Anthology Payroll for Microsoft Dynamics 365 Finance

ANTHOLOGY PAYROLL – V79 STATUTORY DEDUCTION SPREADSHEET FOR CANADA

Release Date:	May 2024
Version:	Version V79 for Canada

Contents

Introduction

This document contains a summary of changes and installation instructions for Statutory Deductions Spreadsheet Version 79 for Canada.

This spreadsheet is only compatible with the following version of Anthology Payroll:

- Anthology Payroll for Microsoft Dynamics 365 Finance

This spreadsheet updates Canadian statutory deductions in Anthology Payroll according to the most recent legislation by governing authorities. It is intended for companies that process Canadian statutory deductions in the specified jurisdictions.

The current baseline version for the Payroll Statutory Deduction Spreadsheet is **Version 77**. If you have installed Version 77, you can install any subsequent version.

For more details about the objects and statutory deductions updated by this spreadsheet, contact Loki Client Support: https://support.campusmgmt.com.

It is recommended that this spreadsheet is installed in a test environment and validated against your test data before installing it in production.

This document is divided into the following sections:

- Summary of Changes

- Installation

Summary of Changes

The following changes are made since the previous version.

Canadian Federal Changes

This version of the spreadsheet contains changes to the following federal taxes:

Tax	Changes
Canadian Pension Plan	Worker maximum contributions for CPP can now be scaled if the worker is not eligible for pension for one or more months out of the tax year. This requires the worker to be assigned a new calculation variable to trigger the appropriate calculations. This change requires post-installation instructions.
Garnishments	Garnishment calculations have been updated to account for garnishment deductions on multiple payments within the same pay period. This change is retroactive to January 1, 2023.

Provincial Changes

This version contains the following provincial/territorial changes:

Tax	Changes
Manitoba	TD1 exemption is increased from $10,855 to $19,145. Calculations for Manitoba Labour Credit are updated with new effective dates. This does not affect calculation amounts and is intended only for ease of maintenance in Microsoft Dynamics 365.
Saskatchewan	TD1 exemption amounts are now processed as total claim amounts instead of being translated to claim codes. As a result of this change, the TD1SK calculation variable is no longer used.

Installation

Installation procedures are divided into the following sections:

- Time to install.
- Prerequisites
- Installation instructions
- Post-installation

Time to Installation

The time required for Anthology Payroll to complete the import process varies depending on the type of spreadsheet:

- This is an update version. The import process time will be minimal because you are only importing records that have been updated since the last baseline version.

These other factors can also impact the time required for installation:

- The amount of pre-existing, custom statutory deduction records in your system. Anthology Payroll must check each of these against the imported records for conflicts.
- The amount of statutory deduction changes included in the current version.

Prerequisites

The prerequisites for installing Version 79 for the Canada are:

- Microsoft Excel installed on the Microsoft Dynamics client from which the statutory deduction spreadsheet is updated.
- Anthology Payroll version required.
- Latest statutory deductions spreadsheet version.

Anthology Payroll Version Required

- This version of the spreadsheet is intended for Anthology Payroll Canadian localization version 10.0. Other versions are not compatible with this spreadsheet.
- To verify your version, click **Anthology Payroll** > Setup > Parameters. The version number appears in the General definitions form title.
- For the latest software updates of Anthology Payroll, please contact Client Support: https://support.campusmgmt.com

Latest Statutory Deduction Spreadsheet Version

Depending on the last Statutory Deductions Spreadsheet that you have imported into your environment, you may need to import a prerequisite spreadsheet before importing this one.

Version 79 for Canada is an update version of the Anthology Payroll Statutory Deductions Spreadsheet. This version is meant to be installed on top of the current baseline version, which is Version 77. Update versions released after each baseline are cumulative and are independent of each other. If you have installed Version 77, you can install any subsequent update version.

If there are any spreadsheet versions between Version 77 and Version 79 that you have not installed, please check for any pre- and post-installation instructions applicable to these missed versions that may apply to statutory deductions in jurisdictions where your company operates. For an overview of these steps since the last baseline, see Pre-Installation Procedures on page 7 and Post-Installation Procedures on page 10.

To determine your current spreadsheet version, click **Anthology Payroll** > System update utilities > Other> Import statutory deduction updates to open the Import statutory deduction updates pane. Note the value of the Latest version installed.

For other versions of the Statutory Deductions Spreadsheet, please contact Loki Client Support: https://support.campusmgmt.com

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Note: it is recommended that you install and test the spreadsheet in a test environment before installing it in production.

Pre-Installation Procedures

Pre-installation procedures may be required to prepare Anthology Payroll for the installation of the spreadsheet. If you follow any of these procedures, ensure to perform the procedures in the same test environment as your initial installation, and to validate correct functionality before performing the same steps in your production environment.

The following table describes the pre-installation procedures applicable to each version since the last baseline version (Version 77).

Note: If you have previously skipped the installation of any spreadsheet versions listed below and they contain pre-installation instructions, then you must contact Client Support for the release notes of those past versions:

https://support.campusmgmt.com

Spreadsheet Version	Pre-installation procedures
77	None
78	None
79	None

Installation Instructions

You must complete the following steps in the proper sequence to install the spreadsheet. It is recommended that you first install and test the spreadsheet in a test environment before installing it in your production environment. It is also recommended to install the spreadsheet at the start of a new pay period before any transactions are made.

To install the Statutory Deductions Spreadsheet:

1. It is recommended to take a backup of your database prior to importing the spreadsheet.

2. Log in to the Microsoft Dynamics 365 Finance. Ensure you are in the company (legal entity) that you want to update.

3. Click **Anthology Payroll** > System update utilities > Other> Import statutory deduction updates to open the Import statutory deduction updates pane. Note the value of the Latest version installed.

4. The next step depends on the latest version of the Statutory Deductions Spreadsheet that you have installed:

   - If there are no version numbers or the latest version number is lower than Version 77, you must install the latest baseline version before proceeding to install this version. The latest baseline version is Version 77. After installing the baseline, proceed with installing Version 79 for Canada.
     For information on how to obtain the baseline version, please see Latest Statutory Deductions Spreadsheet Version on page 6.

   - If the latest version number is Version 77 or higher, then proceed to the next step.

5. In the pane, browse to your statutory deduction spreadsheet and select it.

6. Click OK to start the import.

7. When the import process is complete, navigate to Anthology Payroll > Inquiries > Run controls to view the results of the import process. Take the recommended actions (see Error Messages and Conditions on page 9 accordingly if there are error messages or other issues with the import process.

8. The installation process is complete. Please check for any post-installation notes or instructions that may apply to you. Remember to test the spreadsheet in a test environment before repeating these instructions in your production environment.

Error Messages and Conditions

The following table details some common error messages or conditions that you may encounter when importing a Statutory Deductions Spreadsheet and the recommendations on fixing the error:

Error Condition	Problem and Resolution
No statutory deduction updates are imported. The run controls do not display any messages about importing spreadsheet tables, only that the process has initialized. For reference, highlighted lines in the image below do not appear in the run controls. 	A synchronization error has occurred on the cloud-based environment resulting in the import process hanging. The Statutory Deductions Spreadsheet import process must be restarted. However, it is possible that a partial import has occurred and some records have been imported. These records must be deleted before the import process can be restarted. If this scenario occurs, please contact our Client Support for assistance (https://support.campusmgmt.com).
Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.	You have set up a record in the <tableName> that matches a versioned record in the spreadsheet. If your custom record serves a specific purpose, then it must be renamed. If you want to replace your record with the one in the spreadsheet, then simply delete your custom record. After taking one of these steps, run the import process again.

Post-Installation Procedures

After you have installed the spreadsheet, post-installation procedures are sometimes required to properly configure new data elements. If you follow any of these procedures, ensure to perform the procedures in the same test environment as your initial installation, and to validate correct functionality before installation in your production environment.

The following table describes the post-installation procedures applicable to each version since the last baseline version (Version 77).

Note: *If you have previously skipped the installation of any spreadsheet versions listed below and they contain post-installation instructions, contact our Client Support for the release notes of those past versions: https://support.campusmgmt.com*

Spreadsheet Version	Post-installation procedures
77	Set up CPP Additional Tax Income Reduction
78	None
79	Assign CPP Pensionable Months Calculation Variable

Assign CPP Pensionable Months Calculation Variable

New calculation variables are added to indicate a worker is not eligible for pension contribution for one or more months during the associated tax year. Applicable CPP calculations have been updated to account for workers with this calculation variable.

If you have no workers who fit these criteria, you can skip this procedure.

To assign the calculation variable to a worker individually:

1. In the navigation pane, click Common > **Anthology Payroll workers** to open the Anthology Payroll workers list. On the ribbon, click the AthPay Profile tab > Manage section > Calculation Variables to open the **Worker** calculation variables form.

2. Create a new record.

3. Select the CPP Elig Months 2023 Calculation variable and Pensionable months Item.

4. Set the Active date to the first day of the 2023 tax year and the Expiry date to the last day of the tax year.

5. Save and close the form.

To insert the deduction for multiple workers at a time:

1. In the navigation pane, click Periodic > Other > Mass worker changes > Mass calculation variables insert to open the Worker calculation variables form with the Fast entry tab expanded.

2. On the Fast entry tab, select the CPP Elig Months 2023 Calculation variable and Pensionable months Item.

3. Select from Pay groups, Departments, Occupations, etc. to filter the workers that you wish to assign the variable to. Click Build workers list to populate the list of workers according to your selection.

4. In the workers list, select one or more workers to assign the variable to.

5. Set the Active date to the first day of the 2023 tax year and the Expiry date to the last day of the tax year.

6. Click Insert to add the calculation variable to all selected workers.

7. Save and close the form.