# T4 AND RL-1

## Lesson Plan - January 12, 2024 version

By the end of the *T4 and RL-1* cours, the client and designated paymaster / controller will be able to perform all the tasks linked to generating these forms with **maestro***.

## Unit T4RL01 - Preliminary Analysis and Configuration

Date:                                                        Time:                                     Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| The objective of this session is to clarify the needs and requirements to generating T4 and RL-1 forms in **maestro***, as well as the necessary configuratiosn.<br><br>*PREREQUISITES*<br><br>• ***Installation of the last update***<br>• *Security Management*<br>• *Time Management (Payroll)*<br><br>*OPTIONAL PREREQUISITES*<br><br>• *Mailing Configurations;*<br>• *Contact Management.* | • Analysis<br>• General Settings (**Payroll** module)<br>  • T4 & T4A<br>  • RL-1 | • Discuss the current and future process of generating T4 and RL-1 slips (strengths and weaknesses).<br>• Set up the required configurations.<br>• Make decisions.<br><br>*HOMEWORK*<br><br>• *Get the transmitter numbers (federal and provincial).* | 15 min | • Training document T4, T4A, and RL-1<br>• Notebook | Paymaster / controller |

# Unit T4RL02 - Generating T4 and RL-1 Slips - 101

Date:                                    Time:                                    Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| **Settings- T4 and RL-1**<br><br>By the end of the training lesson, the designated paymaster / controller will be able to set up certain necessary parameters to generating forms in **maestro\***. | • Generate T4 and RL-1 slips<br>• Try the T4 and RL-1 forms (optional) | • Review previous concepts and validate tasks completed as homework.<br>• Explain and complete the different windows and functionalities linked to generating T4 and RL-1 slips, according to the client's needs and **maestro\*** requirements, to automate data entry.<br><br>*HOMEWORK*<br><br>• *N/A* | 15 min. | • Training document T4, T4A, and RL-1<br>• **Maestro\*EXPRESS** - Preparing T4 and RL-1 Slips for 2023<br>• **Maestro\*EXPRESS** - Preparing RL-1 Slips for 2023 (Less than 51 Slips)<br>• Frequently Asked Questions - Preparing T4 and RL-1 Slips<br>• How-To - End of Year and New Year Preparation section in the *Knowledge Base* | Paymaster / controller |

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# Unit T4RL03 - Generating T4 and RL-1 Slips - 201

Date:                              Time:                              Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| **Validation - T4 and RL-1**<br><br>By the end of this training session, the designated paymaster/controller will be able to validate the different data on T4 and Rl-1 forms. | • Update settings according to the decisions that were made<br>• Try the T4 and RL-1 form (optional)<br>• Validate the active year<br>• Miscellaneous Reports:<br>  • 421<br>  • 422<br>• Print T4 and RL-1:<br>  • Generate Data<br>  • Employer's Summary<br>• Government Remittances<br>• T4 and RL-1 - Control Report<br>• T4 and RL-1 - Summary Control Report<br>• Pension Plan Contributions Report<br>• T4 and RL-1 Validation Report:<br>  • Validation of the CNT Contribution including Cumulative Modifications (2023)<br>  • Validation of the Detailed CNT Contribution<br>  • Validation of the HSF Contribution including Cumulative Modifications<br>  • Validation of the Detailed HSF Contribution<br>  • Validation of Employment Incomes by Period – Detailed List (2023)<br>  • Validation of the Group Insurance Contribution for CCQ Employees<br>• Pivotal Analysis of Generated Values | • Review previous concepts and validate tasks completed as homework.<br>• User training according to the process established at the time of the analysis.<br>• Demonstration of the different options and ways to validate the content of the different T4 and RL-1 boxes.<br><br>*HOMEWORK*<br><br>• *Validate the content of the boxes and make the necessary modifications and configurations if necessary.* | 1.5h | • Training document T4, T4A, and RL-1<br>• **Maestro\*EXPRESS - Preparing T4 and RL-1 Slips for 2023**<br>• **Maestro\*EXPRESS - Preparing RL-1 Slips for 2023 (Less than 51 Slips)**<br>• Frequently Asked Questions - Preparing T4 and RL-1 Slips<br>• How-To - End of Year and New Year Preparation section in the *Knowledge Base*<br>• Integrated Tests | Paymaster / controller |

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# Unit T4RL04 - Generating T4 and RL-1 Slips - 301

Date :                                    Time:                                    Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| **Corrections - T4 and RL-1**<br><br>By the end of this training session, the designated paymaster/controller will be able to understand and set up the different elements necessary to generating T4 and RL-1 forms with **maestro\***. | • Update settings according to the decisions that were made<br>• Enter Taxable Benefits<br>• Redefine Boxes<br>• Employee Management (modify cumulatives) | • Review previous concepts and validate tasks completed as homework.<br>• Demonstrate the different options and ways to validate boxes on T4 and RL-1 forms, and how to generate them.<br><br>*HOMEWORK*<br><br>• *Validations and modifications, if needed.* | 1h | • Training document T4, T4A, and RL-1<br>• **Maestro\*EXPRESS** - Preparing T4 and RL-1 Slips for 2023<br>• **Maestro\*EXPRESS** - Preparing RL-1 Slips for 2023 (Less than 51 Slips)<br>• Frequently Asked Questions - Preparing T4 and RL-1 Slips<br>• How-To - End of Year and New Year Preparation section in the *Knowledge Base* | Paymaster / controller |

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# Unit T4RL05 - Generating T4 and RL-1 Slips - 401

Date :                                          Time:                                          Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|-----------|---------|---------|------|--------------------|-------------------|
| **Preparation - T4 and RL-1**<br><br>By the end of this training session, the client will be able to generate T4 and RL-1 forms with **maestro***. | • Print T4 and RL-1:<br>  • Generate Data<br>  • Employer's Summary<br>  • Print T4, T4A, and RL-1<br>  • Generate XML Files | • Review previous concepts and validate work completed as homework.<br>• Validate T4 and RL-1 reports and inquiries.<br><br>*HOMEWORK*<br><br>• *Validate data entries.* | 0.5h or 3h if complete assistance | • Training document T4, T4A, and RL-1<br>• **Maestro*EXPRESS** - Preparing T4 and RL-1 Slips for 2023<br>• **Maestro*EXPRESS** - Preparing RL-1 Slips for 2023 (Less than 51 Slips)<br>• Frequently Asked Questions - Preparing T4 and RL-1 Slips<br>• How-To - End of Year and New Year Preparation section in the *Knowledge Base* | Paymaster / controller |

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# Unit T4RL06 - Form Validation

Date:                                         Time:                                         Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| **Forms - T4 and RL-1**<br><br>By the end of this training session, the client will be able to transmit the forms generated by **maestro\*** to the relevant parties. | • Mailing Configurations | • Transmit forms by internet (governments).<br>• Transmit forms by internet (employees).<br><br>*HOMEWORK*<br><br>• *If needed, finalize the modifications and generation of forms.* | 0.5h | • Training document T4, T4A, and RL-1<br>• **Maestro\*EXPRESS** - Preparing T4 and RL-1 Slips for 2023<br>• **Maestro\*EXPRESS** - Preparing RL-1 Slips for 2023 (Less than 51 Slips)<br>• Frequently Asked Questions - Preparing T4 and RL-1 Slips<br>• How-To - End of Year and New Year Preparation section in the *Knowledge Base* | Paymaster / controller |

# Unit T4RL07 - Tests and Validation

Date:                                         Time:                                         Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|---|---|---|---|---|---|
| **Tests and Validation** | N/A | N/A | N/A | N/A | Paymaster / controller |

# Unit T4RL08 - Conclusion

Date:                                    Time:                                    Trainer:

| Objective | Content | Conduct | Time | Learning Equipment | Targeted Audience |
|-----------|---------|---------|------|--------------------|-------------------|
| By the end of this training session, the client will have shown they have the necessary skills and knowledge to generating T4 and RL-1 forms in **maestro\***. | N/A | Prepare future training sessions. | N/A | Acquired competencies Form | Paymaster / controller |

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