

# T4 AND RL-I

Last modification: March 25, 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 <b>maestro*</b>, as well as the necessary configurations.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"><li>• <b>Installation of the last update</b></li><li>• Security Management</li><li>• Time Management (Payroll)</li></ul> <p><i>OPTIONAL PREREQUISITES</i></p>	<ul style="list-style-type: none"><li>• Analysis</li><li>• General Settings (<b>Payroll</b> module)<ul style="list-style-type: none"><li>• T4 &amp; T4A</li><li>• RL-I</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Discuss the current and future process of generating T4 and RL-I slips (strengths and weaknesses).</li><li>• Set up the required configurations.</li><li>• Make decisions.</li></ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"><li>• Get the transmitter numbers (federal and provincial).</li></ul>	15 min	<ul style="list-style-type: none"><li>• <a href="#">Training document T4, T4A, and RL-I I</a></li><li>• Notebook</li></ul>	Paymaster / controller

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<sup>1</sup>This training document is under development.

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

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

Date:

Time:

Trainer:

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

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

Date:

Time:

Trainer:

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

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

Date :

Time:

Trainer:

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

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

Date :

Time:

Trainer:

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

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## Unit T4RL06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<b>Forms - T4 and RL-I</b>  By the end of this training session, the client will be able to transmit the forms generated by <b>maestro*</b> to the relevant parties.	<ul style="list-style-type: none"> <li>Mailing Configurations</li> </ul>	<ul style="list-style-type: none"> <li>Transmit forms by internet (governments).</li> <li>Transmit forms by internet (employees).</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>If needed, finalize the modifications and generation of forms.</i></li> </ul>	0.5h	<ul style="list-style-type: none"> <li><a href="#">Training document T4, T4A, and RL-I<sup>1</sup></a></li> <li><a href="#">Maestro*EXPRESS - Preparing T4 and RL-I Slips for 2024</a></li> <li><a href="#">Maestro*EXPRESS - Preparing RL-I Slips for 2024 (Less than 6 Slips)</a></li> <li><a href="#">Frequently Asked Questions - Preparing T4 and RL-I Slips</a></li> <li>How-To - <a href="#">End of Year and New Year Preparation</a> section in the Knowledge Base</li> </ul>	Paymaster / controller

## Unit T4RL07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<b>Tests and Validation</b>	N/A	N/A	N/A	N/A	Paymaster / controller

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## 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 <b>maestro*</b> .	N/A	Prepare future training sessions.	N/A	<a href="#">Acquired competencies form - T4-RLI<sup>I</sup></a>	Paymaster / controller

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