

T4 AND RL-I

Last modification: January 20, 2025

Lesson Plan

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

Unit T4RL0I - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this session is to clarify the needs and requirements to generating T4 and RL-I forms in maestro*, as well as the necessary configurations.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• Installation of the last update• Security Management• Time Management (Payroll) <p><i>OPTIONAL PREREQUISITES</i></p>	<ul style="list-style-type: none">• Analysis• General Settings (Payroll module)<ul style="list-style-type: none">• T4 & T4A• RL-I	<ul style="list-style-type: none">• Discuss the current and future process of generating T4 and RL-I slips (strengths and weaknesses).• Set up the required configurations.• Make decisions. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• Get the transmitter numbers (federal and provincial).	15 min	<ul style="list-style-type: none">• Training document T4, T4A, and RL-I I• Notebook	Paymaster / controller

¹This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<ul style="list-style-type: none"> • <i>Mailing Configurations;</i> • <i>Contact Management.</i> 					

Unit T4RL02 - Generating T4 and RL-I Slips - 101

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
Settings- T4 and RL-I 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* .	<ul style="list-style-type: none"> • Generate T4 and RL-I slips • Try the T4 and RL-I forms (optional) 	<ul style="list-style-type: none"> • Review previous concepts and validate tasks completed as homework. • Explain and complete the different windows and functionalities linked to generating T4 and RL-I slips, according to the client's needs and maestro* requirements, to automate data entry. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>N/A</i> 	15 min.	<ul style="list-style-type: none"> • Training document T4, T4A, and RL-I ^I • Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024 • Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips) • Frequently Asked Questions - Preparing T4 and RL-I Slips • How-To - End of Year and New Year Preparation section in the <i>Knowledge Base</i> 	Paymaster / controller

^IThis training document is under development.

Unit T4RL03 - Generating T4 and RL-I Slips - 20I

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
Validation - T4 and RL-I By the end of this training session, the designated paymaster/controller will be able to validate the different data on T4 and RL-I forms.	<ul style="list-style-type: none"> Update settings according to the decisions that were made Try the T4 and RL-I form (optional) Validate the active year Miscellaneous Reports: <ul style="list-style-type: none"> 421 422 Print T4 and RL-I: <ul style="list-style-type: none"> Generate Data Employer's Summary Government Remittances T4 and RL-I - Control Report T4 and RL-I - Summary Control Report Pension Plan Contributions Report T4 and RL-I Validation Report: <ul style="list-style-type: none"> Validation of the CNT Contribution including Cumulative Modifications (2024) Validation of the Detailed CNT Contribution Validation of the HSF Contribution including Cumulative Modifications Validation of the Detailed HSF Contribution Validation of Employment Incomes by Period – Detailed List (2024) Validation of the Group Insurance Contribution for CCQ Employees Pivotal Analysis of Generated Values 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework. User training according to the process established at the time of the analysis. Demonstration of the different options and ways to validate the content of the different T4 and RL-I boxes. <p>HOMEWORK</p> <ul style="list-style-type: none"> <i>Validate the content of the boxes and make the necessary modifications and configurations if necessary.</i> 	1.5h	<ul style="list-style-type: none"> Training document T4, T4A, and RL-I ¹ Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024 Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips) Frequently Asked Questions - Preparing T4 and RL-I Slips How-To - End of Year and New Year Preparation section in the Knowledge Base Integrated Tests 	Paymaster / controller

¹This training document is under development.

Unit T4RL04 - Generating T4 and RL-I Slips - 30I

Date :

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>Corrections - T4 and RL-I</p> <p>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-I forms with maestro*.</p>	<ul style="list-style-type: none"> Update settings according to the decisions that were made Enter Taxable Benefits Redefine Boxes Employee Management (modify cumulatives) 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework. Demonstrate the different options and ways to validate boxes on T4 and RL-I forms, and how to generate them. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validations and modifications, if needed.</i> 	1h	<ul style="list-style-type: none"> Training document T4, T4A, and RL-I ^I Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024 Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips) Frequently Asked Questions - Preparing T4 and RL-I Slips How-To - End of Year and New Year Preparation section in the <i>Knowledge Base</i> 	Paymaster / controller

^IThis training document is under development.

Unit T4RL05 - Generating T4 and RL-I Slips - 40I

Date :

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
Preparation - T4 and RL-I By the end of this training session, the client will be able to generate T4 and RL-I forms with maestro* .	<ul style="list-style-type: none"> Print T4 and RL-I: <ul style="list-style-type: none"> Generate Data Employer's Summary Print T4, T4A, and RL-I Generate XML Files 	<ul style="list-style-type: none"> Review previous concepts and validate work completed as homework. Validate T4 and RL-I reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate data entries.</i> 	0.5h or 3h if complete assistance	<ul style="list-style-type: none"> Training document T4, T4A, and RL-I ^I Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024 Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips) Frequently Asked Questions - Preparing T4 and RL-I Slips How-To - End of Year and New Year Preparation section in the <i>Knowledge Base</i> 	Paymaster / controller

^IThis training document is under development.

Unit T4RL06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
Forms - T4 and RL-I By the end of this training session, the client will be able to transmit the forms generated by maestro* to the relevant parties.	<ul style="list-style-type: none"> Mailing Configurations 	<ul style="list-style-type: none"> Transmit forms by internet (governments). Transmit forms by internet (employees). <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>If needed, finalize the modifications and generation of forms.</i> 	0.5h	<ul style="list-style-type: none"> Training document T4, T4A, and RL-I¹ Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024 Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips) Frequently Asked Questions - Preparing T4 and RL-I Slips 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

¹This training document is under development.

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-I forms in maestro* .	N/A	Prepare future training sessions.	N/A	Acquired competencies form - T4-RLI^I	Paymaster / controller

^IThis training document is under development.