ROE Request | 2016
(Record of Employment)
Overview

This option is for requesting Records of Employment (ROEs) in the PAYweb system. These ROEs are then submitted to Service Canada on your behalf.

A payroll must be closed either by the manual cheque feature of by closing an normal payroll process in order for any terminated employees to appear in the ROE Request section.

There are two options for producing the Record of Employment (ROE):

1. We will produce the ROE for you if you request it. You must have signed and returned the “ROE SAT Addendum” to support@payweb.ca in order to have this functionality turned on.

2. You may issue the ROE yourself. A report is generated as part of the payroll close. The report will detail the required information to enable you to produce the ROE using either the Service Canada software or the paper copies.

If you elect for PAYweb to produce the Record of Employment (ROE) form on your behalf, you MUST Terminate or Lay off the employee in PAYweb.ca using the Terminate Employee screen, either in Enter Payroll or through the Manual Cheque option if you are between payroll runs.

Please be aware that we do not have the detail history for your employees prior to your set-up with us. The ROE that we print for you will not automatically include details from your previous payroll provider. You can either have your previous provider issue an ROE prior to changing service providers or you can manually adjust the information displayed on the ROE in PAYweb to include the information from the previous provider.

Billing charges for each ROE processed or any amended ROEs will be billed with your next payroll run.

This document describes the ROE Request option. This option is only selected if PAYweb.ca produces ROEs on your behalf.

For details on how to address the various errors and warnings, please see Errors and Warnings.
ROE Request

Once the payroll is closed, you must complete the **ROE Request**. If the termination was done through the Manual Cheque option, this procedure can be completed once the Manual Cheque has been updated.

From the Main menu, select **ROE Request**.

All Employees that have been terminated or laid off and do not have a **Finalized** ROE will be listed on the **ROE Request** screen under the **Current** status filter.

In this screen you can search for an employee by a number of different “sorts” listed on the left hand menu such as; Termination Date, Serial No., Employee No. or Creation Date.
Select the employee(s) for whom you need Records of Employment to be issued, and press Enter to continue.

At this point you are in the **Edit Record of Employment** screen and will have full view to the ROE, populated with the information from your payroll. At the top of the page you will notice the **New** status indicating that at this point, there has been no action taken for this ROE. At this time you may update any required information or make any necessary changes to the information on the ROE prior to submitting to Service Canada.

Please note the blue and green buttons that are located at the top and bottom of
Following is a reference table of the blue and green action buttons, and their functions.

<table>
<thead>
<tr>
<th>Button</th>
<th>Action/Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>When making changes to the ROE information, be sure to save prior to returning to the main menu or moving to the next ROE.</td>
</tr>
<tr>
<td>Exit</td>
<td>This button will take you back to the ROE Request screen.</td>
</tr>
<tr>
<td>Next</td>
<td>If multiple ROEs are selected, you can use this button to move directly to the next ROE.</td>
</tr>
<tr>
<td>Request ROE</td>
<td>Once you have verified the information and made any necessary changes to the ROE, you can submit to Service Canada by using this button.</td>
</tr>
<tr>
<td>FAQ</td>
<td>Provides a list of Frequently Asked Questions to help guide you along.</td>
</tr>
<tr>
<td>View History</td>
<td>This will take you to the View History menu with detailed per pay information of the employee’s pay history.</td>
</tr>
<tr>
<td>Recalculate</td>
<td>If changes are made to the ROE such as First or Last Day Worked; by selecting the recalculate button the system will recalculate the values for box 15A,B and C to reflect the your adjustments.</td>
</tr>
<tr>
<td>Service Canada</td>
<td>This link will take you to a step-by-step guide on Service Canada’s website on how to complete an ROE, and the details for each &quot;Block&quot;.</td>
</tr>
<tr>
<td>Hyperlink</td>
<td></td>
</tr>
</tbody>
</table>

For a detailed explanation on each of the “Blocks” on the Record of Employment, please refer to this link for the Service Canada website. A great resource!

Please note, that you must specify the Reason Code for each ROE issued, this is a mandatory field. If no other changes are required to the ROE, click Request ROE to send the ROE to Service Canada.

At this point the PAYweb system will notify you of any missing information or errors prior to submitting to Service Canada. A sample error message is shown below.
Click **Continue** to return to the ROE and the error highlighted with a red border.

Make the necessary adjustments to correct the error and then you can select Request ROE again to resubmit. Additional errors will be highlighted and you will need to repeat the same process until all errors are corrected.
Once all of the errors have been corrected, and you select Request ROE and you will be prompted with a message asking if you are sure. Reminder: please ensure that you have entered all Separation Payments in block 17C.

Once the ROE has been accepted and finalized with Service Canada, if any other adjustments are required, this will need to be done by creating an amendment to the ROE.

Once the ROE has been requested, you will notice the status has changed from New to Requested. The PAYweb system is set up to send files to Service Canada every 30 minutes. The ROE will stay at the Requested status until the file is sent to Service Canada.
You will notice the Action Tools column on the far right hand side of the screen. This allows you to take certain actions depending on the status of the ROE.

When the ROE is in Requested status, you can select the blue envelope with the red “x” to cancel the request. The ROE will return to New status and further edits can be done and then the ROE Request completed again when you are ready.

Once the file has been sent from PAYweb to Service Canada, you will no longer have the option of cancelling the request. At this point the status will be changed to Processing until the file is returned to the PAYweb system as either Finalized, Finalized* or Error.
When Service Canada is finished processing the ROE and PAYweb successfully receives the file, it will now be in the **History** filter and can be accessed by selecting **History** in the **Status Filter** box. If the ROE has come back from Service Canada with an **Error** status, the ROE will remain in the **Current** filter.

If the status is either **Finalized** or **Finalized***, then you may use the **Action Tools** to either print the ROE by clicking on printer icon, or amending the ROE by clicking on the wrench icon.

At this point a **Finalized** ROE is completed and no further action is required. Copies can be printed however, it is not necessary to provide the employee with a copy as Service Canada has it electronically on file. ROEs are kept on the PAYweb system for 11 years.

When you click on the printer icon, the ROE form will appear in .pdf format and can be printed directly from your computer. Here is a sample.
When a Finalized ROE has an asterisk (*), it means that Service Canada has flagged potential warnings on the ROE. The ROE has been successfully accepted by Service Canada so no further action is required, but we recommend you review the warnings.

When the wrench icon is selected, the PAYweb system will verify you would like to amend the ROE and you will see the message below.
When you select **Yes**, the ROE will be reopened with the status of **New** and you may make any changes required by using the same process outlined earlier in this document.
If the ROE has come back from Service Canada will a status of Error, it means that there is information on file with Service Canada that is conflicting and prevents them from accepting the ROE. Possible errors include an overlap of pay period dates that exist on a previously filed ROE.

Below are icons to be aware of:

If the status of the ROE is either Error or Finalized*, there will be an error icon in the Action Tools column that will allow you to edit and correct the errors. For ROEs that are Error status, the errors need to be corrected and the ROE re-submitted. Please contact PAYweb support if you require assistance in troubleshooting the error.

At certain times in the process you may cancel or delete and ROE. The available actions are dependent on where the ROE is in the process. You may choose to Cancel an ROE using this icon. This can only be done when an ROE has errors. By cancelling it will move the ROE to the History screen, but can be reactivated if necessary.

Deleting and ROE is possible for ROEs that have been manually created or an amended version of an ROE that has not yet been sent to Service Canada.

A Few helpful hints when completing the ROE

If the employee terminated is returning to work, enter the Expected Date of Recall. If you do not know if the employee is returning to work, leave the date field blank. The recall code will default to Unknown.

The Comments field is ONLY mandatory if the Reason Code is K (Other).

For all other codes, please enter ONLY any information or comments that would help prevent a phone call from Service Canada to clarify the nature of subsequent payments or the reason for leaving.

NOTE: According to the service Canada website, do not include comments such as “Vacation paid every pay”, or “Included with each pay” in the Comments box.

The Occupation field is not mandatory.

The Vacation Pay field is display only.

- If the employee was paid vacation pay on the final pay period, the amount will automatically populate in this field, but you will need to choose the reason on the drop down menu.
- If the employee is paid vacation every pay, there will be no amount displayed.
- If the employee did not receive any vacation pay on the final pay period, then the field will be blank.
• If the vacation pay amount is blank, you may want to investigate and determine if vacation pay is required prior to requesting the ROE.

Enter the dates and monies paid for any **Statutory Holiday** paid to the employee after their Last Day for which Paid.

Complete the **Other Monies** field with any payments other than regular pay that are paid in the final pay period, in anticipation of the final pay period or at a later date during the interruption of earnings, whether or not these monies are insurable.

The **Payment Code** field is used for Paid Sick/Maternity/Parental Leave or group wage loss indemnity payments paid after the last day worked. If your employee is receiving any of these payments, either from your company or a third payer, enter the **Payment code**, **Payment start Date**, **Amount** and the **Period code**.

**Building an ROE from Scratch**

PAYweb offers the ability to build an ROE from scratch using a blank template for employees who were not previously in the PAYweb system. In the **ROE Request** menu, select the **Create Manual ROE** button.

A blank ROE form will appear, and you may enter the employee information in Block 9, 16, 17, 8, 10, 11, 12 and 15A, B and C. Similar to requesting an ROE for an employee already set up in the payroll, the PAYweb system will provide warning/error messages upfront that can be corrected, and then the ROE can be resubmitted.

And the warnings/errors will have a red border around the box to highlight the issue. This is the same process as processing an ROE for an employee in the system, just that the information is not pre-populated.
Frequently Asked Questions

Q – How do I amend an ROE?
A – To amend an ROE simply go to the Request ROE screen and select the History filter. Search for the Finalized ROE and click on the wrench icon under the Action Tools column. At this point the ROE will open and you can adjust. The ROE will be resubmitted to Service Canada with an amended Serial number in Block 2.

Q – Will I be charged for amending an ROE?
A – Yes, an ROEs that are submitted to Service Canada on your behalf have the normal ROE fee.

Q – How am I billed for ROEs?
A – You will be billed the nominal fee on the next payroll run for each ROE processed.

Q – PAYweb.ca does not have the entire history for my employees as we had a different service provider prior to PAYweb. How do I get the proper EI history onto the ROE?
A – You have two options, if you have received ROEs from your previous provider then you would issue two ROEs for the employee, one from the previous payroll provider and one from NEBS. Alternately you can manually adjust the ROE to include the per pay information from your previous payroll provider.

Q – When or why would I have to amend an ROE?
A - You may need to amend an ROE for various reasons. You may need to change the Reason code, First Day worked, Last Day for which Paid. You may have found out after the ROE was generated that there are other monies owing to the employee, they may be entitled to some Sick leave/maternity of parental leave benefits or a Group Wage loss indemnity payments, or you may owe them Statutory Holiday earnings.
**Q – How long should it take to get my ROE back for my employee?**

A – Files are submitted by PAYweb to Service Canada every 30 minutes, this means that you can received your ROE back as quickly as 35 minutes. However, processing times at Service Canada are out of our control so we cannot guarantee. You will likely have your ROE back the same business day.

**Q - What happens if I did not pay out vacation pay entitled to an employee when I terminated them?**

A – Go to the Employee Profile, select the Payroll tab and change the employee to active, then the start date to be greater than the termination date tab down to the termination date and delete it, press enter to save. Change the start date back to the original start date that was on the screen and press enter to save. Use the Manual Cheque function to pay out Vacation and Terminate again. If the ROE is in Requested status, you can cancel the request and make the necessary adjustments then resubmit. If the status is Processing or Finalized, you will need to amend the ROE.

**Q - How long will the ROE’s be on the system?**

A – ROE’s will stay on the system for 11 years for easy access for the client.
Contact Us

**Customer Support**
7:00am – 8:00pm Eastern Time

(519) 621-3570
1-866-7PAYweb (1-866-772-9932)
support@payweb.ca

www.PAYweb.ca

Signon – Log In
https://login.PAYweb.ca or
https://logint.PAYweb.ca