



CHECKLIST

2023 Year-End Process


IMPORTANT NOTES:


- ✓ Once you begin the Year-End process, you cannot revert back.
- ✓ To process Year-End, you'll need to be on the current Avanti version after your last pay in December.
[Read more >](#)
- ✓ Please ensure you have a complete backup of your database before you start this process. [Read more >](#)
- ✓ The order of these events is critical. Please complete the steps in order.
- ✓ Once all of the steps to the right have been completed, you are ready to process your first pay for 2024.


Year-End Toolkit

Everything you need for 2023 year-end
avanti.ca/year-end-resources

- ☐ **1** Initialization: Employee Totals. This will set all YTD's to zero and prepare you for producing your 2023 tax slips and processing your first pay of 2024. [Read more >](#)
- ☐ **2** Initialization: Vacation, Entitlements. Provides the ability to clear entitlements or carry them forward to the next year. [Read more >](#)

 **Tip:** This is only needed if your entitlement year aligns with the calendar year.
- ☐ **3** Verify the new EI Rate and enter any EI Reduced Rates. [Read more >](#)
- ☐ **4** Verify the new CPP/QPP Rate. [Read more >](#)
- ☐ **5** Verify the new QPIP Rate. [Read more >](#)
- ☐ **6** Enter your new WCB Rates and Maximum Assessable Values. [Read more >](#)
- ☐ **7** Insert your new GL Financial Calendar. [Read more >](#)
- ☐ **8** Insert new Payroll Calendars for all pay groups for 2024. [Read more >](#)

 **Tip:** If you are weekly or bi-weekly check to see if you have 53 or 27 pays in 2023. [Read more >](#)
- ☐ **9** Insert the 2024 Vendor Remittance Reports. [Read more >](#)

 **Tip:** Please ensure your Receiver General or Quebec Receiver reports have been set up.
- ☐ **10** Review formula-based Earnings, Deductions, & Benefit codes for date formulas that should be updated or reset at the beginning of every year. [Read more >](#)
- ☐ **11** If using Time & Attendance, insert new Statutory Holiday dates. [Read more >](#)
- ☐ **12** If using Self-Service, modify the company web settings to include 2024 dates. [Read more >](#)
- ☐ **13** If using Time Entry Templates, open the date range to include 2024. [Read more >](#)