

deluxe[®] CANADA

› Payroll

Approving Tax Forms

2022

Purpose

This guide will help you navigate the Tax Form Authorization process. This is a required step if you wish to use Deluxe Payroll tax form service.

Important Notes:

Deluxe Payroll does not automatically submit/print company tax forms. You must first select your service options and submission preferences in the Tax Form Authorization process.

Also, the government of Canada requires that employees give their consent prior to receiving tax forms by email. If you choose this option, make sure to collect consent forms from your employees. Click [here](#) to learn more about tax form consent.

Disclaimer

The Tax Form Authorization process must be completed prior to February 21st every year to ensure that we are able to meet government deadlines on your behalf. Performing this step after this date may lead to delays and penalties from the government.

Accessing the Tax Form Authorization (Approval) Process

To access the Tax Form Authorization screens, you can click on the orange button in your Year-End Progress bar titled **Review/Edit & Authorize Tax Forms**.



You will then be taken to the **Tax Form Options** screen. From there, you can click on the orange **Authorize Tax Forms** button in the progress bar.



Step 1 - Start

The start screen will provide you with a summary of the tax forms including:

- Taxation year
- Form type (T4/T4A/T5018/RL-1)
- Business number and RP/RS extension
- Number of slips per tax form type

You can also view these helpful resources:

- Tutorial video
- Help Site
- A link to download the guide

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Approving/Ordering your tax forms

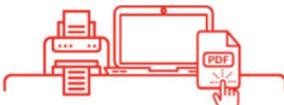
Follow steps 1 through 6 to approve/order your tax forms

- View Reports

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Welcome to the Tax Form Approval menu



In this process, you can:

- approve your tax forms
- choose the delivery method (self-print, email, printed/shipped)
- enter/update your shipping address

Taxation Year		2020	Not Approved
Form	Business Number	Number of Slips	
RL1	111111118 RS 0001	2	
T4	888888888 RP 0001	10	
T4	888888888 RP 0002	5	
T4A	888888888 RP 0001	1	
T4A	888888888 RP 0002	0	
T5018		1	

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Start

If you agree with the Business Numbers and Number of Slips listed on the Start screen, you can click on **Start**.

Step 2 - Filing

On the filing screen, you can review the **Filing Information** settings for your business.

Approving/Ordering your tax forms
Follow steps 1 through 6 to approve/order your tax forms

- View Reports

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Taxation Year: 2020 Not Approved

Filing Information

Filing Method: Deluxe files directly with gov [Learn more about this feature](#)

Tax Form Contact First Name: JOHN

Surname: DOE

Phone Number: (519) 621-3570

Please review the tax form filing information provided above, make any necessary changes and click the **Save and Continue** button to save. [Learn how you can update this](#)

Name: DELUXE PAYROLL

Address 1: 420 SHELDON DRIVE

Address 2: FIRST FLOOR

City,Prov/State: CAMBRIDGE, ON

PO Code/Zip: N1T2H9

Save and Previous **Save and Continue**

Filing Method:

This field allows you to choose if you would like Deluxe to submit/file your tax form data to the government. The available options include:

Deluxe files directly with government.

This is the default setting for most payroll accounts. With this option, Deluxe will transmit your tax form data directly to the CRA (and Revenu Quebec if you have RL-1 slips). With this option, your CRA tax form summaries (T4 summary, T4A summary, and T5018 summary) will also be automatically generated and submitted on your behalf.

Disclaimer

The RL-1 Summary will not be submitted to Revenu Quebec by Deluxe. You must complete and submit this summary manually or by using our "Create RL-1 Summary" option. If you choose to use our "Create RL-1 Summary" option, you must still print, sign, and mail the PDF that is created by the system to Revenu Quebec. This form requires a signature (and a cheque addressed to Revenu Quebec, depending on your company's status) and therefore cannot be submitted directly by Deluxe.

Deluxe does NOT file:

This means that you are responsible for paper filing your tax forms with the Canada Revenue Agency and Revenu Quebec (if applicable). Deluxe Payroll will not file your tax forms with the government if you choose this option. Therefore, you must submit/file all tax forms directly to the government by mail, along with all relevant tax form summaries. You will, however, still receive copies to share with your employees.

Disclaimer

Only choose this option if you are certain that you do not want Deluxe to submit your tax forms to the government on your behalf. Mailing your information to the government late may lead to significant government penalties.

Tax Form Contact Information:

In this area, you can update the name and phone number of the individual responsible for reviewing/receiving tax forms for your business. If we encounter any issues during the tax form process, this is the person that we will contact.

Legal Company Address:

This is the legal company address that will print on all your tax forms. It is very important that this address exactly matches the address that the CRA and/or Revenu Quebec have on file for your business.

What can I do if I need to change this?

If you need to update your legal address, exit the Tax Form Approval process, and make your way back to the main menu. From there, select Company Profile and then select Maintain Addresses.

Step 3 – Service Type

Approving/Ordering your tax forms

Follow steps 1 through 6 to approve/order your tax forms

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TAX FORM DELIVERY OPTIONS

Make a selection from the delivery options below.

PAPERLESS



OPTION 1

Self-print

base run fee + per employee fee

Download/print PDF copies of all tax forms and summaries (excluding RL-1 Summary)

Send tax forms to employees by e-mail

I want Self-print



OPTION 2

E-mail & self-print

base run fee + per employee fee

Download/print PDF copies of all tax forms and summaries (excluding RL-1 Summary)

Send tax forms to employees by e-mail

Go to e-mail options



OPTION 3

E-mail & printed forms

base run fee + per employee fee
85¢ surcharge per printed form
\$29 s/h

Download/print PDF copies of all tax forms and summaries (excluding RL-1 Summary)

Send tax forms to employees by e-mail

Deluxe prints/ships employee forms for anyone not signed up for e-mail

Go to e-mail options



OPTION 4

E-mail & complete package

base run fee + per employee fee
85¢ surcharge per printed form
\$45 report fee + \$29 s/h

Download/print PDF copies of all tax forms and summaries (excluding RL-1 Summary)

Send tax forms to employees by e-mail

Deluxe prints/ships employee forms for anyone not signed up for e-mail

Deluxe prints/ships employer forms and CRA summaries

Go to e-mail options

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In this step, you must choose from the following four (4) available tax form delivery services.

- Option 1: **Self-print**
- Option 2: **E-mail & self-print**
- Option 3: **E-mail & printed forms**
- Option 4: **E-mail & complete package**

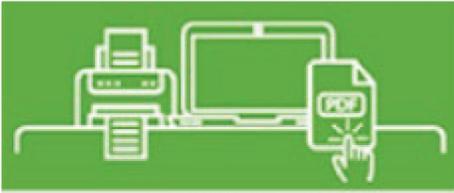
If you choose an option that includes e-mails (i.e., options 2, 3 or 4), you will be taken to Step 4 (E-mail Options) to customize who will receive e-mails. If you choose Option 1: Self-print, you will skip to Step 6 (Finish).

Disclaimer

If you have RL-1 slips, you will not automatically receive an RL-1 Summary during this step. You will need to either manually complete an RL-1 Summary or use our “Create RL-1 Summary” option after this process is completed.

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PAPERLESS OPTIONS:



OPTION 1

Self-print

Choosing this option will give you PDF versions of your employees' tax forms that you can **download** and **print** for your employees. You will also receive PDF versions of your employer forms and CRA summaries. When choosing self-print, Deluxe will not provide tax forms directly to your employees. You will need to **print** and **distribute** them to your employees using the downloaded PDF versions. To download tax forms, select **View Reports**, then select **Download Tax Forms** and select the appropriate tax **year**. For more information, refer to the instructions in **Step 6** below.



OPTION 2

E-mail & self-print

Choosing this option will give you PDF versions of your employees' tax forms that you can download and print. You will also receive PDF versions of your employer forms and CRA summaries. You will then be taken to **Step 4** (E-mail Options).

Important Note:

When choosing this option, you will need to download and print tax forms for any employee not receiving an e-mailed tax form. You will be able to explore e-mail options in Step 4.

DELUXE PRINTING OPTIONS:

OPTION 3

**E-mail &
printed forms**

Choosing this option will give you PDF versions of your employees' tax forms. You will also receive PDF versions of your employer forms and CRA summaries. Deluxe will print and ship self-sealed tax forms for any employee not receiving an e-mailed tax form. This package will be shipped to your shipping address (see Step 5). You will then be taken to Step 4 (E-mail options) to display which of your employees will receive e-mailed tax forms.



OPTION 4

**E-mail &
complete
package**

Choosing this option will give you PDF versions of your employees' tax forms. You will receive Deluxe-printed versions of your employer forms and CRA summaries, as well as PDF versions. Deluxe will print and ship self-sealed tax forms for any employee not receiving an e-mailed tax form and package them with your printed employer documents. This package will be shipped to your shipping address (see Step 5). You will then be taken to Step 4 (E-mail options) to display which of your employees will receive e-mailed tax forms.

What if I don't want e-mailed tax forms at all?

You will be able to opt out of the e-mail service in Step 4. For more information on this, consult Step 4 in this guide.

What is the difference between Option 3 and Option 4?

Although both options include printed, self-sealed forms for any employee not receiving an e-mailed tax form, only Option 4 includes printed employer copies and CRA summaries. Users who choose Option 3 would need to use the downloaded PDF versions of the employer forms and CRA summaries.

Step 4 - E-mail Options

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Approving/Ordering your tax forms

Follow steps 1 through 6 to approve/order your tax forms

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TAX FORM DELIVERY OPTIONS

Make a selection from the delivery options below.



No e-mails

I do not want any employees to receive tax forms by e-mail

If you have turned on e-mail tax forms in your employees' profiles, you must remove it first

No E-mails



E-mail only employees with consent in profile

I have turned on e-mail tax forms in the profiles of the employees that gave me written consent

You must have at least one employee set up for e-mail tax forms to use this option

E-mail only employees with consent in profile



E-mail everyone

I have written consent from all of my employees

Employees who currently receive e-stubs will receive their tax form(s) by e-mail

E-mail everyone

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If you have chosen a **Service Type** that includes e-mailed tax forms, you will be taken to this screen. Here, you can select from three (3) possible email options:

- No e-mails
- E-mail only employees with consent in profile
- E-mail everyone

If you selected **Self-print** in Step 3, you would skip this step.

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EMAIL OPTIONS:



**No
e-mails**

If you chose Self-print in Step 3, you will need to print and distribute tax forms to ALL employees. This will be indicated on the **Electronically Delivered Tax Forms** report (TXELERPT) available in your **View Reports** under Report Group **YREND** after you complete the Tax Form Authorization process.

If you chose **E-mail and self-print** in Step 3, you would need to print and distribute tax forms to ALL employees. This is indicated as **Self-print** in the **Delivery Type** column (see example below). Deluxe will not send any e-mails to your employees.

Note that you can download this list in either Excel by clicking on **Export to Excel** or PDF by clicking on **Download list of e-mail recipients**.

Approving/Ordering your tax forms

Follow steps 1 through 6 to approve/order your tax forms

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EMAIL OPTIONS

You have selected to use our email delivery service for some/all of your employees. Please review the list below to see which employees will receive an email. ?

IMPORTANT

Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	Self-print	
200	2	TURQUOISE, TERRY	Self-print	
100	33	AQUA, ALBERT	Self-print	
100	34	BROWN, BETTY	Self-print	
200	35	COMMISSION, CARL	Self-print	
	36	HOURLY, HANK	Self-print	hh@somewhere.com
	37	SALARY, SALLY	Self-print	
	38	SMITH, TIM	Self-print	
100	39	SMITH, JIM	Self-print	
200	40	DOE, JOHN	Self-print	

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If you chose **E-mail & Printed Forms** or **E-mail & Complete Package** in Step 3, Deluxe will print and ship you the employee tax forms that have "DLX printed" in the **Delivery Type** column (see example below).

Approving/Ordering your tax forms

Follow steps 1 through 6 to approve/order your tax forms

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EMAIL OPTIONS

You have selected to use our email delivery service for some/all of your employees. Please review the list below to see which employees will receive an email. ?

IMPORTANT

Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	DLX printed	
200	2	TURQUOISE, TERRY	DLX printed	
100	33	AQUA, ALBERT	DLX printed	
100	34	BROWN, BETTY	DLX printed	
200	35	COMMISSION, CARL	DLX printed	
	36	HOURLY, HANK	DLX printed	hh@somewhere.com
	37	SALARY, SALLY	DLX printed	
	38	SMITH, TIM	DLX printed	
100	39	SMITH, JIM	DLX printed	
200	40	DOE, JOHN	DLX printed	

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E-mail only employees with consent in profile

You will only be able to choose this option if you have activated the Tax Form Consent flag in one or more employee profiles. To activate this, navigate to the **Calculation** tab of the employee profile. Then select the **magnifying glass**, select **Electronic Tax Forms Consent**, switch the Yes/No field to Yes and press or click **Enter**.

If you chose **E-mail & Self-print** in Step 3, you will need to print and distribute tax forms to the employees that have **"Self-print"** indicated in the **Delivery Type** column. Deluxe will e-mail

tax forms to the employees that have a **Delivery Type** set to “E-mail”. In the example below, Deluxe would e-mail tax forms to employee #36.

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Follow steps 1 through 6 to approve/order your tax forms

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EMAIL OPTIONS

You have selected to use our email delivery service for some/all of your employees. Please review the list below to see which employees will receive an email. ?

IMPORTANT

Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	Self-print	
200	2	TURQUOISE, TERRY	Self-print	
100	33	AQUA, ALBERT	Self-print	
100	34	BROWN, BETTY	Self-print	
200	35	COMMISSION, CARL	Self-print	
	36	HOURLY, HANK	Email	hh@somewhere.com
	37	SALARY, SALLY	Self-print	
	38	SMITH, TIM	Self-print	
100	39	SMITH, JIM	Self-print	
200	40	DOE, JOHN	Self-print	

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If you chose **E-mail & Printed Forms** or **E-mail & Complete Package** in Step 3, Deluxe will print and ship you the tax forms that have “DLX printed” indicate in the **Delivery Type** column. Deluxe will also e-mail tax forms to the employees that have a **Delivery Type** set to “E-mail”. In the example below, Deluxe would e-mail tax forms to employee #36.

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Follow steps 1 through 6 to approve/order your tax forms

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EMAIL OPTIONS

You have selected to use our email delivery service for some/all of your employees. Please review the list below to see which employees will receive an email. ?

IMPORTANT

Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	DLX printed	
200	2	TURQUOISE, TERRY	DLX printed	
100	33	AQUA, ALBERT	DLX printed	
100	34	BROWN, BETTY	DLX printed	
200	35	COMMISSION, CARL	DLX printed	
	36	HOURLY, HANK	Email	hh@somewhere.com
	37	SALARY, SALLY	DLX printed	
	38	SMITH, TIM	DLX printed	
100	39	SMITH, JIM	DLX printed	
200	40	DOE, JOHN	DLX printed	

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E-mail everyone

If you select this option, Deluxe will e-mail tax forms to any employee that is currently configured for e-stubs. If your employee regularly receives their paystub by e-mail, they will receive their tax forms in the same way.

If you chose **E-mail & Self-print** in Step 3, you will need to print and distribute tax forms to the employees that have **“Self-print”** indicated in the **Delivery Type** column. Deluxe will e-mail tax forms to the employees that have a **Delivery Type** set to **“E-mail”**. In the example below, Deluxe would email tax forms to employee #36.

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EMAIL OPTIONS

You have selected to use our email delivery service for some/all of your employees. Please review the list below to see which employees will receive an email. ?

IMPORTANT
Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	Self-print	
200	2	TURQUOISE, TERRY	Self-print	
100	33	AQUA, ALBERT	Self-print	
100	34	BROWN, BETTY	Self-print	
200	35	COMMISSION, CARL	Self-print	
	36	HOURLY, HANK	Email	hh@somewhere.com
	37	SALARY, SALLY	Self-print	
	38	SMITH, TIM	Self-print	
100	39	SMITH, JIM	Self-print	
200	40	DOE, JOHN	Self-print	

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If you chose **E-mail & Printed Forms** or **E-mail & Complete Package** in Step 3, Deluxe will print and ship you the employee tax forms that have “DLX printed” indicated in the **Delivery Type** column. Deluxe will also e-mail tax forms to the employees that have a **Delivery Type** set to “E-mail”. In the example below, Deluxe would e-mail tax forms to employee #36.

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EMAIL OPTIONS

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IMPORTANT

Only employees who have profiles containing e-mail addresses are eligible for email service. Tax forms created manually for individuals without a profile will automatically be in the PRINT group.

Dept No	Empl No	Name	Delivery Type	Email Address
200	1	MAUVE, MABEL	DLX printed	
200	2	TURQUOISE, TERRY	DLX printed	
100	33	AQUA, ALBERT	DLX printed	
100	34	BROWN, BETTY	DLX printed	
200	35	COMMISSION, CARL	DLX printed	
	36	HOURLY, HANK	Email	hh@somewhere.com
	37	SALARY, SALLY	DLX printed	
	38	SMITH, TIM	DLX printed	
100	39	SMITH, JIM	DLX printed	
200	40	DOE, JOHN	DLX printed	

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Step - 5 Shipping

If you chose **E-mail & Printed Forms** or **E-mail & Complete Package** in Step 3, we require you to review/update your shipping address.

Important Note:

Deluxe cannot ship to a P.O. box.

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Taxation Year
2020
Not Approved

Tax Form Shipping Information

Ship Method Courier

Deluxe Payroll will use the Legal Company Name and Address (found on the Filing Information screen) as your Shipping Address for your Tax Forms unless you indicate otherwise in the form below.

IMPORTANT: Courier CANNOT ship to a PO Box.

Ship To Name

Address 1

Address 2

City

Province/State

PO Code/Zip

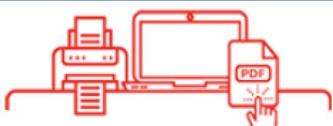
← Save and Previous
✓ Save and Continue

Review the shipping address displayed on this screen. If no address is displayed, we will ship to the legal address indicated in Step 2. If no address is displayed here and you do not want anything shipped to the legal address, enter a shipping address here.

Step 6 - Finishing

Now that you have completed the **Tax Form Authorization**, you will be provided with your tax forms in a PDF format.

• Exit



DOWNLOADING
TAX FORMS

▶ VIEW TUTORIAL

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Tax Forms Filter

Year 2020

Download Selected to Zip

To view individual employee tax forms,
Click on the Tax Form type(underlined)

	Year	Tax Form	Business #
<input type="checkbox"/>	2020	<u>RL1</u>	111111118-RS-0001
<input type="checkbox"/>	2020	<u>T4</u>	111111118-RP-0001
<input type="checkbox"/>	2020	<u>T4</u>	111111118-RP-0002
<input type="checkbox"/>	2020	<u>T4A</u>	111111118-RP-0001
<input type="checkbox"/>	2020	<u>T5018</u>	111111118-RZ-0001

You now have access to the following:

- Tax forms in PDF format
- Instructions on how to download them and when to distribute them to your employees
- A list detailing who received tax forms by email and who requires a printed form (if you selected a paperless option)

For more information on these reports, click [here](#).

Congratulations, you have completed the Tax Form Authorization process!