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# Easypay Payroll Version 2 January 2018 Update Instructions

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**Before** installing this update, complete all of your payrolls for 2017.

**Please read this entire document before proceeding.**

The enclosed Easypay Update CD contains the changes required for the 2017 year-end process and the 2018 tax table updates. This CD is your new software master. If you need to re-install Easypay in the future, this will be the only CD that you require. **Please store the CD in a safe place.** *If you do not have a CD drive on the computer that runs Easypay, please see Step 3 for other options.*

**Here are the steps for closing the 2017 payroll year in Easypay (see below for full details):**

1. Complete all payrolls for 2017. \*\*
2. Backup your data. \*\*
3. Install the Easypay 2018 Update.
4. Verify that the Update has been installed successfully.
5. Set up year-end mapping (if required). \*\*
6. Print the Yearly menu > Year-end YTD Report. \*\*
7. Run the Close Year step. \*\*

\*\* Complete steps 1, 2, 5, 6 and 7 for **each** company that is set up in Easypay.

## **Step 1: Complete All of Your Payrolls for 2017**

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Complete all of your payrolls for 2017 **before** installing the 2018 update. This means closing the last regular pay period in 2017. If you use the Quick Cheque feature, please make sure that it has been closed as well.

**Note:** The CRA specifies that the cheque or direct deposit date determines the year in which the earnings should be recorded. For example, a cheque issued January 2, 2018 should be pay period 01 of 2018; even though most of the pay period was in December 2017.

## **Step 2: Backup Your Data**

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**Important!** Make at least two backup copies of your company data.

**Recommendation:** Run Utilities > Backup twice, as follows:

1. Run Backup once to your removable backup media (flash drive, or formatted CD, etc.). For example, if your flash drive is drive F, set Backup Disk to “**F:**”
2. Run the Backup step again to backup to your local hard drive or server. For example: set Backup Disk to “**C:\YE2017**”

**Please store your removable backup media in a safe location off-site!**

## Step 3: Install the Easypay 2018 Update

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**Note:** If you downloaded the update from our web site, you must follow the installation instructions provided on the download web page.

If your computer has a CD drive, please proceed to the “Installation Instructions” below.

If your computer does NOT have a CD drive...

If the computer that you want to install Easypay on does not have a CD drive, please do one of the following:

- A. Take the Easypay 2018 Update CD to a computer that has a CD drive and a USB port. Copy the **SETUP.EXE** file from the CD to a USB flash drive. Then install the Easypay Update from the flash drive as you would from a CD, using the “Installation Instructions” below.
- B. Contact us by email at **support@easypay.ca** to request a password and instructions for downloading the update.  
In the **subject line** of the email, please type: “**2018 download request**”  
In the **body** of the email, please include:
  - Your **Easypay customer number**, starting with an **E** or **R** – it is located on the address label of the envelope that the CD arrived in. For example: E999999 or R999999.
  - Your **name, company name and phone number**.We will reply within one business day.

### Installation Instructions:

You will need to determine which letter is used to represent your CD drive that you will be using to install the update. For example, “D” or “E” often represent the CD drive.

1. Insert the Easypay Update CD into your CD or DVD drive.
2. **Exit Easypay Payroll and all other programs** currently running on your computer. After Easypay is installed, it may need to restart your computer.
3. Go to the Windows desktop, click the Windows **Start** button.
4. Click **Run** (skip this step if using Windows 7 or Windows Vista).
5. Type: **X:SETUP.EXE** (replacing “X” with the letter that represents the CD drive from which you are installing the update). Examples: D:setup.exe or E:setup.exe.
6. Click OK to start the update and then follow the instructions on the screen.

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## **Step 4: Update Verification**

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To verify that you have installed your 2018 update correctly, go into Easy pay Payroll the way you always do and stop at the first window displayed, which is called **Company Folders**.

You should see a small box in the upper right corner containing: **Tax Tables: 2018A**. If your tables do not say **2018A**, or you do not see the small box, then try installing your update again – this time watch closely to see if you receive any error messages.

## **Step 5: Set up Year-end Mapping (if required)**

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From the main menu, select **Yearly**. The first option is called **Mapping**, which most employers will **not** need to use. The mapping step, if required, must be done **after** the update has been installed and **before** closing the payroll year; it will have no effect after the payroll year is closed.

Taxable benefits which normally go to box 40 (“Other Taxable allowances and benefits”) should **NOT** be mapped. Easy pay will **automatically** add taxable benefits to box 40 and box 14 on the T4 (box A and L on the Quebec RL-1).

Some very specialized earnings, benefits or deductions that should appear in the “Other information” section on the T4, need to be mapped. Examples of Other Information boxes include: (42) Employment commissions, (44) Union dues, etc.

The mapping step is also used to flag certain benefits or deductions so that they are **not** zeroed out by the Yearend step. An **employee loan repayment** is an example of a deduction that should not be cleared at the end of the year; the amount repaid by the employee should carry on from one year to the next.

If you have a Registered Pension Plan (not RRSP contributions), Native Indians working on a reservation (earnings to appear in box 71), or Placement Agency Employees (Employment Code 11, earnings to appear in box 81), please read the **Help** in the Mapping Step.

## **Step 6: Print the Yearly menu > Year-end YTD report**

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From the Easy pay menu, select **Yearly > Year-end YTD Report**. Enter the required year as **17** (for 2017). Print a hard copy of this report for your records.

## **Step 7: Close Year**

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From the Easy pay menu, select **Yearly > Close Year**. Read any messages and instructions that are displayed. The Close Year routine includes a checklist. Please be sure that you have completed each item on the checklist before you check it off. When your checklist is complete and you are ready to close the year, click **OK**.

Do **not** run this step more than once per company. If you encounter a problem during this step then stop, do **not** backup again, and call Easypay support for assistance.

Once the year-end is complete, you may start running your payrolls for 2018. The T4, T4A, and RL-1 information has been saved. This information will be available during all of the upcoming year, so there is no rush to print the T4 slips – there is plenty of time.

### **TD1 Update Utility (only applies to certain situations)**

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The Close Year step will automatically multiply each employee's Federal and Provincial TD1 amounts by the index factor specified for 2018. This means the TD1 amounts should be correct for 2018 and do not need to be manually edited.

If you are **not** running a Close Year step for a company, you may wish to run the TD1 Update step. **Note:** this only applies to **new** Easypay Payroll customers who set up employees at the end of 2017 with the TD1 amounts for 2017, but have **not** run any payrolls in Easypay and, therefore, will not be doing the Close Year Step. The TD1 Update utility is located in Utilities > TD1 Update. This step will index any TD1 amounts to adjust them to the proper values for 2018.

### **Electronic Filing of T4, T4A and RL-1 Slips**

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For instructions on how to file T4, T4A or RL-1 returns electronically using the Internet, start up your Easypay Payroll software and select: **Help > Frequently Asked Questions > T4, T4A, RL-1** and click on the appropriate topic.

If you need more information about filing returns electronically, please visit our web site at **www.easypay.ca** and look in the **Links** page for links to the CRA and Revenu Québec web sites.

### **Internet Access and Messages from Easypay**

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Your Easypay software automatically checks the Easypay web site daily for any important messages or software updates. This is a particularly valuable feature during the first few weeks of the New Year. If there is any news from Easypay or patches that you should download, you will be notified with a message when you open your Easypay program. This feature assumes that the computer you use to run Easypay has **Internet access**. If your computer is not connected to the Internet, then you should periodically visit the **Downloads** page on the Easypay website ([www.easypay.ca](http://www.easypay.ca)) and check for the latest update.

***Thank you – and Best Wishes for the New Year!***