

Acclaim - FAQ: Tax Forms (T4, T4A, RL-1)

Tax season is here! Below you will find frequently-asked questions about Canadian tax forms - Your T4s, T4As, and RL-1s.

- How to Create, Edit, Print, and Submit T4s, T4As, and RL-1s: [Acclaim - Tax Forms](#)
- How to Amend T4s: [Acclaim - Amended T4](#)
- How to Amend RL-1s: [Acclaim - Amended RL-1](#)

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I. Pre-Requisites to Creating Tax Forms

What version number of Acclaim should I be using?

We always recommend having the latest version of Acclaim, no matter what you are doing. To confirm the version you are using, look at the bottom-left corner of Acclaim. You can verify if you are using the latest version by logging into our customer portal at <https://customer.paymatesoftware.com/> and see if there is a download available for a later version.

What is a business number? How can I verify what my business number is? Where can I edit my business number?

"RCT number", "RP number", "Pension number", "EI group", "EI number", and "business number" all mean the same thing. A typical business number is 15 characters long and looks like this: 123456789RP0001

If you want to confirm or change your business number, navigate to Setup > Company. Highlight the company and click "Edit". The taxation information on the bottom-right corner of the window is where your business number will be, along with the EI rate. You can add up to three business numbers and EI rates.

Company Edit [X]

Company Information

Name : Ontario Tealeaf Import Company
 Care Of :
 Address : 123 Orange Pekoe Avenue
 City : Teatown
 Province : Ontario
 Country : Canada
 Postal : L7L 7L7 [NotePad]

Contact Person Information

Surname : Putee
 Givenname : Arthur
 Initial : M
 Position : Controller
 Telephone # : (416)733-3333

Taxation Information

Company Pension Number :
 WCB Rate : 0.0000
 Apply Agricultural Calculation Method
 Payroll Category To Track Days Worked :

Quebec Identification and File Numbers:

NEQ:

EI Group Description	Taxation Number	EI Rate
Standard	123456789RS0000	1.40000
		0.00000
		0.00000

[Save] [Cancel] [Close] [Help]

How can I look at previous years' T4s?

You can log into previous years to look at previous T4s. When you're selecting your company (or you can go to Setup > Company), select the previous year and log in.

II. Creating T4s, T4As, and RL-1s

How many tax forms do I need to produce?

You must create tax forms for each employee, for each business number that your company has. For example, if you have two business numbers, you must create tax forms twice.

Do I need to create tax forms for each payroll group? Do I need to create tax forms for each business number?

You only need to create separate tax forms for each business number.

I have an employee who didn't have income throughout the year, but still made contributions that was tracked outside of Clarity. How do I create a T4 for this employee?

You can manually create a T4 for this employee, if the employee has already been added into Acclaim. To manually create a T4, navigate to Forms > T4 > Edit T4 Supplementaries and click the "+" button to add a T4. Enter the information for the correct employee and save it. If you need to create a manual T4, please do this at the end, after all your other T4s (automatic ones) are created and verified to be accurate. If you recreate the T4s at any time, the manual T4 will be erased. Be sure that your employee is active first!

Can I create T4s in Acclaim and also create additional T4s outside of Acclaim? Do I have to upload both to the CRA?

Acclaim will only generate T4s for employees who exist in Acclaim and have historical data. If you have employees that you pay outside of Acclaim, you must also create T4s for them manually. You can submit them under different submission numbers when you submit them.

I received an error message when trying to create my T4s: "There are unposted timesheets for the selected company. The amounts on unposted timesheets will not be included on the tax slips. Are you sure you want to continue?". What does this mean?

If you are receiving this message when creating your T4s, it means that you may not have posted your last pay period of the year yet, or that you may have open timesheets in the pay period. Navigate to Payroll > Process Payroll and verify if you have any timesheets. Delete the timesheets, or post the payroll (if you are paying it), and try to create your T4s again.

I am unable to create a tax form for an employee, even though I've already double-checked the tax form box assignments and have historical data for the employee. What's going on?

If you are unable to create a tax form for an employee, despite having historical data for them and they are active in the system, restore your current company data into a sandbox company in order to run an integrity check. Follow these steps:

1. In your existing company, navigate to Utilities > Backup Company Data.
2. Create a backup of your existing company. Make a note of where the backup is stored and what the backup file name is.
3. Navigate to Setup > Company.
4. Click "**Add**" to add a new company.
5. Enter "SANDBOX" as the company short name.
6. Enter all the required information.
7. When you return to the company selection screen, highlight "SANDBOX" and click "**Restore**".
8. Select the backup file that you created in step #2 above.
9. Log into "SANDBOX".
10. Navigate to Utilities > Integrity Check. Ensure that there are no issues with the integrity check.
11. Navigate to Reports > Employee History > Detail. Ensure that there is nothing out of the ordinary in this report.

If you are still unable to create a tax form for the employee, you can also manually create a T4 for the employee. However, if you would not like to do so, please contact our support team at support@paymatesoftware.com with your-six digit customer ID and a brief description of your problem. Please note that this may be a special case and may require our team to remotely connect to your computer to resolve the issue, which is a billable service.

III. Editing T4, T4A, and RL-1 Slips and Summaries

How can I adjust my tax forms?

While there are different ways to adjust the tax forms, we recommend making the adjustment to the employee's last historical pay record. After you've completed entering the adjustment, you must re-create the tax forms (if you already created them prior to the adjustment) and confirm that all reports are balancing (*Employee History Summary Journal, Employee Year-to-Date Journal, Audit Report*). You can also choose to directly edit the tax form, but please remember that you must also edit your summary to reflect your changes.

Is there a way that I can temporarily change the names of my employees to their legal names for the tax forms without changing their given names on the paystubs?

Definitely! You can manually change the employee's name to their legal name directly on their tax form. This will not affect the name that will appear on the paystubs.

Why are the amounts not going into the right boxes? Why are the amounts too low/high?

Each payroll category in Acclaim has a particular tax form assignment. These form assignments dictate exactly which box on your tax forms that the associated figure will appear in. To verify and/or change your form assignments, navigate to Setup > Payroll Categories. Select a payroll category and click "**Edit**" to go to the form assignments tab. You can change the form assignment here if required. Each payroll category can only be assigned to one box on any given tax form at a time. If you have already created your tax forms, you must re-create the tax form after you change a form assignment. Your tax forms will not automatically change.

Form Assignments :	
T4 :	(Box 14) Employment Income
RL-1 :	(Box A) Employment Income Before Deductions
T4A :	Not Reported

I have more than six additional boxes to add into my tax form, but Acclaim is only allowing six. How can I add additional boxes?

Each T4 for an employee only allows up to six additional boxes to be included. This means that if you have more than six, you will need to create a second T4 for the employee.

Why is Box 26 on my T4 blank? Why are the pensionable weeks zero?

In Acclaim, the system settings on your computer can sometimes change the date of birth field to indicate a different future date of birth. In this case, the employee's age will register as less than the minimum to be subjected to CPP. This results in Acclaim flagging the employee as non-pensionable, and thus Box 26 on their T4 will not populate and pensionable weeks will be set to zero. Please check the date of birth for the employee and change it to the correct one, then re-create your T4s to reflect your changes. This will not re-occur if you set your regional date and time settings on your computer to a four-digit year, such as "MM/dd/yyyy". Changing the year will not correct the records, however - they must be corrected individually.

What are 'Pensionable Weeks' in my T4s and how is this calculated?

To confirm your employee's number of pensionable weeks, scan through all posted timesheets/paycards for the employee, business number, and tax province. For each of these records, check if the pay period is pensionable based on age. If the pay period is pensionable, then Acclaim will figure out how many weeks are in the pay period. If the employee works in more than one payroll group throughout the year, the number of pensionable weeks may be inaccurate or set to "-1". If this is the case, you can manually edit this field in the employee's T4. Please note that the number of pensionable weeks will not be printed on your T4s - it is only used in the *Audit Report*.

How can I reconcile my tax forms?

Along with each supplementary/slip and summary, you can print an *Audit Report* to verify your figures. To balance your tax forms, please print the *Employee Year-to-Date Journal* and the *Employee History Summary Journal* (for the tax year). Both of these reports must match exactly and in turn, also match your summary and *Audit Report*. If they do not match, please verify:

1. The date range when generating the *Employee History Summary Journal* is correct. This means from January 1st to December 31st of the tax year.
2. The date parameters when generating the *Employee History Summary Journal* is correct. The date range should be based on the cheque or payment date, not the pay period end dates. If you are unsure, review which one you selected and generate a second report with the other selection to compare to the *Employee Year-to-Date Journal* and *Audit Report*.
3. T4 includes money that was paid in that year only. For example, if at the end of the year, your pay period end date was December 30, 2019 but the employee was paid on January 2, 2020, the amount of that cheque is to go on your 2020 tax forms, not your 2019 tax forms. It does not matter when the money was earned - it is when the money was paid that the taxes and other deductions are charged.

Why does my T4 summary say I have an invalid business number?

1. Navigate to Forms > T4 > Edit T4 Summary.
2. Verify that all information is correct under the 'ID Info' tab.
3. The business number should be a nine-digit number, followed by "RP" (uppercase), followed by four digits. It should look something like this: 123456789RP0001
4. The address, city/town, province/territory, country, and accounting contact information must also be entered. The telephone extension field under the contact information can be left blank, however.
5. The unincorporated employer - SIN of the proprietors and certification information are not required.
6. After ensuring that all fields are correct and accurate, save your changes and close.
7. Try and print your T4 summary again.

How can I edit the company information on my tax form summaries?

The company information that is displayed is taken directly from your tax form summary record. To change this information, navigate to your tax form summary and edit the information as required. When you print the summary, you may get an error message with missing fields. This means that you have not yet edited the tax form summary and you must do this before you can print it out.

IV. Printing and Emailing T4s, T4As, and RL-1s

I can see my tax forms when editing the supplementaries and summaries, but I cannot see them under the 'Print' option.

Please ensure that you've selected the correct business number under the 'Print' option and that you've entered the correct submission number. To check your submission number, navigate to the supplementaries and you can find the submission number in the last column.

Why are my insurable and pensionable earnings not printing on the supplementaries/slips?

When Acclaim creates your tax forms, it will set up the print checkbox according to the CRA printing rules. You can modify the print regulations manually by navigating to the tax form supplementary and selecting/deselecting the print checkbox to force Acclaim to print a particular item.

Why is my pension adjustment not printing on the supplementaries/slips?

Based on the CRA regulations, pension adjustment figures will be printed only when there is a pension number entered in the slips and that the adjustment amount is greater than zero. The CRA also stipulates that only the dollar amount should be printed and the cents portion will be excluded. If you have not entered a pension number in the slips, you must do so prior to printing them out. This can be done by navigating to Setup > Company, highlighting a company and clicking the "Edit" button. The pension number can be entered on the right side of the window.

The screenshot shows a 'Company Edit' window with the following sections:

- Company Information:** Name: Ontario Tealeaf Import Company, City: Teatown, Province: Ontario, Country: Canada, Postal: L7L 7L7.
- Contact Person Information:** Surname: Putee, Givenname: Arthur, Initial: M, Position: Controller, Telephone #: (416)733-3333.
- Taxation Information:** Company Pension Number: [redacted], WCB Rate: 0.0000, Apply Agricultural Calculation Method: [checkbox], Payroll Category To Track Days Worked: [dropdown].
- Quebec Identification and File Numbers:** Identification and File Numbers: [input], NEQ: [input].
- EI Group Description Table:**

EI Group Description	Taxation Number	EI Rate
Standard	123456789RS0000	1.40000
		0.00000
		0.00000

My business number is not printing on subsequent copies of the tax form - only the first copy.

As your business number is confidential, it is not printed on any of your employee or recipient copies of the tax forms.

Why is the company address not printing on my tax forms?

The CRA no longer requires your company address to be printed on your tax forms, as they will use your business number to identify and track your company.

I am getting an error message when trying to print out the employer portions of my tax forms.

When creating your tax forms, you must always edit both the supplementaries/slips and summaries in order to print out the employer portions of your tax forms. This will let Acclaim verify that you've reviewed both. If you don't do this, you will receive an error message when trying to print. To edit your supplementaries, review your employee data. To edit your summaries, verify and update your employer information.

Can I email tax forms to terminated employees?

Yes, you can! Please simply double-check the email address that you have on file for them and that they are allowed to receive their tax forms by email. You can then follow the rest of the process normally. Be sure that they have the password you've created for them so they can access their tax forms!

Why are some figures in my *Audit Report* appearing in red?

There are two possible reasons for red figures in the *Audit Report*.

1. Pension Adjustment (cents portion was dropped): When a pension adjustment is reported on a supplementary and there is a cents portion (fraction of a dollar, numbers after the decimal), the government stipulates that the cents portion should not be reported. Therefore, Acclaim will report the amount as a whole dollar in red in the 'Company Information' section, but will report the corrected amount in the 'Company Totals' section in black.

- Code 73 - Days Outside of Canada (fraction of a day was reported): When code 73 has a number of days reported and there is a fraction of a day reported (e.g. 5.3 days), Acclaim will round up to the next whole day (e.g. 5.3 days 6 days). Acclaim will report this figure in red in the 'Company Information' section, but will report the corrected figure in the 'Other Information' totals section.

My tax forms are not aligned properly when I try to print them out. How can I adjust the margins or the positioning of each box?

You can adjust the margins by a millimetres when you're printing out your tax forms. You may also want to take a look at your printer settings.

Can I use a dot matrix printer to print out my tax forms?

Yes, you can! However, please be aware that printing on this type of printer can be slow. We suggest that you make the dot matrix printer your default printer in your Windows settings and that you change the property from "Graphics/Dithering" to "Coarse". This will instruct the printer to print in a draft mode and can possibly be quicker.

How can I use the blank T4/T4A copies from the CRA website to print out my T4s and T4As?

CRA has made downloadable copies of the T4s and T4A tax forms available on their website. These forms can be printed out and be used to print out your T4s and T4As that you've generated in Acclaim. If you have trouble accessing the CRA website or accessing the forms on the CRA website, please contact the CRA directly. Please note that to follow the steps below, you will require Adobe Acrobat.

- In your web browser, open this website and choose your language: <https://www.canada.ca/en/revenue-agency.html>
- Click on 'Forms and Publications'.
- Click on 'View and Download Forms'.
- Search for "T4" (Statement of Remuneration Paid (slip)) or "T4A" (Statement of Pension, Retirement, Annuity, and Other Income).
- Click on either "T4" or "T4A".
- Click on the PDF version of the file (**NOT PDF fillable**). This will display the form in PDF format.
- Download the forms and open it in Adobe Acrobat.
- Navigate to File > Print. This will display your printer settings.
- Find the section 'Copies and Adjustments' and deselect the setting for 'Shrink oversized pages to paper size'. **Note: You must do this step! Otherwise, your forms will not be aligned correctly.**
- Select the number of copies you'd like to make.
- Click "OK". The forms will now print.
- You can load these printed forms into your printer and return to Acclaim to print out your T4s and T4As.

V. Submitting T4s, T4As, and RL-1s to the Government

Can I send my tax forms to the government by mail instead of electronically filing them?

Beginning January 2022, all employers with five or more (5+) employees must file their T4s and T4As electronically. Please ensure that you do not meet this criteria before mailing your T4s and T4As to the CRA.

I got an error message when trying to upload my XML file to the government website. What happened?

If your error message indicates that your eFiling was aborted, it is because either the T619 Transmittal Record (for T4s and T4As) or the RL-1 Transmittal Record (for RL-1s) was not created.

To create your transmittal records for T4s and T4As:

- Navigate to Forms > T619 Magnetic Media Transmittal.
- Select the correct data type. If you're unsure what data type to select, contact the CRA.
- Enter the appropriate transmitter number and transmitter type. If you're not sure what your transmitter number is, you can enter "MM999999".
- Complete the remaining transmitter information as required, such as contact name and address.
- Save your changes and close.

To create your transmittal records for RL-1s:

- Navigate to Forms > Relevé 1 > RL-1 Transmitter Record.
- Enter the appropriate transmitter record.
- Select the appropriate package type and transmitter type.
- Enter the remaining information as required, such as address.

How do I update an employee's address after uploading the tax forms?

If you've already submitted your T4s and find out that you need to make a change on them (address, name, etc.), then you must submit an amended version of the tax form under a different submission number. You can find out more on how to amend tax forms here:

- Amended T4s: <https://helpdesk.paymatesoftware.com/display/CUSTKB/Acclaim+-+Amended+T4>

- Amended RL-1s: [Acclaim - Amended RL-1](#)