Setup checklist

An overview of getting started with Wagepoint.

Determining needs:

When choosing payroll software, you want to find the one that's the right fit.
To ensure you're choosing the right payroll software, it helps be aware of the following:

- Your industry and industry-specific needs.
- Number of employees and contractors.
- Your payroll knowledge and experience.
- Who will be administering and approving payroll.
- Your primary accounting software.
- Required functions and add-ons.
- If you're changing software, identify the key reasons for the change.

Getting set up:

The key to setup is being prepared by having all the information you need.
A good rule of thumb is to allow for up to two weeks to complete the process.
Need an account? Sign up. If you've already signed up, log in here.

Business information:

- [ ] CRA business and payroll registration notice

Provided when the business registers itself.
(If you don't have this, you can request it from the CRA.)

- Legal business name and address
- CRA payroll account number
- Remittance frequency
    - Non-accelerated – monthly
    - Threshold 1 – bi-weekly
    - Threshold 2 – weekly

- [ ] RQ payroll account number

- If your business is based in Québec or you pay employees in the province. (More info.)
- RQ Employer HSF Rate.

Business banking information

- Either a voided cheque or an official statement with bank, transit and account numbers.
- Authorized bank contact (signing authority).

Provincial/territorial tax information

In addition to your federal tax ID, you may also need specific provincial and territorial ID numbers:

- Alberta
  - Workers' Compensation (WCB)
- British Columbia
  - Workers' Compensation (WorkSafeBC)
  - Employer Health Tax (EHT)
- Manitoba
  - Workers' Compensation (WCB)
  - The Health and Post Secondary Education Tax Levy (HE Levy)
- New Brunswick
  - Workers' Compensation (WorkSafeNB)
- Newfoundland and Labrador
  - Workers' Compensation (WorkPlaceNL)
  - Health and Post Secondary Education Tax
- Nova Scotia
  - Workers' Compensation (WCB)
- Ontario
  - Workers' Compensation (WSIB)
  - Employer Health Tax (EHT)
- Prince Edward Island
  - Workers' Compensation (WCB)
- Québec
  - Workers' Compensation (CNESST)
  - Québec Parental Insurance Plan (QPIP)
  - Health Services Fund (HSF)
  - Contribution Related to Labour Standards
  - Workforce Skills Development and Recognition Fund (WSDRF)
- Saskatchewan
  - Workers' Compensation (WCB)
- Northwest Territories
  - Workers' Compensation (WSCC)
- Nunavut
  - Workers' Compensation (WSCC)
- Yukon
  - Workers' Compensation (WCB)

Deduction types

The following simply need to be selected from the existing list in Wagepoint:
(Source deductions, like CPP and EI, are automatically calculated when you process payroll and don't need to be set up as a type of deduction. Income tax is also established based on the information in each employee's TD1.)

- Medical/health
- Critical illness
- Dental
- Vision
- STD
- LTD
- Life ins
- Supplemental life ins
- Dependent life ins
- AD&D
- RRSP
- RRSP (LCF – tax credit)
- Profit sharing
- Pension
- Taxable benefit
- Taxable benefit non-ins
- Garnishments
- Union fringe
- Union special
- Union dues
- Voluntary
- Other
- General
- Charitable donation

Income types
The following have already been created and you simply need to select them:

- Bonus – discretionary
- Bonus – work-related
- Car allowance
- Contractor
- Commission
- Double overtime
- Expense allowance
- Expense reimbursement
- Stat holiday
- Time worked on a stat holiday
- Pay in lieu of notice
- Miscellaneous pay
- Other pay
- Overtime
- Regular pay
- Retro pay
- RRSP earned
- Sick pay
- Severance
- Controlled tips
- Direct tips
- Taxable benefit
- Vacation pay

Custom deduction and income types
Please note that you'll need to allow an average of 2 to 3 business days to request custom incomes and deductions. You will also need to know if these items are taxable.

Pay groups
Group employees based on pay frequency, location, classification, etc. Wagepoint automatically creates a pay group based on the payroll frequency you selected during setup, but you can add more pay groups as needed.

- The common denominator for each group is payroll frequency as this impacts the income and deduction calculations.
- Confirm locations, departments and job titles if they are key to organizing and reporting information.

Statutory holidays
Wagepoint provides a list and you simply need to select the applicable dates. The list below has the most common holidays. Make sure you know the statutory holidays for each province or territory where you pay employees.

- New Year's
- Family Day
- Good Friday
- Victoria Day
- Canada Day
- August Civic Holiday
- Labour Day
- Thanksgiving
- Christmas Day
- Boxing Day

Employee information
For each employee, you'll need:

- First and last name
- Birthdate
- Hire date
- SIN
- Address
- TD1 for tax info
- Vacation and PTO amounts
- Banking info — voided cheque or direct deposit form with transit, institution and account numbers.
- Email address

Contractor information
For each contractor, you'll need:

- First and last name
- Birthdate
- Hire date
- Contractor BN (SIN if a sole proprietor)
- Address
- Banking info — voided cheque or direct deposit form with transit, institution and account numbers.

ROE SAT authorization

In order to submit your ROE to Service Canada from within Wagepoint, you must first sign the ROE SAT Registration Addendum to grant authorization. This is done through an e-sign form in the app.

Year-to-date amounts:

These are crucial for ensuring that the payroll is accurate right from the start. If you have been paying employees either manually or using another software, you will need to provide the year-to-date amounts for:

- Gross earnings
- CPP — employee and employer
- EI — employer and employee
- Income tax — federal and provincial
- Deductions
- Incomes
- Vacation

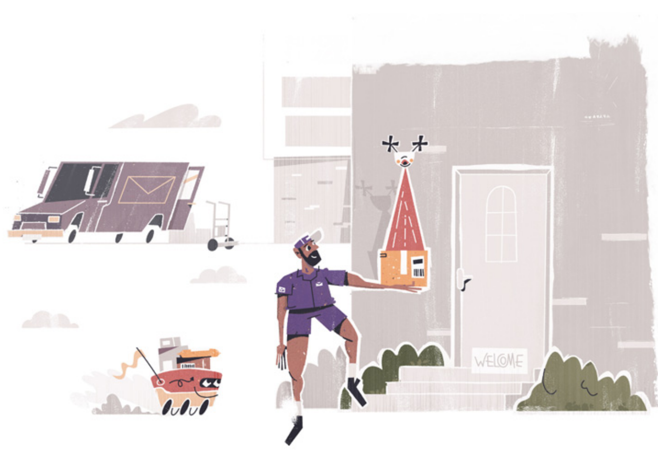
Changing payroll software:

- If you've been using other software, you'll need to:
  - Notify your current provider of your intent to change and confirm a timeline. (A period of up to 30 days may apply.)
  - Request a payroll register report with your year-to-date amounts and ROEs with reason code K (other) and a note stating "switching payroll providers."
- If you've been processing payroll manually, you'll have to put together your own report and generate your own ROEs.
- The only time you don't need year-to-date amounts is when you're starting with the first payroll of the year or if it's the first payroll you've ever run.

Make payroll even easier...

If you need specific scheduling and time-tracking tools, check out our latest time-keeping and paid time-off tools, Track and Luna, along with other popular and practical integrations.

Once your setup is complete, you'll be able to access these add-ons from within Wagepoint.



Getting help.

There are 3 main ways to get the help you need:

1. **Submit a ticket from within Wagepoint**
   Click the "Got a question?" widget box to submit a ticket or access our comprehensive knowledge base.
   Recommended for a speedier response.

2. **Call us at 1-877-757-2272**
   We're available from 9 AM to 9 PM ET daily, except on public holidays. If our lines are busy or it's after-hours, leave a message and we'll call you back.

3. **Email support@wagepoint.com**
   We'll create a ticket for you and get back to you with an answer as soon as possible.