



## CHECKLIST

# 2023 Year-End Prep

### IMPORTANT NOTES:

- ✓ Please complete this Year-End Prep List before moving on to the Year-End Process List.
- ✓ Complete the steps in order.
- ✓ If you want to get ahead of your Year-End, you can complete this checklist prior to receiving the Avanti Tax Update in December.
- ✓ Be sure to balance your Year-End before processing your final pay. This can be done before or after running the final pay of Year-End. [Read more >](#)
- ✓ For clients in the Implementation Process, your Implementation Specialist can assist you with any questions you may have.

### Year-End Toolkit

Everything you need for 2023 year-end

[avanti.ca/year-end-resources](https://avanti.ca/year-end-resources)

- 1** Create your enhanced CPP and QPP Deduction/Benefit codes and add them to your employees. [Read more >](#)
- 2** Review Earnings and Deduction/Benefit codes to ensure that your Tax, CPP, EI, QPIP and QPP (for Quebec employees) compliance codes are marked correctly for compliance. [Read more >](#)
- 3** Review the accumulators on your Earning, Deduction, and Benefit codes. [Read more >](#)
- 4** Verify that 'Employment Status' is correctly indicated on Terminated Employee profiles. (These can be used to retain Terminated Employees during the initialization process). [Read more >](#)
- 5** Verify that all time cards and time data entries have been processed. [Read more >](#)



**Tip:** If you have enough time, double check that the tax slip boxes are set correctly on codes. [Read more >](#)



**Tip:** This is only applicable to clients using time & attendance.

- 6** Verify that all 2023 manual and cancelled payments are processed and updated. [Read more >](#)
- 7** Verify that all entitlements have been paid out for the current year (if applicable). [Read more >](#)
- 8** Verify that there are no outstanding payroll batches for the current 2023 year. [Read more >](#)
- 9** Ensure that payroll processing has been updated for the last pay for the 2023 year. [Read more >](#)
- 10** Make a complete backup of your data. [Read more >](#)



**Tip:** This is only needed if your entitlement year aligns with the calendar year.



**Tip:** This includes any bonus, off cycle, or adjustments for the 2023 payroll year.