



2020 Workday Application Checklist

Action	Functional Area	Complete
January 2020		
Approve final quarterly tax file	Payroll	
Reconcile W-2s totals to tax filing reports and tax filing provider reconciliations	Payroll	
Process and publish W-2s	Payroll	
Close prior year ledger periods	Payroll	
Move up No Retro Prior To Date	Payroll	
Review and update compensation review grid	Advanced Compensation	
Audit compensation planners and organizational structure	Advanced Compensation	
Test year-end compensation processes and confirm calculations	Advanced Compensation	
Update year-end compensation reports and dashboards	Advanced Compensation	
February 2020		
Prepare for Workday 2020 Release 1 by regression testing, running audit reports, testing integrations, and reviewing update presentations	All	
Test merit statements and make updates if necessary	Advanced Compensation	
Continue testing compensation process - confirm proration rules, participation rules, and waiting periods work as expected	Advanced Compensation	
Launch year-end process	Advanced Compensation	
Launch goal setting process	Talent & Performance	
March 2020		
Leverage reports to ensure compensation review process completion	Advanced Compensation	
Finalize compensation process	Advanced Compensation	
Release merit statements	Advanced Compensation	
April 2020		
Run all delivered system audit reports	All	
Identify and analyze and system setup issues	All	
Provide audit notes and assistance in resolution	All	
Review and file quarterly taxes	Payroll	
Mass archive historical goals to prevent them from pulling into mid-year and annual reviews	Talent & Performance	



2020 (cont.)

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Action	Functional Area	Complete
May 2020		
Optimize talent performance reviews by reviewing competency and calibration setups, organization goals, disciplinary actions, talent pools, and dashboards	Talent & Performance	
June 2020		
Create dashboards for executive leadership team that will provide transparency around hiring decisions, retentions, diversification, compensations evaluations, and more	HCM	
Create time tracking and absence dashboards for managers and executive leadership to review period-specific time and absence data as a mid-year checkpoint	Time Tracking	
Launch mid-year performance review	Talent & Performance	
August 2020		
Prepare for Workday 2020 Release 2 by regression testing, running audit reports, testing integrations, and reviewing update presentations	All	
Initiate open enrollment vendor discussions and make decisions for vendor changes	Benefits	
Review and file quarterly payroll taxes	Payroll	
September 2020		
Finalize offerings for new open enrollment plan year	Benefits	
Gather plan policy documents for open enrollment	Benefits	
Initiate/gather new vendor file specifications for open enrollment	Benefits	
Create new open enrollment benefit plan year	Benefits	
Create new open enrollment benefit plans	Benefits	
Set up open enrollment event type	Benefits	
October 2020		
Create open enrollment period schedule for next full calendar year	Benefits	
Initiate open enrollment to employees	Benefits	
Review and file quarterly payroll taxes	Payroll	





2020 (cont.)

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Action	Functional Area	Complete
November 2020		
Prepare year-end payroll	Payroll	
Review upcoming and 2020 holiday schedules	Time Tracking	
Create payroll period schedules for next year	Payroll	
Link time tracking period schedule to payroll schedule	Time Tracking	
Build 2020 FLSA work periods	Time Tracking	
Review and correct W2 errors	Payroll	
Identify and plan for absence or time tracking policy updates	Time Tracking	
Extend alert schedules	HCM	
December 2020		
Create next fiscal year	Payroll	
Create ledger year and ledger periods	Payroll	
Open ledger period for new fiscal year	Payroll	
Test W-2s in Sandbox, correct errors in production	Payroll	
Ensure retirement plan box 13 is checked for participants	Payroll	
Submit 4th quarter file and W-2 data to tax filing provider for testing	Payroll	
Update State Unemployment Insurance and additional company specific tax rates	Payroll	
Review flex spending or any other custom limits	Payroll	
Review scheduled future processes to make sure end dates are extended	Payroll	
Review all compensation plans to ensure proper set-up	Advanced Compensation	
Audit compensation plan assignments	Advanced Compensation	
Ensure performance matrices are updated and in alignment with performance templates	Talent & Performance	
Launch annual performance review	Talent & Performance	



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