



QuickBooks Online Student Guide

Chapter 9

QuickBooks Online Payroll



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When you use QuickBooks Online you can track your small business accounting.

You can track sales, expenses and manage all your day-to-day transactions.

As you grow, QuickBooks Online lets you manage your company payroll.

You can add employees, track time, and pay employees using cheques or via direct deposit. You can track and pay your payroll liabilities and create year-end forms like T4's and Records of Employment.

QuickBooks lets you manage all of your payroll needs directly within in QuickBooks Online.

▶ Objectives

In this chapter you'll learn the following:

- Setting up pay items
- Setting up employees
- Creating Paycheques
- Track and pay liabilities
- Create T4's
- Create Records of Employment
- Tracking and paying liabilities

▶ Payroll Setup

To get started in QuickBooks Payroll it's a good idea to gather some basic information before entering information into QuickBooks. Please see a few sample items that will help you get up and running quickly in QuickBooks Online Payroll.

To get started using QuickBooks Online Payroll, do the following:

1. Click **Payroll**.

The screenshot shows the QuickBooks Online Payroll setup interface. The top navigation bar includes the QuickBooks logo, the company name 'Green Tree Landscapes', and utility icons for Help, Search, Notifications, and a user profile. A message at the top reads: 'Not ready for payroll but still want to track employees' time? We can help. [Add employee](#)'. The main heading is 'Pay employees in minutes' with the subtext 'Let's find the right payroll plan for your business'. Below this, it says 'Select what you need to run your business and we'll recommend a plan.' There are six feature tiles: 'Direct deposit', 'Payroll Reports', 'Employee access', 'Workers' compensation', 'Year end forms and reporting', and 'Taxes filed automatically'. At the bottom, it asks 'Or choose the payroll plan that works for you' and shows frequency options: 'Weekly', 'Biweekly', 'Semimonthly' (selected), and 'Monthly'.

2. Select the options that apply to your business. In this class we will use QuickBooks Payroll. The options available in QuickBooks Payroll are:

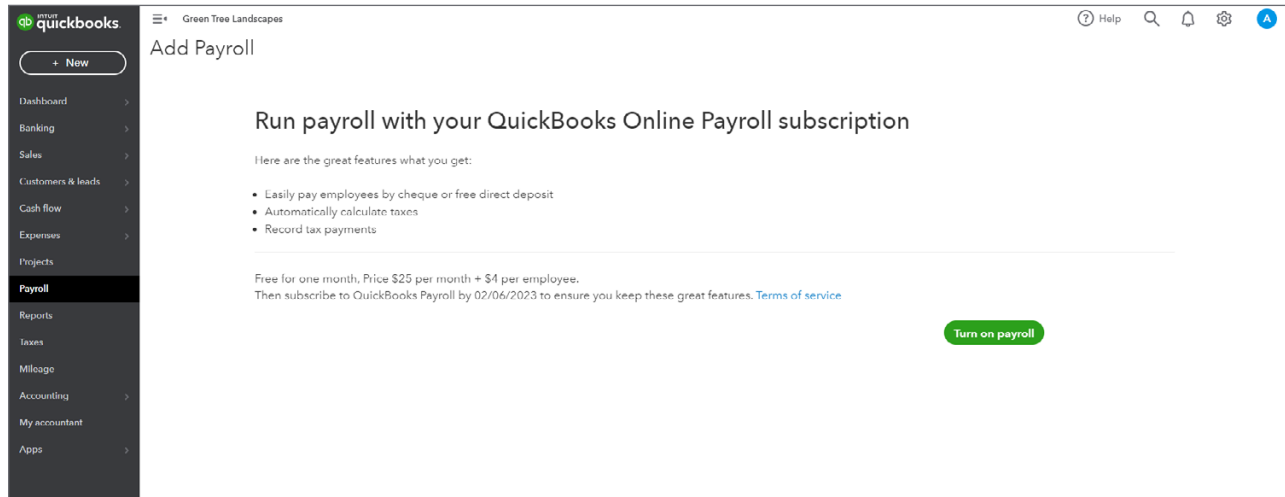
- Direct Deposit
- Payroll Reports
- Employee Access
- Workers' Compensation
- Year end forms and reporting

The screenshot shows the QuickBooks Payroll setup interface. The user is logged in as 'Green Tree Landscapes'. A message at the top says: 'Not ready for payroll but still want to track employees' time? We can help. [Add employee](#)'. The main heading is 'Pay employees in minutes' with the subtext 'Let's find the right payroll plan for your business'. Below this, it says 'Select what you need to run your business and we'll recommend a plan.' There are six feature cards: 'Direct deposit', 'Payroll Reports', 'Employee access', 'Taxes filed automatically', 'Workers' compensation', and 'Year end forms and reporting'. At the bottom, it asks 'Or choose the payroll plan that works for you' and 'How often do you run payroll' with buttons for 'Weekly', 'Biweekly', 'Semimonthly', and 'Monthly'.

3. Choose your Pay Frequency. You can choose **Weekly**, **Biweekly**, **Semimonthly**, or **Monthly**.

The screenshot shows the 'Or choose the payroll plan that works for you' screen. The 'Semimonthly' frequency is selected. Two plans are shown: 'QuickBooks Payroll' and 'Wagepoint'. 'QuickBooks Payroll' is marked as 'RECOMMENDED' and costs '\$25/mo + \$4 per employee' with a 'Free 30-day trial'. 'Wagepoint' costs '\$40/mo + \$4 per employee' with a 'Free 30-day trial'. Below each plan is a list of 'Payroll features' with checkboxes. For QuickBooks Payroll, 'Billed monthly' is checked, while others are unchecked. For Wagepoint, 'Billed each payroll run' is checked, while others are unchecked.

- Click **Free 30-Day trial** to choose QuickBooks Payroll.



- Click **Turn on payroll**.

- Click **Get started**.



- Answer the following question **Have you paid employees in 2023?** For the purposes of this course the answer will be no.

8. Click **Next**.

Getting started

Have you paid employees in 2023?

Answer yes if you, your accountant, or maybe even a previous owner of your business has paid employees.

No I'm not sure Yes

We're thrilled you're here! Since it looks like this is your first time paying employees in 2023, we'll help you set everyone up right.

Next

9. Choose your next pay day. Click **Next**.

Getting started

When is your next payday?

If you need to run payroll soon, we'll make it happen.

Next payday ⓘ

Previous **Next**

10. Enter the primary work location as required. Click **Next**.

Business info

What's the primary work location?

This is the address where most of your employees work. We'll use this as your primary work location.
You can add additional work locations later.

Business name

Street address

City Province Postal code

Next

11. Enter the name and contact information of the company's payroll contact. Click **Next**.

Business info

Who's your payroll contact?

This helps us make sure that reminders and other important payroll info get to the right person.

First name: Last name:

Business phone: Email address:

12. Click **Add employee** to get started.

Your team

✓ Add your first employee

▶ Employee Setup

Personal Info

1. Enter the **First name** and **Last name** of the employee. Enter the employee **Email**.
2. Click **Add employee**.

The screenshot shows a dialog box titled "Say hello to your new team member" overlaid on a "Your team" page. The dialog box contains the following fields and options:

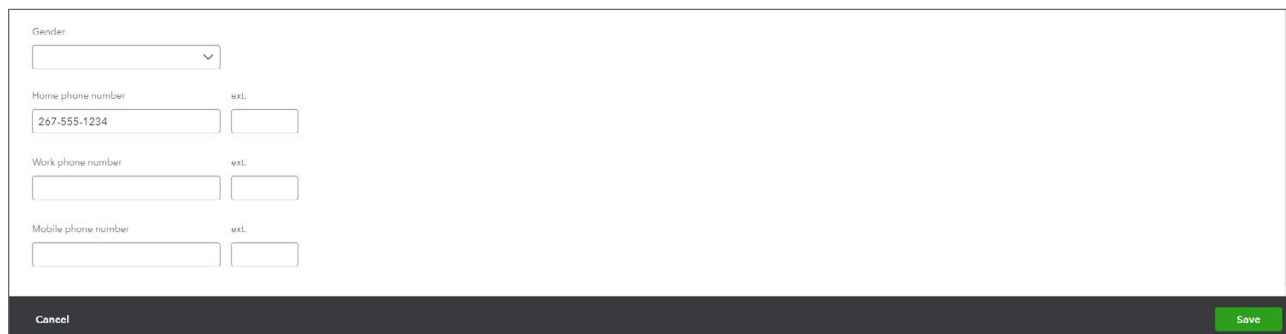
- First name:** Input field with "Jamy".
- M.I.:** Input field (empty).
- Last name:** Input field with "Christensen".
- Email:** Input field with a blurred email address.
- Employee self-setup:** A toggle switch that is currently turned on.
- Buttons:** "Done" and "Add employee" (partially visible).

Below the fields, there is explanatory text: "We'll email them an invite to QuickBooks Workforce where they can view their pay stubs, T4s, and more." with a link "Learn more about Workforce". Below that, it asks "Would you also like your employee to self-setup in Workforce?" and states "They'll enter their personal, tax, and banking info. This is recommended."

The screenshot shows a form titled "Add personal info" for employee "Jamy Christensen". The form includes the following fields and options:

- First name:** Input field with "Jamy".
- M.I.:** Input field (empty).
- Last name:** Input field with "Christensen".
- Email:** Input field with a blurred email address.
- Employee self-setup:** A toggle switch that is currently turned on.
- Text:** "Turn this on if you want this employee to enter their personal, tax, and banking info in Workforce."
- Birth date:** Input field with "14/05/1975" and a calendar icon.
- Address:** Input field with "951 Orenda Rd".
- City or town:** Input field with "Brampton".
- Province:** Dropdown menu with "ON" selected.
- Postal code:** Input field with "L6W 1Z2".
- Social Insurance number:** Input field with "751-327-156".
- Gender:** Input field (empty).
- Buttons:** "Cancel" and "Save".

3. You can select the option Employee self-setup to invite the employee to setup their own information. For the purposes of this class, you'll slide the button to the off position, and you'll enter the information manually.
4. From this window, you'll complete the employee setup. Click **Edit** in the Personal info window.
 - a. Enter the employee **Birth date**. This information is required. QuickBooks uses this information to determine the payroll deductions.
 - b. Enter the employee **Address**.
 - c. Enter the employee **Social Insurance number**.
 - d. Click **Save**.



The screenshot shows a form for entering employee contact information. It includes a dropdown menu for Gender, and three pairs of input fields for Home phone number, Work phone number, and Mobile phone number, each with a separate field for an extension. The Home phone number field contains the value '267-555-1234'. At the bottom of the form, there are 'Cancel' and 'Save' buttons.

Gender	<input type="text"/>		
Home phone number	<input type="text" value="267-555-1234"/>	ext.	<input type="text"/>
Work phone number	<input type="text"/>	ext.	<input type="text"/>
Mobile phone number	<input type="text"/>	ext.	<input type="text"/>

Cancel Save

Employment Details

In the employment details, you'll enter information related to the employee's role.

1. In the Employment details section, click **Edit**.

Employment details			Edit
Status Active	Hire date -	Pay schedule -	
Work location 4997 Davis Drive Markham, ON L3P 2M4	Job title -	Employee ID -	

Employment details

Let's get down to Jamy's job specifics

Status
Active

Hire date
01/05/2023

Pay schedule
Select one
+ Add pay schedule
4997 Davis Drive (ON)

Job title

Employee ID

Cancel Save

2. Enter the **Hire date**.
3. Click Pay schedule and then choose **+Add pay schedule**. A pay schedule lets you group your employees together and pay them according to a schedule that you can customize around your business.
4. Enter your **Pay Frequency**.
5. Enter the **Next payday**.
6. Enter the **End of next pay period**.
7. Enter the **Pay schedule name**.
8. Select the checkbox labeled **Use this pay schedule for employees you add after this one**. This saves you time when adding new employees.

9. Click **Save**.

Pay schedule

Choose when to pay Jamy

What's a pay schedule?

Pay frequency
Twice a month

Custom schedule

Next payday
15/05/2023

Monday

End of next pay period
10/05/2023

Wednesday

Pay schedule name

Use this pay schedule for employees you add after this one

Upcoming pay periods

Pay Period	Pay Date
26/04/2023 - 10/05/2023	15/05/2023
11/05/2023 - 25/05/2023	30/05/2023
26/05/2023 - 10/06/2023	15/06/2023
11/06/2023 - 25/06/2023	30/06/2023

Cancel Save

10. Choose the Work location.

11. Enter the optional fields of Job title and Employee ID if required.

12. Click **Save**.

Tax Withholding

You'll edit the employee's tax information in the tax withholding section.

1. Click **Edit**.
2. Every employee should complete a TD-1 form. You'll use the employee TD-1 form to edit the Federal and Provincial withholdings as needed. QuickBooks enters the default basic amounts. You can edit the Federal TD1 amount and Provincial claim amount as needed.
3. If an employee would like to have additional income withheld, you can enter the amount in the box labeled, **Additional income tax amount you want deducted from each paycheque**.
4. In some instances, you may need to make tax exemptions. If this is the case, you can select the employee tax exemptions by selecting the Canada Pension Plan, Employment Insurance and Federal Income Tax boxes.

5. Click **Save**.

Add withholdings

▼ **Federal withholding**
You can find the information for this page on Jamy's TD-1 form. [Need a blank TD-1 form?](#) Don't have Jamy's TD1 form? That's OK. We'll set Jamy's federal TD1 amount to the basic personal claim amount for now. You can update this later.

Federal TD1 amount (total claim amount)

Additional income tax amount you want deducted from each paycheck

▼ **Provincial withholding**
We use the basic personal amount for the province in which Jamy is currently working in.

ON

Provincial claim amount

▼ **Tax exemptions**
These are not common. Certain government criteria must be met to take these exemptions. Not sure? Contact a tax expert or the applicable tax agency. [Learn more](#)

Canada Pension Plan (CPP)

Cancel Save

Payment Method

In this section, you'll choose how to pay the employee.

1. Click **Start**.
2. Click the **Payment method** menu. You have two options: Paper cheque or Direct Deposit. A paper cheque lets you print cheques for employees. When you choose direct deposit, you'll continue to set up the employee's direct deposit information.

Select payment method

How would you like to pay Jamy?

Payment method

▼ Paper cheque
Direct deposit

Cancel Save

3. Complete the Direct Deposit information for the employee including the bank account **Transit Number**, **Institution number**, and **Account number**.
4. Click **Save**.



NOTE QuickBooks gives you several options for direct deposit. You can deposit to one or more accounts and deposit with the balance printed on a cheque.

Vacation Policy

In this section, you'll set up a vacation policy for the employee.

1. Click **Start**.
2. QuickBooks lets you choose a preset policy or create one from scratch. To keep it simple, we recommend choosing a preset policy. Click the **Vacation policy** menu.

Add vacation pay policy

What's the vacation pay policy for Jamy?

We recommend the **Pay out each pay period** option for part-time, hourly, and commissioned employees. [Learn more](#)

Vacation policy

Add vacation policy

- + Add vacation policy
- 4.00% Accrue time/hrs worked
- 4.00% Paid out each pay period
- Don't track vacation in QuickBooks

Cancel Save

3. Choose the 4.00% Accrue time/hrs worked for hourly workers. QuickBooks completes the remaining fields for you.
4. Click the **Hours are accrued** menu to change when the vacation pay is accrued.

5. Select the checkbox labeled **Use this vacation policy for employees you add after this one**, to apply the policy to all new employees.

Edit vacation pay policy ⓘ ×

What's the vacation pay policy for Jamy?

We recommend the **Pay out each pay period** option for part-time, hourly, and commissioned employees. [Learn more](#)

Vacation policy

Accrue vacation
This is the amount of vacation time and pay your employee will accumulate, which hasn't been used or paid out yet.

Tax settings ▼

Vacation policy details ⓘ

Vacation rate

This rate is a percentage of vacationable earnings.
The available vacation balance will increase with each paycheck.

Hours are accrued

Jamy will earn time off based on the number of hours they work.

Use this vacation policy for employees you add after this one

Cancel
Save

Pay Types

In this section, you'll set up pay types and add the rates of pay for the employee.

1. Click **Start**.
2. Click the **Pay type** menu. You can choose from **Hourly**, **Salary**, or **Commission only**.
3. Choose **Hourly**.

Pay types ⓘ ×

How much do you want to pay Jamy? Supported pay types?

Set employee type

Pay type

✓ Hourly
Salary
Commission only

[+ Add pay type](#)

Set default hours (optional) ⓘ

Rate per hour	Hours per day	Days per week
<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>

Time off pay policies

Unpaid time off

Sick pay

Common pay types

Overtime Pay ▼

Cancel
Save

- Enter the **Rate per hour**. You can add default hours per day or per week, to help you complete your payroll faster.



NOTE If you have salary employees, choose **Salary** from the **Pay type** menu. Choose the **Pay frequency** and enter the **Salary** that corresponds to the **pay frequency**.

How much do you want to pay **Jamy**? [Supported pay types?](#)

Set employee type			Set default hours ⓘ		
Pay type	Pay frequency	Salary	Hours per day	Days per week	
Salary	per year	\$75,500.00	8.00	5.00	

Next you can add **Time off pay policies**. You can add **Unpaid time off** or **Sick pay**.

- To add sick pay, click the **Sick pay** menu.
- Choose **Add new sick pay policy**. A window display on the right side of the window.

Time off pay policies

Unpaid time off

No unpaid time off policy

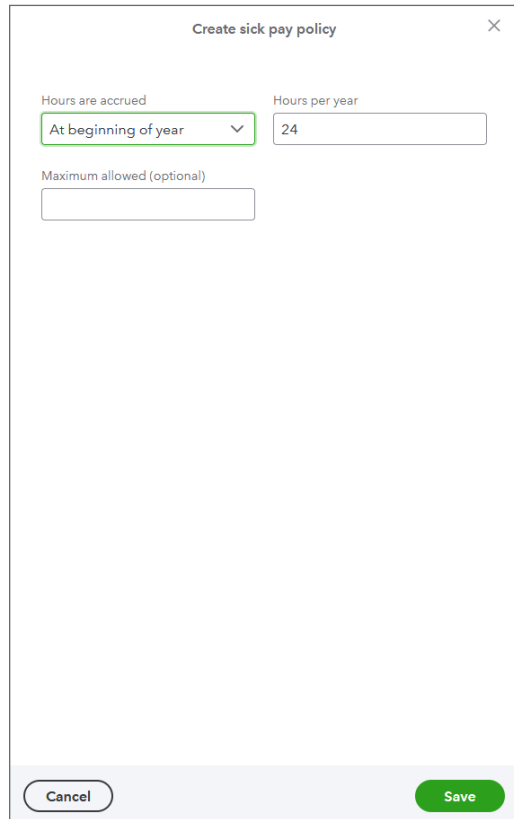
Sick pay

No sick pay policy

✓ No sick pay policy

▼ Add new sick pay policy

- Choose when Hours are accrued. You can choose **At beginning of year**, **Each pay period**, **Per hour worked**, or **On anniversary date**.
- Enter the **Hours per**.

5. Click **Save**.

The screenshot shows a dialog box titled "Create sick pay policy" with a close button (X) in the top right corner. The dialog contains the following fields:

- "Hours are accrued": A dropdown menu with "At beginning of year" selected.
- "Hours per year": A text input field containing the number "24".
- "Maximum allowed (optional)": An empty text input field.

At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.

During the employee setup, you can add additional pay types to the employee's record. The additional pay types are the following:

Overtime Pay—pays the overtime wage of 1.5 x regular wage.

Double Overtime Pay—pays the overtime wage of 2 x regular wage.

Sick Pay—used to pay out sick time accrued.

Bonus—used to pay bonuses as needed throughout the year.

Commission—used to pay out commissions. The commission item is an amount you enter on the pay cheque. QuickBooks will not track or calculate the commission amounts.

Reimbursement—used to reimburse employees for various items.

Allowance—if your business pays out allowances you will setup an allowance.

Other Earnings—use this item to record any other earnings item that does not fit in the above categories.

1. Select any of the required pay types. When you select one of these pay types, it will display on the employee paycheque to be used when running payroll.
2. Select **Overtime pay** to add overtime to the paycheque window.

3. Select **Bonus** to add a bonus to the paycheck window.
4. Click **Save**.

Deductions & Contributions

In this section, you'll add deductions from employee pay and company contributions to the employee pay. Deductions may include items like retirement plans, health benefits, and more.

1. Click **Start**.
2. Click **Add deduction/contribution**.

3. Choose **Health Insurance**. In this example, a company may contribute 100% and the employee does not contribute to the plan.
4. Choose the **Type**.
5. Enter the name of the benefit in the **Description (appears on paycheck)**.
6. In the employee deduction section, choose **None** in the **Calculated as** menu.
7. In the **Company Contribution** section choose Flat amount in the calculated as section.
8. Enter the **Amount per paycheck**.

- Click **Save**. QuickBooks adds the company contribution to the employee paycheck as a preset pay item.

Add deduction /contribution ✕

Deduction/contribution type

Type

Description (appears on paycheck)

Employee deduction

Calculated as

[Deduction Tax Settings](#) ▾

Company contribution ⓘ

Calculated as Amount per paycheck

Annual maximum

[Contribution Tax Settings](#) ▾

Another example of a deduction and company contribution is retirement plans. To add a retirement savings plan:

- Click **Add deduction/contribution**.
- Choose **Retirement plans** under **Deduction/contribution type**.
- Choose the **Type** from the menu.
- Enter the plan name in the **Description** field.
- Under the **Employee deduction** section, choose how you want to calculate the deduction. In this example you'll choose **Flat amount**.
- Enter the **Amount per paycheck**.
- Enter an annual maximum if required.**
- In the **Company contribution section**, choose **Calculated as flat amount**.
- Enter the **Amount per paycheck**.
- Enter the **Annual Maximum** if required. When the employee reaches the maximum, QuickBooks stops the contribution.

11. Click **Done**.

Add deduction /contribution ✕

Deduction/contribution type

Type

Description (appears on paycheque)

Employee deduction

Calculated as Amount per paycheque

Annual maximum

[Deduction Tax Settings](#) ▾

Company contribution ⓘ

Calculated as Amount per paycheque

Annual maximum

[Contribution Tax Settings](#) ▾

Workers' Compensation

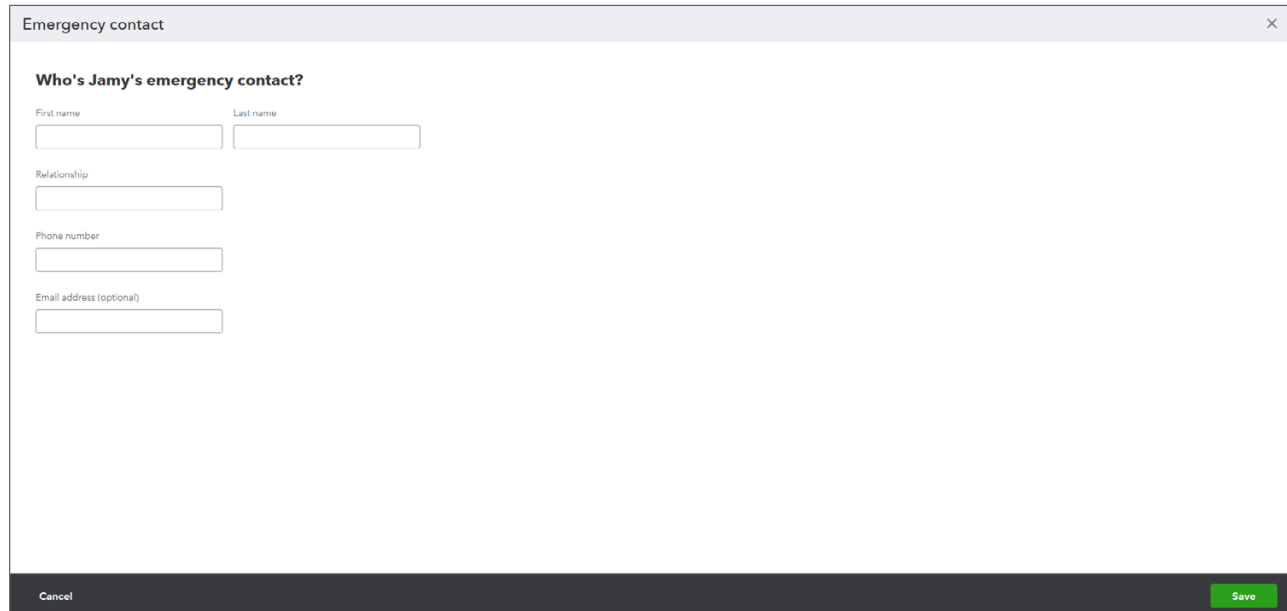
You can add Worker's compensation tracking when you go to the **Payroll** settings under the **Gear** menu.

Emergency Contact

In this section, you can add emergency contact information for your employees.

1. Click **Start**.
2. Enter the emergency contact information.

3. Click **Save**.



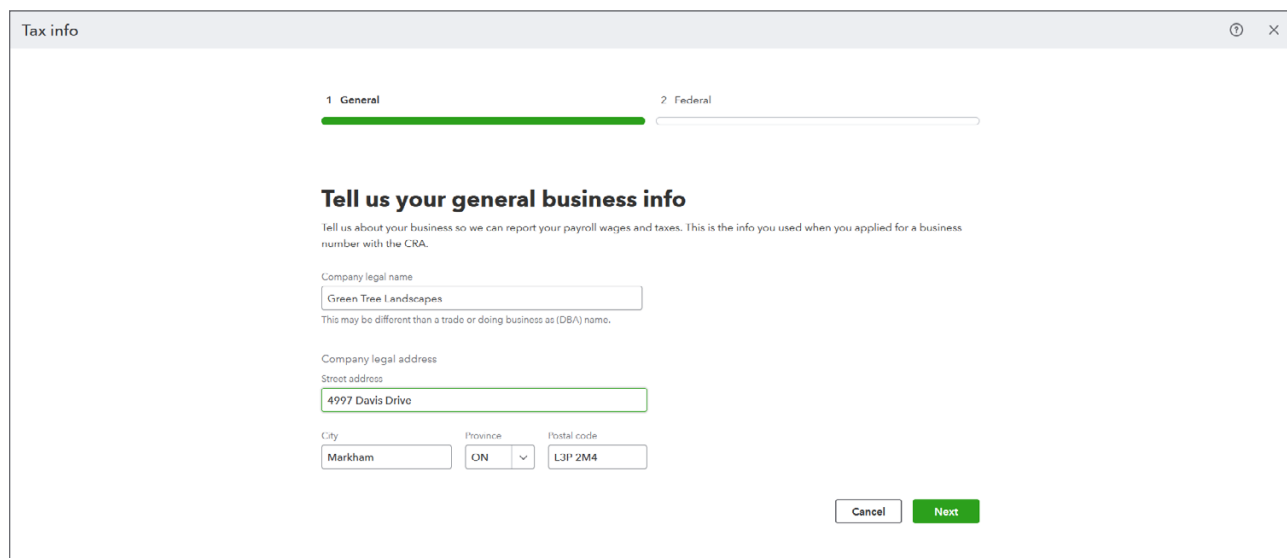
The screenshot shows a window titled "Emergency contact" with a close button (X) in the top right corner. The main heading is "Who's Jamy's emergency contact?". Below this, there are four rows of input fields: "First name" and "Last name" (two separate boxes), "Relationship" (one box), "Phone number" (one box), and "Email address (optional)" (one box). At the bottom of the window, there is a dark bar with a "Cancel" button on the left and a green "Save" button on the right.

Click **Done** to complete the employee set up.

Enter Your Tax Info

Before running your first payroll, you need to add your business and payroll account numbers. You'll add this information in the **Enter your tax info** section.

1. Click **Start**.
2. Enter or update the information as needed.
3. Click **Next**.



The screenshot shows a window titled "Tax info" with an information icon (i) and a close button (X) in the top right corner. At the top, there are two progress indicators: "1 General" (highlighted with a green bar) and "2 Federal". The main heading is "Tell us your general business info". Below this, there is a sub-heading "Tell us about your business so we can report your payroll wages and taxes. This is the info you used when you applied for a business number with the CRA." followed by several input fields: "Company legal name" (with the value "Green Tree Landscapes"), "Company legal address" (with the value "4997 Davis Drive"), "City" (with the value "Markham"), "Province" (a dropdown menu with "ON" selected), and "Postal code" (with the value "L3P 2M4"). At the bottom right, there are "Cancel" and "Next" buttons.

4. Enter your **Business Number**. This information will be provided to you from the Canada Revenue Agency.
5. QuickBooks presets the Form PD7A.
6. Choose **How often you pay your taxes?** This will also be determined by the Canada Revenue Agency.
7. Click **Done**.

Tax info

✓ General 2 Federal

Give us your federal tax info

Once you have your tax info, you can correctly pay your federal taxes. You can find what you need in letters and tax notices you have received from the CRA.

CRA payroll number Don't have it?

Business Number Reference Number

123456789 RP 0001


This is the form used to calculate and submit your payroll taxes to the CRA. ⓘ

Form PD7A

How often do you pay your taxes? ⓘ

Monthly

Previous Done

 To learn how to setup employees and add pay items watch this video:
<https://youtu.be/ruBfNbmGvLY>

▶ Time Tracking in QuickBooks

QuickBooks Online lets you track time for your employees and subcontractors. When you track time you can import the hours into QuickBooks payroll and add the hours to the employee's pay cheque.

You can track time using a weekly timesheet or by entering single time activities.



NOTE Time tracking is a feature only available in the QuickBooks Online Plus version.

To edit time tracking settings in QuickBooks:

1. Click the **Gear** menu and then click **Accounts & Settings**.
2. Click **Time**.

The screenshot shows the 'Account and Settings' interface in QuickBooks Online. On the left is a navigation menu with options: Company, Billing & subscription, Usage, Sales, Expenses, Payments, Time (highlighted), and Advanced. The main content area is titled 'Account and Settings' and has a 'Help' icon in the top right. Under the 'Time' section, there are two tabs: 'General' and 'Timesheet'. The 'Timesheet' tab is selected and contains the following settings:

- First day of work week: Sunday
- Show service field:
- Allow time to be billable:
- Show billing rate to users entering time:

At the bottom of the settings panel are 'Cancel' and 'Save' buttons. At the bottom right of the entire window is a 'Done' button. At the bottom center of the main content area, there are links for 'Privacy', 'Security', and 'Terms of Service'.



NOTE QuickBooks lets you make time activities billable to customers. You can also assign the first day of the work week to display on the timesheet.

Enter Single Time Activity

You can enter a single time activity. From this window you can enter the name of the employee, the date and the start and end time of the time activity.

1. To enter a single time activity click the **New** menu and then click **Single Time Activity**.

CUSTOMERS	SUPPLIERS	EMPLOYEES	OTHER
Invoice	Expense	Single time activity	Bank deposit
Receive payment	Cheque	Weekly timesheet	Transfer
Estimate	Bill		Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Supplier credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print cheques		

[Show less](#)

2. Enter the employee **Name**.
3. Enter the **Date**. Ensure the date is correct as the date determines when the time will be imported into the pay cheque.
4. Enter the Time for the **Start Time** and **End Time**. QuickBooks calculates the total hours. To make entries in these fields, select the **Enter Start and End Times** checkbox.
5. Enter a **Description** if necessary.
6. Click **Save**.

Enter Weekly Timesheet

The weekly timesheet is helpful to enter an entire week of timesheet information. You can enter the same field as a single time activity with one exception, the start and end time.

To fill in a weekly timesheet:

1. Click **New > Weekly Timesheet**.

2. Choose a **Name** from the list.
3. Select the week for which you want to record activities.
4. For each type of activity, enter an activity line:

CUSTOMER	Choose a customer if you want to bill the activity to the customer or track expenses for the customer.
SERVICE	(Optional) If you use services to enter time, choose a service that represents this activity. If you don't see it, Add Service field to timesheets is turned off.
CLASS	(Optional) Choose a Class. If you don't see Class, class tracking is turned off.
LOCATION	(Optional) Choose a Location/Department. If you don't see it, location/department tracking is turned off.
DESCRIPTION	Enter a description of the activity. If the activity is billed to a customer, the Description appears on their invoice, depending on your company settings. Text for the description appears automatically if you select an item from the optional Service field.
BILLABLE	Select this checkbox if you want to bill the activity to the customer. Enter a rate per hour and select Taxable if the activity is taxable.

Weekly Timesheet

Help

Jamy Christensen
7/5/2023 to 13/5/2023

TOTAL HOURS
48:00

#	DETAILS	SUN 7	MON 8	TUE 9	WED 10	THU 11	FRI 12	SAT 13	TOTAL
1	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> Choose a customer <input type="text"/> </div> <div> Regular Pay <input type="text"/> </div> </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Billable (/hr) </div>	8:00	8:00	8:00	8:00	8:00	8:00	8:00	48:00
2	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> Choose a customer <input type="text"/> </div> <div> Select pay item <input type="text"/> </div> </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Billable (/hr) </div>	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
3	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> Choose a customer <input type="text"/> </div> <div> Select pay item <input type="text"/> </div> </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Billable (/hr) </div>	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
TOTAL		8:00	8:00	8:00	8:00	8:00	8:00	8:00	48:00

Add lines
Clear all lines

Privacy

Cancel
Copy last timesheet
Save
Save and new

- For each day of the week this activity occurred, enter the number of hours spent on this activity for that day.

You can add more activity lines if needed or clear all lines and begin again.

- Click **Save** to enter the timesheet.



NOTE If the last timesheet is like the current time period, click **Copy last timesheet**.

Run Payroll in QuickBooks

To run payroll in QuickBooks you'll start on the Employees page. On the employees window, click **Pay my team**.

The screenshot shows the QuickBooks Payroll setup interface. The left sidebar contains navigation options: Dashboard, Banking, Sales, Customers & loads, Cash flow, Expenses, Projects, Payroll (highlighted), Reports, Taxes, Mileage, Accounting, My accountant, and Apps. The main content area is titled 'Payroll' and includes tabs for Overview, Employees, and Compliance. The Overview tab is active, displaying a 'Pay your team with paper cheques' section with a 'Pay my team' button. Below this is a 'SETUP TASKS' section with four items: 'Payday is set' (checked), 'Your business info is complete' (checked), 'We have your team info' (checked), and 'Enter the rest of your tax info' (unchecked) with a 'Finish up' button. A 'SETUP RESOURCES' section on the right offers a video and a 'View resources' link.

- Choose the **Bank account** where the money will be paid from.
- Choose the **Pay Period** and **Pay Date** (when running a regular Pay Schedule, these dates should auto-fill for you).

- If you've entered timesheets that coincide with the pay period, QuickBooks automatically imports the hours. They'll display in the **Regular Pay Hrs...** section.

Run Payroll: Semi-Monthly

Bank account: RBC Chequing | Pay period: 26/04/2023 to 10/05/2023 | Pay date: 15/05/2023 | TOTAL PAY: \$2,708.00

EMPLOYEE	PAY METHOD	REGULAR PAY HRS	OT HRS	SICK PAY HRS	VACATION PAY HRS	STAT HOLIDAY PAY ...	BONUS	MEMO	TOTAL HRS	TOTAL PAY
<input checked="" type="checkbox"/> Christensen, Jamy \$33.85 / hour	Paper cheque	80.00					\$		80.00	\$2,708.00
TOTAL		80.00	0.00	0.00	0.00	0.00	\$0.00		80.00	\$2,708.00

[Add an employee](#)

- Click the pencil (edit) icon to view each employee pay cheque.
- Click the arrow next to **Pay** to expand the pay information.

Run Payroll: Semi-Monthly

PAY TO: **Jamy Christensen** | NET PAY: \$2,058.53

Employee Address: 951 Orenda Rd, Brampton, ON L6W 1Z2 | Pay period: 26-04-2023 to 10-05-2023 | Pay date: 15-05-2023
 Pay from: RBC Chequing | Paid by: Cheque (\$2,058.53)

▼ Pay

TYPE	HOUR	RATE	CURRENT	YTD
Regular Pay	80.00	\$33.85	\$2,708.00	\$2,708.00
Overtime Pay	0.00	\$ 50.78	\$0.00	\$0.00
Sick Pay	0.00	\$33.85	\$0.00	\$0.00
Vacation Pay	0.00	\$33.85	\$0.00	\$0.00
Stat Holiday Pay	0.00	\$33.85	\$0.00	\$0.00
Bonus			\$ 0.00	\$0.00
TOTAL			\$2,708.00	\$2,708.00

▶ Employee taxes
 ▶ Employer taxes
 ▶ Company-paid contributions

Cancel OK

- Click **OK**.
- Click **Save for Later** to complete the payroll at a later time or click **Submit Payroll** to complete the payroll run.

Save for later

Submit payroll ▼

8. Click Preview Payroll.

Run Payroll: Semi-Monthly


Review and Submit

\$1,556.79
TOTAL PAYROLL COST

\$1,122.17
NET PAY

\$231.83
EMPLOYEE

\$202.79
EMPLOYER



1 Printed cheque for \$1,122.17
Deliver these paycheques by 15/05/2023


Pay period: 26/04/2023 to 10/05/2023 Pay date: 15/05/2023

EMPLOYEE	PAY METHOD	TOTAL HOURS	TOTAL PAY	EMPLOYEE TAXES	NET PAY
Christensen, Jamy	Paper cheque	40.00	\$1,354.00	\$231.83	\$1,122.17
TOTAL		40.00	\$1,354.00	\$231.83	\$1,122.17

Back Preview payroll details Submit payroll

9. Click Submit Payroll.

Run Payroll: Semi-Monthly


 **Payroll is done!**
Your team's paycheques are on the way.

1 paycheque to write
Deliver it to your employees by 15/05/2023

Print pay stubs

<input checked="" type="checkbox"/>	EMPLOYEE	NET PAY	CHEQUE NUMBER
<input checked="" type="checkbox"/>	Christensen, Jamy	\$1,122.17	

View payroll reports Finish payroll

 To learn how to pay employees watch this video: https://youtu.be/WHG-Alo_bfE

10. Click **Print pay stubs**.

ViewPdfForm 1 / 2

Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

Pay Stub Detail
PAY DATE:03/15/2017
NET PAY:\$1,135.20

Jane Peterson
1923 Reserve St.
Bloomfield ON K0K 1G0

EMPLOYER
Green Tree Landscapes
5100 Spectrum Way
Mississauga ON L4W 4S2

PAY PERIOD
Period Beginning: 02/26/2017
Period Ending: 03/10/2017
Pay Date: 03/15/2017
Total Hours: 64.00

EMPLOYEE
Jane Peterson
1923 Reserve St.
Bloomfield ON K0K 1G0

BENEFITS

	Used	Available	NET PAY:	\$1,135.20
Vacation	0.00	0.00		

MEMO:

PAY	Hours	Rate	Current	YTD	DEDUCTIONS	Current	YTD
Regular Pay	64.00	25.00	1,600.00	1,600.00	Canada Life	25.00	25.00
Reimbursement	-	-	25.00	25.00	Canada Life	100.00	100.00

11. Click **View Payroll Reports** to view and export your payroll reports to Excel.12. Click **OK**.

Your payroll reports are ready.

Choose which reports you want to export to Excel.
You can keep them for your reports, or send them to your accountant.

EMPLOYER REPORTS

- Total Cost
- Tax Payments

EMPLOYEE REPORTS

- Payroll Summary
- Payroll Details
- Deductions

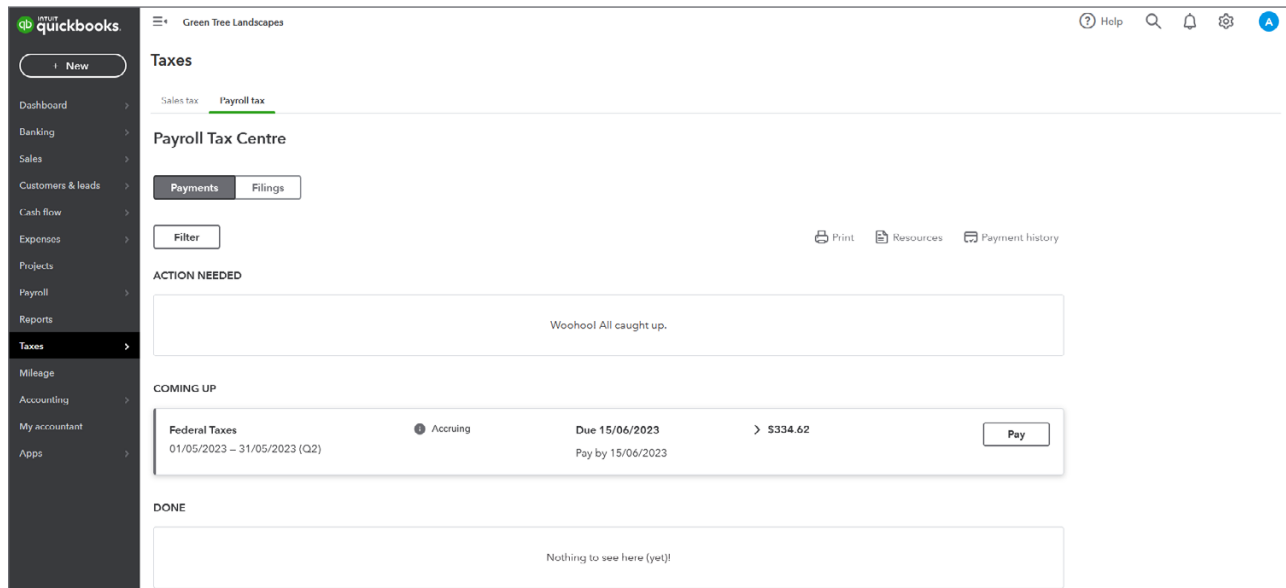
Want to change which payroll reports you see here?
Go to [Company Settings](#).

13. Click **OK**. Click **Finish payroll**.

Paying Payroll Liabilities

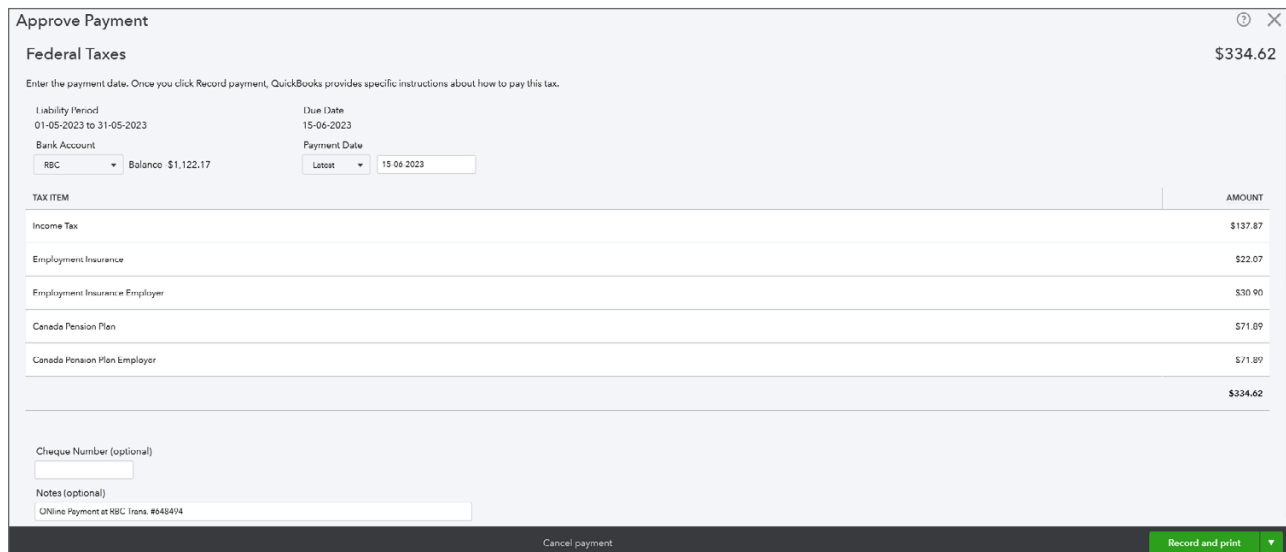
To pay your payroll liabilities:

1. Click **Taxes**.
2. Click **Pay**.



The screenshot shows the QuickBooks Online interface for a user named 'Green Tree Landscapes'. The 'Taxes' section is active, specifically the 'Payroll tax' sub-section. The 'Payroll Tax Centre' is displayed with 'Payments' selected. A 'Filter' button is present. The 'ACTION NEEDED' section shows a message: 'Wooohoo! All caught up.' The 'COMING UP' section shows a table for 'Federal Taxes' with a due date of 15/06/2023 and an amount of \$334.62. A 'Pay' button is next to the amount. The 'DONE' section shows a message: 'Nothing to see here (yet)!'

1. You can record your payment by cheque if required. Enter a **Cheque Number** if you're not printing the cheque.
2. Alternatively, if you make the payment online you can click the drop-down menu and choose **Record Payment**. If you make an online payment, you can enter details of the payment in the Notes section prior to clicking **Record Payment**.



The screenshot shows the 'Approve Payment' dialog box for 'Federal Taxes' with a total amount of \$334.62. The dialog includes fields for 'Liability Period' (01-05-2023 to 31-05-2023), 'Due Date' (15-06-2023), and 'Payment Date' (15-06-2023). A table lists tax items and amounts:

TAX ITEM	AMOUNT
Income Tax	\$137.87
Employment Insurance	\$22.07
Employment Insurance Employer	\$30.90
Canada Pension Plan	\$71.89
Canada Pension Plan Employer	\$71.89
Total	\$334.62

There are fields for 'Cheque Number (optional)' and 'Notes (optional)'. The 'Notes' field contains 'Online Payment at RBC Trans. #0434/4'. Buttons for 'Cancel payment' and 'Record and print' are at the bottom.

- After clicking Record Payment, the **Statement of Account for Current Source Deductions** window displays.
- Click **View** to display the PD7A details.

[← Back](#)

Statement of Account for Current Source Deductions

Select the tax period

i The filing period for this form isn't over yet. If you still need to run your final payroll for this tax period, then this form may have incomplete information.

If you are paying and filing your taxes for the selected tax period outside of the product, use this worksheet to fill in your PD7A amounts online or on the original forms the CRA sent to you. Submit your PD7A to the CRA along with your CPP contributions, EI premiums, and income tax remittance. Do not submit this worksheet.

View this slip to make sure the information is correct. You'll also have the option to print it.

Keep an electronic copy of the slip(s) for your records.

PD7A (Current Period) WORKSHEET

Use the following information to complete your PD7A Form for the current remittance period

CPP contributions	EI premiums	Tax deductions	Current Payment	Gross payroll	No. of employees in last pay period
\$143.78	\$52.97	\$137.07	\$334.62	\$1,354.00	1

CURRENT SOURCE DEDUCTIONS REMITTANCE VOUCHER

DO NOT SUBMIT WORKSHEET TO CRA

Green Tree Landscapes
4997 Davis Drive
Markham ON L3P 2M4

Account number

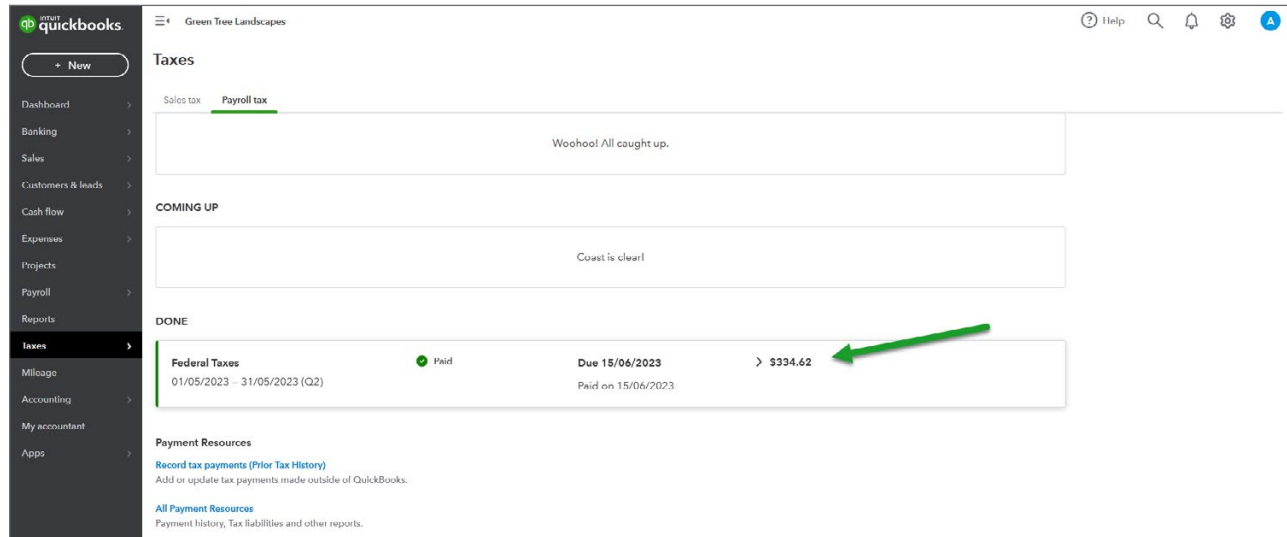
Do not use this area

(Gross payroll in remitting period (dollars only))

Number of employees in last pay period	<input style="width: 30px;" type="text" value="1"/>	End of remitting period for which deductions were withheld	Year	Month
			<input style="width: 30px;" type="text" value="2023"/>	<input style="width: 30px;" type="text" value="5"/>

Amount paid

5. QuickBooks now marks the Taxes as Paid.



6. Click **Monthly Forms** to view the current payroll liabilities. QuickBooks now lets you view the PD7A report.

▶ To learn how to pay taxes watch this video: <https://youtu.be/il6QqxOskFU>

▶ Creating and Printing T4's at Year End

At the end of the calendar year you're required to print T4 or Releve 1 forms for your employees. T4 forms are the yearly forms, which report employee earnings and deductions. Manually preparing these forms can be a daunting task. Luckily, QuickBooks assists you in preparing T4 forms.

The following checklist provides six simple steps for small businesses to get their payroll data in order:

1. Verify employee data.
2. Verify and review benefit information for your employees.
3. Verify and review payroll deductions.
4. Complete a T4 slip for each employee.
5. Complete and remit a T4 Summary form.
6. Review employee wages and benefits for next year.

Preparing T4s

A T4 slip is the end-of-year form that you give to each employee and submit to Canada Revenue Agency (CRA)—usually no later than the last day in February. T4s report the employee's wages and taxes withheld for the calendar year. See the following checklist for the things to report on a T4 slip:

- salary, wages (including pay in lieu of termination notice), tips or gratuities, bonuses, vacation pay, employment commissions, and all other remuneration you paid to employees during the year;
- allowances;
- deductions you withheld during the year

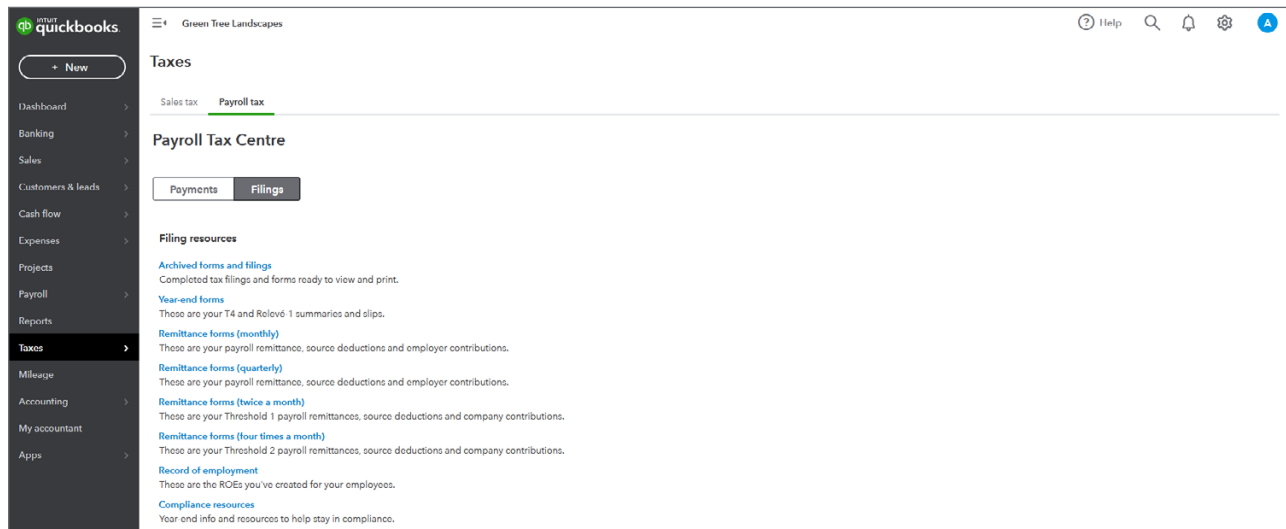
T4 Summary

Once all T4s are printed, you must prepare a T4 Summary. Your T4 Summary is a report that Revenue Canada requires. This summary report totals all employees earnings as recorded on the T4s. It also totals the deductions and payroll taxes (CPP and EI) withheld from the employees during the calendar year. Lastly, this form is used to reconcile those amounts with the source deduction payments that you remitted to CRA.

Your T4 Summary Report is due to be filed with Revenue Canada by the last day of February of the following year.

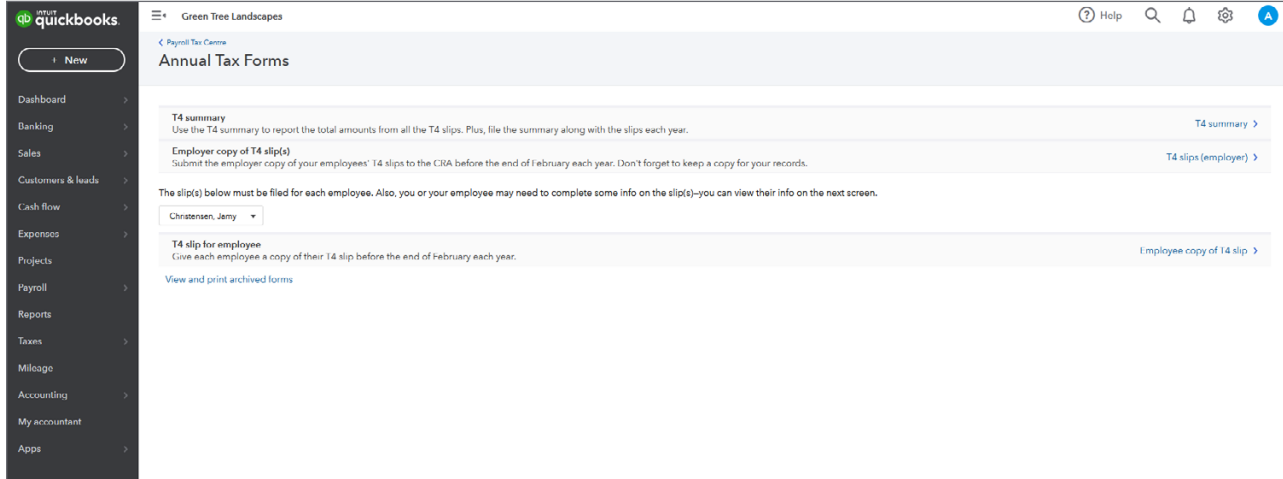
To Print T4's for your employees:

1. On the left navigation bar, click **Taxes**.
2. Click **Payroll Tax**.
3. Click **Filings**.
4. Click **Year-end forms**.

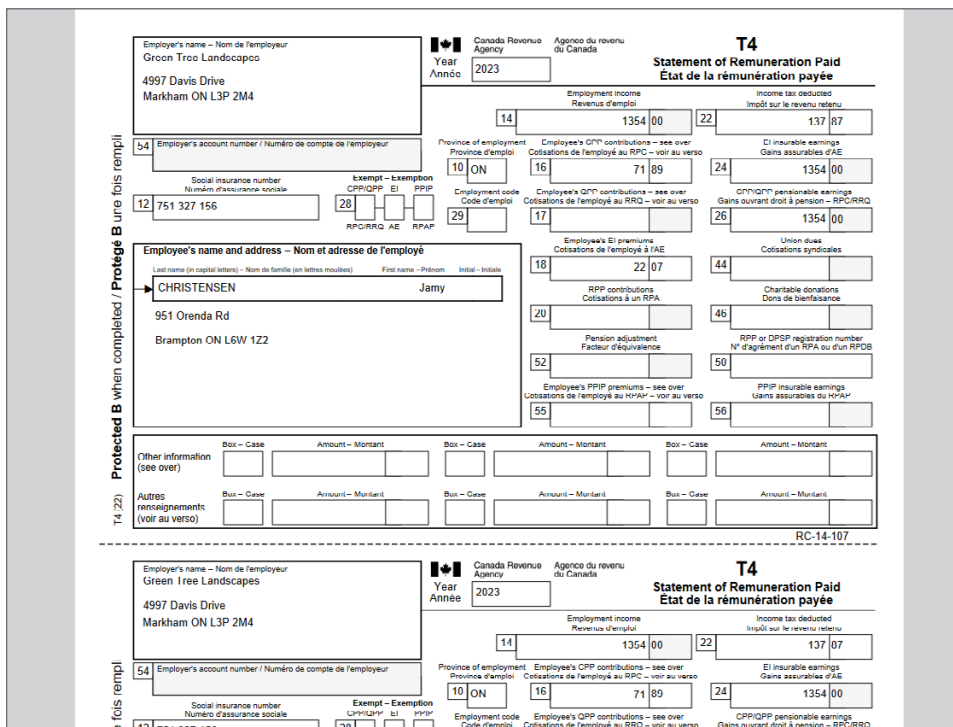


5. Choose the employee.

6. Click **Employee copy of the T4 slip.**



7. Click **View**. Print the form if required.



To learn how to create a T4 watch this video: <https://youtu.be/wHPQFHRPyWM>

▶ Create Records of Employment

In Canada, you're required to issue a Record of Employment (ROE) when an employee:

- quits your company
- is laid off or terminated
- goes on leave



NOTE Please visit the HRDC website for more information regarding who qualifies for a Record of Employment.

The Record of Employment gives the employee all the information they need to submit to the government to claim any benefits they qualify for.

To create a Record of Employment:

1. First you must tell QuickBooks that the person is leaving the company or going on leave. Click **Payroll**.
2. Click the **Employees**.
3. Click the Employee name.
4. Click **Actions** and then click **Change status**.

The screenshot shows the QuickBooks interface for an employee named Jamy Christensen. The interface includes a sidebar with navigation options like Dashboard, Banking, Sales, and Payroll. The main content area displays the employee's profile, including personal information and employment details. The 'Actions' menu is open, showing options like 'Change status' and 'Delete employee'.

Personal info		
Legal name	Preferred first name	Email
Jamy Christensen	Jamy	Jamy@email.com
Phone number	Home address	Birth date
H 267-555-1234	951 Orenda Rd Brampton, ON L6W 1Z2	14-mm-yyyy
Gender	Social insurance number	
-	XXX-XXX-156	

Employment details		
Status	Hire date	Pay schedule
Active	01/05/2023	Semi-Monthly
Work location	Job title	Employee ID
4997 Davis Drive Markham, ON L3R 2M4	-	-

5. Click the **Status** menu to edit the status to reflect the new employee changes.

6. Enter the **Last day of work**.

Employment details

Let's get down to Jamy's job specifics

Status

Active

- Active
- Paid leave of absence
- Unpaid leave of absence
- Terminated**
- Not on payroll
- Deceased

Job title

Employee ID

Cancel Save

7. Choose the **Reason for status change**.

Employment details

Let's get down to Jamy's job specifics

Status Last day of work

Terminated 15/05/2023

Show in employee lists only ⓘ

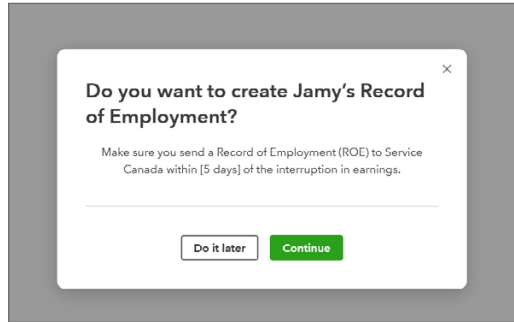
Reason for status change

Select one

- K15 - Other/Canadian Forces - Queen's Regulations/Orders
- K16 - Other/At the employee's request
- K17 - Other/Change of Service Provider
- M00 - Dismissal**
- M08 - Dismissal/Terminated within probationary period
- N00 - Leave of absence
- P00 - Parental

Job title

8. Click **Save**.

9. Click **Continue**.

Review ROE

1 of 1

Automatic Zoom

RECORD OF EMPLOYMENT (ROE)			
1 SERIAL NO. Nil*	2 SERIAL NO. OF ROE AMENDED OR REPLACED Nil*	3 EMPLOYER'S PAYROLL REFERENCE NO.	
4 EMPLOYER'S NAME AND ADDRESS Green Tree Landscapes 4997 Davis Drive Markham ON		5 CRA BUSINESS NUMBER (BN) RP 0001	6 PAY PERIOD TYPE non-standard semi-monthly
7 POSTAL CODE L3P 2M4		8 SOCIAL INSURANCE NO. 751-327-156	
9 EMPLOYEE'S NAME AND ADDRESS Jamy Christensen 551 Orenda Rd Brampton, ON L6W 1Z2		10 FIRST DAY WORKED D M Y 1 1 5 2023	11 LAST DAY FOR WHICH PAID D M Y 15 5 2023
12 OCCUPATION Nil*		13 EXPECTED DATE OF RECALL D M Y 	
14 TOTAL INSURABLE HOURS 40.00		15 REASON FOR ISSUING THIS ROE Dismissal M00	
16 TOTAL INSURABLE EARNINGS 1354.00		17 FOR FURTHER INFORMATION CONTACT Chuck Morris 647-555-1234	
18 THE FIRST ENTRY MUST RECORD THE INSURABLE EARNINGS FOR THE FINAL (MOST RECENT) INSURED PAY PERIOD. ENTER DETAILS BY PAY PERIOD.		19 ONLY COMPLETE IF PAYMENT OR BENEFITS (OTHER THAN REGULAR PAY) PAID IN FULL IN ANTICIPATION OF THE FINAL PAY PERIOD OR PAYABLE AT A LATER DATE.	
PP	INSURABLE EARNINGS	PP	INSURABLE EARNINGS
1	1354.00	2	3
4	5	6	7

Cancel Print Next

10. QuickBooks displays a preview of the ROE.



NOTE You cannot submit this information directly to the HRDC from QuickBooks Online. However, this information can be used to complete the ROE web form for submission.