

# Clarity - Year-End Checklist (2023 - 2024)

This article is intended to close the 2023 year, in preparation for 2024 payrolls.

**Note:** This article only applies to our on-premise Clarity customers who would like to update the software themselves. You can also request for a year-end service installation by completing and returning our year-end installation services form. If you are a hosted customer, please [review this article instead](#).

## Year-End Checklist

- Renewed your license for 2024
- Reviewed your accruals (*Employee Year-to-Date Report* and opening balances)
- Reviewed your accruals and deductions payroll categories if they reset at year-end
- Processed all payrolls for 2023
- Reviewed your Employee Information (name, social security number (SSN) / social insurance number (SIN), address, etc.)
- Reviewed your Company Information (name, address, RCT #/EIN, etc.)
- (Canada only) Review employer (EI) rate (Configuration > Company > Company Edit)
- Made a backup of your data (Utilities > Backup)
- Ensure that no other users are logged into Clarity at the time of your upgrade

## Year-End Update Process

1. Prior to logging into Clarity, click **"Database Options"**. Make a note of your *"Database Server Location"*. After installing the new version, you may be prompted to enter the location of your SQL server.
2. Exit out of your database options. Log into Clarity and into your company in the current payroll year ("2023").
3. Navigate to Help > License information. Make a note of your *"License File"* path. After installing the new version, you might be prompted for location of the license file or the license file path.
4. Close Clarity. Ensure that no other users (if any) are logged into Clarity.
5. In your favorite web browser, go to Paymate's customer portal at [customer.paymatesoftware.com](https://customer.paymatesoftware.com).
6. Log into your Paymate customer account. Your *"Client ID/Username"* is your six-digit customer number that begins with a "1".  
**Note:** If you do not remember your client ID/username, please refer to any old invoices from Paymate. You can find your client ID at the top of the invoice. If you do not remember your password, please click on 'Forgot Password?' to reset your password.
7. After logging into your Paymate customer account, please confirm that your contact information is accurate. Be sure to save if you made any changes!
8. Scroll down into the *Your Products* section. Click **"Download"** next to Clarity.
9. At the bottom of the page, under *Current Downloads*, click **"Download"** next to "2024 - Clarity (2024 tax tables)". The executable file (.exe) will be downloaded to your browser's default downloads folder.  
**Note:** If you're not sure where your browser's default downloads folder is, please check your browser settings or contact your IT person.
10. From your Windows settings, open the Add/Remove Programs or Uninstall a Program function in your Windows Control Panel.
11. Uninstall your current version of Clarity.
12. Open the folder where you downloaded the Clarity .exe file from step #9. Run this file by right-clicking and selecting **'Run as Administrator'**.
13. Follow the instructions in the download wizard to install the new version of Clarity with the 2024 tax tables.  
**Note:** If you have multiple computers that use Clarity, you must install the new version of Clarity with the 2024 tax tables on each computer. Repeat steps 5 through 13 to do this. The serial number and remaining licenses are only activated once.
14. In Paymate's customer portal, scroll up until you see a table with your serial key, expiry date, and maintenance year keys. Highlight the *"Maintenance Year"* key and right-click to copy the key.
15. Launch Paymate Clarity.
16. Navigate to Help > License Information > Activation Key.
17. Paste the maintenance year key that you copied into the field.
18. Click **"OK"**. Ensure that you see that your online activation was successful. Your Clarity is now renewed for 2024!

\*If you are experiencing any difficulty, please email us at [support@paymatesoftware.com](mailto:support@paymatesoftware.com) with your customer ID, a brief description of your issue, and any screenshots that may help us resolve your issue. We are open Mondays through Fridays, 9am to 5pm (EST).

## Closing Off Your Current Year

**WARNING (Canada only):** When you are closing the year, the additional CPP2/QPP2 payroll categories will be added into the system. Clarity will suggest payroll category codes to use for these new ones (e.g. 310 and 311), but if you are already using these payroll category codes for other categories, then you will receive an error message. Simply change the suggested codes for CPP2/QPP2 to codes that you have not yet used and continue the year-end close process as normal.

1. In Clarity, navigate to Year End > Close Year.
2. Read the details of each step of the process before clicking the **"Next"** button to proceed to the next step.  
**Note:** Not all steps may apply to you, and Clarity will automatically skip the steps that do not apply.
3. Review the *options* available and proceed to the next step by clicking **"Next"**.  
**Note:** We strongly suggest to create a backup prior to closing the year.
4. If you are not skipping the backup, select your *"Backup Folder"* location and enter your *"Backup Name"* in the fields. Click **"Backup"** to complete the backup.
5. Select the payroll categories that you'd like to reset to zero for next year, then proceed to the next step by clicking **"Next"**.  
**Note:** If your deduction and accrual payroll categories do not have *"Reset at Year End"* checked in their payroll category setup, they will not appear in this list. Their values will automatically carry over to the next year.
6. The values for your employee and employer maximums and minimums are automatically entered. However, you can overwrite this value for year-end if needed. Once this is complete, proceed to the next step by clicking **"Next"**.
7. Clarity will prompt you to type in *"CLOSE 2023"* (the year you are closing). Enter this into the required field.

8. Once you've typed in the prompted text, click the "**Process**" button and then "**OK**". The 2022 year is now closed and you can process payroll for 2023!

## **Review Your Payroll Groups and Pay Calendars**

1. Log into your company in Clarity with the payroll year "2024" (the new year).
2. Navigate to Setup > Payroll Settings > Payroll Groups.
3. Select a payroll group.
4. Review the pay calendar to ensure that your pay periods and pay dates are correct.
  - a. If your pay frequency is 'weekly', you may have 52 or 53 pay periods this year. Be sure to update the pay frequency if you have a different number of pay periods this year.
  - b. If your pay frequency is 'bi-weekly', you may have 26 or 27 pay periods this year. Be sure to update the pay frequency if you have a different number of pay periods this year.
5. Click the checkmark button to save your changes.
6. Return to your list of payroll groups and repeat steps 3 through 5 for each payroll group you have.

## **Review Your Employees' Taxation Information**

1. Navigate to Employees > Taxation Information.
2. Select an employee.
3. Navigate through each tab to update any additional tax credits for the employee.

**Note:** Additional tax credits will not carry forward from the previous year.
4. Click the checkmark button to save your changes.
5. Return to your list of employees and repeat steps 2 through 5 for each employee.

Watch our video here: