

# Checklist of year-end activities

This checklist is your primary tool for processing your year-end with Dayforce. All tasks are sequentially ordered, and references to other topics are provided. Use this checklist to ensure that all necessary tasks are completed in order and on time.

## November 2024

	Action	Deadline
<input type="checkbox"/>	<p>When you receive your preliminary year-end reports package, follow the instructions for each report to ensure that the information it contains is correct as of the pay period ending date shown in the upper right-hand corner of each report.</p> <p>If you require new earning or deduction codes or adjustments to a current code, contact your Customer Support Team prior to your final payroll run of the year. Charges may apply.</p> <p>For each of the following items, verify that they are correct by checking the relevant reports, see <a href="#">Year-End reports</a>.</p>	At least 5 business days prior to your final input with a 2024 payment date.

	Action	Deadline
	<input type="checkbox"/>	<p>For each employee (including those on terminated status), verify:</p> <ul style="list-style-type: none"> <li>• Name and address</li> <li>• Social Insurance Number</li> <li>• CPP/QPP, EI and QPIP (Quebec Parental Insurance Plan) deficiencies</li> <li>• Province(s) of employment for 2024.</li> </ul> <p>Note: Any employee in a terminated status on your last pay of the year will be removed from your payroll.</p>
	<input type="checkbox"/>	<p>Review Earnings and Deduction/Benefit Matrix to ensure all codes are accurate and are directed to the appropriate box on the T4/RL-1.</p>
	<input type="checkbox"/>	<p>Verify Business Number(s) and/or Quebec Remittance Account Number(s)</p>

	Action	Deadline	
	<input type="checkbox"/>	<p>If any terminated employees are returning in 2025, change their status to <b>On Leave</b>. For a list of terminated employees, review the Terminated Employees Report found in your preliminary balancing report.</p> <p>All employees with a terminated status, as of the last pay of the year, are automatically removed from your payroll after the first pay of the year is processed.</p>	

	Action	Deadline	
	<input type="checkbox"/>	<p>If your payroll includes employees in any of the following provinces, verify:</p> <ul style="list-style-type: none"> <li>• Manitoba Health and Post Secondary Education Tax Number</li> <li>• Ontario Employer Health Tax Number</li> <li>• Newfoundland and Labrador Health and Post-Secondary Education Tax Number</li> <li>• Northwest Territories/Nunavut Payroll Tax Number</li> <li>• Nova Scotia WCB account number and rate</li> <li>• CNESST employer number and rate, Revenu Quebec Identification No.</li> </ul>	
	<input type="checkbox"/>	<p>If applicable verify:</p> <ul style="list-style-type: none"> <li>• Deferred Profit Sharing Plan Number(s)</li> <li>• Registered Pension Plan Number(s)</li> </ul>	
<input type="checkbox"/>	<p>Review and validate your 2025 payroll input schedule. If you have any changes, contact your Customer Support Team.</p>		

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	If you need to make year-end adjustments, a Year-End Adjustment Spreadsheet is available. To locate the spreadsheet, click <a href="#">here</a> . For instructions to complete the spreadsheet, <a href="#">click here</a> . Email your request to <a href="mailto:SBYearEnd@dayforce.com">SBYearEnd@dayforce.com</a> .	At least 5 business days prior to your final input with a 2024 payment date.
<input type="checkbox"/>	It is essential that Dayforce has your most up-to-date contact information on file. Ensure your contact list is current to allow for continued support from Dayforce and to maintain the confidentiality of your payroll. We suggest removing any old contacts, and ensuring at least one backup user is available. To modify your contact listing in Powerpay, <a href="#">click here</a> for instructions.	

**December 2024 and last pay of the year**

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	Employer-offered dental benefits - Enter the dental code to identify whether your employee or their family members were eligible on December 31 to access any dental care insurance you offered. (mandatory)	With your last payroll dated in 2024

	Action	Deadline
<input type="checkbox"/>	<p>Verify the remittance amounts made by Dayforce, on your behalf, during the year by comparing them with the reports from the appropriate government agency (For example: PD7A for Federal and TPZ-1015.R. 14.#-V for Quebec).</p> <div style="border: 1px solid #add8e6; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> Anything not included in your regular payroll processing in 2024 requires you to make the remittance payment to CRA/Revenu Quebec directly.</p> </div>	
<input type="checkbox"/>	<p>Notify Dayforce, by email, of any changes to your company's Receiver General remittance frequency, and/or WCB assessment rate effective for 2025 if applicable.</p> <p>Email a copy of the notice received from CRA or RQ to one of the following centres:</p> <ul style="list-style-type: none"> <li>• All provinces except Quebec: Email: <a href="mailto:Powerpay.Service@dayforce.com">Powerpay.Service@dayforce.com</a></li> <li>• Within Quebec only: Email: <a href="mailto:servicepowerpayquebec@dayforce.com">servicepowerpayquebec@dayforce.com</a></li> </ul> <p>Your Customer Support Team will validate if Dayforce was notified independently for a frequency change, review your setup and update your setup, if required.</p>	<p>At least 5 business days prior to processing your first payroll of 2025</p>

	Action	Deadline
<input type="checkbox"/>	<p>Notify Dayforce, by email, of any changes to your company's EI/QPIP rates effective for 2025 if they <b>will not</b> automatically update to the new prescribed rates. Review the rate on the <a href="#">EI rate table</a> or <a href="#">QPIP rate table</a>.</p> <p>Email a copy of the notice received from CRA or RQ to one of the following centres:</p> <ul style="list-style-type: none"> <li>• All provinces except Quebec: Email: <a href="mailto:Powerpay.Service@dayforce.com">Powerpay.Service@dayforce.com</a></li> <li>• Within Quebec only: Email: <a href="mailto:servicepowerpayquebec@dayforce.com">servicepowerpayquebec@dayforce.com</a></li> </ul>	At least 5 business days prior to processing your first payroll of 2025
<input type="checkbox"/>	<p><b>If you have a company pension plan</b> and your payroll includes a YTD maximum amount for 2024, the maximum must be re-entered in the new year. Email the new maximum to your Customer Support Team.</p>	
<input type="checkbox"/>	<p>Employees in terminated status will be removed from Powerpay when your first pay in 2025 is processed. If you would like them to remain in Powerpay, update their status to On Leave on or before your last pay dated in 2024.</p>	
<input type="checkbox"/>	<p>Review any amounts for employees who have CRA/Revenu Quebec letters (for reductions in taxable remuneration) and/or K3 or K3P amounts for federal/provincial tax credits as they are re-set to zero on the first pay of the new year. If the amount applies to multiple years, the figure must be re-entered on the first pay of the new year. Contact your Customer Support Team for assistance if you require a special report to review these figures. (Service fees may apply)</p>	

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	<p>All commissioned employees should complete a TD1X form for 2025 prior to the first pay of the new year.</p> <p>Ensure that any exemption amounts for commissioned employees are re-entered on the first pay of the new year if these employees have completed a TD1X form.</p>	At least 5 business days prior to processing your first payroll of 2025
<input type="checkbox"/>	<p>Your tax forms will automatically produce with your last payroll dated in 2024 unless you change the Intent page to <b>No</b>.</p> <hr/> <p>Note: All employees in a terminated status on the last pay of the year will be removed from your payroll after the first pay of the year has been processed. If any employees will be returning next year, move them to a Leave status.</p> <hr/>	

**First pay of the year 2025**

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	<p>Change terminated employees to <b>On Leave</b> to prevent them from deleting off the payroll after the first run of the year. For a list of terminated employees, review the Terminated Employees Report found in your preliminary balancing report.</p>	First pay period in 2025
<input type="checkbox"/>	<p>Ensure that tax exemption status codes and claim amounts for employees that have other than the basic exemptions are updated with your first payroll of the new year.</p>	First pay period in 2025

	Action	Deadline
<input type="checkbox"/>	<p>If you have employees in Quebec, with your first payroll run in 2025 you will need to enter your total Worldwide gross payroll amount (including taxable benefits) for 2024, in order to accurately calculate the Quebec Health Services Fund in the new year. The upper total payroll threshold for QHSF of \$7.5 million is expected to be indexed in 2025.</p>	First pay period in 2025
<input type="checkbox"/>	<p>If you have employees in Quebec, who will turn 73 in the new year, their QPP deduction will stop automatically with pay period one of the new year but you must also change their CPP/QPP status code to <b>Exempt from CPP/QPP</b> on the <b>Employee Profile</b> page. From the <b>Payroll</b> menu, select <b>Hire/Profile &gt; Employee Profile.Compensation</b> tab. From the <b>People</b> menu, select <b>People List &gt; Compensation</b>.</p>	First pay period in 2025
<input type="checkbox"/>	<p>On the first pay of the year do <b>not</b> select an Employee Status Change of Terminated. Instead, select an Employee Status Change of Leave.</p> <p>If you select Terminated, the employee is deleted from the payroll after the first run of the year processes.</p>	First pay period in 2025
<input type="checkbox"/>	<p>Tax override calculations for employees with CRA/Revenu Quebec letters (for reductions in taxable remuneration) and/or labour-sponsored tax credits for 2024 will be automatically reset to zero with the first payroll of the new year.</p> <p>Enter new amounts for 2025 with your first payroll of the new year on the <b>Statutory Deductions</b> page. From the <b>Payroll</b> menu, select <b>Regular Payment &gt; Statutory Deductions</b>.</p>	First pay period in 2025

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	If you use <b>Time Off Requests in Powerpay</b> , review and update your 2025 statutory holiday calendar to ensure that the observed dates are appropriate for your organization.	First pay period in 2025
<input type="checkbox"/>	If you use <b>Time Off Requests in Powerpay</b> , review and update your 2025 custom holidays.	First pay period in 2025
<input type="checkbox"/>	If you require an ROE before your first pay of the year has processed, create it on an extra run. ROE runs are not permitted as the first run of the year.	

**January – February 2025**

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	Review the Powerpay Info Centre and Year-End tab for communication of Dayforce’s important dates and deadlines detailing when adjustments must be received and tax forms must be processed. See <a href="#">Missed tax form deadlines</a> , for more information. <b>If you are unable to meet any deadline, contact your Customer Support Team</b> for advice on how to proceed.	
<input type="checkbox"/>	If you have adjustments, review the information provided on the <b>After the First Pay of the New Year</b> page. From the <b>Year End</b> menu, select <b>Year-End Adjustment Process &gt; After the First Pay of the New Year</b> .	After your first pay dated in January
<input type="checkbox"/>	If you submitted adjustments to be processed for your tax forms after your last pay of 2024, you are responsible for remitting any statutory deductions created by the adjustments to the appropriate agencies by the specified deadline imposed by those agencies.	

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	<p><b>If pension adjustments (PAs) are being calculated by an actuary</b>, ensure that they have been provided and verified to reports prior to processing your tax forms. See <a href="#">Calculate pension adjustments (PA)</a>.</p>	After your first pay dated in January
<input type="checkbox"/>	<p>If you have reviewed your Year-End Balancing Reports and are ready to request your tax forms, call our Interactive Voice Response service (IVR) at 1-800-667-7867 or see <a href="#">Request tax forms after the last pay of the year</a>. The deadline to request your tax forms is February 21.</p>	February 21
<input type="checkbox"/>	<p><b>If you have employees in Quebec</b>, you are responsible for submitting the RL-1 Summary to Revenu Quebec, see <a href="#">Tax form deadlines</a>.</p>	February 28
<input type="checkbox"/>	<p><b>If you have employees in Quebec</b>, you are responsible for filing your CNT levy and WSDRF return with Revenu Quebec. Please refer to the RL-1 Summary (RLZ-1.S-V).</p>	February 28
<input type="checkbox"/>	<p><b>If you have employees working in provinces other than Quebec or Nova Scotia</b>, you are responsible for remitting your WCB premiums (if applicable) for 2024. Your provincial WCB should communicate to you the rates at which to calculate your premiums owing and your annual return filing obligations.</p>	Please check with your WCB board for deadlines

**March 2025**

<input checked="" type="checkbox"/>	Action	Deadline
<input type="checkbox"/>	<p><b>If you have employees in Ontario</b>, you are responsible for filing an annual Ontario EHT Return, to reconcile the annual tax due against the installments made in 2024. This is the employer’s responsibility, even if Dayforce remits EHT on your behalf. See <a href="#">Ontario employer health tax (EHT)</a>.</p>	March 14
<input type="checkbox"/>	<p><b>If you have employees in Quebec</b>, you are responsible for completing and filing your annual Quebec CNESST report to reconcile the annual CSST premiums due against the installments made in 2024.</p>	March 14
<input type="checkbox"/>	<p><b>If you have employees in British Columbia</b>, you are responsible for completing and filing your BC EHT annual return by March 31, 2025 and for making all tax payments.</p>	March 31
<input type="checkbox"/>	<p><b>If you have employees in Ontario</b>, you are responsible for filing your Ontario WSIB reports and remittances (if applicable) for 2024. The WSIB should communicate to you the rates at which to calculate your premiums owing.</p>	March 31
<input type="checkbox"/>	<p><b>If you have employees in Manitoba</b> and the Manitoba gross earnings for 2024 are \$2,250,000 or greater, you are required to file an annual report that includes a copy of your information summaries (i.e. T4, T4A) requested from CRA. See <a href="#">Manitoba health and post-secondary education tax</a>.</p>	March 31

☑	Action	Deadline
☐	<p><b>If you have employees in Newfoundland and Labrador</b>, and your Newfoundland remuneration is greater than the \$2 million threshold, you are responsible for submitting an Annual Declaration Return form to the Department of Finance. See <a href="#">Newfoundland and Labrador health and post-secondary education tax (HAPSET)</a></p>	March 31