

Chapter 9

QuickBooks Online Payroll

When you use QuickBooks Online you can track your small business accounting.

You can track sales, expenses and manage all your day-to-day transactions.

As you grow, QuickBooks Online lets you manage your company payroll.

You can add employees, track time, and pay employees using cheques or via direct deposit.

You can track and pay your payroll liabilities and create year-end forms like T4's and Records of Employment.

QuickBooks lets you manage all of your payroll needs directly within in QuickBooks Online.

Objectives

In this chapter you'll learn the following:

- Setting up pay items
- Setting up employees
- Creating Paycheques
- Track and pay liabilities
- Create T4's
- Create Records of Employment
- Tracking and paying liabilities

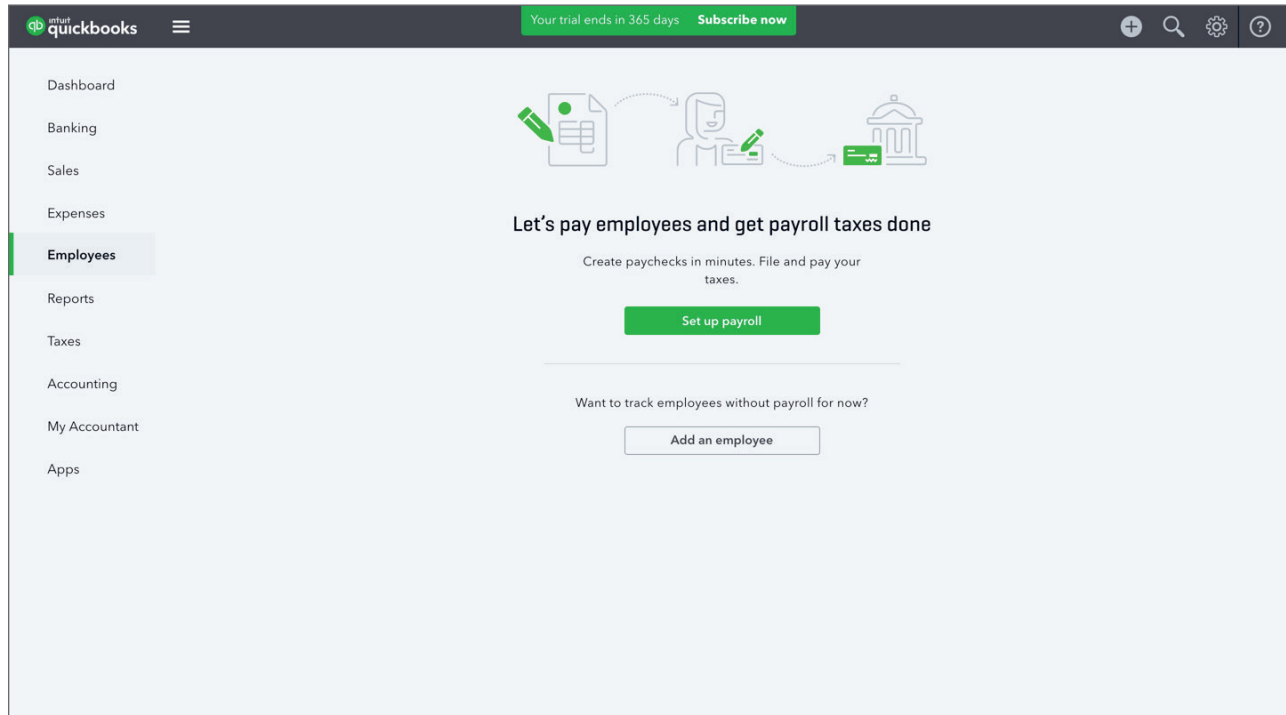
Payroll Setup

To get started in QuickBooks Payroll it's a good idea to gather some basic information before entering information into QuickBooks. Please see a few sample items that will help you get up and running quickly in QuickBooks Online Payroll.

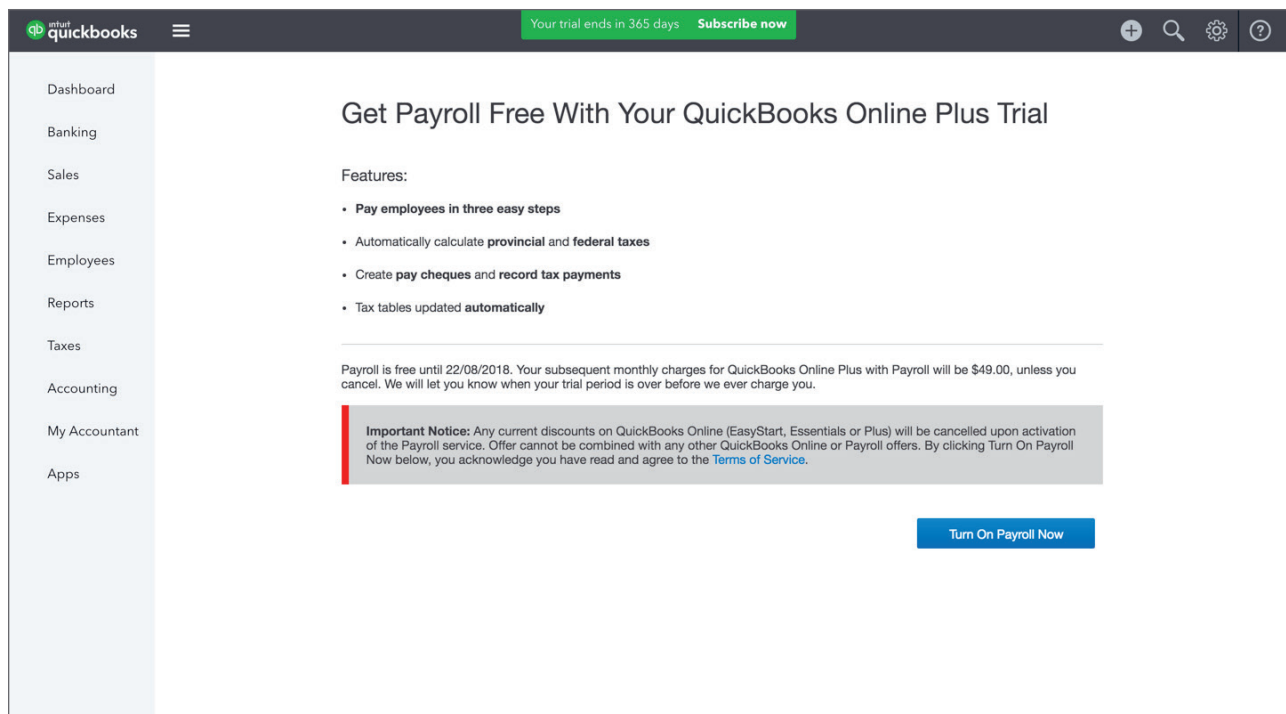
To get started using QuickBooks Online Payroll, do the following:

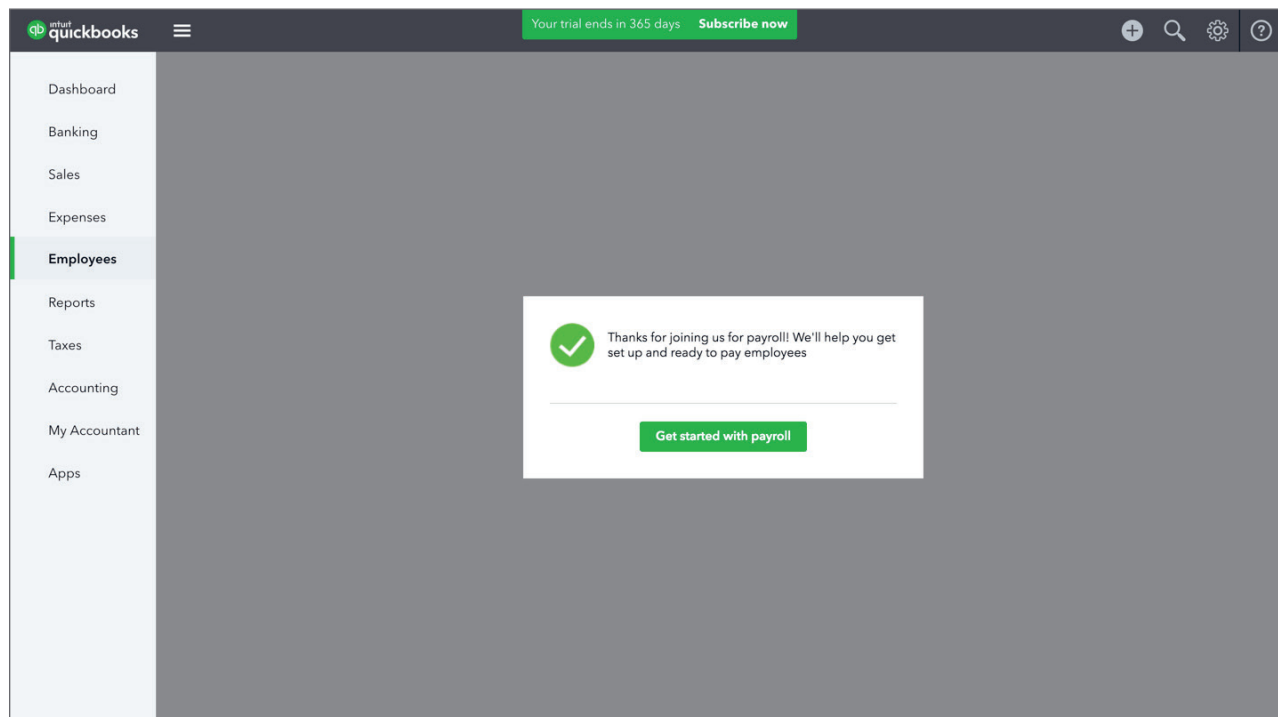
1. Click **Employees**.

2. Click **Setup Payroll**.



3. Click **Turn On Payroll Now**.



4. Click **Get started with payroll**.

5. Enter your business information including your company contact information.

6. Click **Continue**.The screenshot displays the "Get Ready for Payroll" setup window. The title bar at the top says "Get Ready for Payroll" with a close button. The main content area has a heading "Let's get to know you a little better. First, a few quick questions about your business." Below this, there is a section titled "About your business" with several input fields: "Business name" (containing "Green Tree Landscapes"), "Business address" (containing "5100 Spectrum Way"), "City or town" (containing "Mississauga"), "Province" (a dropdown menu showing "ON"), "Postal code" (containing "L4W 5S2"), and "Business phone" (an empty field). To the right of these fields is a callout box with a pink header "Why do this?" and text stating: "We'll use this info to set up your account, send you reminders, and customize your payroll." At the bottom of the window, there is a dark bar with a "Cancel" button on the left and a green "Continue" button on the right.

QuickBooks needs to know if you've paid employees before using QuickBooks Online Payroll. If you have, you'll select the option **Yes, I've already paid T4 employees this year**.

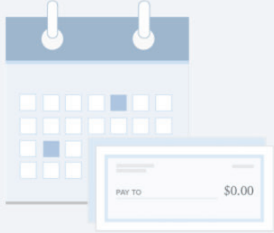
Every employer's a little different...
Tell us your payroll story.

Have you paid any T4 employees in 2017?

☒ No, I'm a brand new employer paying T4 employees for the first time.
I have not paid employees manually, through an accountant, or using another service in 2017.

☐ Yes, I've already paid T4 employees this year.
I am switching to QuickBooks Online Payroll.

[What's the difference between contractors and T4 employees?](#)



Cancel Continue

7. If you are starting QuickBooks Payroll from scratch, you'll select **No, I'm a brand new employer paying T4 employees for the first time**. Click **Continue**.



NOTE When you're setting up payroll in QuickBooks, you need to enter summarized payroll amounts if you're just beginning to use QuickBooks payroll but you've already written pay cheques earlier in the calendar year. The summarized amounts ensure correct year-to-date totals on the pay cheques you write for the rest of this year.

8. QuickBooks now asks if you have completed TD1 forms. Click **Yes, I have completed TD1 forms from all (or most) of my employees**.


How about employee forms?
This info helps us calculate pay cheques.

Do you have TD1 forms like this filled out by your employees?

☒ Yes, I have completed TD1 forms from all (or most) of my employees.

☐ No, I don't have TD1 forms for my employees yet.

[Need to print TD1 forms?](#)



Back Continue



NOTE The Canada Revenue Agency (CRA) requires you to keep a current federal and provincial TD1 form on file for each of your employees. For Québec employees, you must keep a federal TD1 form and a provincial TP-1015.3 form on file.

These forms tell you how much income tax to deduct from your employees' pay cheques. For this reason, it is very important that you keep your employees forms current. If you need to print TD1 forms for your employees, click the link labeled **Need to print TD1 forms?** QuickBooks will let you view and print the forms directly from this window for both Federal and Provincial requirements.

The screenshot shows the Canada Revenue Agency website. At the top is the Canada Revenue Agency logo and a navigation bar. Below the navigation bar, there is a breadcrumb trail: Home → Forms and publications → TD1. The main heading is "TD1 forms for 2017 for pay received on January 1, 2017 or later". Below this heading, there are four sections: Federal, Alberta, British Columbia, and Manitoba. Each section contains a list of links to the respective TD1 forms and worksheets.

Canada Revenue Agency

Home → Forms and publications → TD1

→ TD1 forms for 2017 for pay received on January 1, 2017 or later

TD1 forms for 2017 for pay received on January 1, 2017 or later

Federal

- [TD1 2017 Personal Tax Credits Return](#)
- [TD1-WS 2017 Worksheet for the Personal Tax Credits Return](#)

Alberta

- [TD1AB 2017 Alberta Personal Tax Credits Return](#)
- [TD1AB-WS Worksheet for the 2017 Alberta Personal Tax Credits Return](#)

British Columbia

- [TD1BC 2017 British Columbia Personal Tax Credits Return](#)
- [TD1BC-WS Worksheet for the 2017 British Columbia Personal Tax Credits Return](#)

Manitoba

- [TD1MB 2017 Manitoba Personal Tax Credits Return](#)
- [TD1MB-WS Worksheet for the 2017 Manitoba Personal Tax Credits Return](#)

Next, you'll complete each of the 6 steps for the employee you're setting up.

Let's add one of your employees

First name* M.I. Last name*

Jane Peterson

1 What are Jane's tax withholdings?
Enter TD1 form

2 How often do you pay Jane?
Enter a pay schedule

3 How much do you pay Jane?
Hourly \$ / hour
Add additional pay types

4 What is Jane's vacation policy?
Enter a vacation policy
We'll use your province's minimum rate for now.

5 Does Jane have any deductions? (Examples: retirement, health care)
No (most common)

Sample cheque We'll show you an example of a pay cheque once you've given us enough information to do so.

Green Tree Landscapes
5100 Spectrum Way
Mississauga, ON L4W 5S2

PAY TO Jane Peterson

DELETE EMPLOYEE

Done

9. First, enter the employee's **First Name** and **Last Name**. The middle initial is optional. Next, click the **Enter TD1 form**.

What are Jane's withholdings?

Need blank TD1 forms? * Required

Canada Revenue Agency Agence du revenu du Canada

2017 Personal Tax Credits Return TD1

Last name* First name* M.I. Date of birth* Employee Number

Peterson Jane 28-12-1958

Home address* Country of permanent residence (For non-residence only) Social Insurance Number*

1923 Reserve St. 224 220 806

City or town* Province* Postal Code*

Bloomfield ON KOK 1G0

Federal TD1 amount (total claim amount) \$ 11,635

Additional tax amounts that you want to deduct from each pay cheque \$ 0

► Provincial Taxes
We use the basic personal amount for the province in which your business is located as the default amount for Jane's provincial.

Cancel Done

10. Complete the TD form for the employees. You must enter the **Last Name, First Name, Home Address** (including **Postal Code**), **Date of Birth** and **Social Insurance Number**.
11. Enter the Federal TD1 amount in the appropriate field. This number comes from the employee field. If necessary, you can use the default number that QuickBooks enters based on a regular TD1 form.
12. Click the **Provincial Taxes** down arrow and enter the Provincial TD1 amount.
13. Click **Done**.

The screenshot shows a TD1 form interface with the following fields and values:

Last name*	First name*	M.I.	Date of birth*	Employee Number
Peterson	Jane		28-12-1958	

Home address*	Country of permanent residence (For non-residence only)	Social Insurance Number*
1923 Reserve St.		224 220 806

City or town*	Province*	Postal Code*
Bloomfield	ON	K0K 1G0

Federal TD1 amount (total claim amount).....	
	\$ 11,635

Additional tax amounts that you want to deduct from each pay cheque.....	
	\$ 0

▼ Provincial Taxes
 We use the basic personal amount for the province in which your business is located as the default amount for Jane's provincial withholdings.

Province	Provincial Amount
Ontario	10,171

► Tax exemptions
 These are not common unless this employee is the owner of the business. If Jane Peterson is the owner, they are likely exempt from Employment Insurance.

Buttons: Cancel, Done



NOTE You can deduct additional tax amounts from employees pay cheques. If an employee requests this, enter the extra amount to be deducted in the box labeled, **Additional tax amounts that you want to deduct from each pay cheque**.

City or town*

Bloomfield

Province*

ON

Postal Code*

KOK 1G0

Federal TD1 amount (total claim amount).....

\$ 11,635

Additional tax amounts that you want to deduct from each pay cheque.....

\$ 0

▼ Provincial Taxes

We use the basic personal amount for the province in which your business is located as the default amount for Jane's provincial withholdings.

Province	Provincial Amount
Ontario	10,171

▼ Tax exemptions

These are not common unless this employee is the owner of the business. If Jane Peterson is the owner, they are likely exempt from Employment Insurance.

Which taxes does Jane NOT pay?

☐ Canada Pension Plan (CPP)

☐ Employment Insurance (EI)

Cancel

Done



NOTE In rare cases, you can make an employee exempt from paying CPP and EI. To do this click the **Tax exemptions** down arrow and make the appropriate selections. This should only be done when instructed by the Canada Revenue Agency or other government authority.

QuickBooks returns you to the Edit Employee Details window.

Edit employee details

First name*

Jane

M.I.

Last name*

Peterson

1 What are Jane's tax withholdings?

Federal: \$11,635

Provincial: \$10,171

2 How often do you pay Jane?

Enter a pay schedule

3 How much do you pay Jane?

Hourly \$ / hour

Additional pay types: Stat Holiday Pay

4 What is Jane's vacation policy?

Enter a vacation policy

Sample cheque

We'll show you an example of a pay cheque once you've given us enough information to do so.

Green Tree Landscapes

5100 Spectrum Way

Mississauga, ON L4W 5S2

PAY TO

Jane Peterson

Delete employee

Done

The second step is to answer the question: **How often do you pay Jane?** (or another employee name)

14. Click **Enter a pay schedule**.

15. Next, answer the questions listed in the Pay Schedule window.

16. Choose how often you pay the employee. Click the menu under **How often do you pay Jane?**

What's Jane's pay schedule?

How often do you pay Jane?

Every Week

When's the next payday?

17-03-2017

When's the last day of work (pay period) for that payday?

15-03-2017

What do you want to name this pay schedule?

Every Friday

☒ Use this schedule for employees you add after Jane

Next four pay periods (based on dates you entered)

PAY PERIODS	PAYDAY
09-03-2017 – 15-03-2017	17-03-2017
16-03-2017 – 22-03-2017	24-03-2017
23-03-2017 – 29-03-2017	31-03-2017
30-03-2017 – 05-04-2017	07-04-2017

Cancel Done

You can choose from the following selections:

- Every Week
- Every other week (Bi-weekly)
- Twice a month
- Every month

17. Enter the next payday date in the **When's the next payday?** field.

18. Enter the last day of work for the payday in the **When's the last day of work (pay period) for that payday?**

19. Name the pay schedule in the **What do you want to name this pay schedule?** field.

The screenshot shows a window titled "What's Jane's pay schedule?". On the left, there are several input fields: "How often do you pay Jane?" with a dropdown set to "Twice a Month" and a link to "Custom schedule"; "When's the next payday?" with a date field set to "31-03-2017"; "When's the last day of work (pay period) for that payday?" with a date field set to "25-03-2017"; and "What do you want to name this pay schedule?" with a text field containing "Semi-monthly". Below these is a checkbox labeled "Use this schedule for employees you add after Jane" which is checked. On the right, a section titled "Next four pay periods (based on dates you entered)" contains a table with two columns: "PAY PERIODS" and "PAYDAY".

PAY PERIODS	PAYDAY
11-03-2017 – 25-03-2017	31-03-2017
26-03-2017 – 10-04-2017	16-04-2017
11-04-2017 – 25-04-2017	30-04-2017
26-04-2017 – 10-05-2017	16-05-2017

At the bottom of the window are "Cancel" and "Done" buttons.



NOTE To attach this pay schedule to all future employees, select **Use this schedule for employees you add after Jane.**

20. Click **Done** to complete the payroll schedule setup.

QuickBooks returns you to the **Edit Employee Details** window.

1 What are Jane's tax withholdings?
Federal: \$11,635
Provincial: \$10,171

2 How often do you pay Jane?
Semi-monthly starting 31-03-2017

3 How much do you pay Jane?
Hourly \$ 25.00 / hour
Additional pay types: Stat Holiday Pay

4 What is Jane's vacation policy?
Enter a vacation policy
We'll use your province's minimum rate for now.

5 Does Jane have any deductions? (Examples: retirement, health care)
No (most common)

6 How do you want to pay Jane?
Paper cheques

SAMPLE CHEQUE
Green Tree Landscapes
5100 Spectrum Way
Mississauga, ON L4W 4S2
PAY TO Jane Peterson
\$1,567.58

GROSS PAY	
Hourly	\$2,000.00

TAXES WITHHELD	
Employment Insurance	\$32.60
Canada Pension Plan	\$91.78
Income Tax	\$308.04

SUMMARY	
Total pay	\$2,000.00
Taxes	\$432.42
Net pay this cheque	\$1,567.58

Delete employee Done

21. Next, you'll tell QuickBooks how much you pay the employee. Click the down arrow in step 3 under **How much do you pay Jane?** You can choose from **Hourly**, **Salary** or **Commission Only**. If you pay the employee hourly you can enter their hourly account in the appropriate field.

3 How much do you pay Jane?
Hourly \$ 25.00 / hour
Additional pay types: Stat Holiday Pay

4 What is Jane's vacation policy?
Enter a vacation policy
We'll use your province's minimum rate for now.

22. If you choose **Salary**, you can enter the Salary amount in the appropriate field and tell QuickBooks the time-period for the salary. This tells QuickBooks how much to pay in every pay period. You can choose **per year**, **per month** or **per week**.

3 How much do you pay Test?

Salary \$ 45,000.0 per year

☐ Test works part-time

Additional pay types: Vacation Pay, Stat

per year
per month
per week

23. During the employee setup, you will add wage items to the employee's record. In step 3 you can also add **Additional pay types**. Click the **Edit** button to setup additional pay types.

The additional pay types are the following:

- **Overtime Pay**—this pay type pays the overtime wage of 1.5 X regular wage.
- **Double Overtime Pay**—this pay type pays the overtime wage of 2 X regular wage.
- **Sick Pay**—used to pay out sick time accrued.
- **Bonus**—used to pay bonuses as needed throughout the year.
- **Commission**—used to pay out commissions. The commission item is an amount your enter on the pay cheque. QuickBooks will not track or calculate the commission amounts.
- **Reimbursement**—used to reimburse employees for various items.
- **Allowance**—if your business pays out allowances you will setup an allowance.
- **Other Earnings**—use this item to record any other earnings item that does not fit in the above categories.

How much do you pay Jane?

You pay Jane:

Hourly \$ 25.00 / hour

☐ Hourly 2

[Add an hourly rate](#)

You can also pay Jane:

☐ Overtime Pay

☐ Double Overtime Pay

☐ Sick Pay

☒ Stat Holiday Pay

☐ Bonus

☐ Commission

☐ Allowance

☐ Reimbursement

☐ Other Earnings

Cancel Done

24. Select the items you need to appear on the employee pay cheque in the left-hand column.

How much do you pay Jane?

You pay Jane:

Hourly / hour

☐ Hourly 2

[Add an hourly rate](#)

You can also pay Jane:

☒ Overtime Pay

☒ Double Overtime Pay

25. To add a **Sick pay policy** click select **Sick Pay**. Choose a policy that works for your company's situation. You can choose from the following:

- a. at beginning of year
- b. each pay period
- c. per hour worked
- d. on anniversary date

26. Enter the number of **hours per** and the **Maximum allowed** (optional field).

27. Click **OK** to setup the policy.

You can also pay Jane:

☐ Overtime Pay

☐ Double Overtime Pay

☒ Sick Pay

Add a Sick pay policy

Hours are accrued

Jane earns hours per year

Maximum allowed (Optional) hours

☒ Sick Pay


☐ Each pay period

☐ Per hour worked



☐ On anniversary date

28. Click **Bonus** and **Commission** to add these pay types to the pay cheque. When these items are selected, it means that they'll display on each pay cheque.

You can also pay Jane:

- ☐ Overtime Pay
- ☐ Double Overtime Pay
- ☐ Sick Pay
- ☒ Stat Holiday Pay
- ☒ Bonus
- ☒ Commission  [Add commission type](#)

29. Add any additional pay types. Enter the recurring amounts in the appropriate fields if necessary. This automates the pay outs of these items on the employee pay cheque.

<input checked="" type="checkbox"/> Allowance 	Recurring amount: \$ 25.00 (optional)
<input checked="" type="checkbox"/> <input type="text"/> Add allowance type	Recurring amount: \$ 0.00 (optional)
<input checked="" type="checkbox"/> Reimbursement 	Recurring amount: \$ 25.00 (optional)
<input checked="" type="checkbox"/> <input type="text"/> Add reimbursement type	Recurring amount: \$ 0.00 (optional)

<input checked="" type="checkbox"/> Other Earnings 	Recurring amount: \$ <input type="text"/> (optional)
<input checked="" type="checkbox"/> <input type="text"/> Add other earnings type	Recurring amount: \$ 0.00 (optional)

30. Click **Done** to return to the **Edit Employee** details window.

4


What is Jane's vacation policy?

[Enter a vacation policy](#)

We'll use your province's minimum rate for now.


5

Does Jane have any deductions? (Examples: retirement, health care)

No (most common) 

6

How do you want to pay Jane?

Paper cheques 

31. In Step 4 click **Enter a Vacation Policy**.

32. Answer the question **What is Jane's Vacation policy?** You can choose to accrue vacation (most common) or to pay vacation pay each pay period.

What is Jane's vacation policy?

☐ Jane accrues vacation

☐ Jane receives vacation pay each pay period (recommended for part-time employees)

33. Choosing to accrue vacation lets you choose when the employee accrues vacation and enter how many hours the employee accrues per period.

What is Jane's vacation policy?

☒ **Jane accrues vacation**
 Ontario employees earn a minimum of 2 weeks of vacation. For full-time employees, that's 80 hours.
[Learn more about percent accruals, wage items, and other Canadian vacation policies.](#)

ENTER THE VACATION INFORMATION

When does Jane accrue? Jane earns hours per year (this is equivalent to 10 eight-hour days)

☒ Use this vacation policy for employees

☐ Jane receives vacation pay each pay period (recommended for part-time employees)

Minimum rate for vacation ✕

We've set the vacation rate to Ontario's minimum for a full-time employee (based on a 40-hour work week).



NOTE You can choose one of the following options to accrue vacation:

- at beginning of year
- each pay period
- per hour worked
- on anniversary date

What is Jane's vacation policy?

☒ **Jane accrues vacation**
 Ontario employees earn a minimum of 2 weeks of vacation. For full-time employees, that's 80 hours.
[Learn more about percent accruals, wage items, and other Canadian vacation policies.](#)

ENTER THE VACATION INFORMATION

When does Jane accrue? Jane earns hours per year (this is equivalent to 10 eight-hour days)

☒ Use this vacation policy for employees

☐ Jane receives vacation pay each pay period (recommended for part-time employees)

at beginning of year
 each pay period
 per hour worked
 on anniversary date



NOTE If you pay out every period you will be required to enter a vacation % amount in the appropriate field.

What is Jane's vacation policy?

☐ Jane accrues vacation

☒ Jane receives vacation pay each pay period (recommended for part-time employees)
 Ontario employees have a minimum pay out rate of 4%.
[Learn more about percent accruals, wage items, and other Canadian vacation policies.](#)


ENTER THE VACATION INFORMATION

Jane earns
 percent of gross wages per year

☒ Use this vacation policy for employees you add after Jane

34. If the employee has a balance you will enter it here.


4 What is Jane's vacation policy?




What is Jane's current vacation balance?

hours \$ vacation pay

35. Click **OK** to return to the **Edit employee details** window.

5 Does Jane have any deductions? (Examples: retirement, health care)
 No (most common) 

6 How do you want to pay Jane?
 Paper cheques 

36. To add deductions and contributions to the employee record, click the drop-down menu in the **What deductions or contributions does Jane have?**

37. These deductions/contributions are optional and will only be setup if your company offers these types of benefits. Choose the first type of deduction: **Health Insurance**.

What deductions or contributions does Jane have?

Deduction/contribution type

(choose one) ▼

(choose one)

Health Insurance

Other deductions

Retirement Plans

38. Complete the information to setup the Health Insurance deduction/contribution.

- I. Enter the Provider name. This is the provider of the benefit offered. QuickBooks will print the supplier name on the cheque.
- II. In the left-hand column under **Employee deduction**, enter the **Amount per pay period**. You can also choose **% of gross pay**.

What deductions or contributions does Jane have?

Deduction/contribution type

Health Insurance ▼

Type

Private Health Care ▼

Provider (appears on pay cheque)

Canada Life

Employee deduction	Company-paid contribution
<p>Amount per pay period</p> <p>\$ amount ▼ \$</p> <p>\$ amount</p> <p>% of gross pay (Optional)</p> <p>None</p>	<p>Amount per pay period</p> <p>None ▼</p>

Cancel OK

- III. In the right-hand column enter the **Company-paid contribution** portions.
- IV. Enter the **Amount per pay period**.
- V. Enter the **Annual Maximum (optional)**. This means that you will cap the amount that the company pays to the benefit.

VI. Click **OK**.

What deductions or contributions does Jane have?

Deduction/contribution type
Health Insurance

Type
Private Health Care

Provider (appears on pay cheque)
Canada Life

Employee deduction	Company-paid contribution
Amount per pay period \$ amount \$ 25.00	Amount per pay period \$ amount \$ 25.00
Annual maximum (Optional) \$	Annual maximum (Optional) \$

Cancel OK

39. Next, choose **Retirement Plans**.

40. Choose the **Type**. You can choose **Registered Retirement Savings Plan** or **Registered Pension Plan**.

What deductions or contributions does Jane have?

Deduction/contribution type
Retirement Plans

Type
(choose one)
(choose one)
Registered Retirement Savings Plan
Registered Pension Plan

Cancel OK

41. Complete the information as needed for the retirement savings benefit. The same information is required in these fields as in the previous benefit.

42. Click **OK** to complete the setup.

What deductions or contributions does Jane have?

Deduction/contribution type
Retirement Plans ▼

Type
Registered Retirement Savings Plan ▼

Provider (appears on pay cheque)
Canada Life

Employee deduction	Company-paid contribution
Amount per pay period \$ amount ▼ \$ 100.00	Amount per pay period \$ amount ▼ \$ 100.00
Annual maximum (Optional) \$	Annual maximum (Optional) \$ 2,500.0

43. Create any other deductions needed for your business. Click the drop-down menu under **What deductions or contributions does Jane have?**

44. Choose the deduction to create. For example, you can create **Union Dues**.

What deductions or contributions does Jane have?

Deduction/contribution type
Other deductions ▼

Type
(choose one) ▼
(choose one)
Cash Advance Repayment
Loan Repayment
Charitable Donation
Union Dues
Other after tax deductions

Cancel OK

45. Click **OK**. Enter the name of the deduction in the **Description**. Enter the name that will display on the employee pay cheque.
46. Enter the amount to be deducted per pay period. Enter the **Annual maximum** if necessary.

47. Click **OK** to complete the setup.

What deductions or contributions does Jane have?

Deduction/contribution
New deduction/contribution ▼

Deduction/contribution type
Other deductions ▼

Type
Other after tax deductions ▼

Description (appears on pay cheque)

Employee deduction

Amount per pay period
\$ amount ▼ \$

Annual maximum (Optional)
\$

Cancel OK

QuickBooks returns to the **Edit employee details** window. To complete the setup complete the information in **Step 6—How do you want to pay Jane?**

48. Click the edit button to choose **Paper cheques** or **Direct deposit**.

5 Does Jane have any deductions? (Examples: retirement, health care)

Canada Life		
Canada Life		
Advance		
Union Dues		

[Add a new deduction](#)

6 How do you want to pay Jane?

Paper cheques

49. Choose **Paper cheque** to write or print cheques to employees.

How do you pay Jane?

What do you use to pay Jane?

Paper cheque

Paper cheque that you can print and hand to Jane yourself.

Direct deposit

Direct deposit to two accounts

Direct deposit with balance as a cheque

Cancel Edit company direct deposit info OK

50. Choose **Direct Deposit** to setup the employee to receive their pay via direct deposit in their bank account.

How do you pay Jane?

What do you use to pay Jane?

Direct deposit

Jane's direct deposit info

Each time you run payroll, we automatically deposit Jane's pay cheque in this bank account. Make sure you have Jane's [direct deposit authorization form](#).

Moving money securely from your company's bank account to Jane's takes some time. Make sure you run payroll by 5 pm Pacific Time, 2 banking days before payday.

Account type

☒ Chequing

☐ Savings

Transit number

Institution number

Account number

Confirm account number

Pay

\$

Transit number

Institution number

Account number

Cancel Edit company direct deposit info OK

51. Enter the employee's bank account information.

52. Click **Edit company direct deposit info** to enter the company bank information.

▶ Time Tracking in QuickBooks

QuickBooks Online lets you track time for your employees and subcontractors. When you track time you can import the hours into QuickBooks payroll and add the hours to the employee's pay cheque.

You can track time using a weekly timesheet or by entering single time activities.



NOTE Time tracking is a feature only available in the QuickBooks Online Plus version.

To enable time tracking in QuickBooks:

1. Click the **Gear** icon and then click **Company Settings**.
2. Click **Advanced**.
3. Click **Time Tracking**.

Advanced

Time tracking

☒ Add Service field to timesheets ? On

☒ Make Single-Time Activity Billable to Customer ? On

☐ Show billing rate to users entering time ?

First day of work week

Sunday ▼

Cancel Save



NOTE QuickBooks lets you make time activities billable to customers. You can also assign the first day of the work week to display on the timesheet.

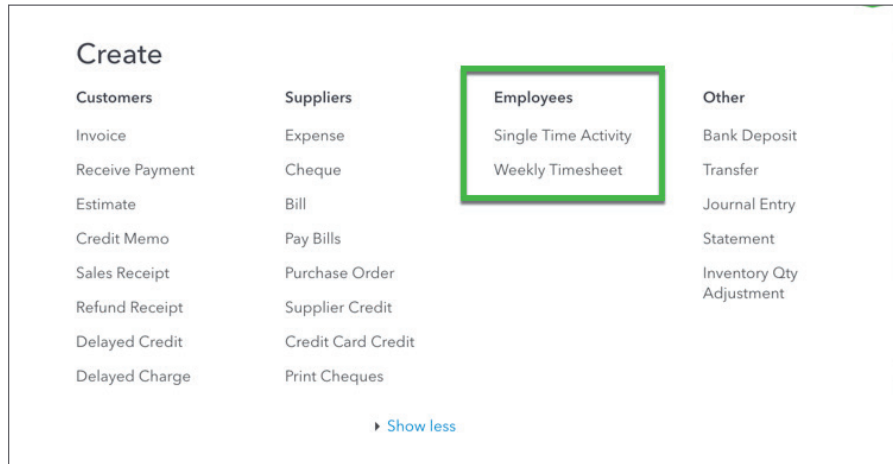
Enter Single Time Activity

You can enter a single time activity. From this window you can enter the name of the employee, the date and the start and end time of the time activity.



NOTE You can also add the Customer name to track the time to a specific customer.

1. To enter a single time activity click the **Create +** menu and then click **Single Time Activity**.



2. Enter the employee **Name**.
3. Enter the **Date**. Ensure the date is correct as the date determines when the time will be imported into the pay cheque.
4. Enter the Time for the **Start Time** and **End Time**. QuickBooks calculates the total hours. To make entries in these fields, select the **Enter Start and End Times** checkbox.
5. Enter a **Description** if necessary.
6. Click **Save**.

The screenshot shows the 'Time Activity' form in QuickBooks Online. The form is titled 'Time Activity' and has a settings icon, a help icon, and a close icon in the top right corner. The form is divided into several sections:

- Name:** Jane Peterson (dropdown menu)
- Date:** 01-03-2017 (text input)
- Customer:** Bruna Cagliari (dropdown menu)
- Service:** Hours (dropdown menu)
- Billable:** ☐ (checkbox)
- Enter Start and End Times:** ☒ (checkbox)
- Time:** 8:00 AM (dropdown menu)
- Start time:** (text input)
- End time:** (dropdown menu)
- Description:** (text input area)
- Privacy:** (text input area)

 A large grid of time slots is displayed in the center, ranging from 12:00 AM to 8:45 AM in 15-minute increments. The 8:00 AM slot is highlighted. At the bottom, there are three buttons: 'Cancel', 'Save', and 'Save and new' (with a dropdown arrow).

Enter Weekly Timesheet

The weekly timesheet it helpful to enter an entire week of timesheet information. You can enter the same field as a single time activity with one exception, the start and end time.

To fill in a weekly timesheet:

- 1. Click **Create (+) > Weekly Timesheet.**
- 2. Choose a **Name** from the list.
- 3. Select the week for which you want to record activities.
- 4. For each type of activity, enter an activity line:

CUSTOMER	Choose a customer if you want to bill the activity to the customer or track expenses for the customer.
SERVICE	(Optional) If you use services to enter time, choose a service that represents this activity. If you don't see it, Add Service field to timesheets is turned off.
CLASS	(Optional) Choose a Class. If you don't see Class, class tracking is turned off.
LOCATION	(Optional) Choose a Location/Department. If you don't see it, location/department tracking is turned off.
DESCRIPTION	Enter a description of the activity. If the activity is billed to a customer, the Description appears on their invoice, depending on your company settings. Text for the description appears automatically if you select an item from the optional Service field.
BILLABLE	Select this checkbox if you want to bill the activity to the customer. Enter a rate per hour and select Taxable if the activity is taxable.

Weekly Timesheet

Jane Peterson 3/5/2017 to 3/11/2017

TOTAL HOURS: 40:00

#	DETAILS	SUN 5	MON 6	TUE 7	WED 8	THU 9	FRI 10	SAT 11	TOTAL
1	Customer name: Sales Description: <input type="checkbox"/> Billable		8:00	8:00	8:00	8:00	8:00		40:00
2	Customer name: Service item Description: <input checked="" type="checkbox"/> Billable 0.00 /hr								
3	Customer name: Service item Description: <input checked="" type="checkbox"/> Billable 0.00 /hr								
TOTAL			8:00	8:00	8:00	8:00	8:00		40:00

Add lines Clear all lines

Cancel Copy last timesheet Save Save and new

- For each day of the week this activity occurred, enter the number of hours spent on this activity for that day.

You can add more activity lines if needed or clear all lines and begin again.

- Click **Save** to enter the timesheet.



NOTE If the last timesheet is like the current time period, click **Copy last timesheet**.



NOTE To customize what you see on the timesheet form, click the Gear icon on the timesheet form.

Weekly Timesheet

Jane Peterson 3/5/2017 to 3/11/2017

Customize what you see here

Changes you make here apply to all timesheets

☒ Show service

☒ Make time activities billable

#	DETAILS	SUN 5
1	Customer name: Sales Description: <input type="text"/> <input type="checkbox"/> Billable	<input type="text"/>
2	Customer name: <input type="text"/> Service item: <input type="text"/> Description: <input type="text"/> <input checked="" type="checkbox"/> Billable 0.00 /hr	<input type="text"/>
3	Customer name: <input type="text"/> Service item: <input type="text"/> Description: <input type="text"/> <input checked="" type="checkbox"/> Billable 0.00 /hr	<input type="text"/>
TOTAL		

Add lines Clear all lines

Cancel Copy last timesheet

TOTAL HOURS

40:00

WED 8 THU 9 FRI 10

8:00 8:00 8:00

Columns

- ☒ Sun
- ☒ Mon
- ☒ Tue
- ☒ Wed
- ☒ Thu
- ☒ Fri
- ☒ Sat

Run Payroll in QuickBooks

To run payroll in QuickBooks you'll start on the Employees page. On the employees window, click **Run payroll**.

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Employees

0 NET PAY

0 EMPLOYEE

0 EMPLOYER

2017 PAYROLL COST

Run payroll

Next payroll due Friday, 25/8

[Pay cheque list](#)

Find an employee

Active employees

Add an employee

NAME	PAY RATE	PAY METHOD
JT Thorstein, Jane	\$35.00 / hour	Cheque

1. Choose the **Bank account** where the money will come out from.
2. Choose the **Pay Period** and **Pay Date** (when running a regular Pay Schedule, these dates should auto-fill for you).
3. If you've entered timesheets that coincide with the pay period, QuickBooks automatically imports the hours. They'll display in the **Regular Pay Hrs...** section.

Run Payroll: Semi-monthly

Bank account: Chequing Balance \$5,474.57

Pay period: 02/26/2017 to 03/10/2017

Pay date: 03/15/2017

TOTAL PAY: \$3,625.00

EMPLOYEE	REGULAR PAY HRS...	OT HRS	VACATION PAY HR...	STAT HOLIDAY PAY...	BONUS	COMMISSION	REIMBURSEMENT	TOTAL PAY
JP Peterson, Jane \$25.00 / hour	64.00				\$	\$	\$ 25.00	\$1,625.00
JT Thorensten, Joel \$25.00 / hour	80.00							\$2,000.00
TOTAL	144.00	0.00	0.00	0.00	\$0.00	\$0.00	\$25.00	\$3,625.00

Add an employee

Cancel

Preview payroll

4. Click the pencil (edit) icon to view each employee pay cheque.
5. Click the arrow next to **Pay** to expand the pay information.

Run Payroll: Semi-monthly

PAY TO

Jane Peterson

NET PAY

\$1,135.20

Employee Address

1923 Reserve St.

Bloomfield, ON K0K 1G0

Pay period

02/26/2017 to 03/10/2017

Pay date

03/15/2017

Pay from

Chequing

Paid by

Cheque (\$1,135.20)

▼ Pay

TYPE	HOUR	RATE	CURRENT	YTD
Regular Pay	64.00	\$25.00	\$1,600.00	\$1,600.00
Overtime Pay	0.00	\$ 37.50	\$0.00	\$0.00
Vacation Pay	0.00	\$25.00	\$0.00	\$0.00
Stat Holiday Pay	0.00	\$25.00	\$0.00	\$0.00
Bonus			\$ 0.00	\$0.00
Commission			\$ 0.00	\$0.00
Reimbursement			\$ 25.00	\$25.00
TOTAL			\$1,625.00	\$1,625.00

Cancel

OK

Run Payroll: Semi-monthly

Stat Holiday Pay	0.00	\$25.00	\$0.00	\$0.00
Bonus			\$ 0.00	\$0.00
Commission			\$ 0.00	\$0.00
Reimbursement			\$ 25.00	\$25.00
TOTAL			\$1,625.00	\$1,625.00

► Employee taxes

► Employee deductions

► Employer taxes

► Company-paid contributions

Paid time off

Hours used

Hours available

Vacation

0.00

0.00

Memo

Cancel

OK

6. Click **Employee Taxes** and **Employee Deductions** to expand the sections.

Run Payroll: Semi-monthly

▼ Employee taxes

TYPE	CURRENT	YTD
Employment Insurance	\$27.71	\$27.71
Canada Pension Plan	\$76.93	\$76.93
Income Tax	\$ 179.66	\$179.66
TOTAL	\$284.30	\$284.30

▼ Employee deductions

TYPE	CURRENT	YTD
Union Dues	\$ 55.50	\$55.50
Advance	\$ 25.00	\$25.00
Canada Life	\$ 100.00	\$100.00
Canada Life	\$ 25.00	\$25.00
TOTAL	\$205.50	\$205.50

Cancel OK



NOTE Some of the fields are editable. You cannot edit the **CPP** and **EI** employee or employer portions in any circumstance. However, you can edit the Federal Tax amount if needed.

7. Click **Employer Taxes** and **Company-Paid Contributions** to view the information.

Run Payroll: Semi-monthly

► Employee taxes

► Employee deductions

▼ Employer taxes

TYPE	CURRENT	YTD
Employment Insurance Employer	\$38.79	\$38.79
Canada Pension Plan Employer	\$76.93	\$76.93
TOTAL	\$115.72	\$115.72

▼ Company-paid contributions

TYPE	CURRENT	YTD
Canada Life	\$ 100.00	\$100.00
Canada Life	\$ 25.00	\$25.00
TOTAL	\$125.00	\$125.00

Paid time off Hours used Hours available
 Vacation 0.00 0.00

Memo

Cancel OK

8. Click **OK** to move to the next employee and review the same process if necessary.

Run Payroll: Semi-monthly

PAY TO

Joel Thorensten

NET PAY

\$1,508.89

Employee Address

3967 Davis Drive

Welland, ON L3B 3Z6

Pay period

02/26/2017 to 03/10/2017

Pay date

03/26/2017

Pay from

Chequing

Paid by

Cheque (\$1,508.89)

▼ Pay

TYPE	HOUR	RATE	CURRENT	YTD
Regular Pay	80.00	\$25.00	\$2,000.00	\$2,000.00
Vacation Pay	0.00	\$25.00	\$0.00	\$0.00
Stat Holiday Pay	0.00	\$25.00	\$0.00	\$0.00
TOTAL			\$2,000.00	\$2,000.00

► Employee taxes

► Employee deductions

► Employer taxes

► Company-paid contributions

Paid time off

Hours used

Hours available

Cancel

OK

Run Payroll: Semi-monthly

Review and Submit

\$2,644.09

NET PAY

\$4,023.14

TOTAL PAYROLL COST

\$980.91

EMPLOYEE

\$398.14

EMPLOYER

2 Paper checks for \$2,644.09

Deliver these pay cheques by 03/15/2017

Pay period: 02/26/2017 to 03/10/2017

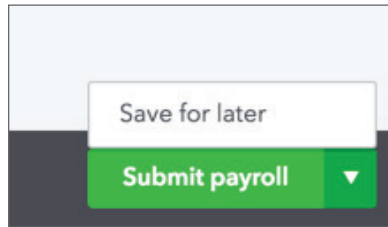
Pay date: 03/15/2017

EMPLOYEE	TOTAL HOURS	TOTAL PAY	EMPLOYEE TAXES AND DEDUCTIONS	NET PAY
JP Peterson, Jane	64.00	\$1,625.00	\$489.80	\$1,135.20
JT Thorensten, Joel	80.00	\$2,000.00	\$491.11	\$1,508.89
Totals:	144.00	\$3,625.00	\$980.91	\$2,644.09

Back

Submit payroll

9. Click **Save for Later** to come later to complete the payroll or click **Submit Payroll** to complete the payroll run.



10. From the Run Payroll window you can click to **Print pay stubs**, or enter a **Cheque Number**. You can also **Print Payroll Reports** from this window.

Run Payroll: Semi-monthly

Got it! Your payroll is all set.

We've used your info to create pay cheques for your employees.

2 pay cheques to write
Deliver cheques to your employees by 03/15/2017

[Print pay stubs](#)

<input checked="" type="checkbox"/>	EMPLOYEE	NET PAY	CHEQUE NUMBER
<input checked="" type="checkbox"/>	Peterson, Jane	\$1,135.20	<input type="text"/> Auto-fill
<input checked="" type="checkbox"/>	Thorensten, Joel	\$1,508.89	<input type="text"/>

[View payroll reports](#) [Finish payroll](#)

11. Click **Print pay stubs**.

ViewPdfForm 1 / 2

Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

Pay Stub Detail
PAY DATE: 03/15/2017
NET PAY: \$1,135.20

Jane Peterson
1923 Reserve St.
Bloomfield ON K0K 1G0

EMPLOYER
Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

PAY PERIOD
Period Beginning: 02/26/2017
Period Ending: 03/10/2017
Pay Date: 03/15/2017
Total Hours: 64.00

EMPLOYEE
Jane Peterson
1923 Reserve St.
Bloomfield ON K0K 1G0

BENEFITS

	Used	Available	NET PAY:	\$1,135.20
Vacation	0.00	0.00		

MEMO:

PAY	Hours	Rate	Current	YTD	DEDUCTIONS	Current	YTD
Regular Pay	64.00	25.00	1,600.00	1,600.00	Canada Life	25.00	25.00
Reimbursement	-	-	25.00	25.00	Canada Life	100.00	100.00

12. Click **View Payroll Reports** to view and export your payroll reports to Excel.

13. Click **OK**.

Your payroll reports are ready.

Choose which reports you want to export to Excel.
You can keep them for your reports, or send them to your accountant.

Export to Excel

EMPLOYER REPORTS

- ☒ Total Cost
- ☒ Tax Payments

EMPLOYEE REPORTS

- ☒ Payroll Summary
- ☒ Payroll Details
- ☒ Deductions

Want to change which payroll reports you see here?
Go to [Company Settings](#).

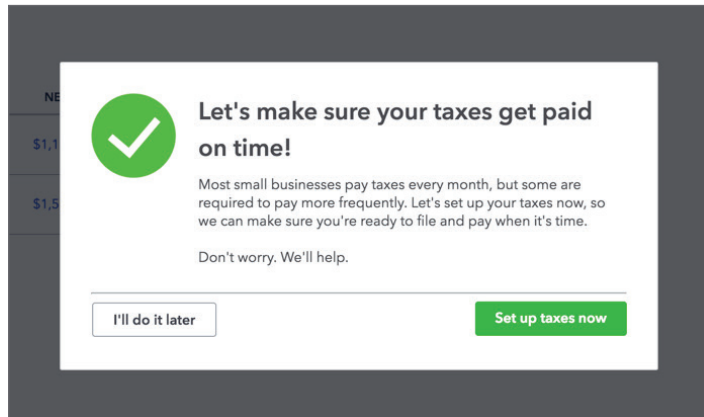
OK

14. Select the reports to view and then click **OK**. QuickBooks exports your reports to Excel.

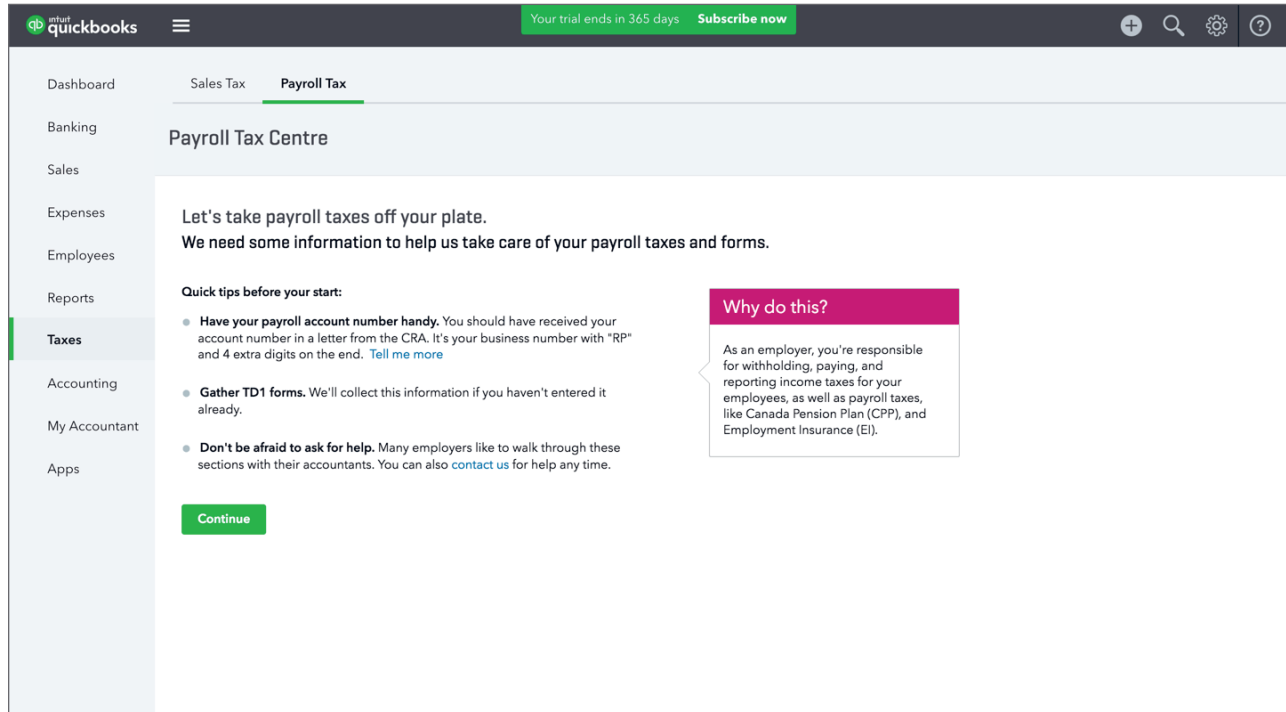
Paying Payroll Liabilities

QuickBooks automatically tracks your payroll liabilities for your company. After your first payroll run, QuickBooks will prompt you to setup your payroll taxes so that you're ready to pay when they come due.

You'll see the following window after your first payroll run.



1. Click **Set up taxes now**.
2. Click **Continue**.



3. QuickBooks checks to see if you've entered the correct hire and birth dates for employees you've paid this year.

4. Click Continue.

Payroll Taxes Setup and Compliance

Employee details
We need valid hire and birth dates only for employees you paid this year. We use this info to fill out your payroll taxes and forms.

NAME	HIRE DATE	WITHHOLDINGS
<div>JP</div> Peterson, Jane	03/01/201	TD1 info
<div>JT</div> Thorensten, Joel	03/01/201	TD1 info

Cancel

Continue

5. Add or edit any Business Details. Enter the **CRA payroll account number** if you've received it or select **No, I haven't received it yet**, or **I don't have it handy**.

6. Choose **How often the CRA requires you to remit payroll deductions and contributions**.

7. Click **Continue**.

Business details
We use this info to fill out your payroll taxes and forms.

What business name do you use when filing tax forms (filing name)? [What if I'm a sole proprietor?](#)

Green Tree Landscapes

What address do you use when filing tax forms (filing address)?
☒ Same as business address: 5100 Spectrum Way, Mississauga, ON, L4W 4S2

Do you know your CRA payroll account number?

☐ Yes, it is

83738933 RP 0001

☒ No, I haven't received it yet, or I don't have it handy

How often does the CRA require you to remit payroll deductions and contributions?

(choose one)

Cancel

Continue

Business details

We use this info to fill out your payroll taxes and forms.

What business name do you use when filing tax forms (filing name)? [What if I'm a sole proprietor?](#)

Green Tree Landscapes

What address do you use when filing tax forms (filing address)?

☒ Same as business address: 5100 Spectrum Way, Mississauga, ON, L4W 4S2

(choose one)

I'm not sure

Once a month (regular remitter)

Once every quarter (quarterly remitter)

Up to twice a month (accelerated remitter - threshold 1)

Up to four times a month (accelerated remitter - threshold 2)

(choose one)

tions and contributions?

(null)

Cancel

Continue

8. Now you're ready to remit your taxes. From the **Payroll Tax Centre** you can Pay taxes, edit your tax setup or view **Monthly**, **Annual** or **Employer Forms**.

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+

🔍

⚙️

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Taxes

Pay Taxes

You may also want to:

✎ Edit your tax setup

✎ View your Tax Liability report

✎ View tax payments you have made

✎ Enter prior tax history

Forms

📄 Monthly Forms

Monthly remittance forms and worksheets.

[View Archived Forms >>](#)

📄 Annual Forms

Annual forms, including T4 and Relevé 1 slips.

[View Archived Forms >>](#)

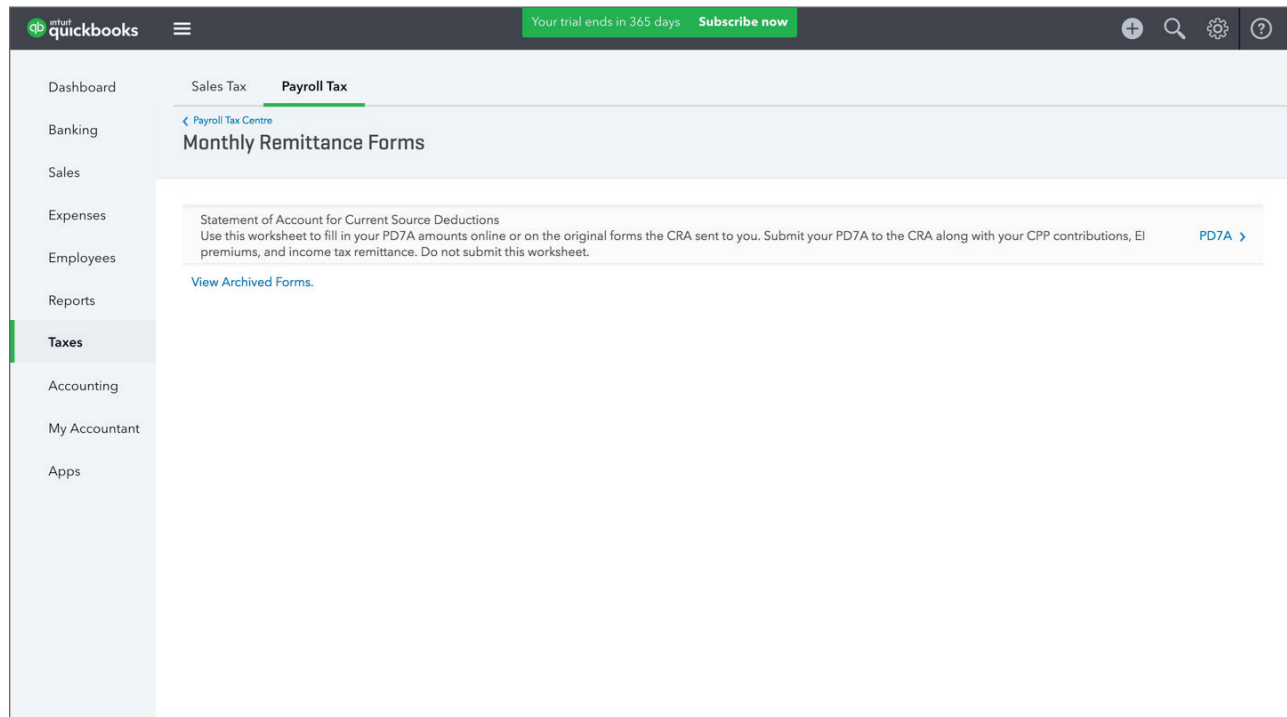
📄 Employer Forms

Other employer forms, including Records of Employment.

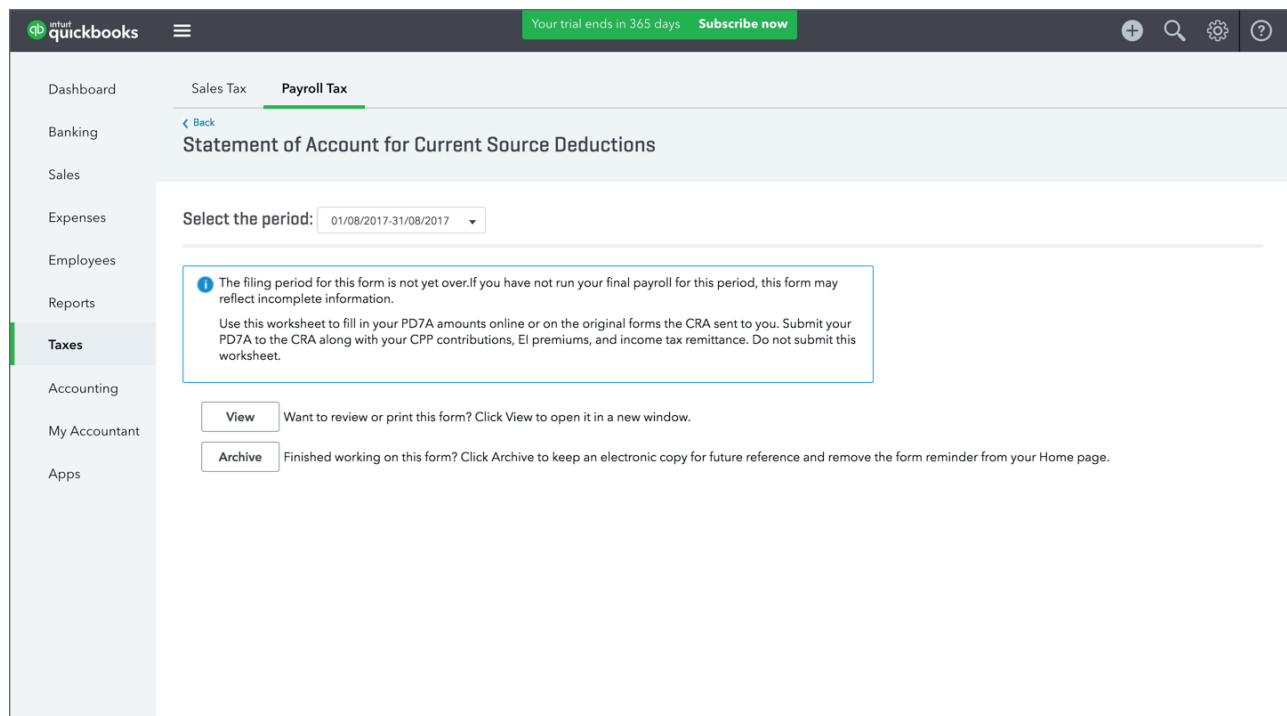
[View Archived Forms >>](#)

9. Click **Monthly Forms** to view the current payroll liabilities. QuickBooks now lets you view the PD7A report.

10. Click the **PD7A Report** link.



11. Select the period for the report.



12. Click **View**. QuickBooks displays the PD7A report.

13. After viewing and printing the report you can close the browser tab.

**PD7A (Current Period)
WORKSHEET**

Use the following information to complete your PD7A Form for the current remittance period

CPP contributions	EI premiums	Tax deductions	Current Payment	Gross payroll	No. of employees in last pay period
\$337.42	\$144.74	\$471.39	\$953.55	\$3,600.00	2

**CURRENT SOURCE DEDUCTIONS
REMITTANCE VOUCHER**

Account number

Do not use this area ☐

Gross payroll in remitting period (dollars only)
\$3,600.00

Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

Number of employees in last pay period

End of remitting period for which deductions were withheld
Year Month

Amount paid **\$953.55**

DO NOT SUBMIT WORKSHEET TO CRA

14. Click **Back** to go back to the Payroll Tax Centre.

15. Click **Pay Taxes**.

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Pay Taxes

TAX TYPE	DUE DATE	AMOUNT
No tax payments are currently due.		
Upcoming Tax Payments (You don't need to pay these yet. We'll remind you when they are due.)		
Federal Taxes	15/09/2017	\$803.16 Record payment

16. Click **Record Payment**.

17. Choose the **Bank Account** from which you'll pay the liabilities.

18. Enter the **Payment Date** and review the amounts.
19. Click **Record and Print**.

Approve Payment

Federal Taxes

\$953.55

Important!

You are making this payment before the end of the tax period. This tax should only be paid after all wages have been entered for the period. If you do not want to make this payment now, click **Delete** at the bottom.

Liability Period

03/01/2017 to 03/31/2017

Due Date

04/15/2017

Bank Account

Chequing

Balance \$1,876.93

Payment Date

Earliest

03/26/2017

TAX ITEM	AMOUNT
Income Tax	\$471.39
Employment Insurance	\$60.31
Employment Insurance Employer	\$84.43
Canada Pension Plan	\$168.71
Canada Pension Plan Employer	\$168.71
	\$953.55

Cancel

Delete

Record and print

\$953.55

Record payment

Record and print

► Creating and Printing T4's at Year End

At the end of the calendar year you're required to print T4 or Releve 1 forms for your employees. T4 forms are the yearly forms, which report employee earnings and deductions. Manually preparing these forms can be a daunting task. Luckily, QuickBooks assists you in preparing T4 forms.

The following checklist provides six simple steps for small businesses to get their payroll data in order:

1. Verify employee data.
2. Verify and review benefit information for your employees.
3. Verify and review payroll deductions.
4. Complete a T4 slip for each employee.
5. Complete and remit a T4 Summary form.
6. Review employee wages and benefits for next year.

Preparing T4s

A T4 slip is the end-of-year form that you give to each employee and submit to Canada Revenue Agency (CRA)—usually no later than the last day in February. T4s report the employee's wages and taxes withheld for the calendar year. See the following checklist for the things to report on a T4 slip:

- salary, wages (including pay in lieu of termination notice), tips or gratuities, bonuses, vacation pay, employment commissions, and all other remuneration you paid to employees during the year;
- allowances;
- deductions you withheld during the year

T4 Summary

Once all T4s are printed, you must prepare a T4 Summary. Your T4 Summary is a report that Revenue Canada requires. This summary report totals all employees earnings as recorded on the T4s. It also totals the deductions and payroll taxes (CPP and EI) withheld from the employees during the calendar year. Lastly, this form is used to reconcile those amounts with the source deduction payments that you remitted to CRA.

Your T4 Summary Report is due to be filed with Revenue Canada by the last day of February of the following year.

To Print T4's for your employees:

1. On the left navigation bar, click **Taxes**.
2. Click **Payroll Tax**.

3. Click **Annual Forms**.
4. Click **T4 slip (employee)**.

The screenshot shows the QuickBooks interface with the 'Payroll Tax' tab selected. The left sidebar lists various categories, with 'Taxes' highlighted. The main content area is titled 'Annual Tax Forms' and includes a 'Payroll Tax Centre' link. It contains a 'Summary of Remuneration Paid' section with instructions on filing T4 slips and a 'T4 Summary' link. Below this is an 'Employer copies: Statement of Remuneration Paid' section with instructions on submitting T4 slips to the CRA and a 'T4 slip (employer)' link. A dropdown menu shows '-- All Employees --'. Further down is an 'Employee copies: Statement of Remuneration Paid' section with instructions on giving T4 slips to employees and a 'T4 slip (employee)' link. A 'View Archived Forms' link is also present.

5. Select the **Period**.
6. Click **View**.

The screenshot shows the QuickBooks interface with the 'Payroll Tax' tab selected. The left sidebar lists various categories, with 'Taxes' highlighted. The main content area is titled 'Employee copies: Statement of Remuneration Paid' and includes a 'Back' link. It features a 'Select the period:' dropdown menu set to '2017'. A blue information box contains a message about the filing period and instructions on giving T4 slips to employees. Below this are two buttons: 'View' and 'Archive'. The 'View' button has a tooltip that says 'Want to review or print this form? Click View to open it in a new window.' The 'Archive' button has a tooltip that says 'Finished working on this form? Click Archive to keep an electronic copy for future reference and remove the form reminder from your Home page.'

7. Print the T4.

T4 Statement of Remuneration Paid / État de la rémunération payée
Year / Année: 2017

Employer's name - Nom de l'employeur: Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

Employee's name and address - Nom et adresse de l'employé:
Last name (in capital letters) - Nom de famille (en lettres majuscules): PETERSON
First name - Prénom: Jane
1923 Reserve St.
Bloomfield ON K0K 1G0

Employer's account number / Numéro de compte de l'employeur: 54
Social insurance number / Numéro d'assurance sociale: 12 224 220 806

Province of employment / Province d'emploi: 10 ON
Employment code / Code d'emploi: 29

Employment income - line 101 / Revenu d'emploi - ligne 101: 14 17750.00
Income tax deducted - line 437 / Impôt sur le revenu retenu - ligne 437: 22 2716.10

Other information (see over) / Autres renseignements (voir au verso):
Box - Case: 40 Amount - Montant: 700.00
Box - Case: 42 Amount - Montant: 2200.00
Box - Case: 85 Amount - Montant: 175.00

RC-14-107

▶ Create Records of Employment

In Canada, you're required to issue a Record of Employment (ROE) when an employee:

- quits your company
- is laid off or terminated
- goes on leave



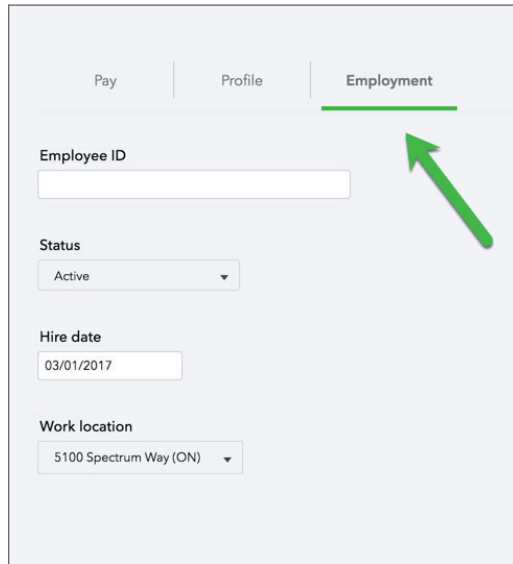
NOTE Please visit the HRDC website for more information regarding who qualifies for a Record of Employment.

The Record of Employment gives the employee all the information they need to submit to the government to claim any benefits they qualify for.

To create a Record of Employment:

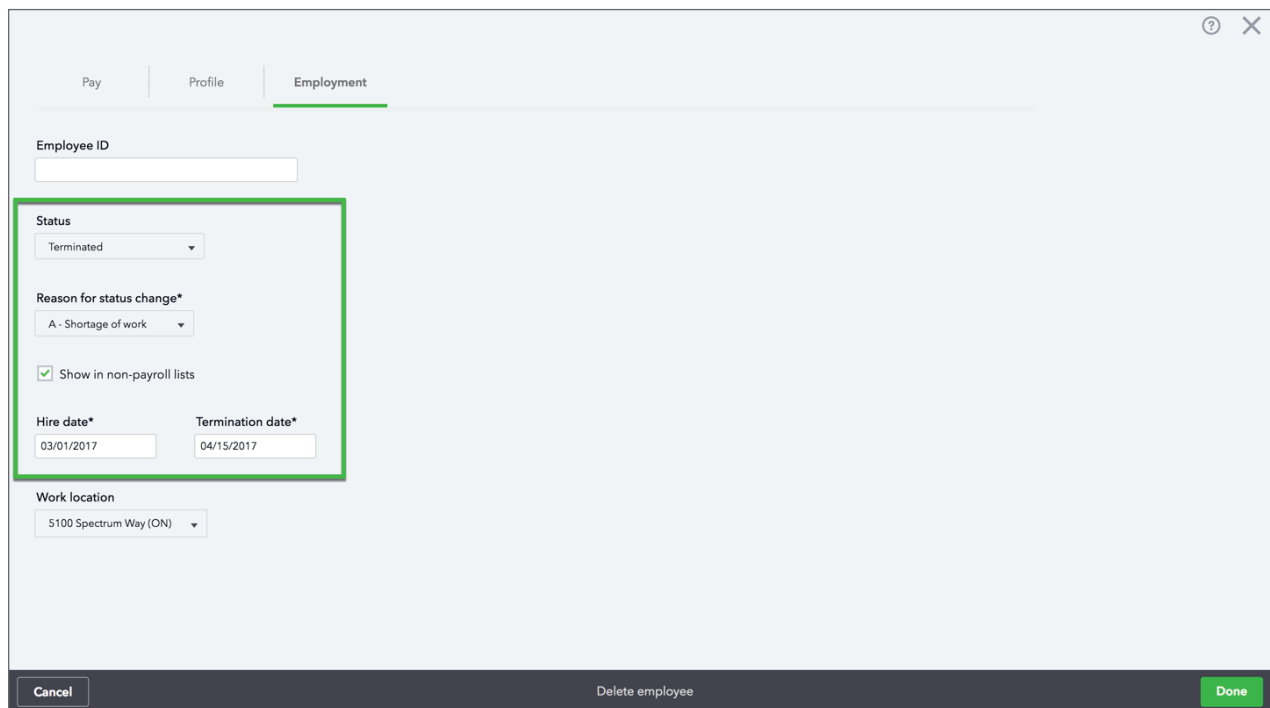
1. First you must tell QuickBooks that the person is leaving the company or going on leave. Click **Employees**.
2. Click the **employee name**.

3. Click the Employee name and then click **Edit Employee**.



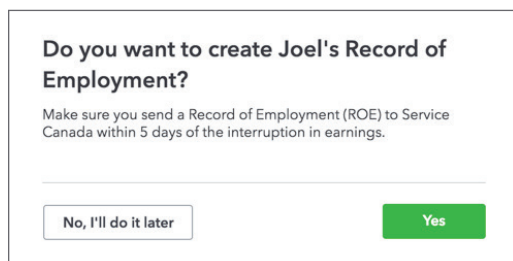
The screenshot shows the 'Employment' tab selected in a three-tab interface (Pay, Profile, Employment). The 'Employee ID' field is highlighted with a green arrow. Below it, the 'Status' is set to 'Active', the 'Hire date' is '03/01/2017', and the 'Work location' is '5100 Spectrum Way (ON)'.

4. Enter the new **Status**, **Reason for Status change** and the **Termination date**.



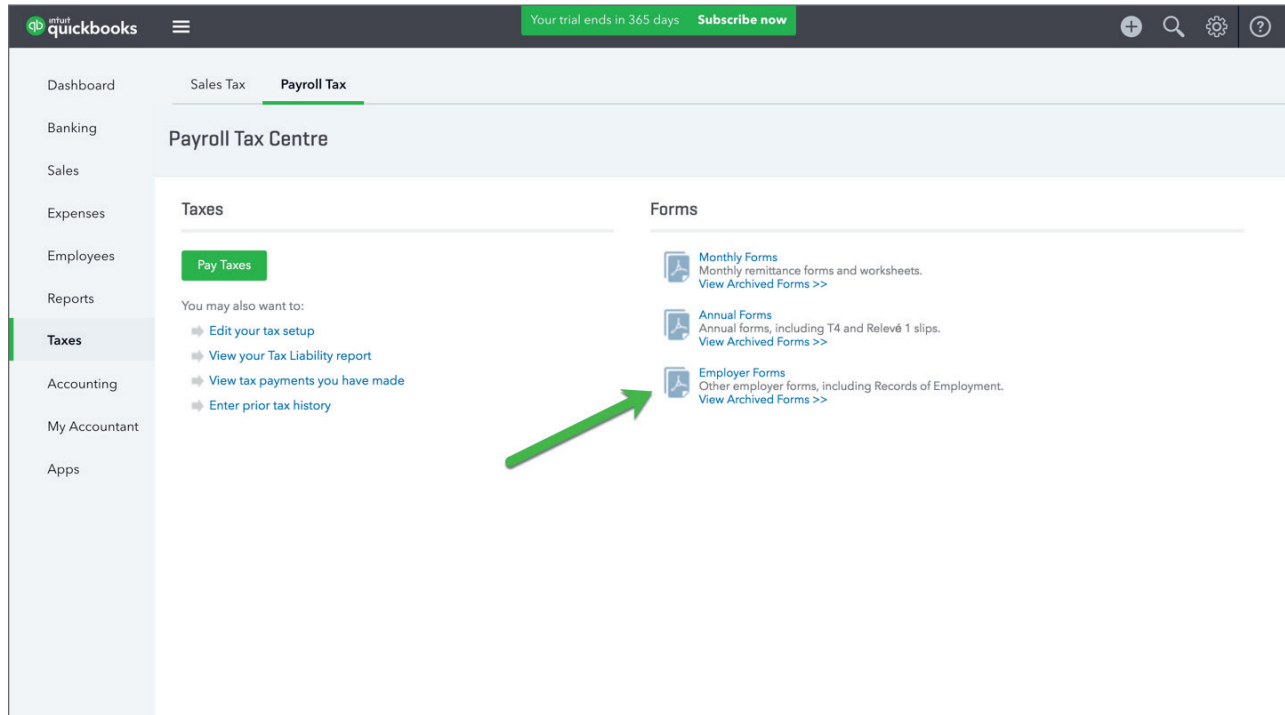
The screenshot shows the 'Employment' tab with the 'Status' dropdown set to 'Terminated'. The 'Reason for status change*' dropdown is set to 'A - Shortage of work'. The 'Show in non-payroll lists' checkbox is checked. The 'Hire date*' is '03/01/2017' and the 'Termination date*' is '04/15/2017'. The 'Work location' is '5100 Spectrum Way (ON)'. At the bottom, there are buttons for 'Cancel', 'Delete employee', and 'Done'.

5. Click **Done**.



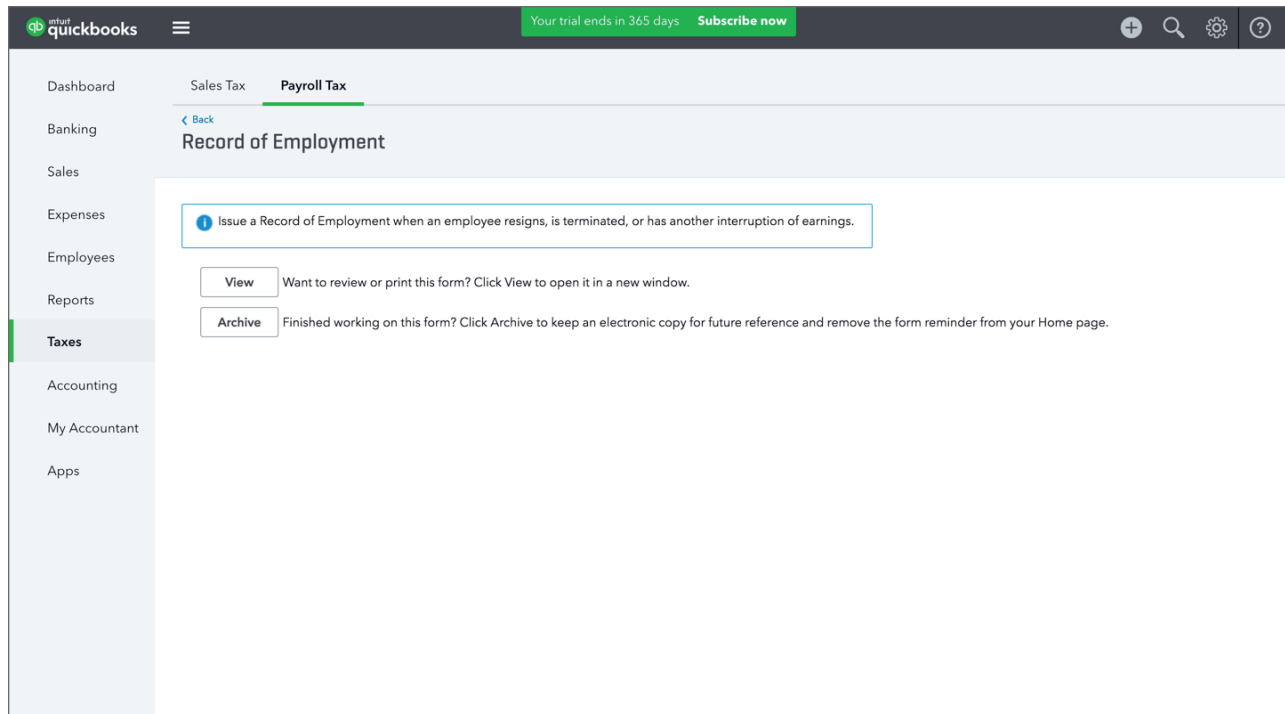
The screenshot shows a confirmation dialog box with the title 'Do you want to create Joel's Record of Employment?'. The text below reads: 'Make sure you send a Record of Employment (ROE) to Service Canada within 5 days of the interruption in earnings.' At the bottom, there are two buttons: 'No, I'll do it later' and 'Yes'.

6. From the **Payroll Tax Centre**, click **Employer Forms**.



7. Choose the employee name.

8. Click **ROE**.



9. Click **View**.

ViewPdfForm1 / 1

RECORD OF EMPLOYMENT (ROE)

1 SERIAL NO.
N/A*

2 SERIAL NO. OF ROE AMENDED OR REPLACED
N/A*

3 EMPLOYER'S PAYROLL REFERENCE NO.
848036968 RP 0001

4 EMPLOYER'S NAME AND ADDRESS
Green Tree Landscapes
5100 Spectrum Way
Mississauga ON

5 CRA BUSINESS NUMBER (BN)
848036968

6 PAY PERIOD TYPE
Semi-monthly

7 POSTAL CODE
L4W 4S2

8 SOCIAL INSURANCE NO.
425-154-705

9 EMPLOYEE'S NAME AND ADDRESS
Joel Thorensten
3967 Davis Drive
Welland, ON L3B 3Z6

10 FIRST DAY WORKED
D M Y
1 3 2017

11 LAST DAY FOR WHICH PAID
D M Y
15 4 2017

12 FINAL PAY PERIOD ENDING DATE
D M Y
30 4 2017

13 OCCUPATION
N/A*

14 EXPECTED DATE OF RECALL
N/A*

15A TOTAL INSURABLE HOURS
456.00

15B TOTAL INSURABLE EARNINGS
12625.00

15C THE FIRST ENTRY MUST RECORD THE INSURABLE EARNINGS FOR THE FINAL (MOST RECENT) INSURED PAY PERIOD. ENTER DETAILS BY PAY PERIOD

P.P.	INSURABLE EARNINGS	P.P.	INSURABLE EARNINGS	P.P.	INSURABLE EARNINGS
1	2825.00	2	5200.00	3	6900.00
4	6200.00	5		6	
7		8		9	
10		11		12	
13		14		15	
16		17		18	
19		20		21	
22		23		24	
25		26		27	
28		29		30	
31		32		33	
34		35		36	
37		38		39	
40		41		42	
43		44		45	
46		47		48	
49		50		51	
52		53			

15D ONLY COMPLETE IF PAYMENT OR BENEFITS (OTHER THAN REGULAR PAY) PAID IN OR IN ANTICIPATION OF THE FINAL PAY PERIOD OR PAYABLE AT A LATER DATE
FOR FURTHER INFORMATION, CONTACT
Matthew Peterson
647-555-0988

16 REASON FOR ISSUING THIS ROE
Shortage of work
A

17 COMMENTS
N/A*

18 ONLY COMPLETE IF PAID SICK/MATERNITY/PARENTAL LEAVE OR GROUP WAGE LOSS INDEMNITY PAYMENT (AFTER THE LAST DAY WORKED)

NOTE You cannot submit this information directly to the HRDC from QuickBooks Online. However, this information can be used to complete the ROE web form for submission.