



CHECKLIST

2023 Tax Slip Process

ADDITIONAL LINKS:

Issues When Creating Tax Slips

[Amending Tax Slips](#)

[Cancelling T4 and T4A Tax Slips](#)

[Cancelling RL-1 and RL-2 Tax Slips](#)

[Deleting Tax Slips](#)

Creating Additional Tax Forms

[Generate T2200 Form](#)

[Generate TP-64.3-V Form](#)

Year-End Toolkit

Everything you need for 2023 year-end

avanti.ca/year-end-resources

- ☐ 1 Review earning and deduction/benefit codes to ensure that the correct tax slip boxes are indicated. [Read more >](#)

- ☐ 2 Review the dental plan reporting on the pay groups. [Read more >](#)



Tip: If you offer dental benefits to your employees and haven't already updated your dental reporting, you'll need to update your pay groups. [Read more >](#)

- ☐ 3 Ensure all employees have their SIN and the correct home address on their Employee Profile. [Read more >](#)

- ☐ 4 Review and update transmitter data for the 2023 tax year. [Read more >](#)

- ☐ 5 Review tax slip groups for the 2023 tax year. Insert, modify, and delete as required. [Read more >](#)



Tip: If you have processed year-end in Avanti in a prior year, there is an option to copy last year's tax slip groups. If you have created any new pay groups or 2023 was your first year processing tax slips in Avanti, you will need to insert new tax slip groups.

- ☐ 6 Extract employee tax slip data for 2023. [Read more >](#)



Tip: Select 'extract from history' when extracting employee tax slip data, unless otherwise directed by your implementation specialist.

- ☐ 7 Import external tax slip data for adjustments or employees from an external source if applicable. [Read more >](#)

- ☐ 8 Import Tax Slip Pension Adjustments, if required. [Read more >](#)

- ☐ 9 Review and modify your employees' extracted and imported tax slip data. [Read more >](#)

- ☐ 10 Validate the tax slip groups to prepare for review listings. [Read more >](#)

- ☐ 11 Print the review listings for all your tax slip groups. [Read more >](#)



Tip: Use these along with report designer reports to balance your tax slips.



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- ☐ **12** Make any additional modifications to employee tax slip data and repeat import processes as necessary. Validate and review after repeating any of these steps. [Read more >](#)



Tip: If you re-extract for a tax slip group, any changes you made to the tax slips will be overwritten. You will need to make your adjustments again.

- ☐ **13** If you have employees in Quebec, print the RL-1 summary and update any remaining required fields. [Read more >](#)
- ☐ **14** Generate transmission media and create all files for submission to the reporting agencies. [Read more >](#)



Tip: If you're filing more than 5 returns, you'll need to file electronically for the 2023 tax year. [Read more >](#)

- ☐ **15** Submit transmission files electronically to the reporting agencies.

- ☐ **16** Save the tax slip images. [Read more >](#)



Tip: Your tax slips will be available on ASSP after the delay. [Read more >](#)

Not displaying tax slips on ASSP? Go to setting up tax slips on ASSP. [Read more >](#)

- ☐ **17** Print or email your tax slips: [Print](#) | [Email](#)
- ☐ **18** Delivering Tax Slips to Terminated Employees. [Read more >](#)