, EI  
FIT, provincial and QC taxes are not included.



## Automatically calculate and adjust year to date values

Recalculate and adjust this employee's taxes as this is their final pay run of the tax year.

### Recalculate and adjust year to date taxes

You've selected to recalculate and adjust this employee's year to date taxes in this pay run.

Recalculations can reduce the chance of receiving a PIER report from the Canada Revenue Agency.

#### Recalculations are typically only needed:

- At the end of a tax year.
- When processing an employee's final pay run.

If this is not a final pay run for this employee, the recalculation uses forecasted income and taxes.

Select 'Save' to view a summary of the changes. You must check that the amounts are correct before saving.

To switch back to a normal pay run calculation, deselect the checkbox.

To learn more, [read our Recalculations help article \(opens in a new tab\)](#).

## Edit taxes and other expenses amounts

Select this option to overwrite the auto-calculated taxes and other expenses amounts.

### You're editing auto-calculated amounts

You're editing amounts which may impact this employee's taxes, year to date values, and reports. If you edit the employee's earnings, benefits, allowances, and deductions, these amounts will not automatically recalculate. Switch back to auto-calculated amounts at any time by clearing the check box.

# Prepare Tax slips

➤ Create T4s and RL1s

➤ Send Tax document to Sage HR employee's profile



## Form: T4 original

Submission ID:	Tax year	Date generated	Employment count	Status
00000010	2025	26/02/2025	1	Generated

### Here are your next steps:

#### Download T4 XML file

Using your browser, download the T4 XML file.

[Download T4 XML file](#)

#### Submit T4 XML file to CRA

Log In into the CRA web portal and upload your T4 XML file.

[Submit T4 XML file](#)

#### Send T4 tax documents to employees

Send T4 tax documents to your employees in Sage HR.

[Send T4 tax documents](#)

**i** Not sent

#### View T4 slips

View your employee T4 slips as a PDF file. These files may be downloaded.

[View T4 slips](#)

#### View T4 totals report

View the T4 totals report as a PDF file. These files may be downloaded.

[View T4 totals report](#)

# Demonstration

- Reconcile Payroll Information
- Generate T4s and RL-1s
- Send to Sage HR



A vertical navigation sidebar with a light gray background. At the top is a circular profile picture. Below it are several menu items, each with an icon and text: "Employee" (briefcase icon), "Personal" (eye icon), "Notes" (notepad icon), "Documents" (folder icon), "Payslips and tax documents" (document icon, highlighted in green with a white right-pointing arrow), "Training" (graduation cap icon), "Emergency contacts" (first aid kit icon), "Tasks" (list icon), "Onboarding" (plus icon), and "1-to-1" (person icon).

## Payslips and tax documents

Payslips

T4s

RL-1s

0 selected

[Select 1 item](#)



**2025**

Tax year

FY2025

Period



**Download**

# Best practice

- ✓ Start early
- ✓ Reconcile payroll information and make necessary adjustment
- ✓ Validate your company and employee data
- ✓ Stay informed of any federal or provincial tax regulations
- ✓ Communicate clearly with employees

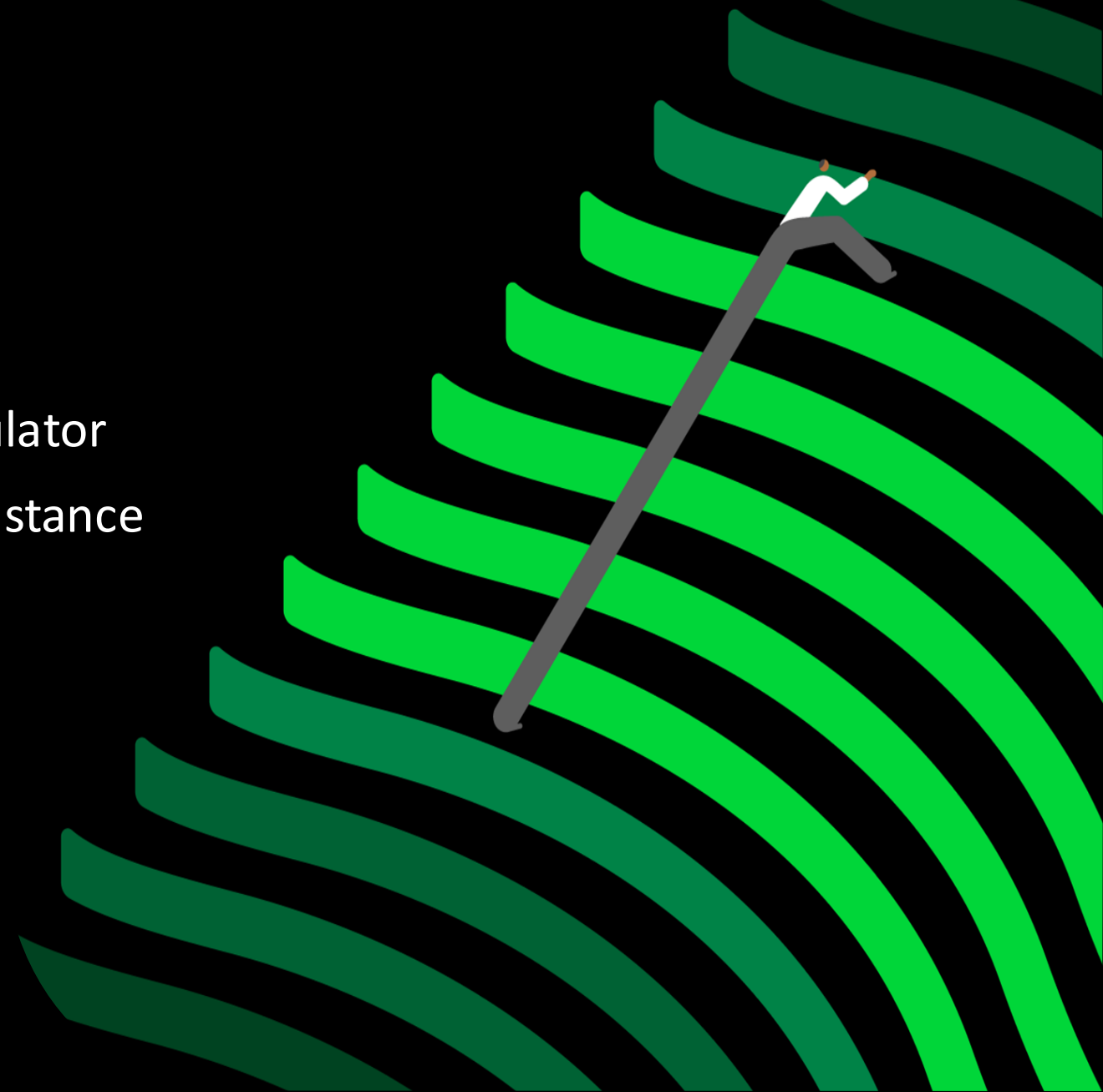
# Tools and Resources

## TOOLS

- CRA PDOC and Revenue Quebec Calculator
- Chat with Sage Payroll support for assistance

## RESOURCES

- Sage payroll year-end center  
[communityhub.sage.com](https://communityhub.sage.com)



Congratulations, you have completed the Payroll year-end overview!  
Let's do a quick recap



# Thank you!

