



International Journal of Multidisciplinary Research and Growth Evaluation.

Design/Automation of Dental Benefits Reporting Box 45 in Canada T4

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Article Info

ISSN (Online): 2582-7138

Impact Factor (RSIF): 7.98

Volume: 06

Issue: 05

September - October 2025

Received: 22-08-2025

Accepted: 26-09-2025

Published: 24-10-2025

Page No: 986-991

Abstract

This article focusses on how we can automate the mandatory statutory requirement of reporting the Dental Benefits Box 45 in Canada T4 Year End Forms. This research paper researches on designing the reporting of Box 45 Dental Benefits using the delivered functionality of Workday Payroll. This research outcome will provide the Workday Payroll view based on Canada Year End rules. This article proves the success of this design with a successful live case study by implementing this design in Retail industry with over 30000 employees and concludes with the implementation strategy.

DOI: <https://doi.org/10.54660/IJMRGE.2025.6.5.986-991>

Keywords: Workday Payroll, Year End, T4, Box 45, Dental Benefits, Workday Web Service

1. Introduction

Organizations which are processing payroll using any solutions are required to provide the year end forms to their employees after the completion of calendar year. For US Employees, W2 needs to be provided to the employees and for Canada T4 needs to be provided. These forms will report on the actual income, taxes paid, and other benefits received by the employees for the entire calendar year. These forms will be then submitted by the employees as tax returns to availability of any tax refund if they paid excess. Workday Payroll is one of the well-known Cloud-Based payroll management solutions which not only delivers in built payroll calculations but also provides these Year End Forms using Year End process. This Year End Process needs to be configured by the business owners based on their company policy to have the correct values in correction section of forms.

2. What is Workday Payroll?

Workday Payroll is a Cloud-Based payroll management solution which is designed to automate and streamline the payroll business process for organizations irrespective of sizes and categories of employees. It helps payroll businesses to effectively manage their employees' compensation, earnings and deductions configuration rules, tax deductions, tax compliance, payroll reporting, and payroll analytics in a single software solution platform. Workday Payroll offers real-time calculations, managing FLSA rules, delivered connectors with major vendors like ADP, Fidelity, seamless integrations between HR and Finance Systems. Workday Payroll also comes in with best user self -service experience interface, maintaining employee tax elections, direct deposit information and pre built audit controls which make payroll administrator to administer the payroll activities effectively.

3. What is Year End Process?

Year End Process in terms of Payroll is regarded as the activities which are performed out to close the calendar year and create the prerequisites for the upcoming year. Some of the major yearend activities are like completion of payroll adjustments for the past period, completion of last payroll period of the year. Once the last payroll period is completed, audit all the payroll results for the year and configure the settings to generate the year end forms like W2 for US and T4 for Canada. The prerequisites activities for the new upcoming year payroll are like Holiday Calendar creation, FLSA Calendar for US, Absence Calendar etc.

4. Canada Specific Year End Process

Canada has specific Year End Process which are T4, T4A, T4A-RCA, RL-1, RL-2. Workday delivers configuration for each of these forms so that Workday calculates the proper earnings and deductions in the appropriate boxes/section of each form.

5. What is T4?

T4 Slip is specific to Canada also known as the Statement of Remuneration Paid. This is mandatory tax document issued by Employers to their employees which will summarize the income and deductions of the year. It includes earnings

earned by the employees and the taxes paid by the employees. It also includes the contributions to government programs like Canada Pension Plan (CPP) and Employment Insurance (EI). The employees will use this form to file their personal Income Tax.

6. Workday Configuration

Workday has provided a configuration option to map the earnings and deductions to the corresponding boxes of each of the forms and organization can map their appropriate earning and deductions before processing the forms.

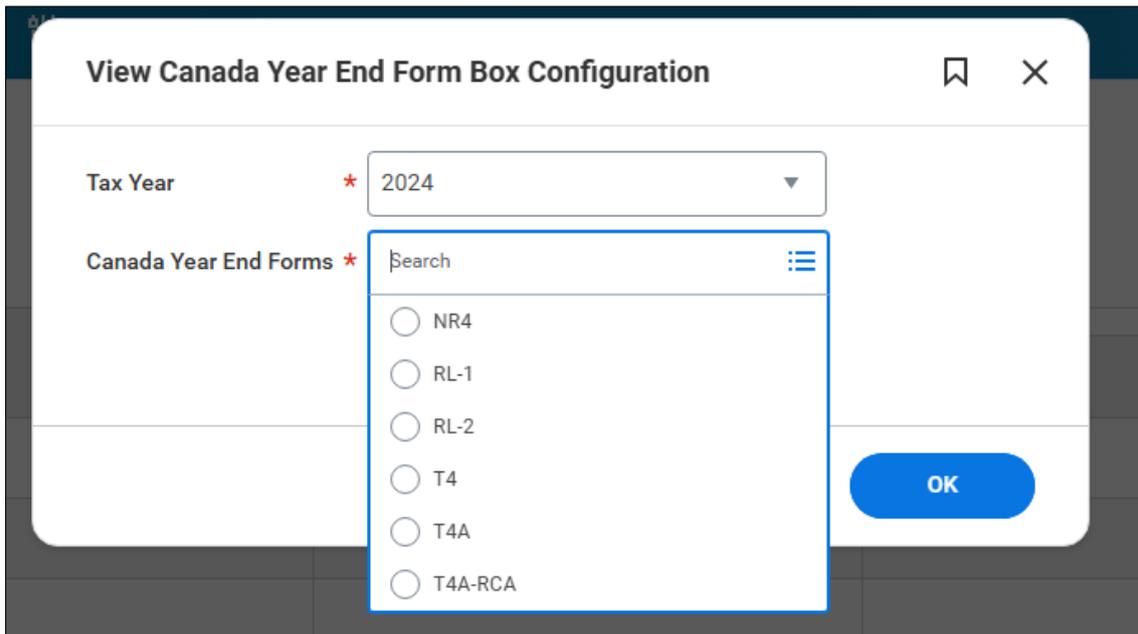


Fig 1: Canada Year End Box Configuration

View Canada Year End Form Box Configuration				
As of Year		2024		
Canada Year End Forms		T4		
32 Items				
Box Label	Calculation	Other Information		
		Calculation	Detail Reporting Code	
Employer's name				
Employee's name and address				
Year				
10 - Province of employment				
12 - Social insurance number				
14 - Employment income	Federal Income Tax (FIT) [CAN] - Subject Wages			
16 - Employee's CPP contributions	Canada Pension Plan (CPP) [CAN]			
16A - Employee's second CPP contributions	Canada Pension Plan 2 (CPP2) [CAN]			
17 - Employee's QPP contributions	Quebec Pension Plan - QPP [CAN]			
17A - Employee's second QPP contributions	Quebec Pension Plan 2 (QPP2) [CAN]			
18 - Employee's EI premiums	Employment Insurance - EI [CAN]			

Fig 2: Canada T4 Form Box Configuration

7. What is Box 45?

Box 45 in T4 Form is "Employer-Offered dental Benefits" code. From Calendar 2023, it is mandatory whether the employee or any of their family members were eligible, on December 31st of the year, to access any dental care

insurance, or coverage of dental services of any kind that you offered.

The Eligible Code and the Access information is tabulated below

Table 1: Box 45 Code and Access Values

Code	Access
1	Not eligible to access any dental care insurance, or coverage of dental services of any kind
2	Payee only
3	Payee, spouse and dependent children
4	Payee and their spouse
5	Payee and their dependent children

Employers are expected to map the correct code in Box 45 of T4 form based on the access provided to the employees. Based on the company policy of dental provision and employees opted in this box needs to be updated with corrected code.

8. Options available Workday

Workday has provided 2 options to populate this Box 45 code in T4. In case if your employer wants to provide 1 common code across all employees then the common code and access can be configured in “Maintain Dental Benefits Recipient Code” and the all the employees will get this code mapped in Box 45.

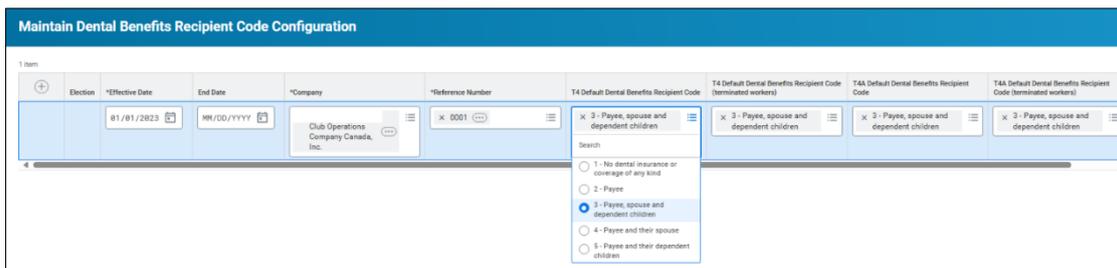


Fig 3: Maintain Dental Benefits Recipient Code

The second option is overriding this value at the employee level. We can override this value by going to Actions Under the Employee and navigate to Payroll → Override Dental

Benefits Recipient Code for Worker task. For any bulk list of employees, we can use Workday Web Service Template to load the values.

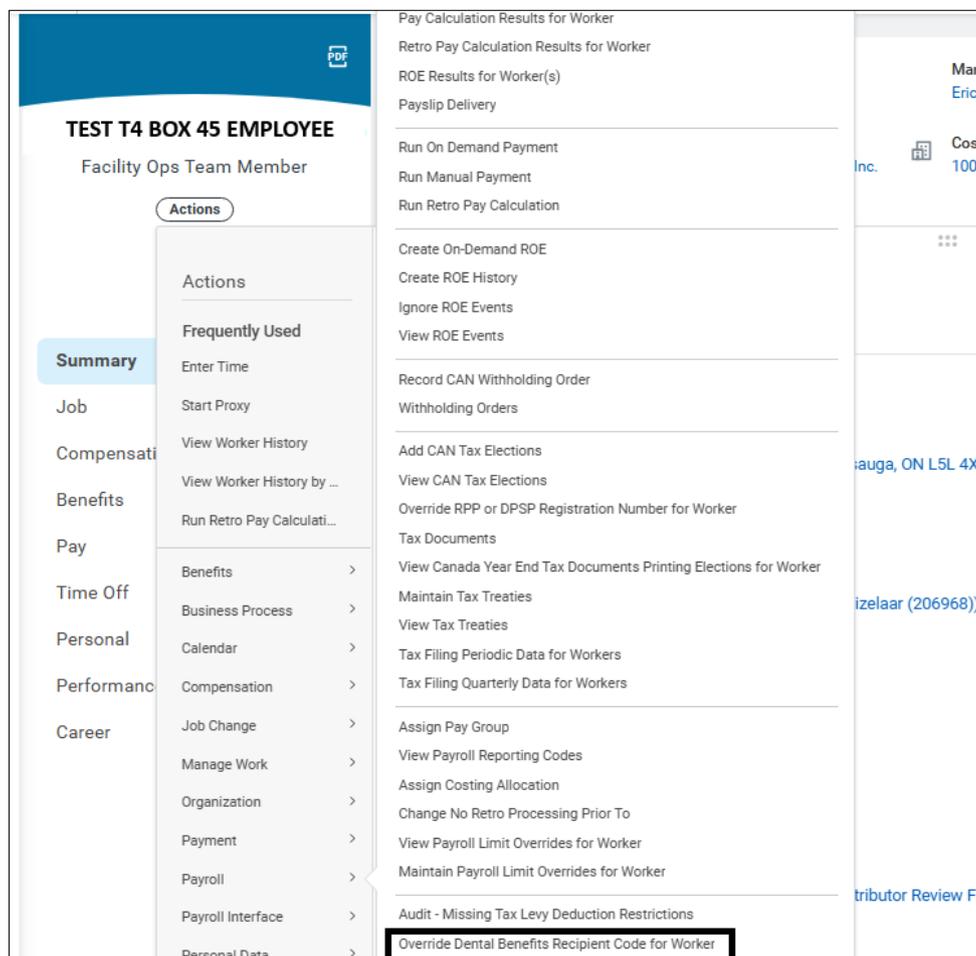


Fig 4: Override Dental Benefits Recipient Code for Worker

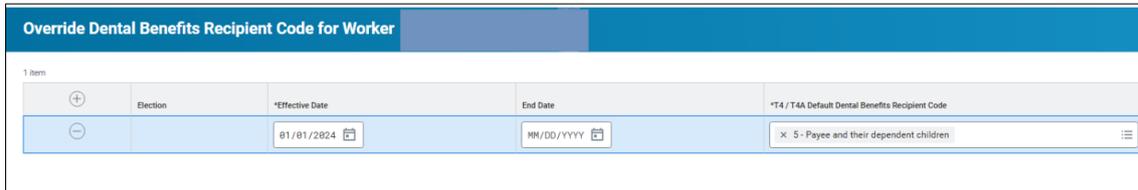


Fig 5: Employee Override Dental Benefits Recipient Code for Worker

Live Case Study

One of the Top fitness club companies which got more than 30000 employees across USA and Canada has been using the Workday payroll. This organization has various types of employees like salaried, hourly, commission, exempt 7i commission, unit rate and the combination of these employee types.

Requirement

This organization has outsourced the Benefits to a vendor who maintains their benefits elections and Dental is part of the benefits. Employees in Canada who are part time and not reached 90 days from the hire date as of December 31st needs

to be overridden with code 1 which is “Not eligible to access any dental care insurance, or coverage of dental services of any kind”.

Implementation Methodology

We architect this design by generating a list of employees who are part-time and list of employees who did not attain 90 days from hire date as of December 31st using Workday Report. Then these employees will be loaded into a Workday Delivered Webservice Excel Template (EIB) which used the Employee Override Dental Benefits Recipient Code for Worker web service to load the override value.

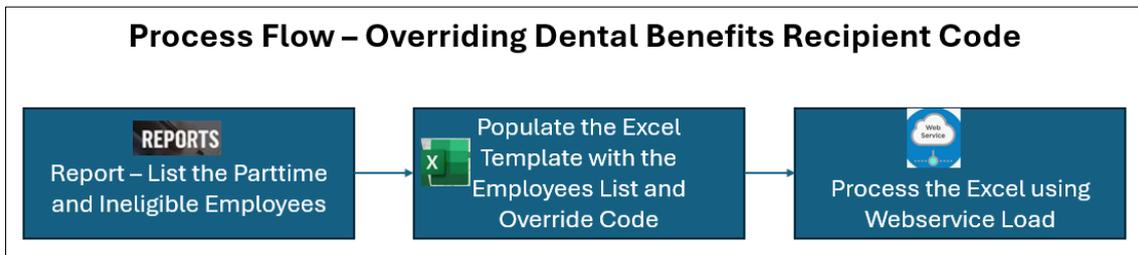


Fig 6: Process Flow

Step 1: Creation of Workday Custom Report to pull all the employees who are part-time and reached 90 days from hire

date as of December 31st



Columns	Sort	Filter	Prompts	Output	Share	Advanced
10 items						
Business Object	Field	Column Heading Override				
Worker	<input type="checkbox"/> Employee ID					
Worker	<input checked="" type="checkbox"/> Location Address - Country					
Worker	<input type="checkbox"/> Full Legal Name					
Worker	<input checked="" type="checkbox"/> Location					
Worker	<input type="checkbox"/> Hire Date					
Worker	<input type="checkbox"/> Termination Date					
Worker	<input type="checkbox"/> Employee Type					
Worker	<input checked="" type="checkbox"/> Time Type					
Worker	<input type="checkbox"/> CF_EVAL Worker Status	Employee Status				
Worker	<input type="checkbox"/> Current Effective Date					

Filter on Instances					
Filter conditions for filtering on instances 8 items					
And/Or	(Field	Operator	Comparison Type	Comparison Value
And		<input checked="" type="checkbox"/> Location Address - Country	in the selection list	Value specified in this filter	Canada
And	((<input type="checkbox"/> Termination Date	greater than or equal to	Value from another field	<input type="checkbox"/> Cf Current Effective Date - 365 Days
And		<input checked="" type="checkbox"/> Time Type	in the selection list	Value specified in this filter	Part time
And		<input type="checkbox"/> Active Status	equal to	Value specified in this filter	
Or	((<input checked="" type="checkbox"/> Time Type	in the selection list	Value specified in this filter	Part time
Or	(<input checked="" type="checkbox"/> Time Type	in the selection list	Value specified in this filter	Full time
And		<input type="checkbox"/> Hire Date	greater than or equal to	Value from another field	<input type="checkbox"/> Current Effective Date - 90 Days
And		<input type="checkbox"/> Active Status	equal to	Value specified in this filter	Yes

Fig 7: Custom Report Generation

Step 2: Populate the Webservice Excel Template with the data from the Report

Override Dental Benefits Recipient Code for Worker - v44.0										
Area	All	Required	Optional	Optional	Required	Optional	Required	Optional	Optional	Required
Restrictions	Required	Optional	Optional	Required	Optional	Required	Optional	Optional	Optional	Required
Format	Text	Payroll Election Data	Text	Employee ID	Workday Payroll Election Definition	YYYYMMDD	YYYYMMDD	Y/N	Text	Text
Fields	Spreadsheet Key*	Recipient Code Overri	ID	Worker*	Recipient Definition	Payroll Election Data E	End Date	Inactive	Row ID*	
	1			TEST EMP1	W_OVERRIDE_DENTAL_BENEFITS_RECIPIENT_CODE_FOR_WORKEF	12/31/2025			1	
	2			TEST EMP2	W_OVERRIDE_DENTAL_BENEFITS_RECIPIENT_CODE_FOR_WORKEF	12/31/2025			1	
	3			TEST EMP3	W_OVERRIDE_DENTAL_BENEFITS_RECIPIENT_CODE_FOR_WORKEF	12/31/2025			1	

Payroll Election Data Snapshot Field Value Data* (All > Recipient Code Override Data > Election Data)									
Required	Required	Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional
Text	Workday Payroll Election Field	N/N	Number (21.9)	Number (16.4)	Payroll Constant Text ID	YYYY-MM-DD	DateTime	Text	
Row ID*	Payroll Election Field All *	Boolean Value	Number Value	Currency Value	Payroll Election Instance Field Selectable*	Date Value	Moment Value	Text Value	
1	W_IS_T4_T4A_DEFAULT_DENTAL_BENEFITS_RECIPIENT_CODE				1 - No dental insurance or coverage of any kind				
1	W_IS_T4_T4A_DEFAULT_DENTAL_BENEFITS_RECIPIENT_CODE				1 - No dental insurance or coverage of any kind				
1	W_IS_T4_T4A_DEFAULT_DENTAL_BENEFITS_RECIPIENT_CODE				1 - No dental insurance or coverage of any kind				

Fig 8: Web Service Excel Template

Step 3: Initiate the Webservice Load Integration to Process to load the data

View Integration System Box 45 Update for T4 form - Canada

Basic Details

System Name Box 45 Update for T4 form - Canada

> System ID

Configuration Security

Get Data 1 item

Retrieval	File Name	File Type	Template	Details
Retrieval Method Attach File at Launch		Web Service Spreadsheet Template	Web Service Operation Name Put Override Dental Benefits Recipient Code for Worker Web Service Version v44.0	Decrypt Using Force Integrity Check Digital Signature Validation Using

Transform

Transformation Type Web Service Template Model

Transformation Put Override Dental Benefits Recipient Code for Worker

Deliver

Delivery Method Workday Web Service Operation

Workday Endpoint Put Override Dental Benefits Recipient Code for Worker (Web Service)

Fig 9: Workday EIB (Web Service Load)

9. Case Study Outcome:

This model has been successfully implemented to override the Dental Benefits Recipient Code, and it successfully generated the Canada T4 Form correctly as per the Statutory requirement. This design was implemented successfully, and it processed the employees' T4s with 100% accuracy and saved organization from any legal issues with payroll as legal compliance. As this model is designed and implemented with configurable options the output was 100% accurate without any additional development or cost. This model is considered as one of the successful models in implementation.

10. Conclusion

Workday Payroll is revolutionizing payroll management by its unique process model with robust configuration capabilities. It provides the payroll business function not only to configure their own earnings, deduction, and calculation rules but also configure and generate the Yearend forms as required by country specific formats. As organizations build their own earnings and deductions, Workday's year end box configuration enables business to map their earnings and deduction to their appropriate boxes and Workday yearend process generates the year end forms with correct values in the appropriate boxes. As this Box 45 requirement in Canada T4 is made mandatory the above research helps in build an effective solution to override the code at employee level instead of manually updating. This study and design not only reduce time but also saves employee costs and eliminates errors.

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