

# Fiori My Tax Forms Custom Tile at City of Mississauga

Darren Headrick

Jun Dou

City of Mississauga



# Agenda

About Mississauga

My Tax Forms

- Background/business need

- Requirements/solution—high level

- Solution—ERP, form, Fiori

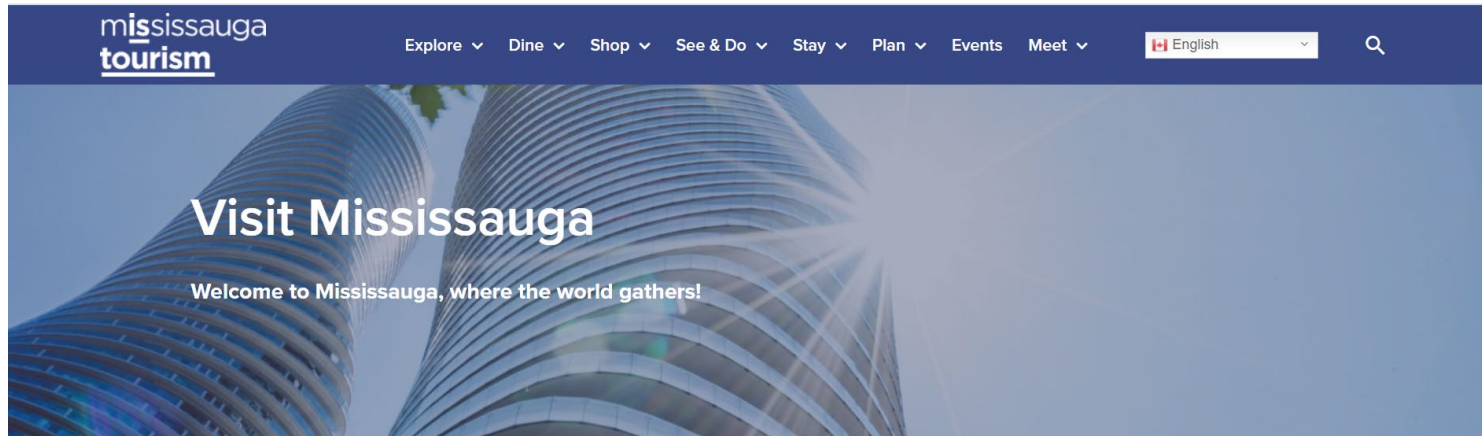
Change management

Key Learnings

Questions

# About Mississauga

<https://www.visitmississauga.ca/about-mississauga/>



## Welcome to Mississauga

Mississauga is Canada's sixth largest city, located in Southern Ontario on the beautiful waterfront of Lake Ontario. Conveniently a 30-minute drive from downtown Toronto, Mississauga is also within close reach of Niagara Falls and other day trips and less than 90 minutes from the US border. With so much to see and do, Mississauga has something for everyone! Come visit us, and see for yourself.



# City of Mississauga: Who we are

- 7<sup>th</sup> largest city in Canada, 3<sup>rd</sup> largest in Ontario, over 700,000 residents
- Home of Toronto Pearson Airport
- A great place to live, work and play
- Over 7,000 union and non-union employees across 5 departments
  - Community Services (e.g. Fire, Library, Recreation, Parks & Forestry)
  - Corporate Services (e.g. IT, Finance, HR)
  - Transportation & Works (e.g. Transit, Works, Enforcement)
  - Planning & Building (e.g. Building, Development & Design)
  - City Manager's Office (e.g. Economic Development Office, Internal Audit)

# SAP at the City



= First Canadian Municipality



- 1995: SAP live with FI/CO and MM on R3
- 2007: Migrated to ECC 6
- 2010: Migrated PeopleSoft to SAP HCM including Portal ESS and MSS
- 2013: ECC Enhancement Pack 6
- 2014: Upgraded BObj to 4.1
- 2014: HR Processes and Forms (ESS Personal Info Change, Personnel MSS)

Authorization Form on



- 2015: Fiori Leave Tiles
- 2016: Fiori My Paystubs, BObj to 4.2 and Lumira
- 2017: SuccessFactors (SF) Talent modules (Rctg/Onbdg, etc.) project start
- 2018: SF CDP live March, Recruiting and Onboarding live July
- 2019: SF PMGM live February, Succession live March
- 2020: SF Compensation live February
- 2021: My Tax Forms internally developed custom tile
- 2021: Migrated to S4 1809 (May)



## Background/business need

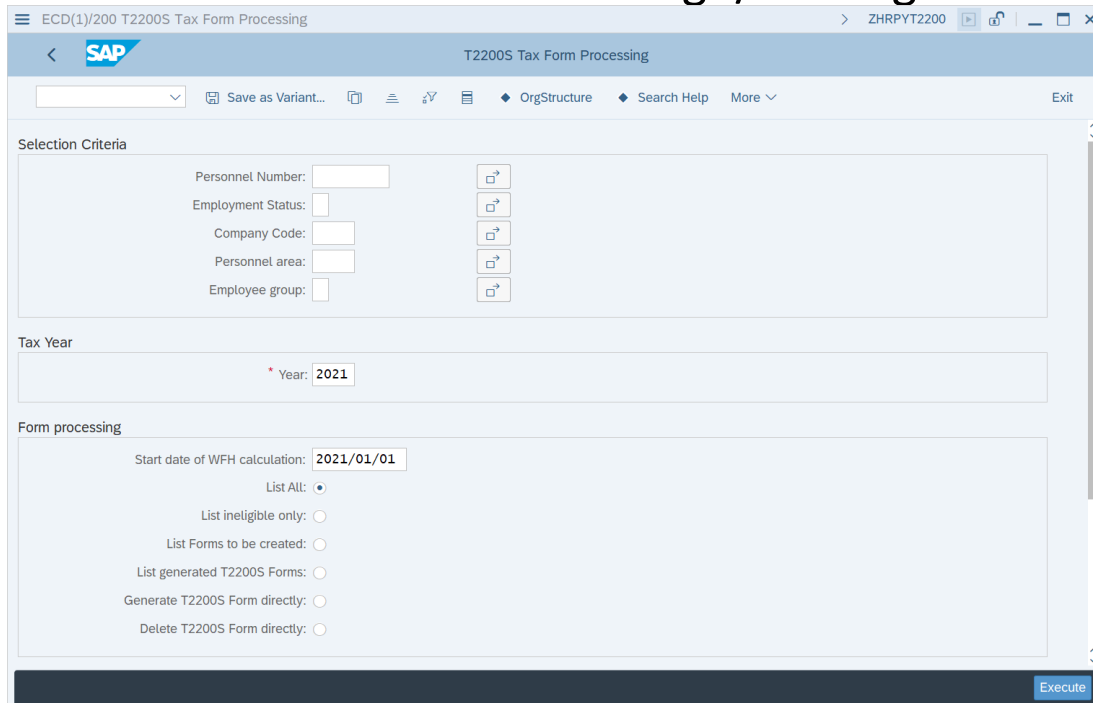
- During the pandemic, CRA has allowed employees to claim a flat rate deduction for home office expenses if employees receive a T2200S form from their employer
- The City needed a flexible way to assign and distribute forms to employees
- SAP has no standard T2200S or T4 tile on Fiori for employees (closest standard functionality: ESS Tax Form Reprint)
- CRA's guidance had provided high level direction and specifics became available in late 2020

## Requirements/Solution—high level

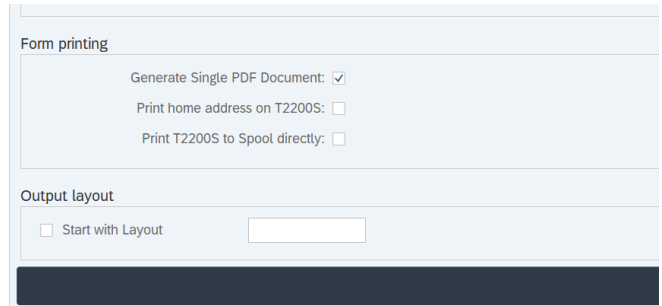
- IT and Finance were interested in developing a Fiori tile for all active, eligible employees to access the form
- Finance needed a way to choose employees en masse and assign or unassign for exceptions or after review
- Finance needed a way to produce hard copy forms for mail out to terminated or retired employees

# Solution—ERP

- ERP transaction to assign/unassign form



The screenshot shows the SAP T2200S Tax Form Processing transaction. The interface includes a menu bar with options like 'Save as Variant...', 'OrgStructure', 'Search Help', and 'More'. Below the menu is the 'Selection Criteria' section with input fields for 'Personnel Number', 'Employment Status', 'Company Code', 'Personnel area', and 'Employee group', each with a search icon. The 'Tax Year' section shows 'Year: 2021'. The 'Form processing' section contains a date field for 'Start date of WFH calculation' set to '2021/01/01' and several radio button options: 'List All:', 'List ineligible only:', 'List Forms to be created:', 'List generated T2200S Forms:', 'Generate T2200S Form directly:', and 'Delete T2200S Form directly:'. An 'Execute' button is located at the bottom right.



The screenshot shows the 'Form printing' and 'Output layout' options. The 'Form printing' section includes three checkboxes: 'Generate Single PDF Document:' (checked), 'Print home address on T2200S:' (unchecked), and 'Print T2200S to Spool directly:' (unchecked). The 'Output layout' section includes a checkbox for 'Start with Layout' and an empty input field.



ECD(1)/200 T2200S Tax Form Processing ( Total 45 entries )      ZHRPYT2200

**SAP**      T2200S Tax Form Processing ( Total 45 entries )

Generate T2200S    Print T2200S    Delete T2200S    More

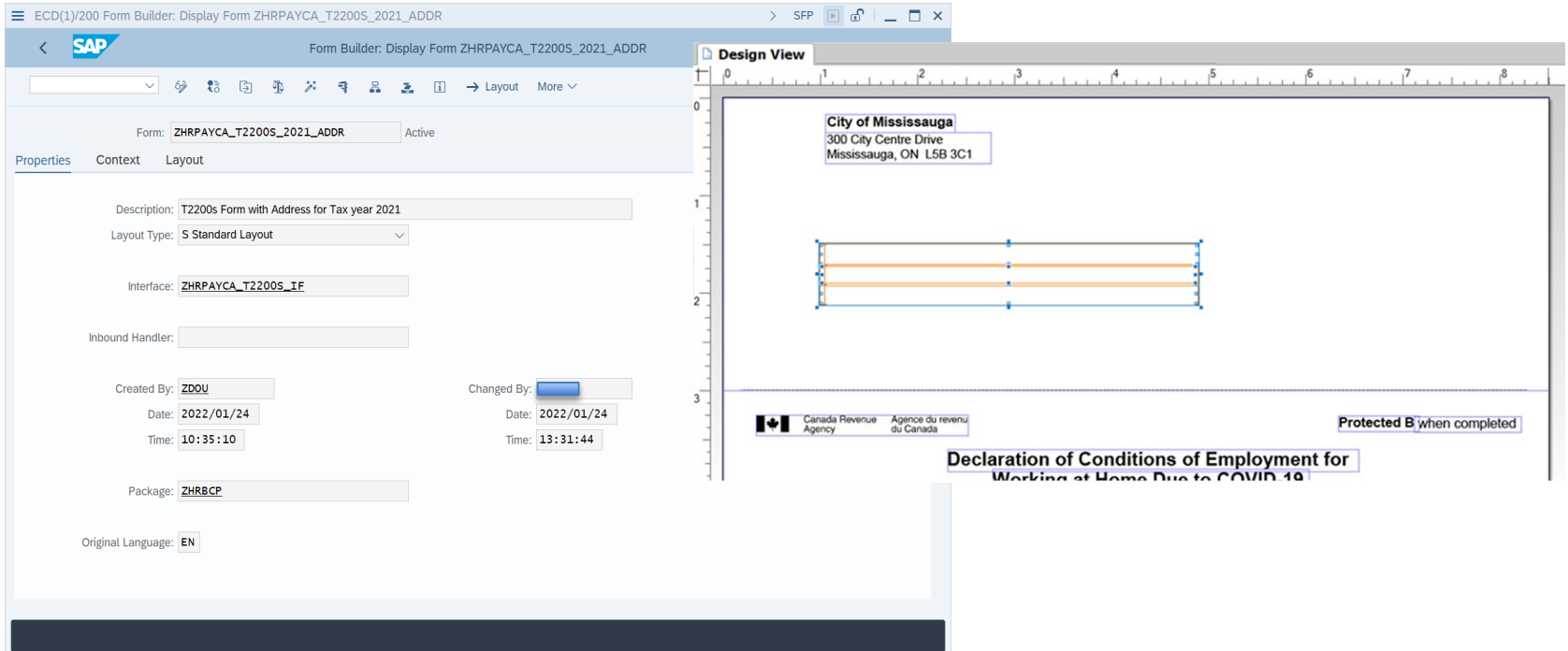
**T2200S Tax Form Processing ( Total 45 entries )**  
 List all  
 Number of Forms created (Green) : 37  
 Number of Forms ineligible (Red) : 8

Payr...	Pers.Assign	Pers...	Suba.	First name	Last name	Start Date	End Date	WFH hours	Actual hours	% WFH hours	Cons. Wks	Created on	Created by
2021		CM99 0045		Harry	Jones	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Alfie	Martinez	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Karen	Robinson	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Karl	Baldwin	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Margaret	Penney	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0001		Harry	Heath	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0001		Test	Support			0.00	0.00	0.00	0		
2021		CM99 0001		Helen	Support			0.00	0.00	0.00	0		
2021		CM99 0045		Joshua	Williams	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Test	Pack			0.00	0.00	0.00	0		
2021		CM99 0045		Bank	Test			0.00	0.00	0.00	0		
2021		CM99 0045		Jacob	Thompson	2021/03/01	2021/03/27	140.00	140.00	100.00	4	2022/01/27	
2021		CM99 0045		Samuel	Penney	2021/05/03	2021/06/05	168.00	173.25	96.97	5	2022/01/27	
2021		CM99 0045		Damon	Wilson	2021/05/17	2021/06/19	168.00	169.75	98.97	5	2022/01/27	
2021		CM99 0001		Joshua	Martin	2021/09/17	2021/10/09	104.00	112.00	92.86	4	2022/01/27	
2021		CM99 0025		Range	NewNumber			0.00	0.00	0.00	0		
2021		CM99 0025		Test	TestBP1			0.00	0.00	0.00	0		

Sample output in Dev showing eligible (green) and ineligible (red) based on criteria, totals

# Solution—ERP

- ERP form using Adobe Document Services



The screenshot displays the SAP Form Builder interface for configuring a form. The left pane shows the configuration details for the form 'ZHRPAYCA\_T2200S\_2021\_ADDR'. The right pane shows the 'Design View' of the form, which includes the City of Mississauga header, a table with three rows, and a footer with the Canada Revenue Agency logo and a 'Protected B' warning.

**Form Configuration Details:**

- Form: ZHRPAYCA\_T2200S\_2021\_ADDR (Active)
- Description: T2200s Form with Address for Tax year 2021
- Layout Type: S Standard Layout
- Interface: ZHRPAYCA\_T2200S\_IF
- Inbound Handler: (Empty)
- Created By: ZDOU
- Changed By: (User)
- Date: 2022/01/24
- Time: 10:35:10
- Package: ZHRBCP
- Original Language: EN

**Design View Content:**

- City of Mississauga  
300 City Centre Drive  
Mississauga, ON L5B 3C1
- Table with 3 rows and 1 column.
- Canada Revenue Agency / Agence du revenu du Canada logo.
- Protected B when completed
- Declaration of Conditions of Employment for Working at Home Due to COVID-19

ECD(1)/200 Print Preview, Document 1 of 1 > ZHRPYT2200

< **SAP** Print Preview, Document 1 of 1

More ▾

Share Sign In

Canada Revenue Agency Agence du revenu du Canada

Protected B when completed

### Declaration of Conditions of Employment for Working at Home Due to COVID-19

This form is only for employees who worked from their home in 2021 due to COVID-19. The **employer** must complete and sign this form if the employee chooses to use the detailed method to calculate their home office expenses (work-space-in-the-home and supplies). If the employee is required to pay for expenses other than home office expenses, do not use this form. Instead, complete Form T2200, Declaration of Conditions of Employment.

The **employee** does **not** need to attach this form to their return, but they must keep it in case we ask to see it later. However, the employee must complete Form T777S, Statement of Employment Expenses for Working at Home Due to COVID-19, and attach it to their tax return to deduct home office expenses for the year.

For more information about claiming employment expenses, see Guide T4044, Employment Expenses.

Part A – Employee information					
Last name	Penney	First name	Margaret	Tax year	2021
Employer address	300 City Centre Drive, Mississauga, Ontario, L5B 3C1				

### Part B – Conditions of employment

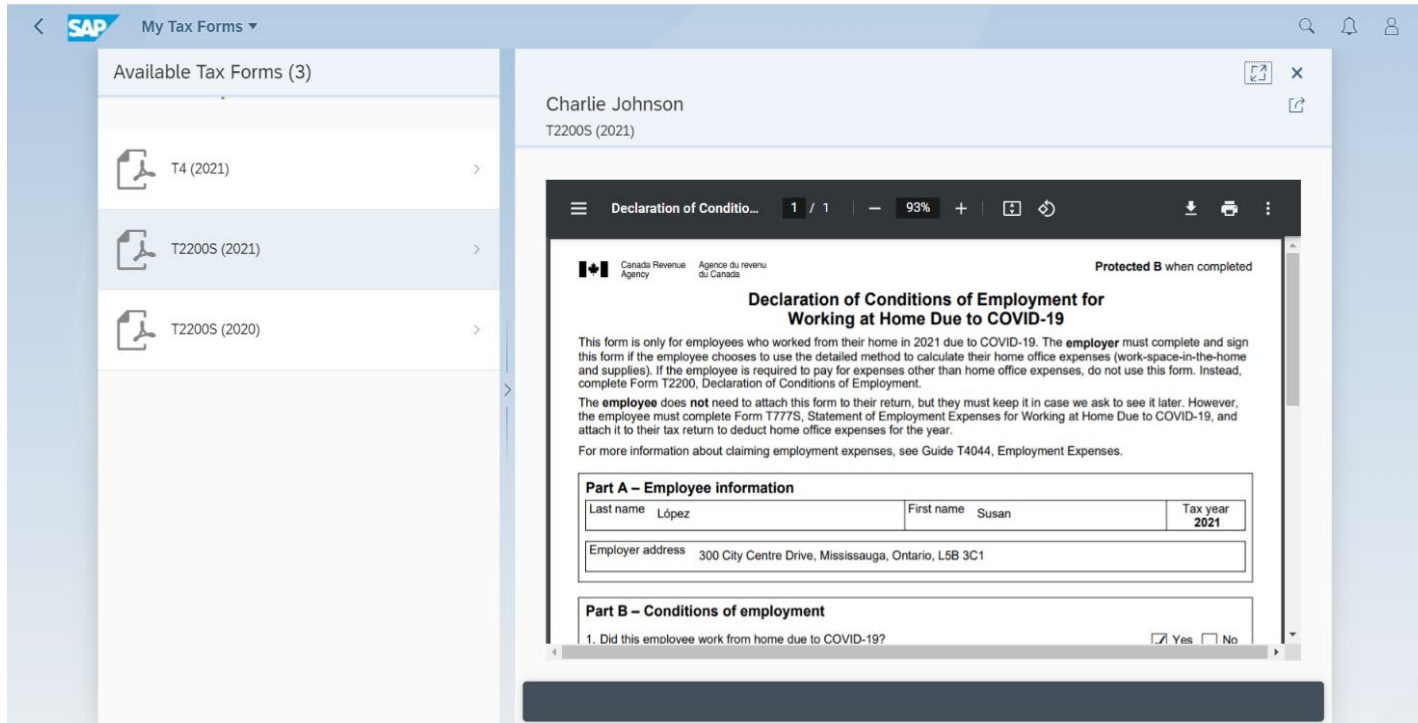
1. Did this employee work from home due to COVID-19?  Yes  No

Sample form in Dev;  
address on form for  
printing doesn't  
appear in display of  
form in Fiori (print  
only feature)

## Solution—Fiori

- Custom tile developed on WebIDE using Adobe Document Services to display employee's tax forms (any T2200S, T4); Dev example below, employee has 3 forms available





The screenshot displays the SAP 'My Tax Forms' interface. On the left, a sidebar titled 'Available Tax Forms (3)' lists three forms: T4 (2021), T2200S (2021), and T2200S (2020). The main area shows a preview of the 'Declaration of Conditions of Employment for Working at Home Due to COVID-19' form for Charlie Johnson, T2200S (2021). The form is displayed in a viewer with a dark header bar containing a menu icon, the title 'Declaration of Conditio...', page indicators '1 / 1', zoom level '93%', and icons for zoom, search, and print. The form content includes the Canada Revenue Agency logo, the title 'Declaration of Conditions of Employment for Working at Home Due to COVID-19', and a 'Protected B when completed' notice. The form text explains its purpose and provides instructions for completion. It features two main sections: 'Part A - Employee information' and 'Part B - Conditions of employment'. Part A includes fields for 'Last name' (López), 'First name' (Susan), 'Tax year' (2021), and 'Employer address' (300 City Centre Drive, Mississauga, Ontario, L5B 3C1). Part B includes a question: '1. Did this employee work from home due to COVID-19?' with 'Yes' and 'No' radio button options.

Available Tax Forms (3)

- T4 (2021)
- T2200S (2021)
- T2200S (2020)

Charlie Johnson  
T2200S (2021)

Declaration of Conditio... 1 / 1 - 93% +

Canada Revenue Agency / Agence du revenu du Canada

**Protected B when completed**

### Declaration of Conditions of Employment for Working at Home Due to COVID-19

This form is only for employees who worked from their home in 2021 due to COVID-19. The **employer** must complete and sign this form if the employee chooses to use the detailed method to calculate their home office expenses (work-space-in-the-home and supplies). If the employee is required to pay for expenses other than home office expenses, do not use this form. Instead, complete Form T2200, Declaration of Conditions of Employment.

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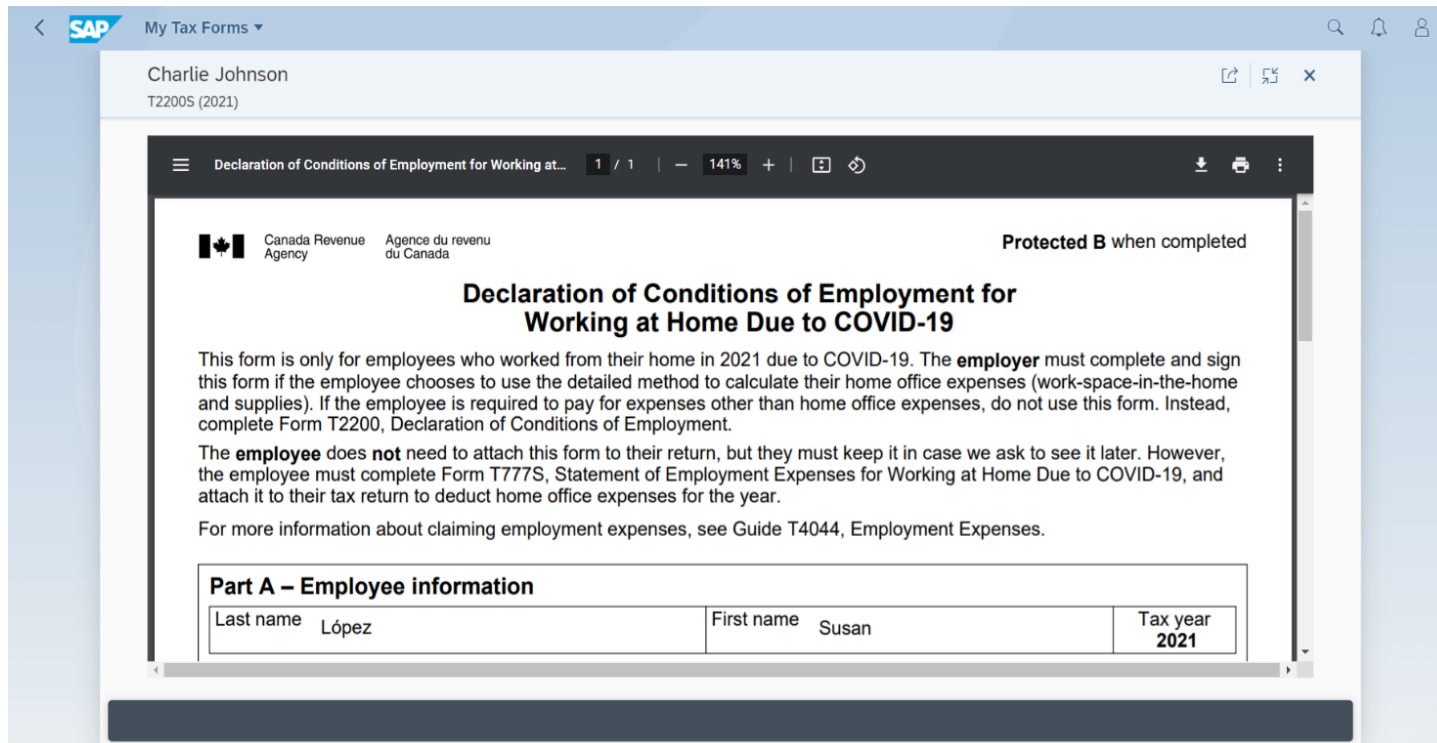
**Part A – Employee information**

Last name	López	First name	Susan	Tax year	2021
Employer address	300 City Centre Drive, Mississauga, Ontario, L5B 3C1				

**Part B – Conditions of employment**

1. Did this employee work from home due to COVID-19?  Yes  No

Overview on left and form on right; standard controls for download and print



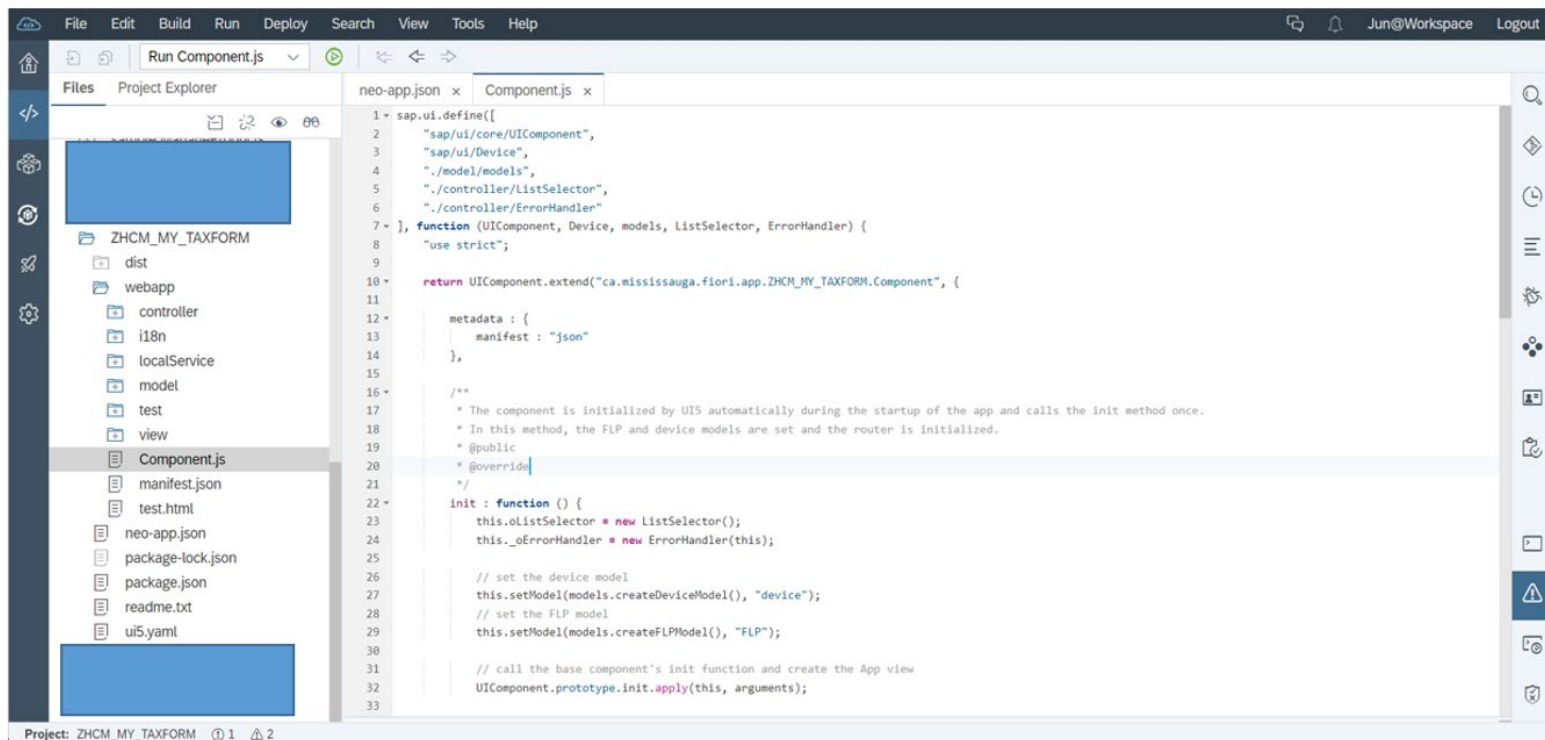
The screenshot shows the SAP My Tax Forms interface. At the top, it displays the user's name 'Charlie Johnson' and the tax year 'T2200S (2021)'. The main content area shows a document titled 'Declaration of Conditions of Employment for Working at Home Due to COVID-19'. The document header includes the Canada Revenue Agency logo and the text 'Protected B when completed'. The document body contains instructions for employees and employers regarding the form. Below the text, there is a section titled 'Part A – Employee information' with a table containing the following data:

Part A – Employee information					
Last name	López	First name	Susan	Tax year	2021

Ability to turn off  
overview/full screen  
view

## SAP Web IDE:

Develop front end of Fiori App: My Tax Forms and deploy it to Fiori Launchpad.



```
1- sap.ui.define([
2   "sap/ui/core/UIComponent",
3   "sap/ui/Device",
4   "./model/models",
5   "./controller/ListSelector",
6   "./controller/ErrorHandler"
7- ], function (UIComponent, Device, models, ListSelector, ErrorHandler) {
8   "use strict";
9
10-
11-
12-
13-
14-
15-
16-
17-
18-
19-
20-
21-
22-
23-
24-
25-
26-
27-
28-
29-
30-
31-
32-
33-
```

Project: ZHCM\_MY\_TAXFORM 1 2

## Change Management:

- City staff have used Fiori for pay statement
  - good familiarity with using tiles
- Staff transferred time to QA using Clone & Test and ran process with good data in QA
- Finance normally communicates with employees on T4s so employees were naturally expecting info
- Team created job aid to help employees use and print if needed
- Team worked with Print Services on printing, sorting, inserting and mailing



## Change Management:

- Initially used externally developed and purchased T4 tile to minimize risk in 2021 (risk mitigation)
  - My Tax Forms tile and T4 capability was ready when T4s needed to be distributed
  - Disabled display of T4s temporarily in My Tax Forms
- City switched to City developed My Tax Forms tile for T4 in 2022
- Slight differences in navigation and updated job aid and communication to employees

## SAP Fiori My Tax Forms (T4)

SAP Fiori has a My Tax Forms tile available as of February 2021 for eligible staff to access their T4 form(s) prepared by Finance.

**Note:** if you are on the City's network and can access the SAP Fiori link from the Apps menu on Inside Mississauga, skip steps 1 and 2.



**1** If you are not logged into the City network, type [go.mississauga.ca](https://go.mississauga.ca) in a browser on a device with an internet connection.

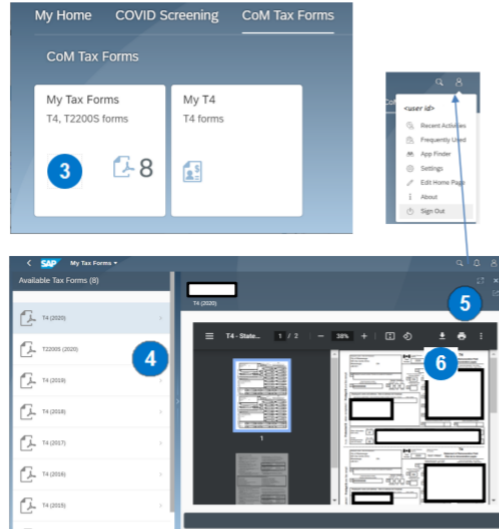
**2** Enter your network user id and password. If you have forgotten your password or your password has expired, contact the IT HelpDesk.

**3** Click on My Tax Forms tile to get to your T4 form(s)

**4** Use the left side list to select the tax form you wish to view.

**5** Use the printer icon to print if necessary (**Note:** Printing requires the device has a printer set up; be careful printing confidential info.)

**6** Use the download button to save the file (**Note:** Be careful when saving confidential info).



**Note:** above screen shot for Chrome browser; other browser pdf controls may be slightly different. **If Chrome pdf error occurs,** ensure PDF Documents is set to not download/off in Settings>Privacy and security>Site settings>(Additional content settings)>PDF Documents.

**CAUTION:** ensure you Sign Out from your session (see top right), close all windows or lock or shut down your device to protect your confidential info.

## Key Learnings and Benefits:

- Able to deploy a custom tile and transaction within a short period of time
- Addition of the address to the first page helped Print Services print forms for retired and terminated employees
- Payroll liked the features in the custom transaction e.g. selection and display variants, ability to specify attendance types, ability to grant/remove to individuals, etc.

## Next steps for City:

- May develop an employment verification letter tile (no SAP standard tile)
- May develop a tile to gather consent or other info from employees (e.g. United Way campaign, etc.)
- May develop a tile to display info for employees (e.g. employee directory)
- Deployment of other development tools (eclipse, ADT, etc.)

# Questions?

Humour/fact: the City's custom tile is not agnostic i.e. is not *'a person who claims neither faith nor disbelief in God'*

Rhetorical questions: Is something that is browser agnostic mean that it doesn't have faith in or disbelief in browsers? Should someone really say that it works on all or most browsers?

Mark Twain said "Don't use a five dollar word when a fifty cent one will do" (or is more accurate)

- Contact info:
  - [darren.headrick@mississauga.ca](mailto:darren.headrick@mississauga.ca)
  - Project Manager, SAP Development Support