Creating, Updating, and Stopping General Deductions

General Deductions are non-benefit deductions, such as charity, garnishments, and parking. General Deductions can be both pre-tax and post-tax based on setup from the General Deductions or Garnishment tables in Cardinal. Deductions are set up at the Company (Agency) level for employee's who are eligible.

Note: Cardinal does not prorate deductions. Therefore, the entire amount is deducted if a deduction starts or ends in the middle of the pay period.

This Job Aid outlines the processes for creating, updating, and stopping a General Deduction in Cardinal.

Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.
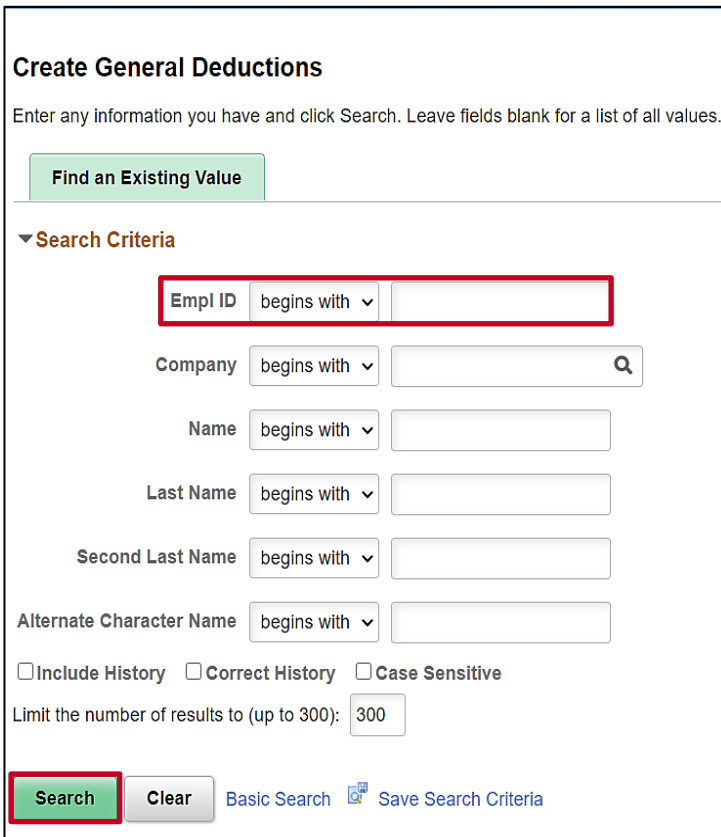
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Creating A New General Deduction

1. Navigate to the **Create General Deduction** page using the following path:

   Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

The **Create General Deductions Search** page displays.

Create General Deductions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID	begins with ⌄	
Company	begins with ⌄	🔍
Name	begins with ⌄	
Last Name	begins with ⌄	
Second Last Name	begins with ⌄	
Alternate Character Name	begins with ⌄	

☐ Include History   ☐ Correct History   ☐ Case Sensitive

Limit the number of results to (up to 300): 300

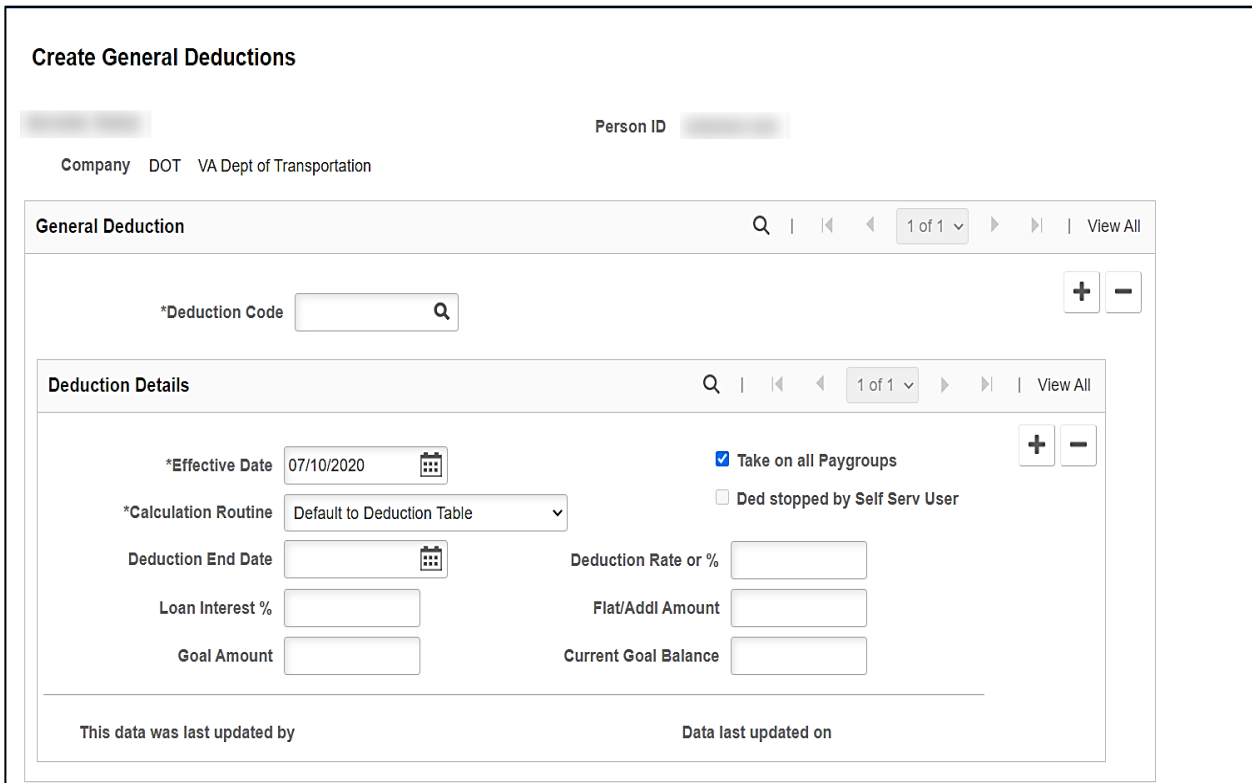[Search]   [Clear]   Basic Search   Save Search Criteria

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

   Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

The **Create General Deductions** page displays.

4. Enter/select the applicable **Deduction Code** using the **Deduction Code Look-Up** icon.

Note: For further information about Deduction Codes, see the Job Aid titled **PY381_General and Benefits Deduction Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

5. The **Effective Date** field defaults to the current system date. Update this date by entering it in this field or using the **Calendar** icon as needed.

Note: Cardinal does not pro-rate general deductions. If the effective date is within the pay period, the deduction will be deducted with the full amount. If the effective date is prior to the current pay period, the Payroll Administrator will need to do a retroactive calculation and enter the retroactive amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. The **Take on all Paygroups** checkbox is selected by default. Use this option to have the system take a deduction every time it issues a check to the employee. For employees with multiple jobs in different Pay Groups, this field will control whether the deduction will process on all Pay Groups or only the Primary Pay Group.

If an employee has multiple jobs within the company:

- When checked, the deduction will be taken from all jobs

- When unchecked, the deduction will only be taken from the primary job (Pay Group) which can be viewed on the Update Payroll Options page. See the section of this job aid titled Updating the Primary Paygroup for more information.

7. The **Calculation Routine** field defaults to "**Default to Deduction Table**". Select the appropriate value. See the table below for the field options and descriptions.
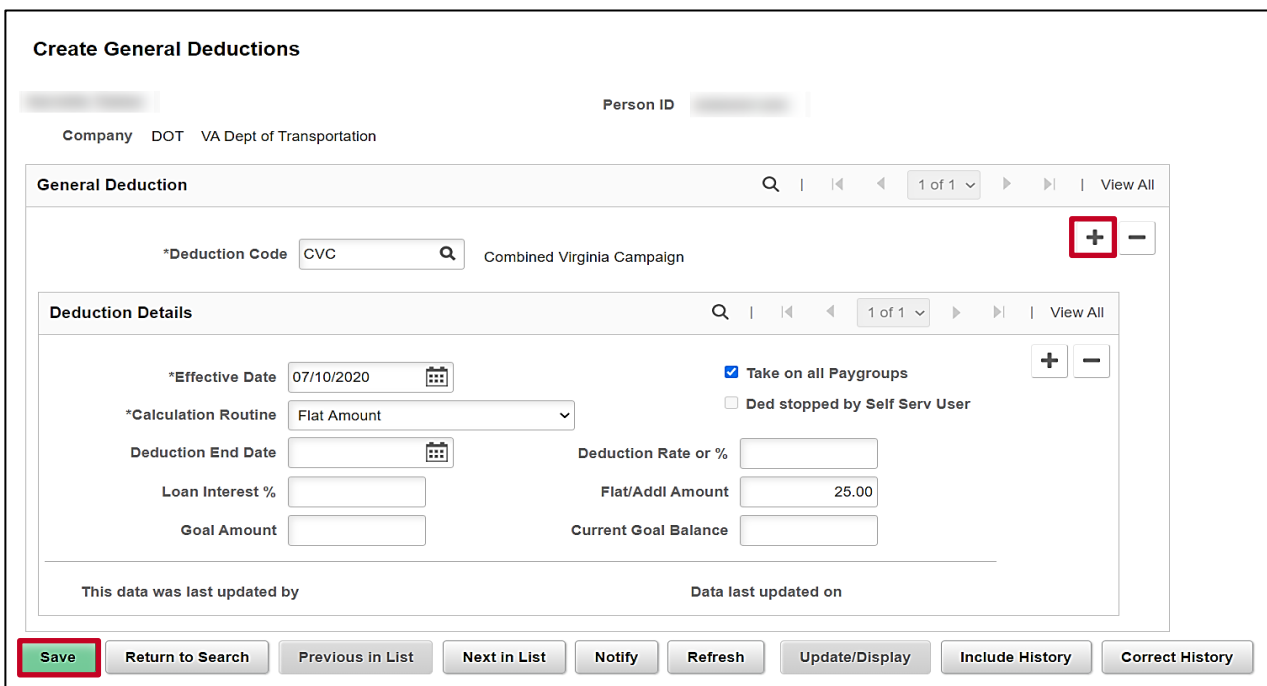
The **Calculation Routine** field options are listed below. Note not all options are used in Cardinal.

Calculation Routine Options	Description
Default to Deduction Table	Select this value to use the calculation routine that is specified on the Deduction Table
Flat Amount	Select this value to calculate the deduction as a flat amount and enter the amount in the **Flat/Additional Amount** field
Percent of Federal Gross	Not used in Cardinal
Percent of Net Pay	Select this value to calculate the deduction as a percent of the employee's net pay. Enter the percent in the **Deduction Rate or %** field. Net pay is determined at the time that the deduction is calculated. Establish the priority of the calculation on the Deduction table.
Percent of Special Earnings	Not used in Cardinal
Percent of Total Gross	Not used in Cardinal
Percentage	Select this value to calculate the deduction as a percentage. Enter the percentage in the **Deduction Rate or %** field
Rate x Hours Worked	Not used in Cardinal
Rate x Special Hours	Not used in Cardinal
Rate x Total Hours	Not used in Cardinal
Special Deduction Calculation	Not used in Cardinal

8. Optionally, select a deduction end date using the **Deduction End Date Calendar** icon.

   Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. To deduct a partial amount due to mid-pay period changes, calculate the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

9. If the "**Percent of Net Pay**" or "**Percentage**" calculation routine was selected during Step 7, enter the applicable deduction rate or deduction percentage in the **Deduction Rate or %** field.

10. The **Loan Interest %** field is not being utilized in Cardinal.

11. If the "**Flat Amount**" calculation routine was selected during Step 7, enter the flat amount for the deduction in the **Flat/Addl Amount** field.

12. Optionally, enter a total goal amount for the deduction in the **Goal Amount** field.

    Note: If entered, the deduction will automatically stop once the goal amount is reached (i.e., Goal Amount = Current Goal Balance).

The screenshot below displays a Sample Deduction (with applicable data entered/selected).
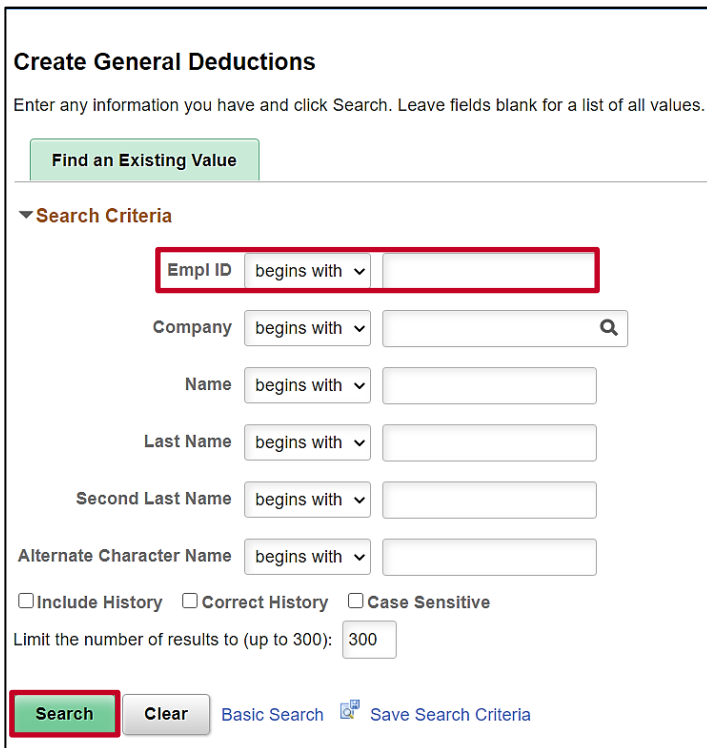
13. To add an additional general deduction, click the **Add a New Row** (**+**) icon within the **General Deductions** section and repeat Steps 5-13.

14. Once all deductions are entered, click the **Save** button.

Updating a General Deduction

1. To update a general deduction, navigate to the **Create General Deductions** page using the following path:

   Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

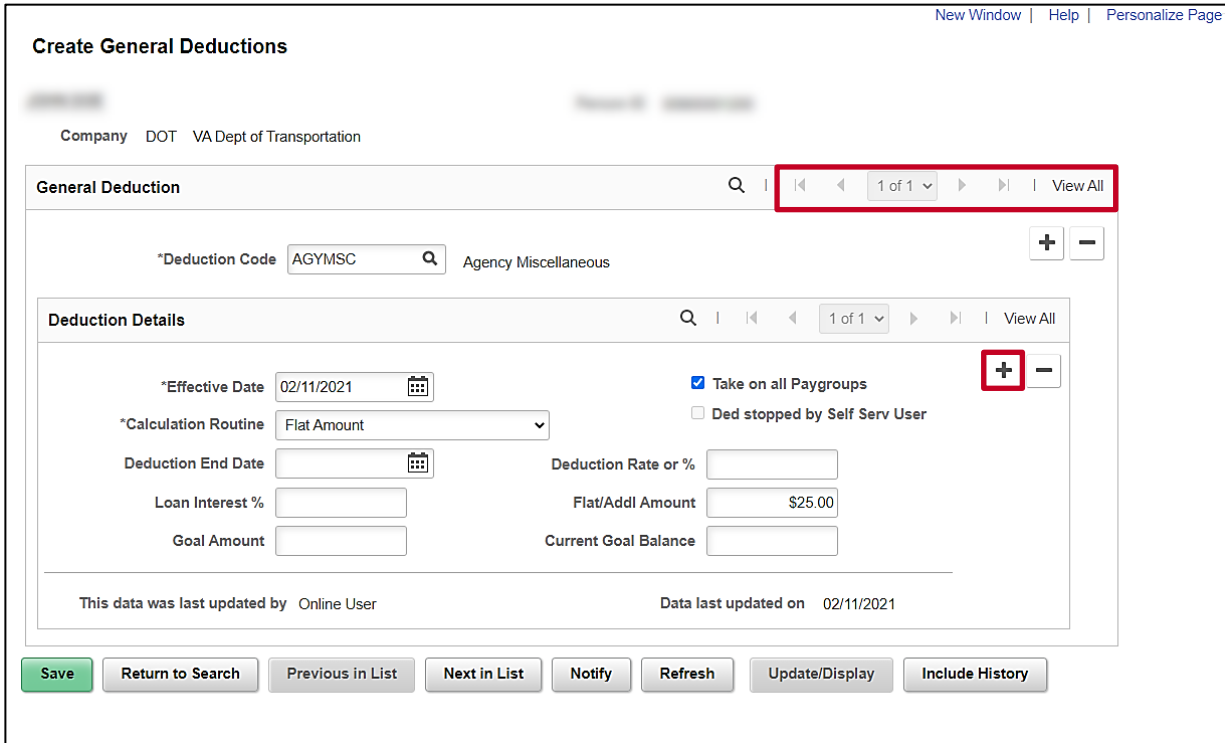The **Create General Deductions Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

   Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

The **Create General Deductions** page displays.

4.   In this example, the employee only has one deduction (Row 1 of 1). If the employee has multiple deductions defined, navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section.

5.   Once the correct deduction is displayed, click the **Add a New Row** icon (**+**) within the **Deduction Details** section. The data from the previous row automatically transfers to the new row.

A new effective dated row displays for the deduction.

6. **The Effective Date** field defaults to the current system date. Update this date using the **Calendar** icon as needed.

   Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction update will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

7. Review and update the applicable information in the corresponding field(s). Refer to the **Creating a New General Deduction** section within this Job Aid for specific data entry guidance.

8. To enter an additional effective dated row for the same deduction, click the **Add a New Row** icon (**+**) within the **Deduction Details** section and repeat Steps 6-9.

9. Once all updates are completed, click the **Save** button.
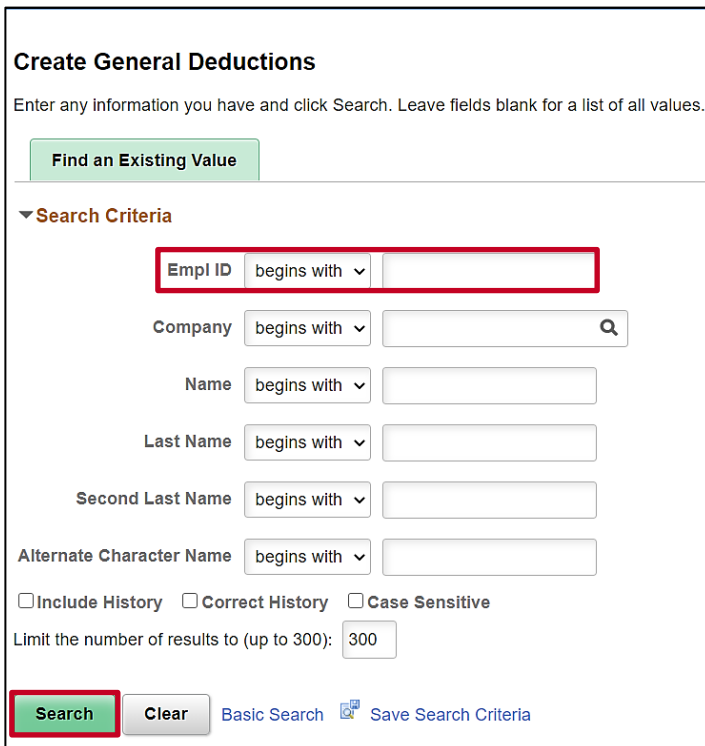
Manually Stopping a General Deduction

1. To update a general deduction, navigate to the **Create General Deduction**s page using the following path:

    Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

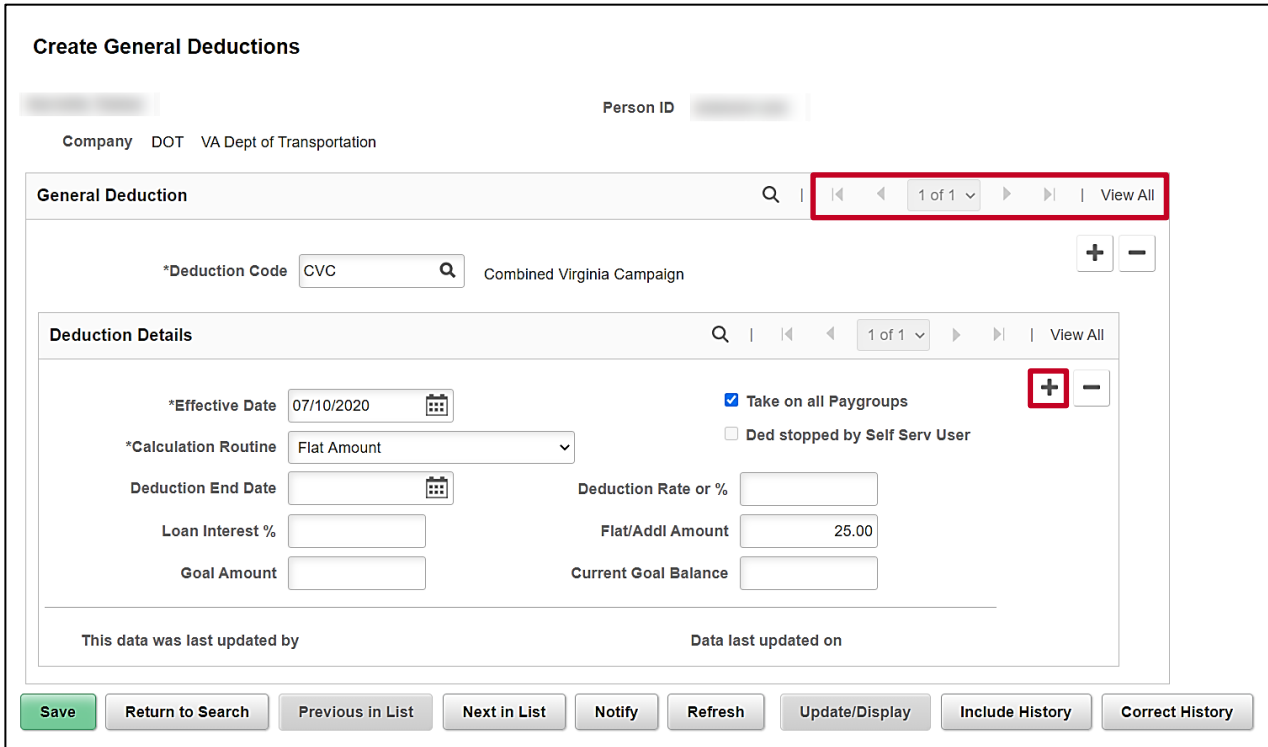The **Create General Deductions Search** page displays.

Create General Deductions

Enter any information you have and click Search. Leave fields blank for a list of all values.

> **Find an Existing Value**

▼ Search Criteria

Empl ID	begins with ▾	
Company	begins with ▾	🔍
Name	begins with ▾	
Last Name	begins with ▾	
Second Last Name	begins with ▾	
Alternate Character Name	begins with ▾	

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search   **Clear**   Basic Search   📰 Save Search Criteria

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

    Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

The **Create General Deductions** page displays.

4.   In this example, the employee only has one deduction (Row 1 of 1). If the employee has multiple deductions defined, navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section.

5.   Once the correct deduction is displayed, click the **Add a New Row** icon (**+**) within the **Deduction Details** section.

A new effective dated row displays for the deduction (Row 1 of 2 in this example).

6. The **Effective Date** field defaults to the current system date. Update this date using the Calendar icon as needed.

   Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will stop in the future pay period. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

7. Enter/select the applicable date for the deduction to stop in the **Deduction End Date** field.

   Note: This date must be later than the effective date used to start the deduction.

8. Click the **Save** button.
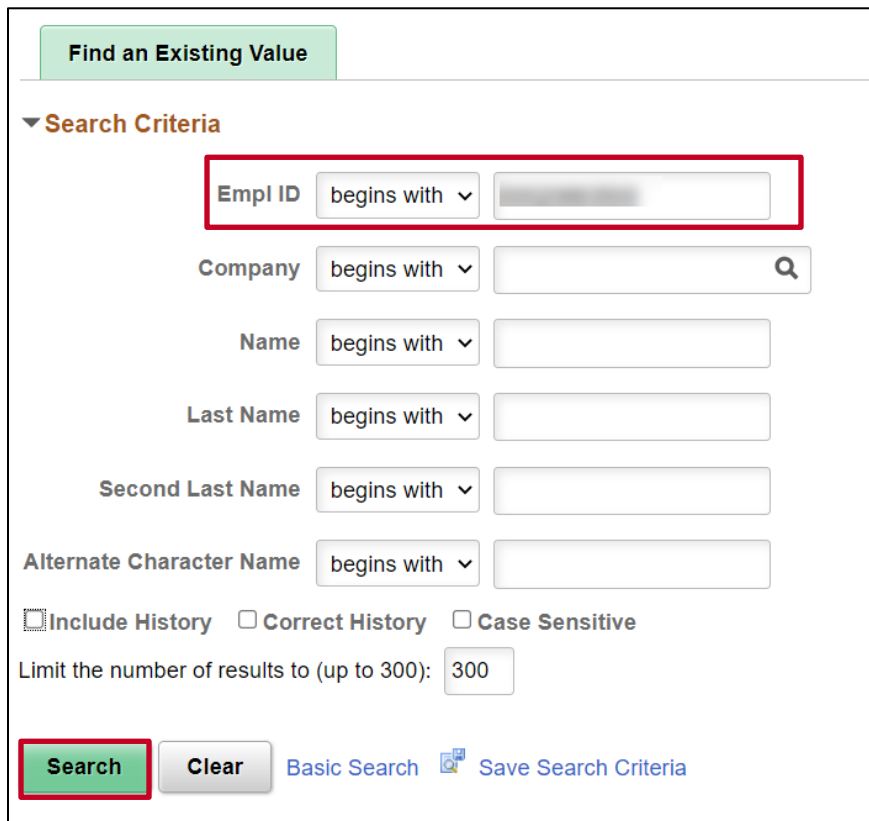
Updating the Primary PayGroup

This field is populated based on the Job Data record (**PayGroup** field on the **Payroll** tab that corresponds with the **Job Indicator** on the **Work Location** tab).   An exception to this is when Job Data is updated in Correction mode. When this occurs, the **Primary PayGroup** field may need to be updated manually. This section of the job aid provides the steps to manually update the employee's PayGroup.

1.   To update the **Primary PayGroup**, navigate to the **Update Payroll Options** page using the following path:

   Menu > Payroll for North America > Employee Pay Data USA > Update Payroll Options
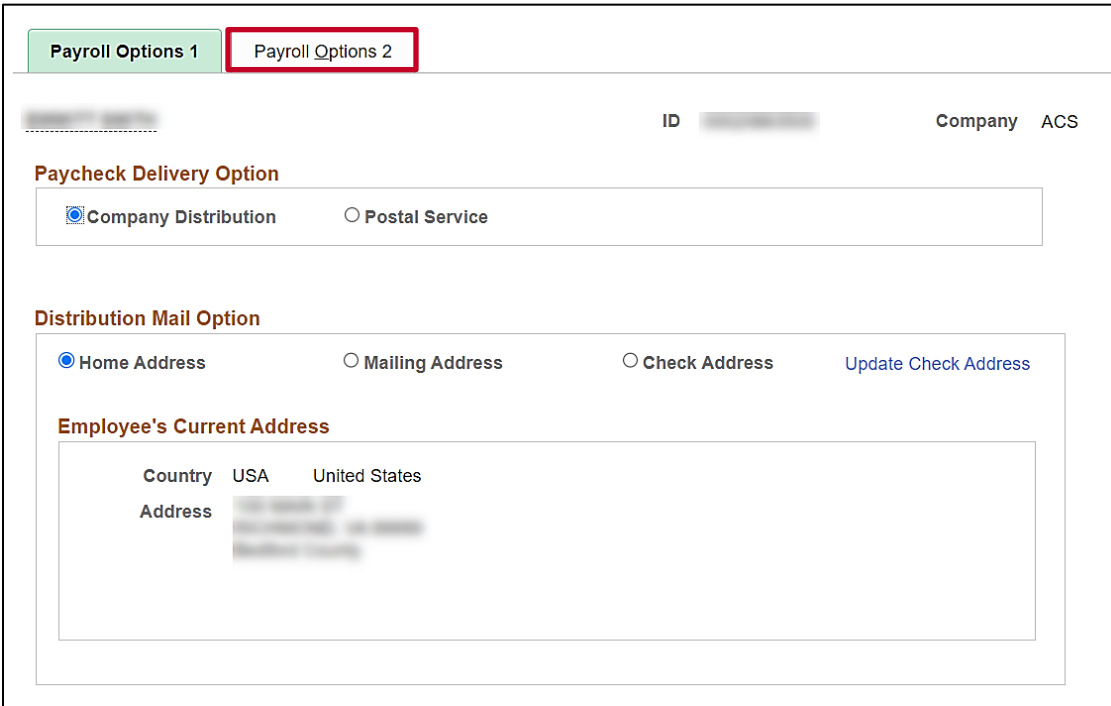
  The **Update Payroll Options Search** page displays

2.   Search for the applicable employee by entering the employee ID in the **Empl ID** field.

   Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3.   Click the **Search** button.

The **Payroll Options** page displays
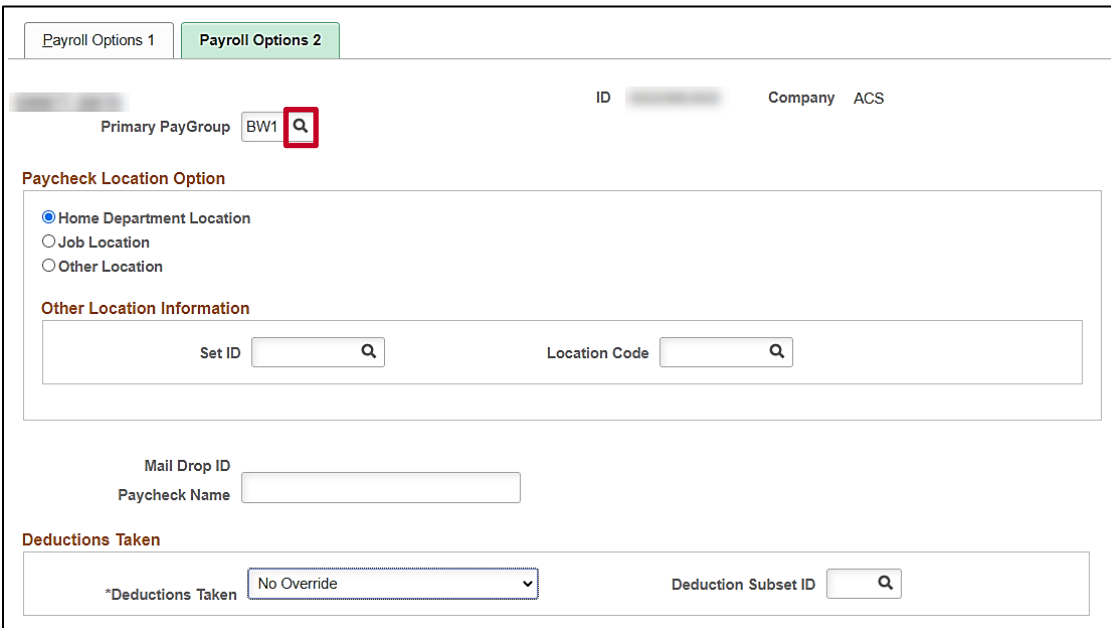
4. Click the **Payroll Options 2** tab to view the **Primary PayGroup** for the employee.
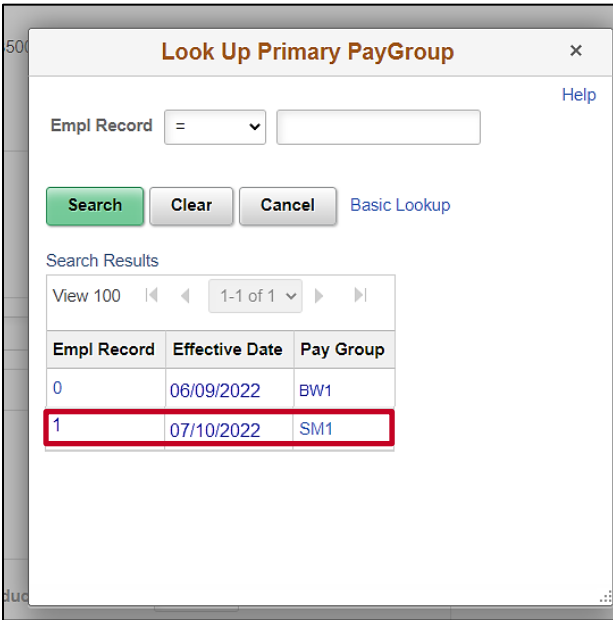
5. Click the **Primary PayGroup** look up icon.

The **Look Up Primary PayGroup** displays in a pop-up window.
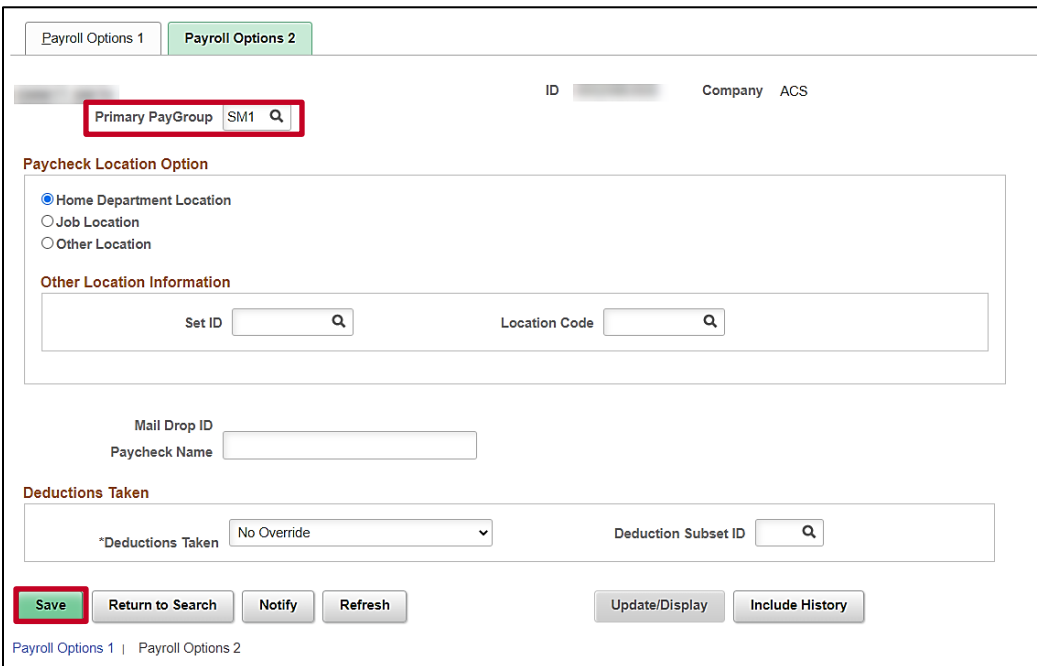
6. Select the appropriate option.

The **Payroll Options 2** page returns.

7. Confirm that the appropriate value displays.

8. Click the **Save** button.