

Overview of the Using the Single-Use Payroll Online Tool (SPOT)

The Single-Use Payroll Online Tool (SPOT) tool is used by Payroll Administrators to enter one-time transactions affecting pay or deductions in Cardinal. Transactions can be entered online in SPOT or through a spreadsheet upload.

This Job Aid provides information on entering earnings and deduction transactions (online or spreadsheet upload), deleting SPOT batches, SPOT transaction approvals, and reviewing batches after approval.

This Job Aid also contains a SPOT scenario section which provides various examples to assist with SPOT entry.

Table of Contents

Entering an Earnings Transaction in SPOT	3
Entering a Deduction Transaction in SPOT	18
SPOT Template Upload Process	30
Deleting SPOT Batches	45
Approving SPOT Transactions Overview	47
Closing a SPOT Batch	53
Sending Back a SPOT Batch.....	55
Reviewing Send Back Batches	57
Monitoring SPOT Transactions	62
SPOT Scenarios	63
Entering Pay Docking (LNP)	63
Review Paycheck Page – Pay Docking (LNP).....	64
Entering Adjustments to Regular Pay – Hire or Terminated Mid Pay Period.....	65
Review Paycheck Page – Entering Adjustments to Reg Pay (Hired/Termed Mid Pay Period)	66
Entering Adjustments to Regular Pay – Change in Compensation from Prior Period.....	67
Review Paycheck Page – Change in Compensation for Prior Pay Period	68
Entering a Separate Check – Bonus Payment with One-Time Deferrals.....	69
Review Paycheck Page - Bonus Payment with One-Time Deferrals.....	71
Deceased Pay.....	73

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Paycheck Page with Due Agency Deduction - Deceased Pay.....	75
Review Paycheck Page with Due Agency Deduction - Deceased Pay (continued)	76
Review Paycheck Page with Due Agency Deduction – Deceased Pay (continued)	77
Review Paycheck Page with Additional Before-Tax Medical Deduction	78
Review Paycheck Page with Additional Before-Tax Medical Deduction (continued)	79
Review Paycheck Page with Additional Before-Tax Medical Deduction (continued)	80
Adjusting VRS Retirement Benefit Deductions.....	81
Employee Enrolled in the Retirement Plan.....	81
Review Paycheck Page – Employee Enrolled in in the Retirement Plan	84
Employee Not Enrolled in the Retirement Plan.....	87
SPOT Entry for an Additional Pay.....	89

Entering an Earnings Transaction in SPOT

1. Navigate to the **Enter SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.

Enter SPOT Transactions

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

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Company

Pay Group

Pay Period End Date

Transaction Type

Batch Identity

Batch Status

Created By

Case Sensitive

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

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Add a New Value** tab displays.

Enter SPOT Transactions

Batch Identity

*Company

*Pay Group

*Pay Period End Date

*Transaction Type

[Find an Existing Value](#) | [Add a New Value](#)

The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
Pay Period End Date	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed). When processing an Off-cycle transaction, use the pay period end date communicated by SPO.
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> • Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). • Deductions – deduction overrides, extra deductions or deduction refunds.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

3. Enter/select the appropriate values in the **Company, Pay Group, Pay Period End Date,** and **Transaction Type** fields.
4. Click the **Add** button.

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	NEXT	
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	00830084700	
Pay Period End	05/24/2023	Submitted By		
Transaction Type	Earnings	Approved By		Totals (only for Valid rows)
Batch Status	New	Modified By		Total Amt : <input style="width: 100px;" type="text"/>

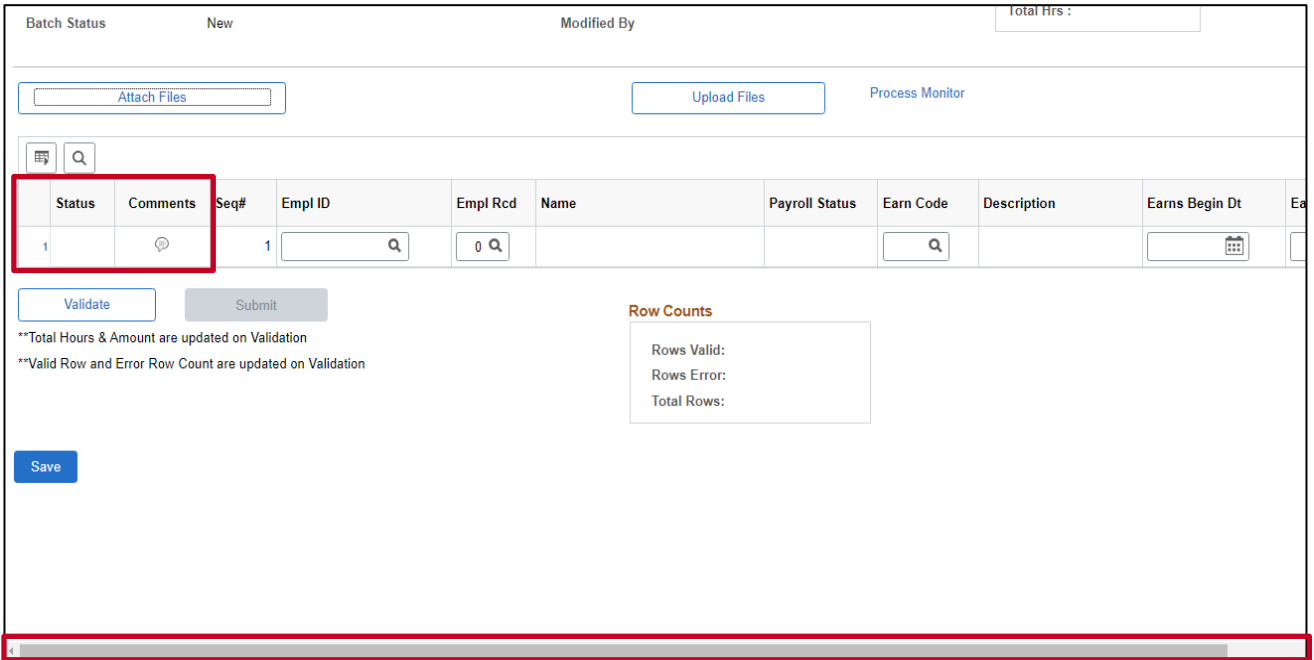
Process Monitor

Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:

Field	Description
Batch Status	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> New – when a new batch is initiated Created – when the batch is saved Validated – when the batch is validated Modified after Validation – when the batch is changed after validation Submitted – when the batch is submitted for approval In Review – when the approver is reviewing the batch for approval Closed – after the approver has submitted the batch to payroll
Batch ID	Defaults to “ NEXT ”; automatically updates when the batch is submitted
Created By	Displays the name of the Payroll Administrator who created the batch
Submitted By	Displays the name of the Payroll Administrator who submitted the batch
Approved By	Displays the name of the SPOT approver who approved the batch

Note: For further information on the **Attach Files** and **Upload Files** buttons, see the [SPOT Template Upload Process](#) section of this Job Aid.



Batch Status: New Modified By: Total Hrs: []

Attach Files [] Upload Files [] Process Monitor []

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1	[]	1	[]	0			[]		[]

Validate [] Submit [] Save []

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

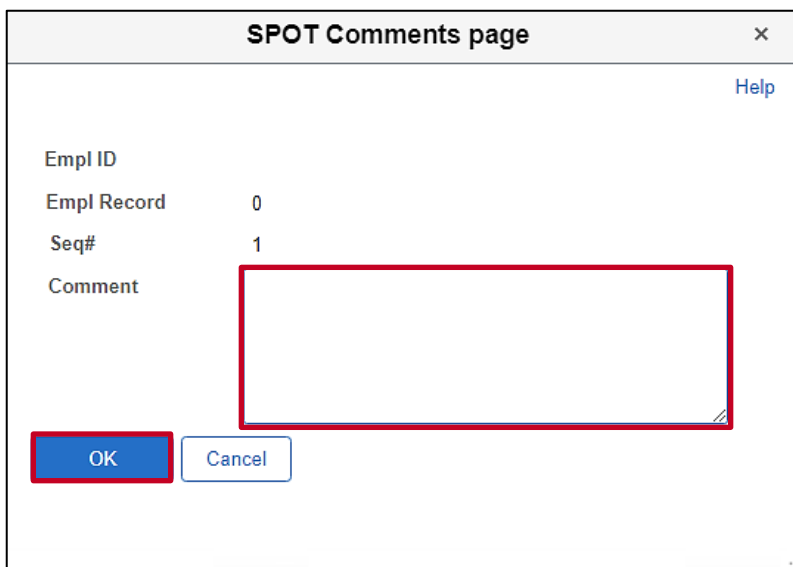
Row Counts

Rows Valid: []
Rows Error: []
Total Rows: []

Note: Use the scrollbar at the bottom of the page to move left/right as required.

- The **Status** column is initially blank. It displays the status of specific transaction after the batch has been validated.
- Click the **Comments** icon.

The **SPOT Comments** page displays in a pop-up window.



SPOT Comments page [x]

Help []

Empl ID []

Empl Record 0

Seq# 1

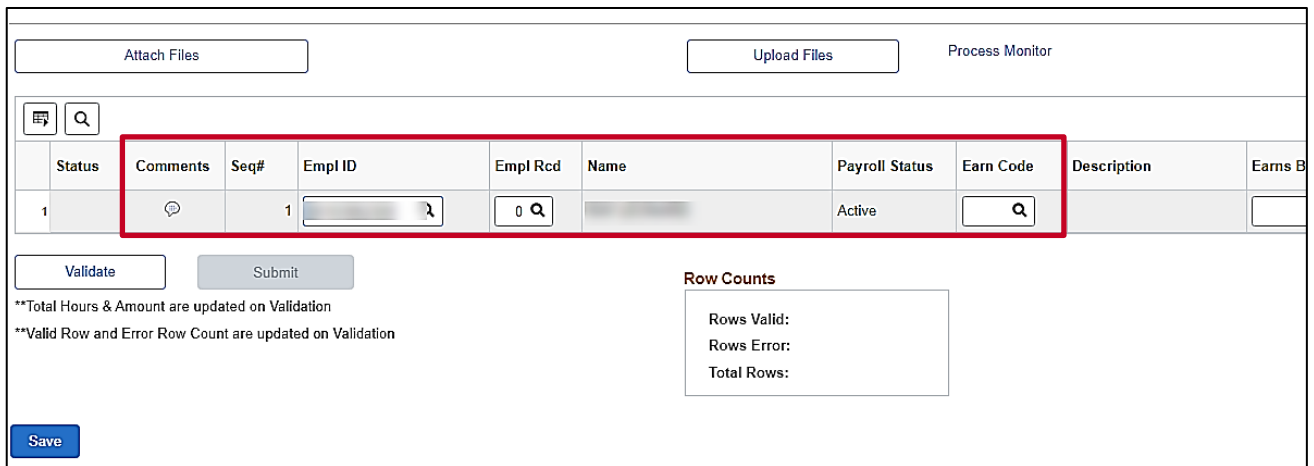
Comment []

OK [] Cancel []

- Enter any applicable comments in the **Comment** field.
- Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.



Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns B
1		1		0		Active			

Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

9. The **Seq#** field auto-populates and is read-only.
10. Select the applicable employee's Employee ID using the **Empl ID Look Up** icon.
Note: An Empl ID not valid for the Company/Pay group combination of the batch will create an error when the **Validate** button is clicked.
11. Select the applicable Employee Record as required using the **Empl Rcd Look Up** icon.
12. The **Name** field auto-populates based on the Employee ID selected. Verify accuracy.
13. Verify the Payroll Status in the **Payroll Status** field.
Note: A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is "**Terminated**".
14. Select the appropriate Earnings Code using the **Earn Code Look Up** icon.
Note: An Earnings Code not valid for the Employee Type (Hourly vs Salaried) will create an error when the **Validate** button is clicked. For a listing of Earnings Codes, see the Job Aid titled **PY381_Earnings Codes** located on the Cardinal Website in **Job Aids** under **Learning**. The following earnings codes cannot be entered as a separate check using the begin and end date within the current period or it will cause an error. They are as follows:

- **LSH** – Leave Share
- **STD** – Short Term Disability
- **WCL** – VSDP Work Comp Pay
- **WCP** – Workers Comp
- **WCS** – Work Comp Supplement

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Be Tak
TMP	Temporary Pay	04/25/2023	05/09/2023	1	Annualized			200.00	De

15. The **Description** field auto-populates based on the Earnings Code selected. Verify accuracy.
16. Select the appropriate Earnings beginning and end dates using the **Earns Begin Dt** and **Earns End Dt Calendar** icons.
Note: These are required fields for all Pay Periods. If left blank, an error will occur when the **Validate** button is clicked.
17. The **Tax Periods** field defaults to “1” and refers to the number of Pay Periods covered by the earnings payment.
Note: The **Tax Periods** field is used in conjunction with the “Annualized” tax method.
18. Select the appropriate tax method using the **Tax Method** dropdown button. There are two options which are:
 - **Annualized** – this tax method multiplies the earnings by the pay periods and is taxed based upon the annualized amount (the **Tax Period** field impacts how the earnings are annualized).
 - **Supplemental** – this tax method is most often used for bonus payments and leave payouts and should not be used for earnings related to hours worked. See the **Job Aid** titled **PY381_Earnings Codes** for a list of Earning Codes that use the “Supplemental” tax method. This **Job Aid** is located on the Cardinal Website in **Job Aids** under **Learning**.
19. Enter the applicable number of hours in the **Oth Hrs** field to one decimal place (e.g., 8.0).
20. Enter the applicable hourly rate in the **Hourly Rate** field to two decimal places (e.g., 22.55).
21. Enter the applicable amount in the **Amount** field to two decimal places (e.g., 200.00). The amount can be a positive or negative number based upon the value selected in the **Earn Code** field.
Note: The **Oth Hrs**, **Hourly Rate**, and **Amount** fields are available only if applicable based upon the value selected in the **Earn Code** field.
22. Click the horizontal scrollbar to scroll to the right as needed.

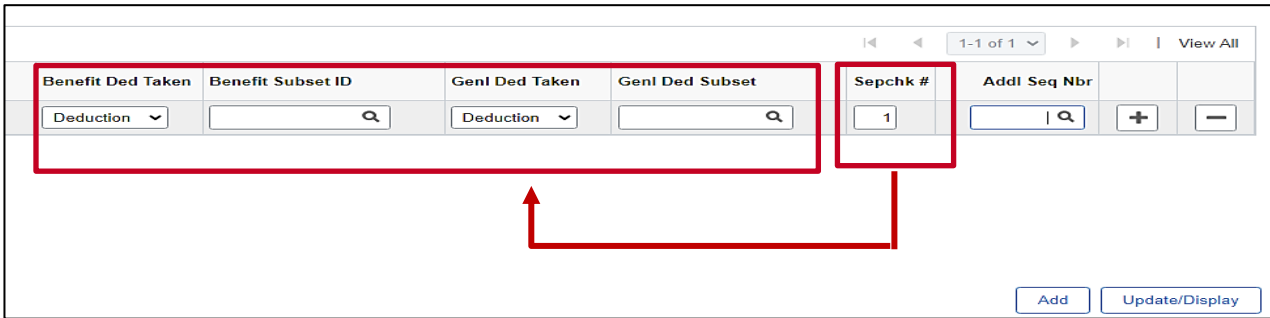
PY381_Using the Single-Use Payroll Online Tool (SPOT)

The remaining fields on the **Enter Payroll SPOT Trans** tab display.

Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr		
200.00	Deduction		Deduction		0		<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

23. The **Benefit Ded Taken**, **Benefit Subset**, **Genl Ded Taken**, and **Genl Ded Subset** fields are not enabled. Entry of these fields is triggered based on the value in the **Sepchk#** field. See Steps 25 – 28 for details on these fields.
24. The **Sepchk#** field defaults to “0” indicating that the earnings will be added to the employee’s regular check for the Pay Period being processed. Incrementally update this field by one if the employee requires on or more separate checks.

Note: When deductions need to be modified on the separate check, you will need to enter a SPOT deduction batch using the corresponding separate check value and make the adjustments. See page 23 of this job aid for more details.

PY381_Using the Single-Use Payroll Online Tool (SPOT)


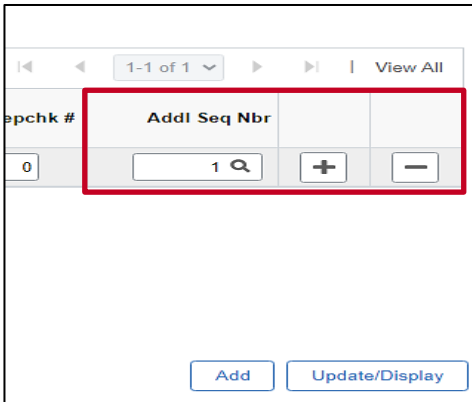
Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
Deduction		Deduction		1	

Note: When the **Sepchk#** field value is changed from the default of “0”, the **Benefit Ded Taken**, **Benefit Subset ID**, **Genl Ded Taken**, and **Genl Ded Subset** fields become enabled and are required to be completed. Follow the steps below to make the appropriate updates to each of these fields.

25. Click the **Benefit Ded Taken** dropdown button and select the applicable value based on the following:
 - a. **Deduction** – all benefit deductions are taken from the earnings
 - b. **None** – no benefit deductions are taken from the earnings
 - c. **Subset** – a subset of benefit deductions is taken from the earnings

Note: A Benefit Subset ID value must be selected in the **Benefit Subset ID** field if the “Subset” value is selected in the **Benefit Ded Taken** field. If “Subset” was not selected, do not select a value in the **Benefit Subset ID** field and skip to Step 27.
26. Select the appropriate value using the **Benefit Subset ID Look Up** icon based on the following:
 - a. **BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings
 - b. **GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken
 - c. **SPT** (SPOT Allow) – Not used by Cardinal
 - d. **LVS** (Leave Share) – All deductions will be taken from the earnings
27. Select the appropriate value using the **Genl Ded Taken** dropdown button based on the following:
 - a. **Deduction** – all benefit deductions are taken from the earnings
 - b. **None** – no benefit deductions are taken from the earnings
 - c. **Subset** – a subset of benefit deductions is taken from the earnings

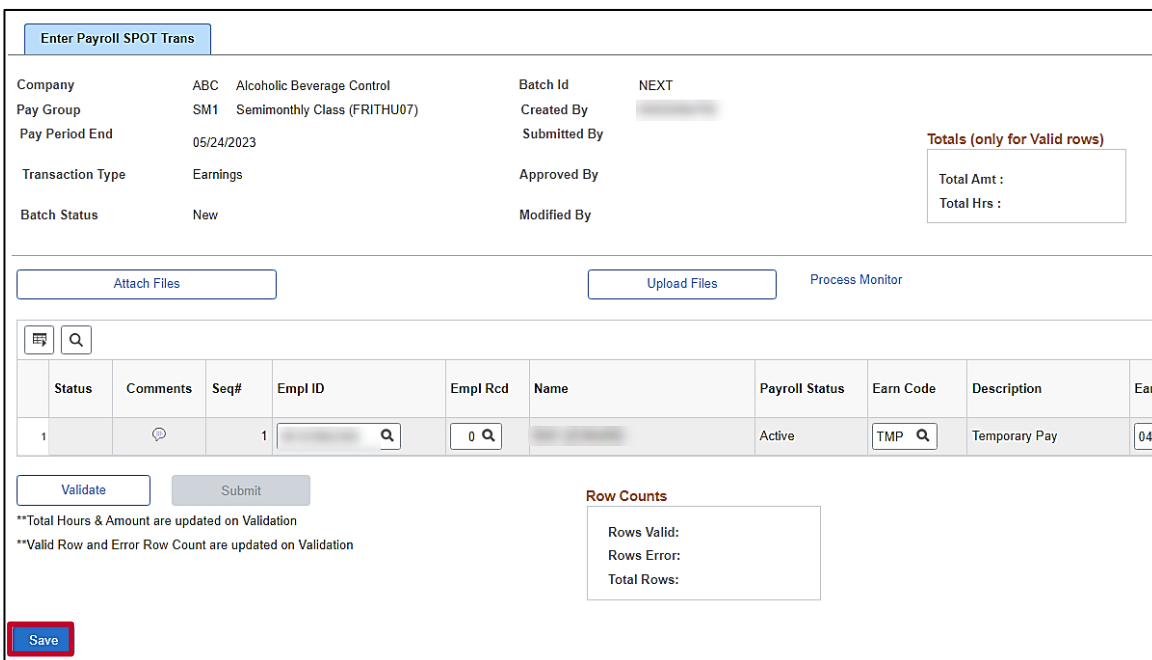
Note: A General Deduction Subset value must be selected in the **Genl Ded Subset** field if the “Subset” value is selected in the **Genl Ded Taken** field. If “Subset” was not selected, do not select a value in the **Genl Ded Subset** field and skip to Step 28.
28. Select the appropriate value using the **Genl Ded Subset Look Up** icon based on the following:
 - a. **BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings
 - b. **GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken
 - c. **SPT** (SPOT Allow) – Not used by Cardinal
 - d. **LVS** (Leave Share) – All deductions will be taken from the earnings

PY381_Using the Single-Use Payroll Online Tool (SPOT)


29. The **Addl Seq Nbr** field is used to tie the SPOT entry to the respective Additional Pay record as each additional pay record is created with a sequence number. The **Addl Seq Nbr** field is only required if the Additional Pay record has a **Goal Balance**. Cardinal needs the **Addl Seq Nbr** to recognize which record to update.

Note: If the adjustment being made is not for an Additional Pay, leave this field blank. If you enter a sequence number for earnings that is not Additional Pay, you will receive a validation error.

- 30. Click the **Add a Row** icon (+) to add an additional item as needed and then repeat Steps 5 – 29 until all the SPOT earnings transactions have been entered into the batch.
- 31. Click the **Delete a Row** icon (-) to delete a line as needed.
- 32. Click the horizontal scrollbar to scroll to the left as needed.



33. Click the **Save** button to save the batch.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1847
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Created	Modified By	

Totals (only for Valid rows)
 Total Amt :
 Total Hrs :

Attach Files
Upload Files
Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begi
1		1		0		Active	TMP	Temporary Pay	04/25/2023

Validate
Submit

Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

Save

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

34. Verify that the **Batch ID** field populates with a number (“1847” in the example above).
35. Verify that the **Batch Status** field updates to “Created”.
Note: After a batch is saved, additional items can still be added as necessary.
36. Click the **Validate** button to validate all the individual fields as well as combinations of fields.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1847
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Validated	Modified By	

Attach Files

Upload Files

Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Beg
1 OK		1		0		Active	TMP	Temporary Pay	04/25/202

Validate

Submit

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

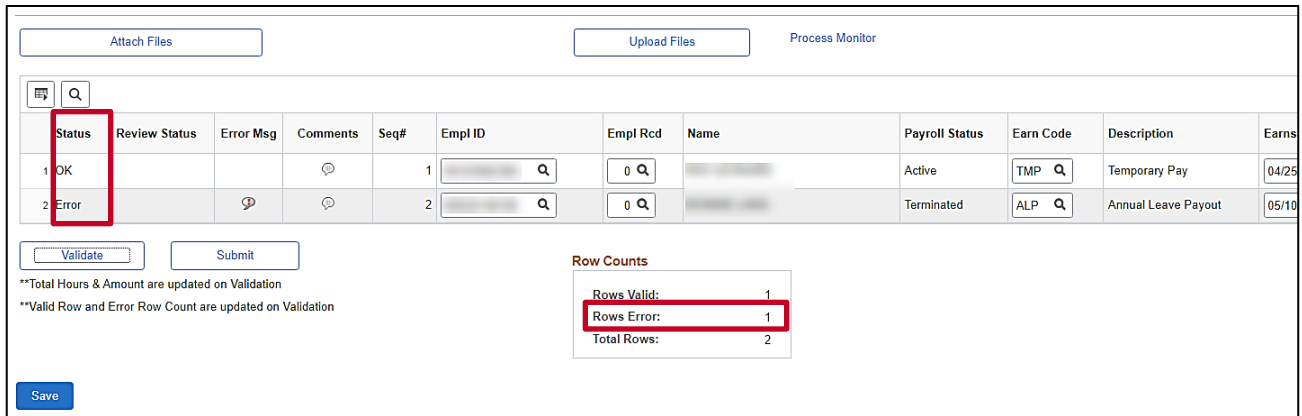
Row Counts
 Rows Valid: 1
 Rows Error:
 Total Rows: 1

Save

37. The Batch Status updates to “Validated”.
38. The **Totals (only for Valid rows)** section provides a summary of:
 - a. **Total Amt** – sum of the values entered in the **Amount** field for the batch
 - b. **Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch
39. The **Row Counts** section provides a summary of:
 - a. **Rows Valid** – the number of valid rows in the batch
 - b. **Rows Error** – the number or rows in the batch containing errors
 - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
40. If the **Rows Error** field is blank, indicating that all rows are valid, skip to Step 49.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The screenshot below provides an example of a batch that contains an error.



Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns
OK				1		0		Active	TMP	Temporary Pay	04/25
Error				2		0		Terminated	ALP	Annual Leave Payout	05/10

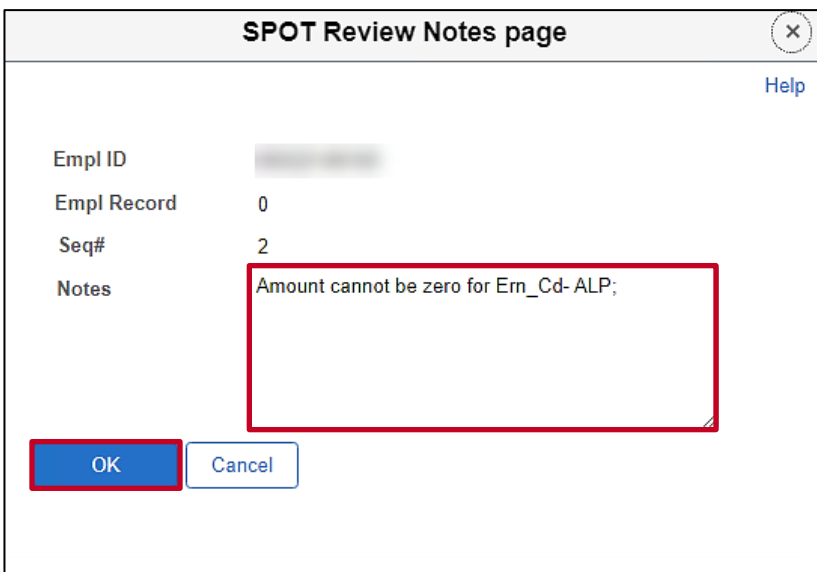
Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

41. If the **Rows Error** field populates with a number, indicating that at least one row is not valid.
42. The **Status** field updates with one of the following values:
 - **OK** – no errors
 - **Error** – issue with the line

Note: If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.

43. Click the **Bubble** icon in the **Error Msg** field to view the error message.

The **SPOT Review Notes** page displays in a pop-up window.



SPOT Review Notes page ✕

[Help](#)

Empl ID: [Redacted]

Empl Record: 0

Seq#: 2

Notes: Amount cannot be zero for Ern_Cd- ALP;

44. Review the **Notes** field.
45. Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.

<input type="button" value="Attach Files"/>		<input type="button" value="Upload Files"/>		Process Monitor	
<input type="button" value="Validate"/>		<input type="button" value="Submit"/>		Row Counts Rows Valid: 1 Rows Error: 1 Total Rows: 2	
**Total Hours & Amount are updated on Validation		**Valid Row and Error Row Count are updated on Validation			
<input type="button" value="Save"/>					

Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns
1	OK			1		0		Active	TMP	Temporary Pay	04/25
2	Error			2		0		Terminated	ALP	Annual Leave Payout	05/10

46. Update the applicable fields to correct the identified errors.

47. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans	
Company	ABC Alcoholic Beverage Control
Pay Group	SM1 Semimonthly Class (FRITHU07)
Pay Period End	05/24/2023
Transaction Type	Earnings
Batch Status	Modified After Validation
Batch Id	1846
Created By	
Submitted By	
Approved By	
Modified By	
Totals (only for Valid rows) Total Amt : 3150.25 Total Hrs :	
<input type="button" value="Attach Files"/>	
<input type="button" value="Upload Files"/>	
Process Monitor	
<input type="button" value="Validate"/>	
<input type="button" value="Submit"/>	
Row Counts Rows Valid: 1 Rows Error: 1 Total Rows: 2	
**Total Hours & Amount are updated on Validation **Valid Row and Error Row Count are updated on Validation	
<input type="button" value="Save"/>	
<input type="button" value="Return to Search"/>	
<input type="button" value="Previous in List"/>	
<input type="button" value="Next in List"/>	

Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	OK		1		0		Terminated	ALP	Annual Leave Payout
2	Error		2		0		Active	TMP	Temporary Pay

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated successfully.

48. Verify that the **Batch Status** field updates to “Modified After Validation”.

49. Click the **Validate** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1846
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Validated	Modified By	

Totals (only for Valid rows)
 Total Amt : 3380.25
 Total Hrs :

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earn
1 OK		1		0		Terminated	ALP	Annual Leave Payout	05/1
2 OK		2		0		Active	TMP	Temporary Pay	04/2

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 2
Rows Error:
 Total Rows: 2

51. Verify the **Batch Status** field updates to "Validated".
52. Verify that the **Rows Error** field is blank indicating that all errors have been corrected.
53. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

54. Click the **OK** button to submit the batch for review.

Note: A batch cannot be edited after it has been submitted.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page returns.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1846
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[REDACTED]
Pay Period End	05/24/2023	Submitted By	[REDACTED]
Transaction Type	Earnings	Approved By	[REDACTED]
Batch Status	Submitted	Modified By	[REDACTED]

Totals (only for Valid rows)
 Total Amt : 3380.25
 Total Hrs :

Attach Files
Upload Files
Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	E
1 OK		1	[REDACTED]	0	[REDACTED]	Terminated	ALP	Annual Leave Payout	0
2 OK		2	[REDACTED]	0	[REDACTED]	Active	TMP	Temporary Pay	0

Validate
Submit

Row Counts

Rows Valid:	2
Rows Error:	
Total Rows:	2

Save
Return to Search
Previous in List
Next in List

55. Verify that the **Batch Status** field updates to “Submitted”.
56. Verify that the **Submitted By** field updates with your information.

Entering a Deduction Transaction in SPOT

1. Navigate to the **Enter SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.

Enter SPOT Transactions

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

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Company

Pay Group

Pay Period End Date

Transaction Type

Batch Identity

Batch Status

Created By

Case Sensitive

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

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Add a New Value** tab displays.

Enter SPOT Transactions

Batch Identity

*Company

*Pay Group

*Pay Period End Date

*Transaction Type

[Find an Existing Value](#) | [Add a New Value](#)

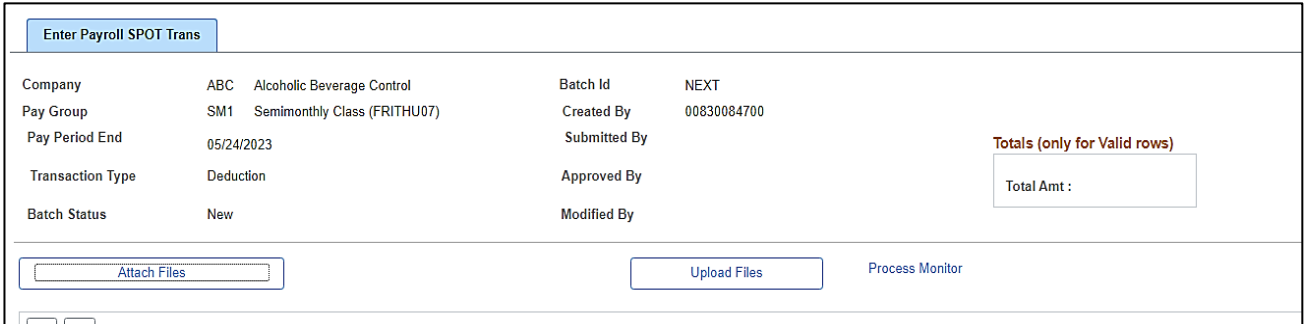
The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
Pay Period End Date	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed). When processing an Off-cycle transaction, use the pay period end date communicated by SPO.
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> • Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). • Deductions – deduction overrides, extra deductions or deduction refunds.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

3. Enter/select the appropriate values in the **Company**, **Pay Group**, and **Pay Period End Date** fields.
4. Enter/select “**Deductions**” in the **Transaction Type** field.
5. Click the **Add** button.

The **Enter SPOT Transactions** page displays with the **Enter Payroll SPOT Trans** tab displayed.

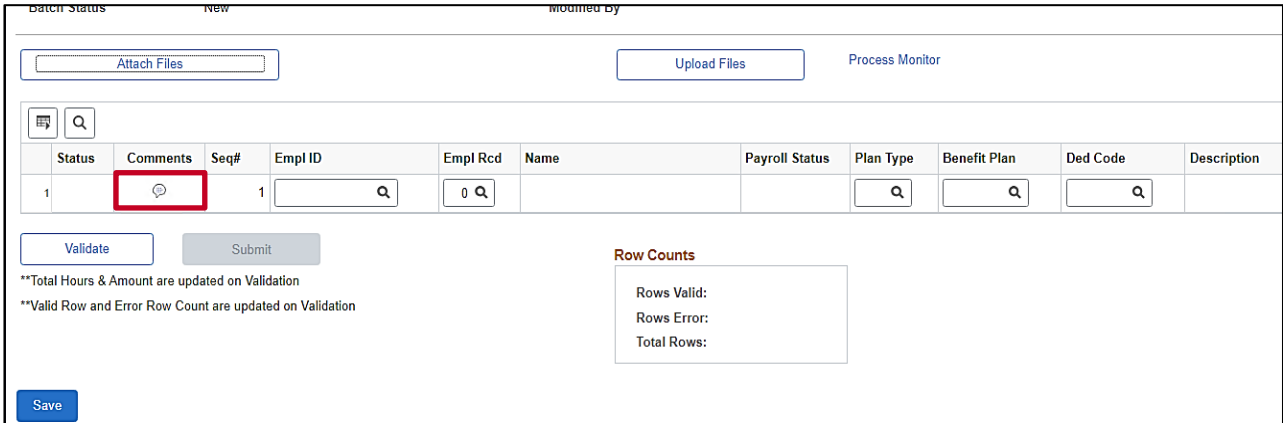


Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of the additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:


Field	Description
Batch Status	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> • New – when a new batch is initiated • Created – when the batch is saved • Validated – when the batch is validated • Modified after Validation – when the batch is changed after validation • Submitted – when the batch is submitted for approval • In Review – when the approver is reviewing the batch for approval • Closed – after the approver has submitted the batch to payroll
Batch ID	Defaults to “ NEXT ”; automatically updates when the batch is submitted
Created By	Displays the name of the Payroll Administrator who created the batch
Submitted By	Displays the name of the Payroll Administrator who submitted the batch
Approved By	Displays the name of the SPOT approver who approved the batch

Note: For further information on the **Attach Files** and **Upload Files** buttons, see the [SPOT Template Upload Process](#) section of this Job Aid.

PY381_Using the Single-Use Payroll Online Tool (SPOT)


Batch Status: new | modified by

Attach Files | Upload Files | Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
		1	<input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	<input type="text"/>	

Validate | Submit

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

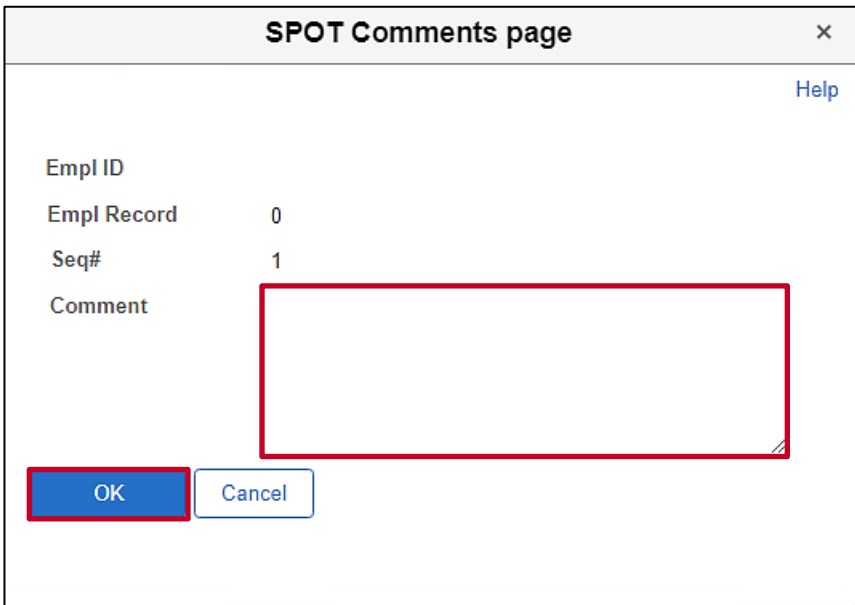
Row Counts
Rows Valid: 0
Rows Error: 0
Total Rows: 0

Save

Note: Use the scroll bar at the bottom of the page to move left/right as required.

- The **Status** column is initially blank. It displays the status of each specific transaction after the batch has been validated.
- Click the **Comments** icon.

The **SPOT Comments** page displays in a pop-up window.



SPOT Comments page [X]

Help

Empl ID

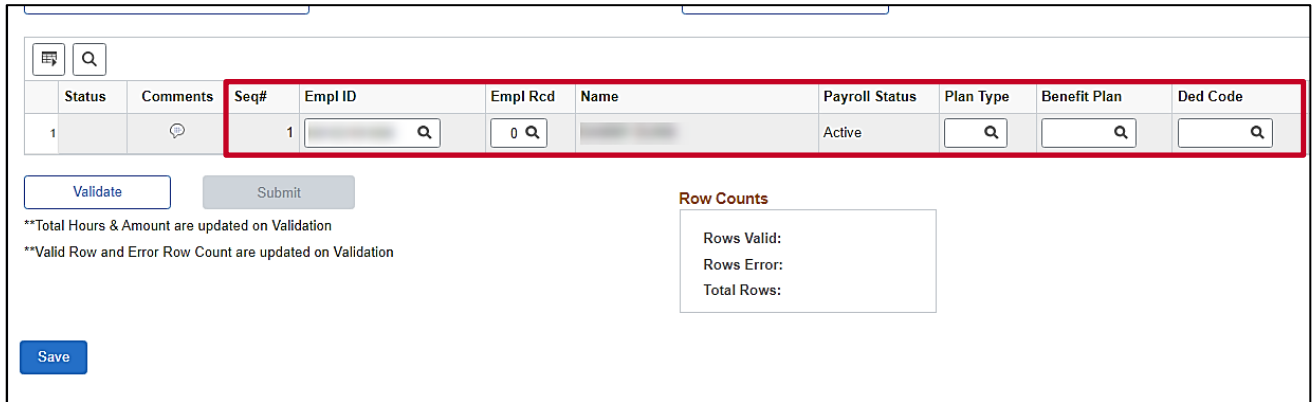
Empl Record: 0

Seq#: 1

Comment:

OK | Cancel

- Enter any applicable comments in the **Comment** field.
- Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)







Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code
1		1	<input type="text"/>	<input type="text"/>		Active	<input type="text"/>	<input type="text"/>	<input type="text"/>

Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

****Total Hours & Amount are updated on Validation**
****Valid Row and Error Row Count are updated on Validation**

10. The **Seq#** field auto-populates and is read-only.
11. Select the applicable employee's Employee ID using the **Empl ID Look Up** icon.
Note: An Empl ID not valid for the Company/Pay group combination of the batch will create an error when the **Validate** button is clicked.
12. Select the applicable Employee Record as required using the **Empl Rcd Look Up** icon.
13. The **Name** field auto-populates based on the Employee ID selected. Verify accuracy.
14. Verify the Payroll Status in the **Payroll Status** field.
Note: A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is "Terminated".
15. Select the appropriate Plan Type using the **Plan Type Look Up** icon.
Note: For detailed information about the **Plan Type**, **Benefit Plan**, **Ded Code**, and **Ded Class** fields, see the Job Aid titled **PY381_General and Benefit Deduction Codes**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Training**.
16. Select the appropriate Benefit Plan using the **Benefit Plan Look Up** icon.
17. Select the appropriate Deduction Code using the **Ded Code Look Up** icon.
Note: When the **Validate** button is clicked, the Deduction Code selected are verified as a valid code for the Benefit Plan selected. An error will occur if this is an invalid combination.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Description	Ded Class	Ded Calc	Rate/Percent	Amount	One Time Cd	Sepchk #		
CoVA Care	A 	Amount 		15.25	Refund 	0		

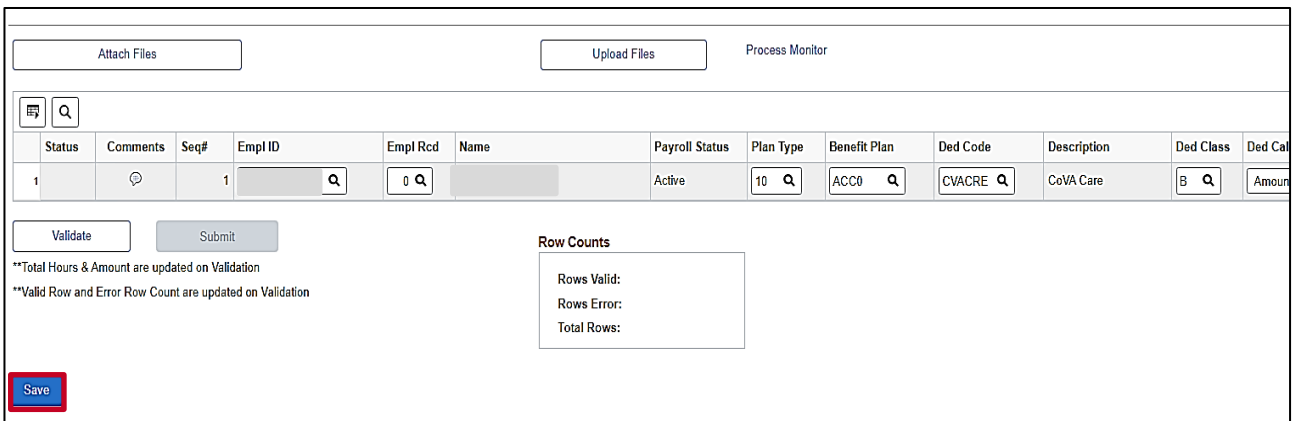
18. The **Description** field auto-populates based on the Deduction Code selected. Verify accuracy.
19. Select the appropriate Deduction Classification using the **Ded Class Look Up** icon. The following values are available, but only valid values for the Deduction Code display:
 - a. **Before-Tax**
 - b. **After-Tax**
 - c. **Non-Taxable**
 - d. **Tax Ben**
 - e. **Taxable**
20. Select the appropriate deduction calculation option using the **Ded Calc** dropdown button.

Note: The option of “Amount” is typically selected. The option “Percentage” can be selected when the **Ded Code** is **DUEAGY** and a percentage of net pay needs to be entered. Confirm with SPO prior to selecting any other deduction calculation options.
21. The **Rate/Percent** field enabled when the **Ded Code** is **DUEAGY** and the **Ded Calc** is **Percentage**. This allows a percentage of net pay needs to be collected.
22. Enter the appropriate deduction amount to two decimal places (e.g., 200.00) in the **Amount** field. The deduction amount can be either a positive or negative number.
23. Select the appropriate One Time Code using the **One Time Cd** dropdown button. The following options are available:
 - a. **Addition** – Add to the current deduction(s)
 - b. **Arns Paybk** – Not used by Cardinal
 - c. **Override** – Alter amount that would have been deducted
 - d. **Refund** – Amount due back to the employee; **DO NOT** enter a negative value in the **Amount** field if this option is selected
24. The **Sepchk#** field defaults to “0” indicating that the deductions will be taken from the employee’s regular check for the Pay Period being processed.

Note: For a separate check, the **Sepchk#** value will be greater than “0” and should correspond with the separate check number entered on the SPOT earnings batch. This will ensure that the deductions are taken from the correct check. An error will occur when the batch is validated if a SPOT deduction transaction for a Separate check is entered prior to entering the corresponding SPOT earnings transaction.
25. Click the **Add a Row** icon (+) to add an additional item and click the **Delete a Row** icon (-) to delete a line. Repeat steps 5 – 23 until all SPOT deduction transactions are added.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

26. Click the horizontal scrollbar to scroll to the left as needed.



Attach Files Upload Files Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Cal
1		1		0		Active	10	ACC0	CVACRE	CoVA Care	B	Amount

Validate Submit

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

Row Counts

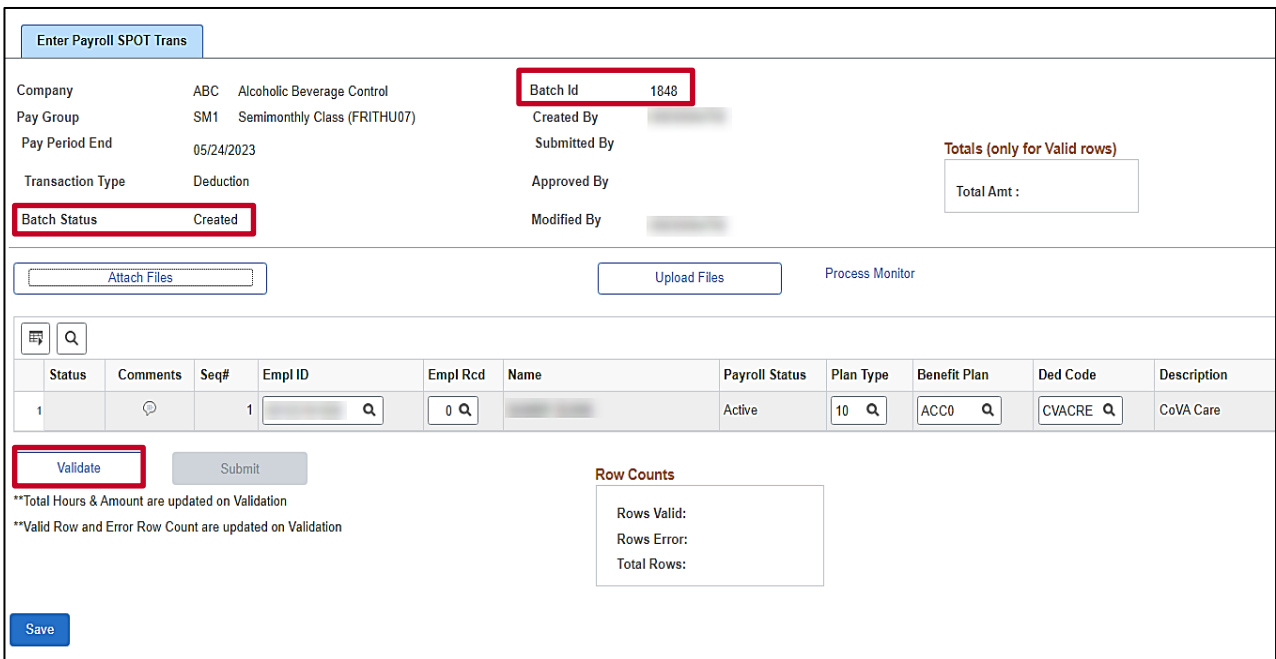
Rows Valid:
Rows Error:
Total Rows:

Save

27. Click the **Save** button.

Note: After a batch is saved, additional items can still be added as necessary.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company ABC Alcoholic Beverage Control Batch Id 1848
 Pay Group SM1 Semimonthly Class (FRITHU07) Created By
 Pay Period End 05/24/2023 Submitted By
 Transaction Type Deduction Approved By
 Batch Status Created Modified By

Totals (only for Valid rows)
Total Amt :

Attach Files Upload Files Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1		1		0		Active	10	ACC0	CVACRE	CoVA Care

Validate Submit

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:
Rows Error:
Total Rows:

Save

28. Verify that the **Batch ID** field populates with a number (“1848” in the example above).

29. Verify that the **Batch Status** field updates to “Created”.

30. Click the **Validate** button to validate all the individual fields as well as combinations of fields.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1848
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	00830084700
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Deduction	Approved By	
Batch Status	Validated	Modified By	00830084700

Totals (only for Valid rows)
 Total Amt : 15.25

Attach Files
Upload Files
Process Monitor

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1 OK		1	00103191000	0	SAMMY DUNN	Active	10	ACC0	CVACRE	CoVA Care

Validate
Submit

Row Counts
 Rows Valid: 1
 Rows Error:
 Total Rows: 1

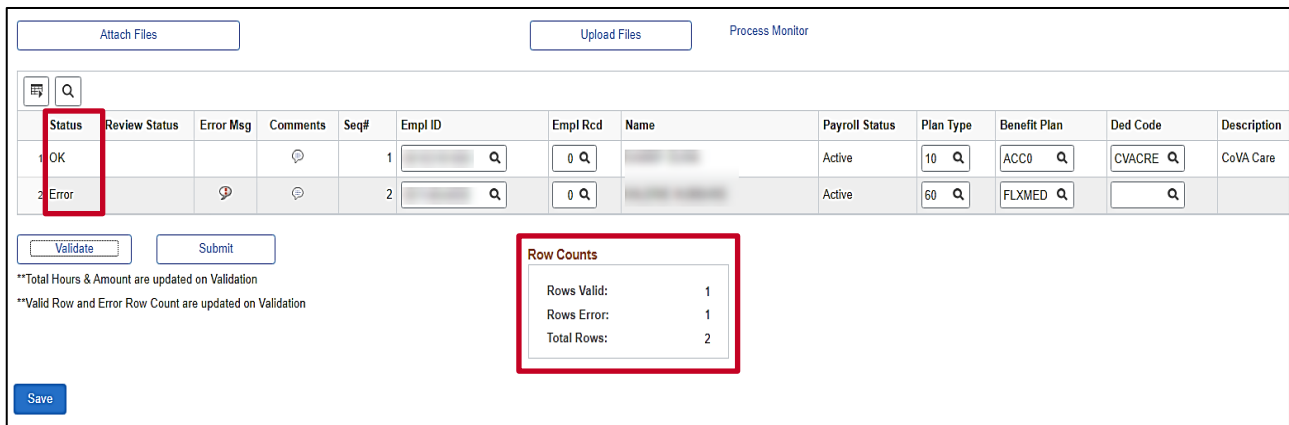
**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

31. Verify that the **Batch Status** updated to “Validated”.
32. The **Totals (only for Valid rows)** section provides a summary of the sum of the values entered in the **Amount** field for the batch.
33. The **Row Counts** section provides a summary of:
 - a. **Rows Valid** – the number of valid rows in the batch
 - b. **Rows Error** – the number or rows in the batch containing errors
 - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
34. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 43.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The screenshot below provides an example of a batch that contains an error.



Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
OK				1	[Redacted]	0	[Redacted]	Active	10	ACC0	CVACRE	CoVA Care
Error				2	[Redacted]	0	[Redacted]	Active	60	FLXMED		

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

35. If the **Rows Error** field populates with a number, indicating at least one row is not valid.

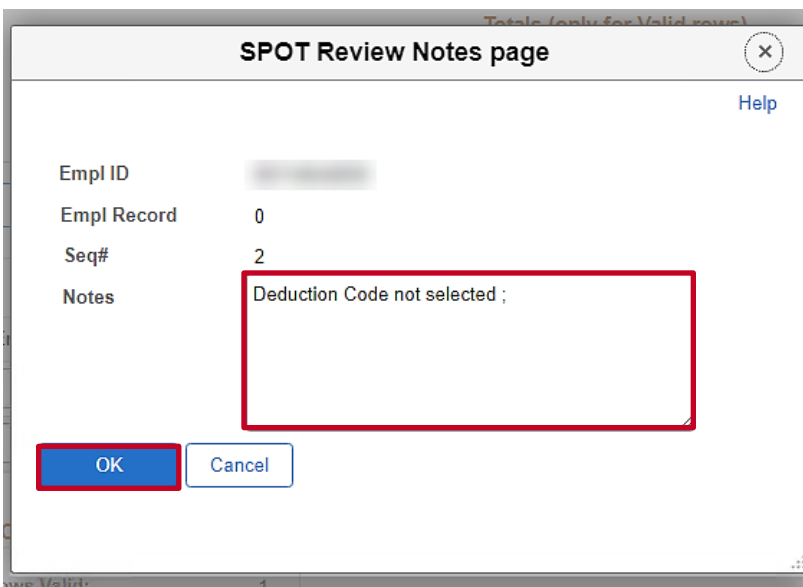
36. The **Status** field updates with one of the following values:

- **OK** – no errors
- **Error** – issue with the line

Note: If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.

37. Click the **Bubble** icon in the **Error Msg** field to view the error message.

The **SPOT Review Notes Page** pop-up window displays.



Totals (only for Valid rows)

SPOT Review Notes page [Close]

[Help](#)

Empl ID: [Redacted]

Empl Record: 0

Seq#: 2

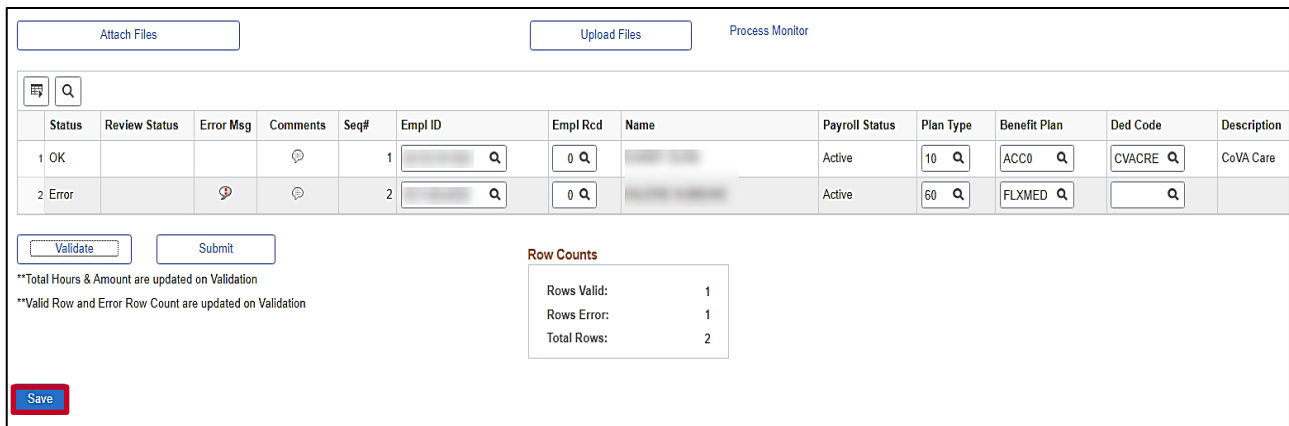
Notes: Deduction Code not selected ;

38. Review the **Notes** field.

39. Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.



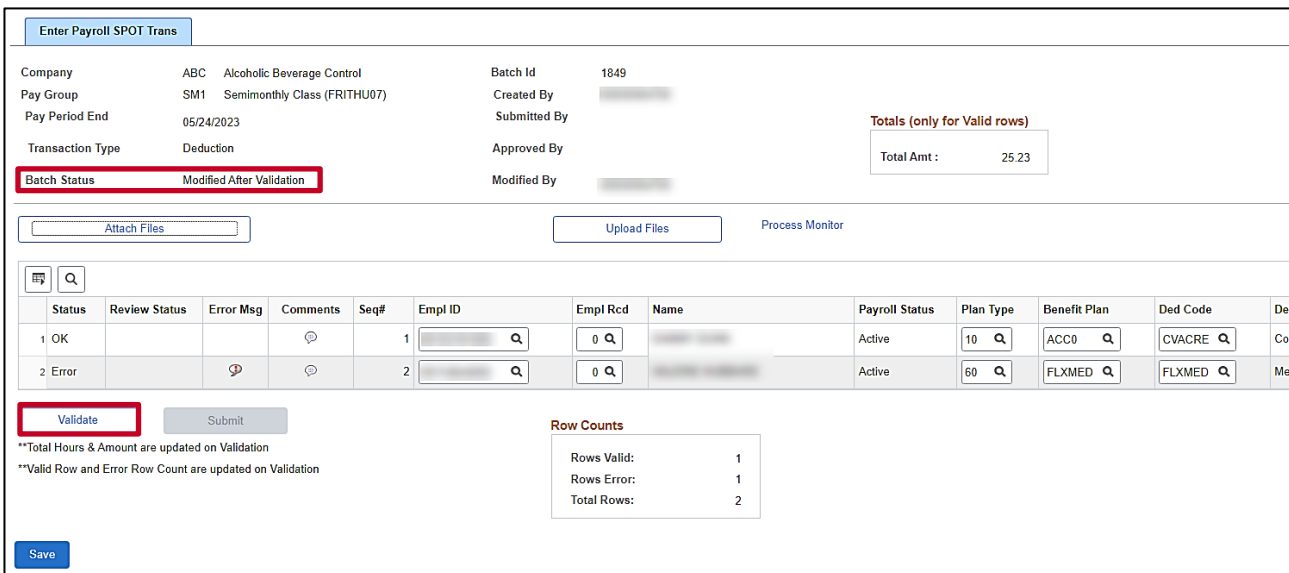
Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1 OK				1	[Redacted]	0	[Redacted]	Active	10	ACC0	CVACRE	CoVA Care
2 Error				2	[Redacted]	0	[Redacted]	Active	60	FLXMED		

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

40. Update the applicable fields to correct the identified errors.

41. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans
 Company: ABC Alcoholic Beverage Control Batch Id: 1849
 Pay Group: SM1 Semimonthly Class (FRITHU07) Created By: [Redacted]
 Pay Period End: 05/24/2023 Submitted By: [Redacted]
 Transaction Type: Deduction Approved By: [Redacted]
Batch Status: Modified After Validation Modified By: [Redacted]

Totals (only for Valid rows)
 Total Amt: 25.23

Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1 OK				1	[Redacted]	0	[Redacted]	Active	10	ACC0	CVACRE	CoVA Care
2 Error				2	[Redacted]	0	[Redacted]	Active	60	FLXMED	FLXMED	Med

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

42. Verify that the **Batch Status** field updates to “Modified After Validation”.

43. Click the **Validate** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1849		
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By		Totals (only for Valid rows) Total Amt : 225.23	
Pay Period End	05/24/2023	Submitted By			
Transaction Type	Deduction	Approved By			
Batch Status	Validated	Modified By			

Attach Files
Upload Files
Process Monitor

	Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1	OK			1		0		Active	10	ACC0	CVACRE	CoVA Care
2	OK			2		0		Active	60	FLXMED	FLXMED	Medical FSA

Validate
Submit

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 2
Rows Error: 0
 Total Rows: 2

Save

44. Verify that the **Batch Status** field updates to “Validated”.
45. Verify that the **Rows Error** field is blank indicating that all errors have been fixed.
46. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

OK
Cancel

47. Click the **OK** button to submit the batch for review.

Note: A batch cannot be edited after it is submitted.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Spot Transactions** page returns.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1849		
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[Redacted]		
Pay Period End	05/24/2023	Submitted By	[Redacted]	Totals (only for Valid rows)	
Transaction Type	Deduction	Approved By		Total Amt : 225.23	
Batch Status	Submitted	Modified By	[Redacted]		

[Process Monitor](#)

Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1 OK		[Redacted]	1	[Redacted]	0	[Redacted]	Active	10	ACC0	CVACRE	CoVA Care
2 OK		[Redacted]	2	[Redacted]	0	[Redacted]	Active	60	FLXMED	FLXMED	Medical FSA

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 2
 Rows Error: 0
 Total Rows: 2

48. Verify that the **Batch Status** field updates to “Submitted”.
49. Verify that the **Submitted By** field updates with your information.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Template Upload Process

The SPOT Template Upload process can be used to enter a large volume of transactions into SPOT. There are two Template Uploads:

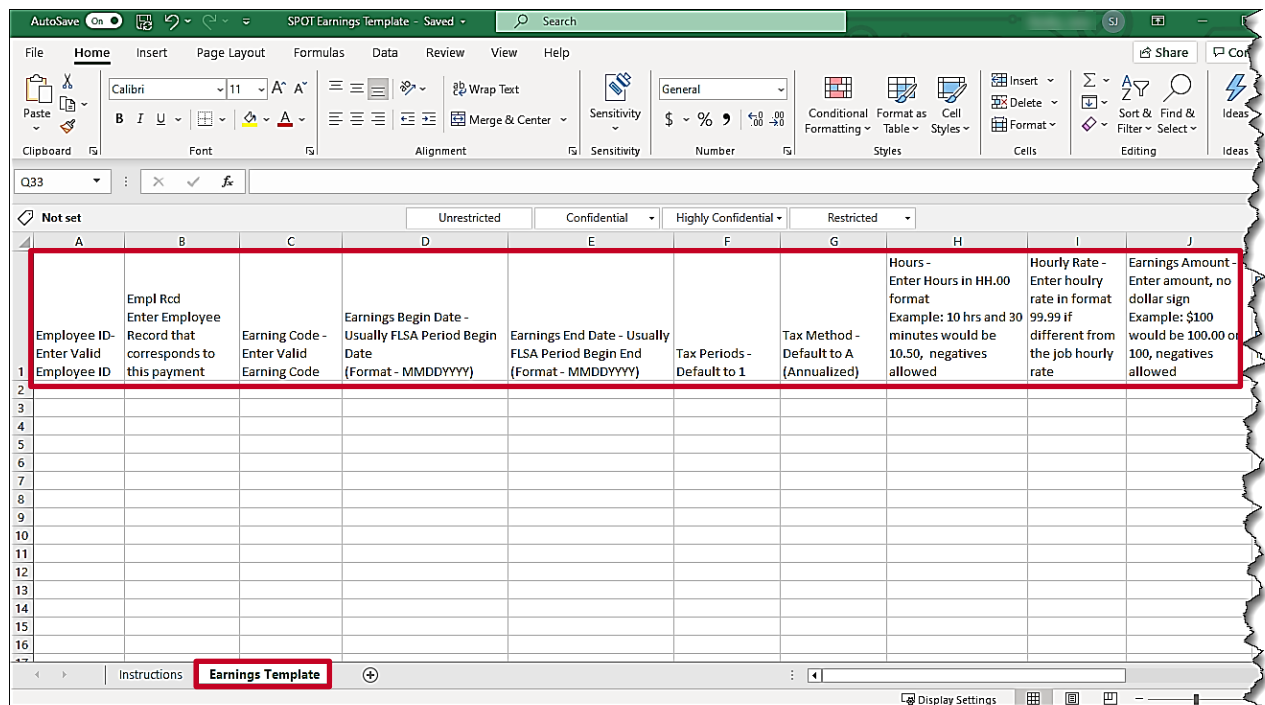
- Earnings
- Deductions

The templates are located on the Cardinal website in **HCM Update Templates** under **Resources**.

Note: Batches should not exceed more than 1000 lines. If you have more than 1000 lines to upload, you will need to upload it as a separate batch.

1. Download and open the appropriate SPOT Upload Template. (The **SPOT Earnings Template** file is used in this example).

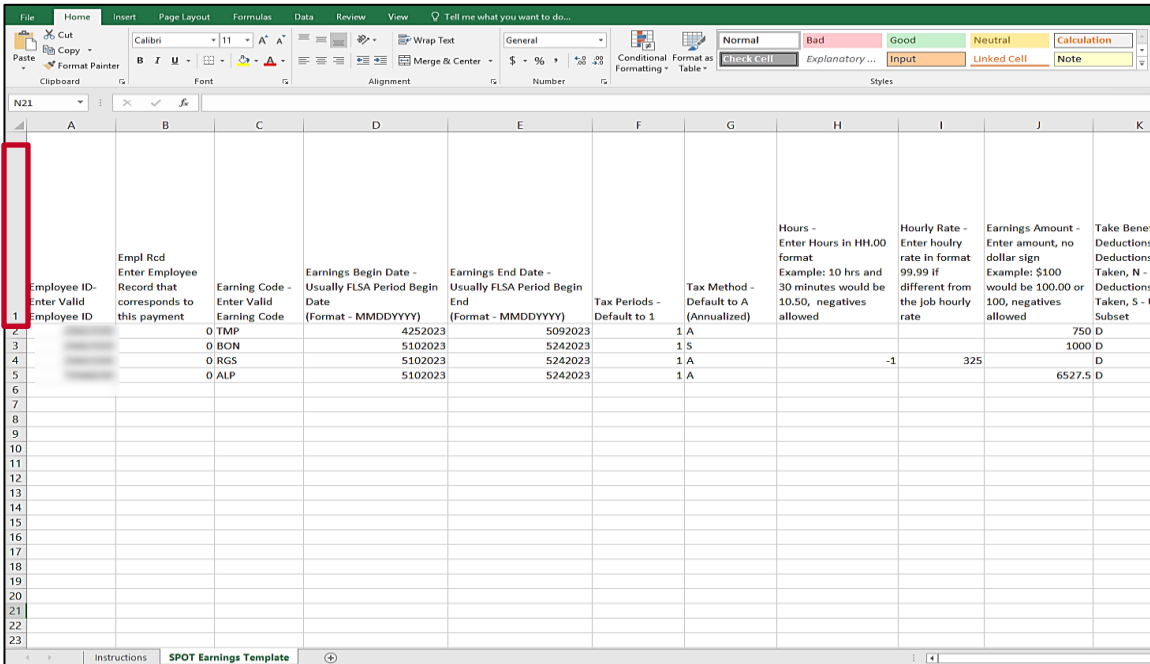
The **SPOT Earnings [or Deductions] Template** opens with the **Earnings [or Deductions] Template** workbook displayed by default.



2. Click the **Earnings [or Deductions] Template** workbook if it is not displayed by default.

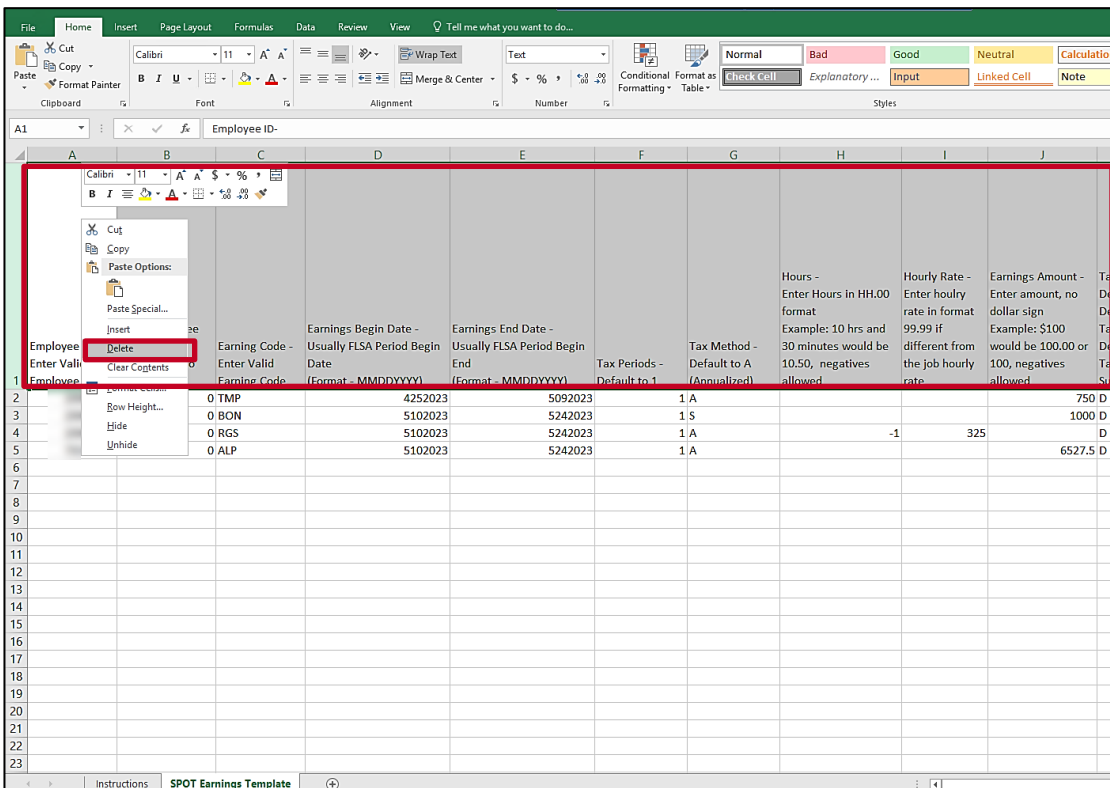
PY381_Using the Single-Use Payroll Online Tool (SPOT)

- Enter the transactions starting in **Row 2** on the template following the instructions listed in the **Header Row (Row 1)** and reference the Instructions tab as needed.



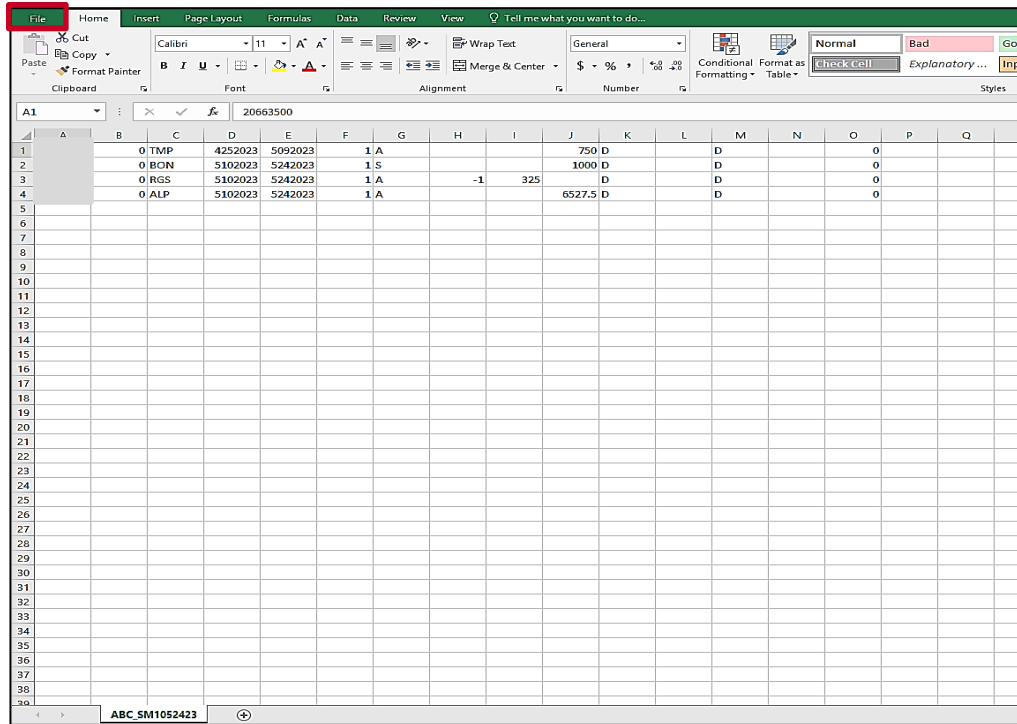
1	Employee ID - Enter Valid Employee ID	Empl Rcd Enter Employee Record that corresponds to this payment	Earning Code - Enter Valid Earning Code	Earnings Begin Date - Usually FLSA Period Begin Date (Format - MMDDYYYY)	Earnings End Date - Usually FLSA Period Begin End (Format - MMDDYYYY)	Tax Periods - Default to 1	Tax Method - Default to A (Annualized)	Hours - Enter Hours in HH.00 format Example: 10 hrs and 30 minutes would be 10.50, negatives allowed	Hourly Rate - Enter hourly rate in format 99.99 if different from the job hourly rate	Earnings Amount - Enter amount, no dollar sign Example: \$100 would be 100.00 or 100, negatives allowed	Take Benef Deductions Taken, N - R Deductions Taken, S - U Subset
2			0 TMP	4252023	5092023		1 A			750 D	
3			0 BON	5102023	5242023		1 S			1000 D	
4			0 RGS	5102023	5242023		1 A	-1	325		D
5			0 ALP	5102023	5242023		1 A			6527.5 D	

- Use the mouse or track pad and right click in the cell labeled "1" to select the entire **Header** row.

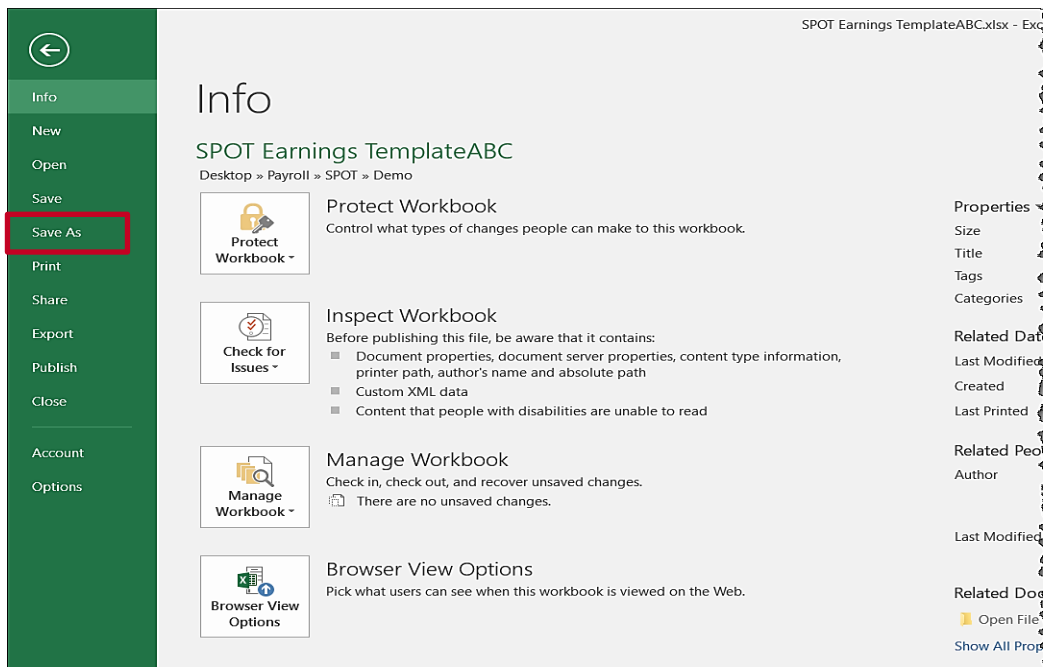


1	Employee ID - Enter Valid Employee ID	Empl Rcd Enter Employee Record that corresponds to this payment	Earning Code - Enter Valid Earning Code	Earnings Begin Date - Usually FLSA Period Begin Date (Format - MMDDYYYY)	Earnings End Date - Usually FLSA Period Begin End (Format - MMDDYYYY)	Tax Periods - Default to 1	Tax Method - Default to A (Annualized)	Hours - Enter Hours in HH.00 format Example: 10 hrs and 30 minutes would be 10.50, negatives allowed	Hourly Rate - Enter hourly rate in format 99.99 if different from the job hourly rate	Earnings Amount - Enter amount, no dollar sign Example: \$100 would be 100.00 or 100, negatives allowed	Take Benef Deductions Taken, N - R Deductions Taken, S - U Subset
2			0 TMP	4252023	5092023		1 A			750 D	
3			0 BON	5102023	5242023		1 S			1000 D	
4			0 RGS	5102023	5242023		1 A	-1	325		D
5			0 ALP	5102023	5242023		1 A			6527.5 D	

- Click the **Delete** menu list item from the dropdown menu to delete the entire **Header** row.

PY381_Using the Single-Use Payroll Online Tool (SPOT)


5. Click the **File** button from the Ribbon.

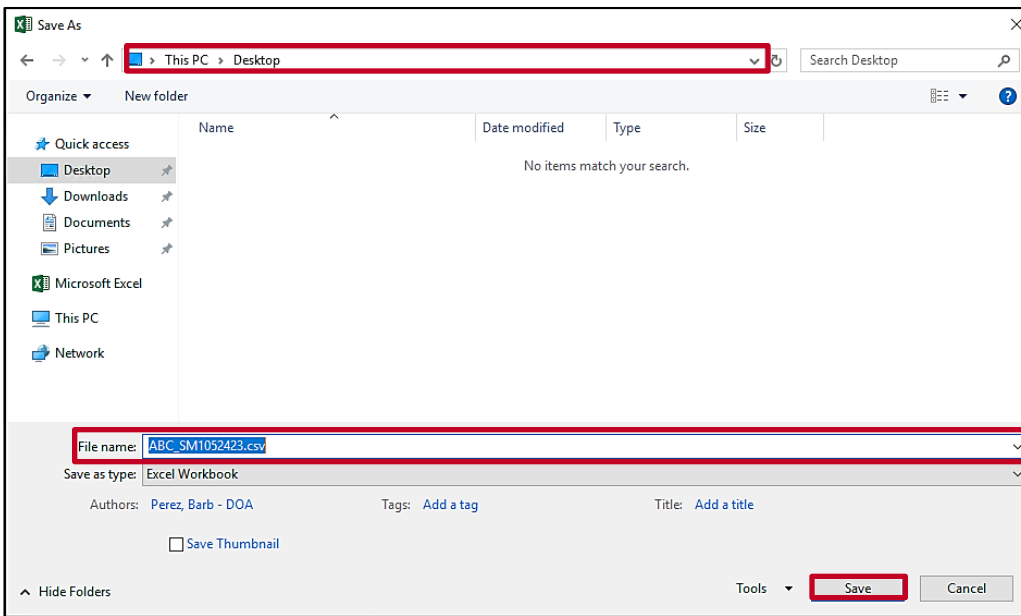


6. Click the **Save a Copy** or **Save As** button.

Note: The button name depends upon the version of Microsoft Excel and personalized settings loaded on your computer, but the functionality is the same.

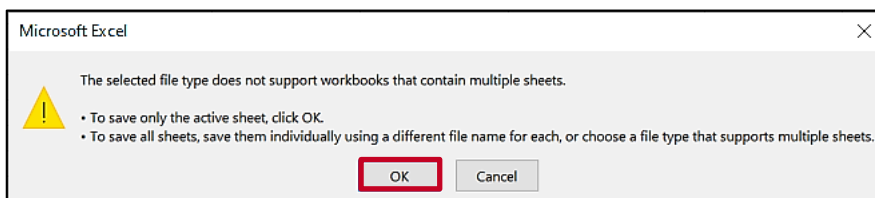
PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Save As** page displays in a pop-up window.



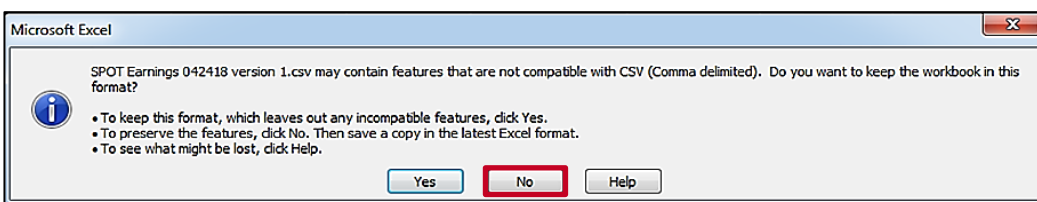
7. Select a destination using the Save Destination dropdown menu.
8. Enter a unique name for the file in the **File name** field.
9. Select **CSV (Comma Delimited)** from the **Save as type** drop-down menu.
10. Click the **Save** button.

A **Microsoft Excel Warning Message** displays.



11. Click the **OK** button.

A second **Microsoft Excel Warning Message** displays.



12. Click the **No** button.

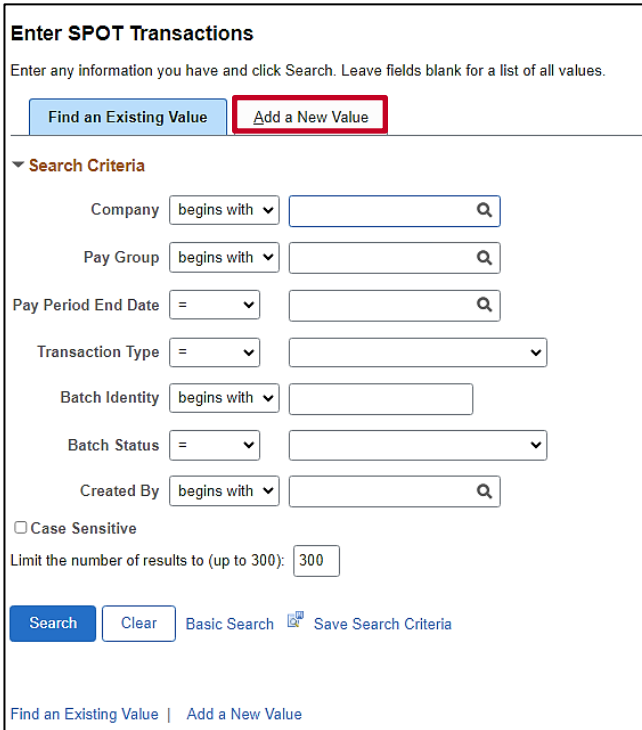
Note: The file is now saved and ready to be uploaded.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

13. Navigate to the **Enter SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.



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

[Find an Existing Value](#) **[Add a New Value](#)**

▼ **Search Criteria**

Company begins with

Pay Group begins with

Pay Period End Date =

Transaction Type =

Batch Identity begins with

Batch Status =

Created By begins with

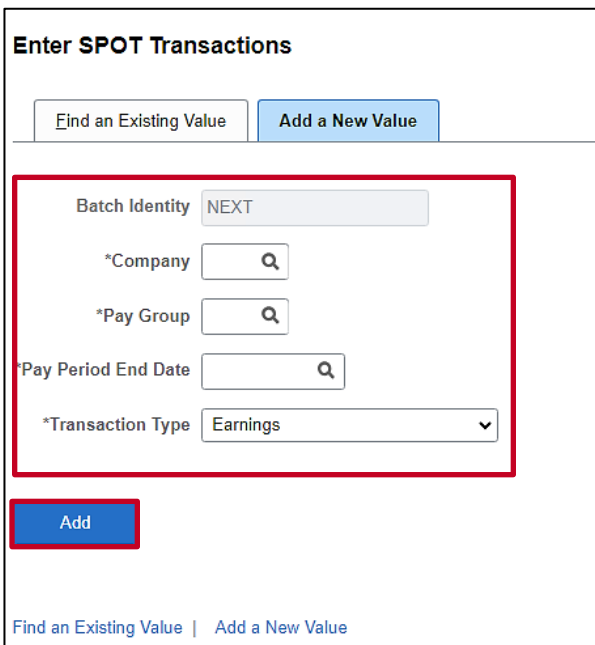
Case Sensitive

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

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

14. Click the **Add a New Value** tab.



Enter SPOT Transactions

[Find an Existing Value](#) **[Add a New Value](#)**

Batch Identity

*Company

*Pay Group

*Pay Period End Date

*Transaction Type

[Find an Existing Value](#) | [Add a New Value](#)

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
Pay Period End Date	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed).
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> • Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). • Deductions – deduction overrides, extra deductions or deduction refunds.

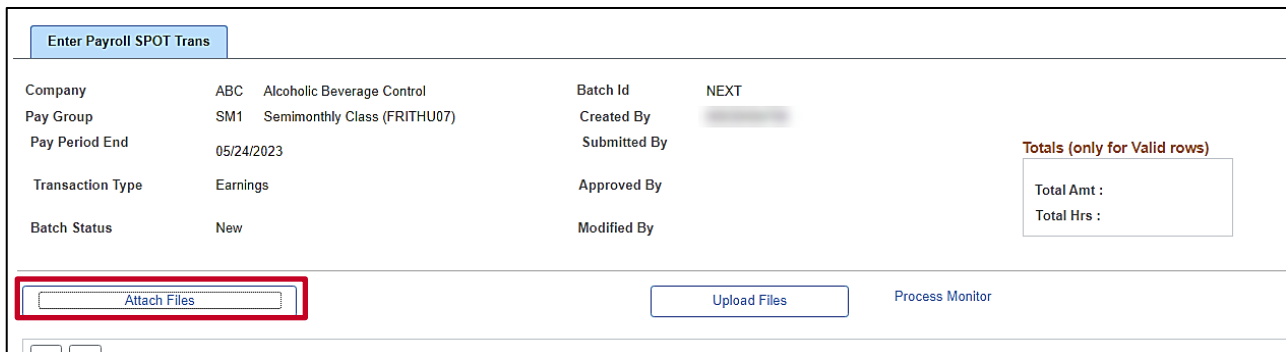
15. Enter/select the appropriate values in the **Company, Pay Group, Pay Period End Date**, and **Transaction Type** fields.

Note: This Job Aid shows an Earnings transaction, but there is no difference between an Earnings and Deductions transaction when using the mass upload process.

16. Click the **Add** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

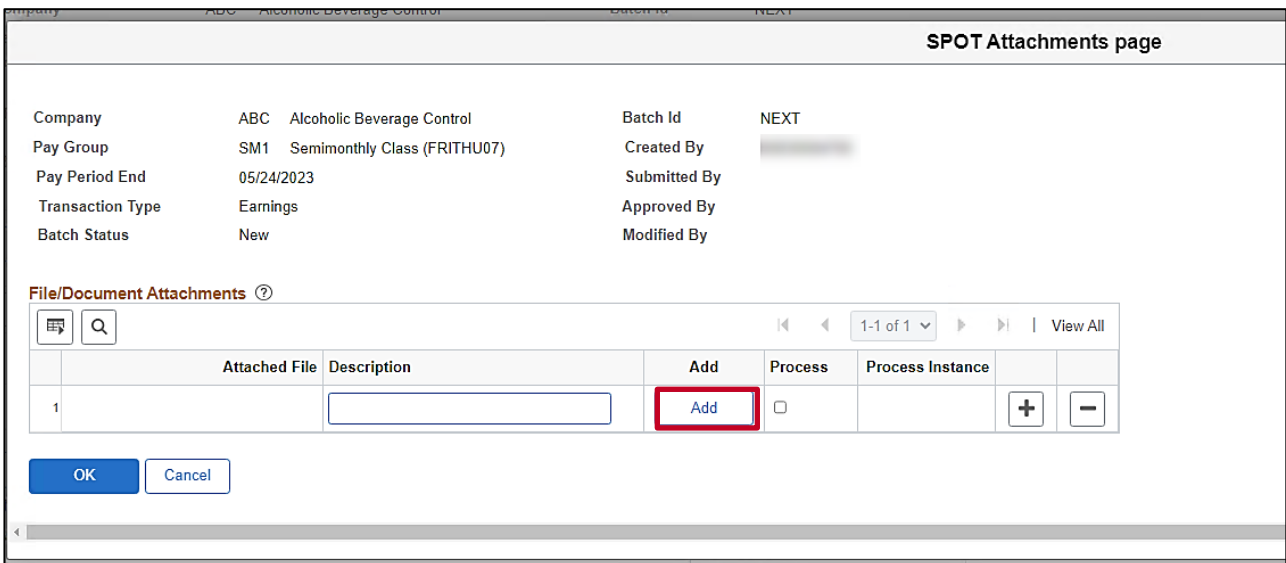
The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

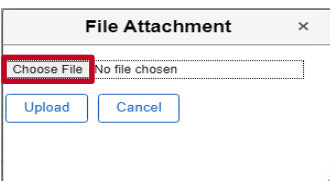
- Click the **Attach Files** button.

The **SPOT Attachments** page displays in a pop-up window.



- Click the **Add** button.

The **File Attachment** page displays in a pop-up window.

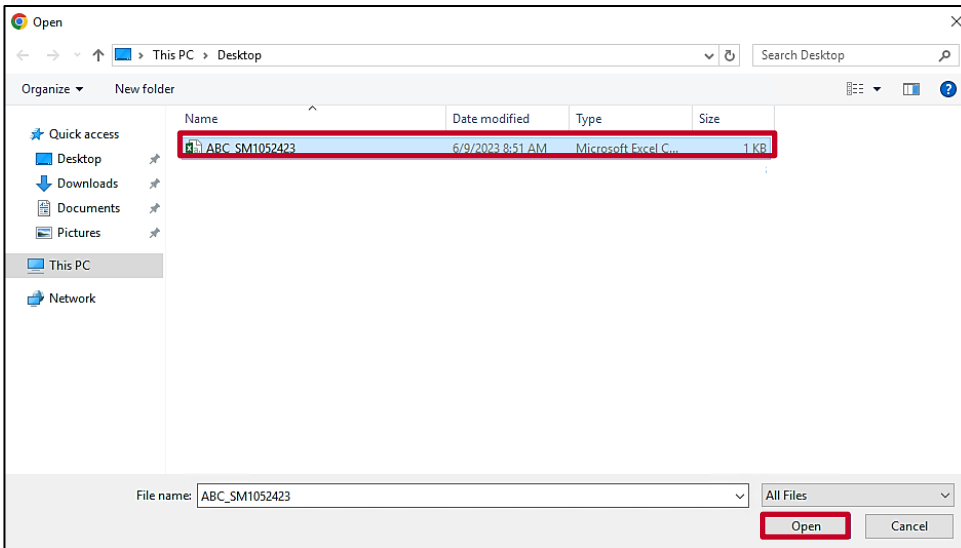


- Click the **Choose File** button.

Note: Depending on the browser used, a **Browse** button may appear in place of the **Choose File** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

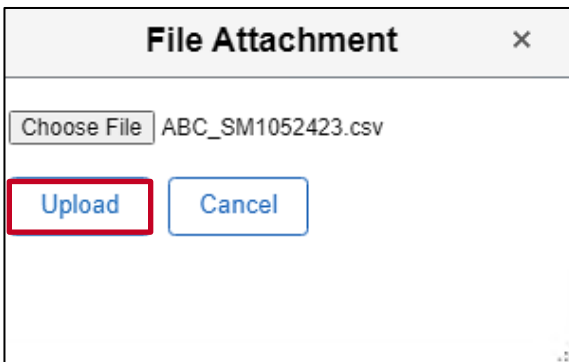
The **Open Files** page displays in a pop-up window.



20. Navigate to and select the applicable file.

21. Click the **Open** button.

The **File Attachment** page returns.



22. Click the **Upload** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Attachments** page returns.

SPOT Attachments page

Company	ABC Alcoholic Beverage Control	Batch Id	NEXT
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	New	Modified By	

File/Document Attachments ?

🔍
1-1 of 1 | View All

Attached File	Description	View	Delete	Process	Process Instance
1 ABC_SM1052423.csv	<input style="width: 100%;" type="text"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input checked="" type="checkbox"/>	+ -

Note: The file is now connected to the batch, but the individual transactions are not uploaded.

23. Enter a description in the **Description** field as needed.
24. Select the **Process** checkbox option.
25. Click the **OK** button.

The **Enter Payroll SPOT Trans** tab returns.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	NEXT
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	New	Modified By	

🔍

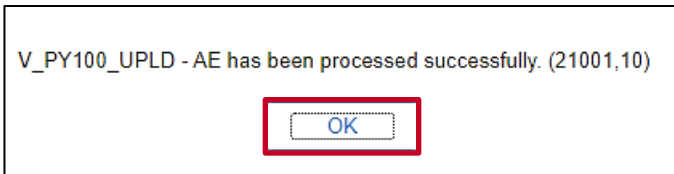
Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descr
1		1	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>			<input style="width: 80%;" type="text"/>	

Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

26. Click the **Upload Files** button to upload the individual transactions.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

A **Successful Upload** message displays in a pop-up window.



27. Click the **OK** button.
28. If the file does not successfully load, verify the following:
 - a. All mandatory fields were properly filled out in the template.
 - b. The fields were entered using the correct format.
 - c. The file was saved in the .csv format.

The **Enter Payroll SPOT Trans** tab returns.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Created	Modified By	

Totals (only for Valid rows)
 Total Amt :
 Total Hrs :

Attach Files
Upload Files
Process Monitor

Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earn
1			1		0		Active	TMP	Temporary Pay	04/2
2			2		0		Active	BON	Non-discretionary Bonus (FLSA)	05/1
3			3		0		Active	RGS	Regular Time - Salaried	05/1
4			4		0		Terminated	ALP	Annual Leave Payout	05/1

Validate
Submit

Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

Save

29. Verify that a **Batch ID** is assigned (“1850” in this example).
30. Verify that the **Batch Status** field updates to “Created”.
31. Verify that the required fields were populated correctly and update if required.
32. Click the **Validate** button.

Note: Edits that occur when keying the batch online are applied when the **Validate** button is clicked for the uploaded template.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850	Totals (only for Valid rows) Total Amt : 8277.50 Total Hrs : -1.00
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By		
Pay Period End	05/24/2023	Submitted By		
Transaction Type	Earnings	Approved By		
Batch Status	Validated	Modified By		

Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1 OK			1		0		Active	TMP	Temporary Pay	04/25/2023
2 OK			2		0		Active	BON	Non-discretionary Bonus (FLSA)	05/10/2023
3 OK			3		0		Active	RGS	Regular Time - Salaried	05/10/2023
4 OK			4		0		Terminated	ALP	Annual Leave Payout	05/10/2023

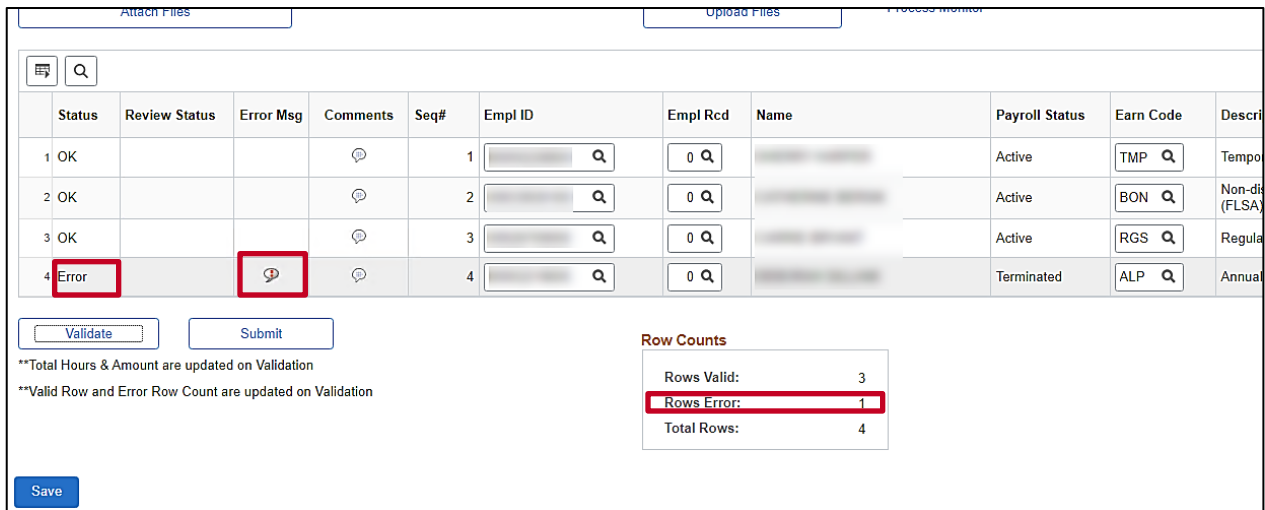
**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 4
 Rows Error: 0
 Total Rows: 4

33. The **Batch Status** field updates to “Validated”.
34. The **Totals (only for Valid rows)** section provides a summary of:
 - a. **Total Amt** – sum of the values entered in the **Amount** field for the batch
 - b. **Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch
35. The **Row Counts** section provides a summary of:
 - a. **Rows Valid** – the number of valid rows in the batch
 - b. **Rows Error** – the number or rows in the batch containing errors
 - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
36. If the **Rows Error** field is blank, indicating that all rows are valid, skip to Step 44.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The screenshot below provides an example of a batch that contains an error.



	Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descri
1	OK				1		0		Active	TMP	Tempo
2	OK				2		0		Active	BON	Non-df (FLSA)
3	OK				3		0		Active	RGS	Regula
4	Error				4		0		Terminated	ALP	Annual

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 3
Rows Error: 1
 Total Rows: 4

37. The **Status** field displays one of two statuses:

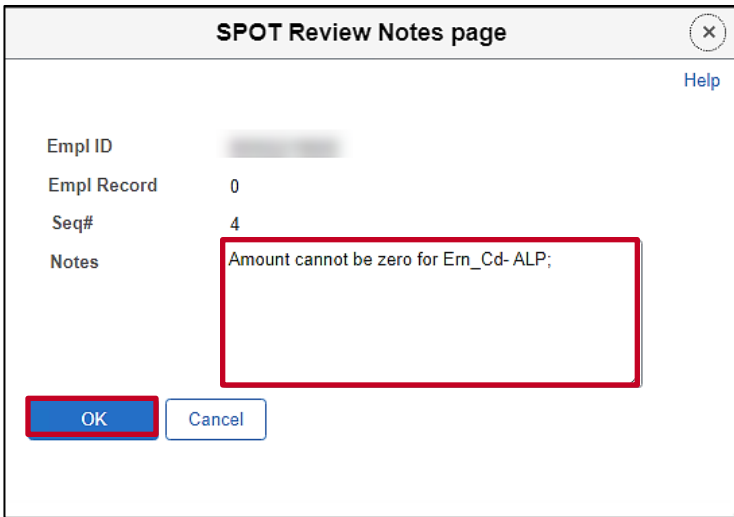
- **OK** – no errors
- **Error** – issue with the line

Note: If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “Error” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.

38. Click the **Bubble** icon in the **Error Msg** field to view the error message.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Review Notes Page** displays in a pop-up window.



SPOT Review Notes page

Empl ID [REDACTED]

Empl Record 0

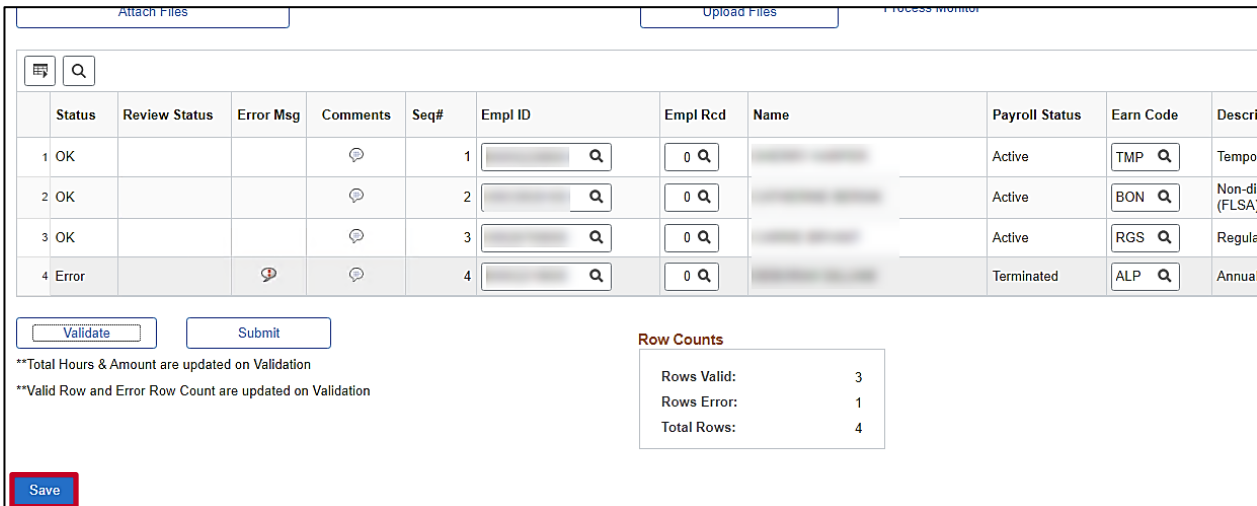
Seq# 4

Notes Amount cannot be zero for Em_Cd-ALP;

OK Cancel

39. Review the **Notes** field.

40. Click the **OK** button.



	Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	OK				1	[REDACTED]	0	[REDACTED]	Active	TMP	Tempo
2	OK				2	[REDACTED]	0	[REDACTED]	Active	BON	Non-dir (FLSA)
3	OK				3	[REDACTED]	0	[REDACTED]	Active	RGS	Regula
4	Error				4	[REDACTED]	0	[REDACTED]	Terminated	ALP	Annual

Validate Submit

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:	3
Rows Error:	1
Total Rows:	4

Save

41. Update the applicable fields to correct the identified errors.

42. Click the **Save** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[Redacted]
Pay Period End	05/24/2023	Submitted By	[Redacted]
Transaction Type	Earnings	Approved By	[Redacted]
Batch Status	Modified After Validation	Modified By	[Redacted]

[Process Monitor](#)

Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1 OK				1	[Redacted]	0	[Redacted]	Active	TMP	Temporary Pay
2 OK				2	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary B (FLSA)
3 OK				3	[Redacted]	0	[Redacted]	Active	RGS	Regular Time - Sala
4 Error				4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual Leave Payo

Row Counts
 Rows Valid: 3
 Rows Error: 1
 Total Rows: 4

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

43. Verify that the **Batch Status** field updates to “Modified After Validation”.
44. Click the **Validate** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Validated	Modified By	

Totals (only for Valid rows)

Total Amt :	8007.50
Total Hrs :	-1.00

Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1 OK			1		0 Q		Active	TMP	Temporary Pay	04/25/2023
2 OK			2		0 Q		Active	BON	Non-discretionary Bonus (FLSA)	05/10/2023
3 OK			3		0 Q		Active	RGS	Regular Time - Salaried	05/10/2023
4 OK			4		0 Q		Terminated	ALP	Annual Leave Payout	05/10/2023

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:	4
Rows Error:	0
Total Rows:	4

45. Verify that the **Batch Status** field updates to “Validated”.
 46. Verify that the **Rows Error** field is blank indicating that all errors have been fixed.
 47. Click the **Submit** button to submit the batch for review.
- A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

48. Click the **OK** button to submit the batch for review.
- Note:** A batch cannot be edited after it is submitted.

Deleting SPOT Batches

Payroll Administrators can delete batches if the batch has not been closed. All transactions within a batch are deleted and will not process when a batch is deleted. This process cannot be undone, so use only as appropriate. Utilize the **Delete a Row** button (-) to only delete specific transactions within a batch.

1. Navigate to the **Delete SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Delete Spot Transactions

The **Delete SPOT Transactions Search** page displays.

Delete SPOT Transactions

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

[Find an Existing Value](#)

▼ **Search Criteria**

Batch Identity


Company

Pay Group

Pay Period End Date

Transaction Type

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

[Basic Search](#)  [Save Search Criteria](#)

2. Enter the search criteria in the corresponding fields for the applicable batch, preferably the specific batch number.
3. Click the **Search** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Delete SPOT Transactions** page display with the applicable batch.

Delete Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1570
Pay Group	BW3 Biweekly Wage (FRITHU07)	Created By	
Pay Period End	08/10/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Created	Totals (only for Valid rows)	
			Total Amt : Total Hrs :

View Supporting Documents

Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin
1		1		1		Active	RGH	Regular Time - Hourly	07/28/2023

Delete Batch

Return to Search

Previous in List

Next in List

4. Click the **Delete Batch** button to delete the batch.

A **Confirmation Message** displays.

Are you sure you want to delete the Batch? (25200,38)

Once Batch is deleted it can not be opened or edited again. Are you sure you want to Delete the batch?

OK

Cancel

5. Click the **OK** button to delete the batch. Once a batch is deleted, it cannot be opened or edited.

The **Delete SPOT Transactions Search** page displays after the batch has been deleted.

Delete SPOT Transactions

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

Find an Existing Value

Search Criteria

Batch Identity begins with

Company begins with Q

Pay Group begins with Q

Pay Period End Date = v Q

Transaction Type = v

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

Search

Clear

Basic Search
🔍

Save Search Criteria
🔖

Approving SPOT Transactions Overview

Each Agency designates at least one person as the SPOT Approver to review and approve, deny or send back SPOT transactions. SPOT Approvers are not able to approve their own batches.

SPOT Approvers can take the following actions on the SPOT transactions within the batch:

- **Approve:** Approved SPOT transactions are loaded to employee paysheets for processing once the batch is Closed.
- **Deny:** Denied transactions will not load to employee's paysheets. When a transaction is marked as denied, it cannot be updated. If the transaction needs to be processed, it must be entered in a new batch. SPOT Approvers should include comments for transactions that are denied for tracking and audit purposes.
- **Send Back:** Transactions that require updates will be sent back to the Payroll Administrator for review and correction. These transactions are not marked as Approved or Denied. The SPOT Approver should enter comments indicating the required revision. When a batch contains these types of transactions, the batch cannot be Closed. The batch will be sent back to the Payroll Administrator so that those transactions can be modified and resubmitted for approval. When batches are sent back the only transactions that can be updated are those not marked as Approved or Denied. SPOT transactions that are sent back do not generate an email, therefore Payroll Administrators should use the SPOT Online Query to identify batches that require updates.

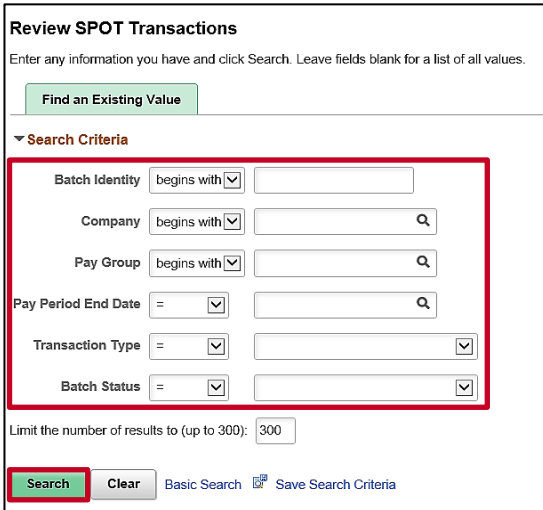
This section of the job aid will walk through the approval process and the options noted above.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

1. Navigate to the **Review SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Review SPOT Transactions

The **Review SPOT Transactions Search** page displays.



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

Find an Existing Value

Search Criteria

Batch Identity begins with

Company begins with

Pay Group begins with

Pay Period End Date =

Transaction Type =

Batch Status =

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

[Basic Search](#) [Save Search Criteria](#)

2. Enter the applicable/known search criteria to find the appropriate batch. The search options include the following:

Fields	Descriptions
Batch Identity	Number assigned to the Batch
Company	The three-character company code
Pay Group	Pay group options for the Company
Pay Period End Date	Select the Pay Period end date for the batch you want to approve
Transaction Types	Select the appropriate option: <ul style="list-style-type: none"> Earnings Deductions
Batch Status	Options include: <ul style="list-style-type: none"> Closed Created Deleted In Review Modified After Validation New

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Fields	Descriptions
	<ul style="list-style-type: none"> Submitted Validated

3. Click the **Search** button.

The **Review SPOT Transactions** page refreshes with the matching search results at the bottom of the page (if more than one batch matches the search criteria entered).

Review SPOT Transactions

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

[Find an Existing Value](#)

Search Criteria

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

Batch Status

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

[Basic Search](#)

Search Results

View All 1-4 of 4

Batch Identity	Company	Pay Group	Pay Period End Date	Transaction Type	Batch Status
1836	ABC	SM1	05/24/2023	Earnings	Submitted
1847	ABC	SM1	05/24/2023	Earnings	Submitted
1849	ABC	SM1	05/24/2023	Deduction	Submitted
1850	ABC	SM1	05/24/2023	Earnings	Submitted

4. If more than one batch matched the search criteria entered, click any of the links within the appropriate batch's row to open the **Review Payroll Spot Trans** tab for the applicable batch.

For this scenario, Batch **1850** is selected.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Review Payroll SPOT Trans** tab displays for the applicable batch.

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850	
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By		
Pay Period End	05/24/2023	Submitted By		
Transaction Type	Earnings	Approved By		
Batch Status	Submitted			Totals (only for Valid Total Amt : 8 Total Hrs :

View Supporting Documents

Send Back

Close Batch

Process Monitor

☰

🔍

	Approve	Deny	Comments	Seq#	*Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input type="checkbox"/>	<input type="checkbox"/>	💬	4		0		Terminated	ALP	Annual Leave Pa
2	<input type="checkbox"/>	<input type="checkbox"/>	💬	3		0		Active	RGS	Regular Time - S
3	<input type="checkbox"/>	<input type="checkbox"/>	💬	2		0		Active	BON	Non-discretionar (FLSA)
4	<input type="checkbox"/>	<input type="checkbox"/>	💬	1		0		Active	TMP	Temporary Pay

Approve All

Deny All

Save

Return to Search

Previous in List

Next in List

5. Review the entries on the batch.
6. You have the following options:
 - a. **Approve:** Click the Approve checkbox next to individual transactions to approve them.
 - b. **Deny:** Click the Deny checkbox next to individual transaction to deny them. When you deny an individual transaction, enter a Comment to note why for tracking and audit purposes.
 - c. **Send Back:** To Send Back an individual transaction, leave the **Approve** and **Deny** checkboxes unchecked.

Note: SPOT Approvers cannot edit SPOT transactions.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[Redacted]
Pay Period End	05/24/2023	Submitted By	[Redacted]
Transaction Type	Earnings	Approved By	
Batch Status	In Review		

Totals (only for Valid rows)

Total Amt :	8007.50
Total Hrs :	-1.00

View Supporting Documents
Send Back
Close Batch
Process Monitor

	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual Leave Payout
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		3	[Redacted]	0	[Redacted]	Active	RGS	Regular Time - Salaried
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>		2	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)
4	<input type="checkbox"/>	<input type="checkbox"/>		1	00000220000	0	[Redacted]	Active	TMP	Temporary Pay

Approve All
Deny All

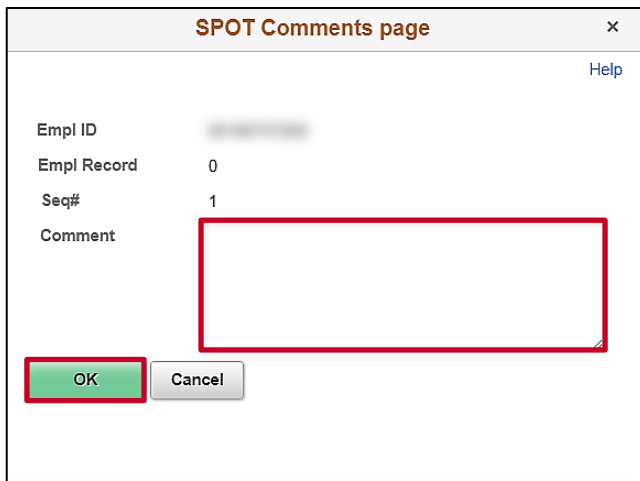
Save
Return to Search
Previous in List
Next in List

Note: In this example, two transactions were approved, and one transaction, denied and one is left unchecked so it can be sent back for updates.

7. Click the corresponding **Comments** icon for any denied transactions.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Comments** page displays in a pop-up window.

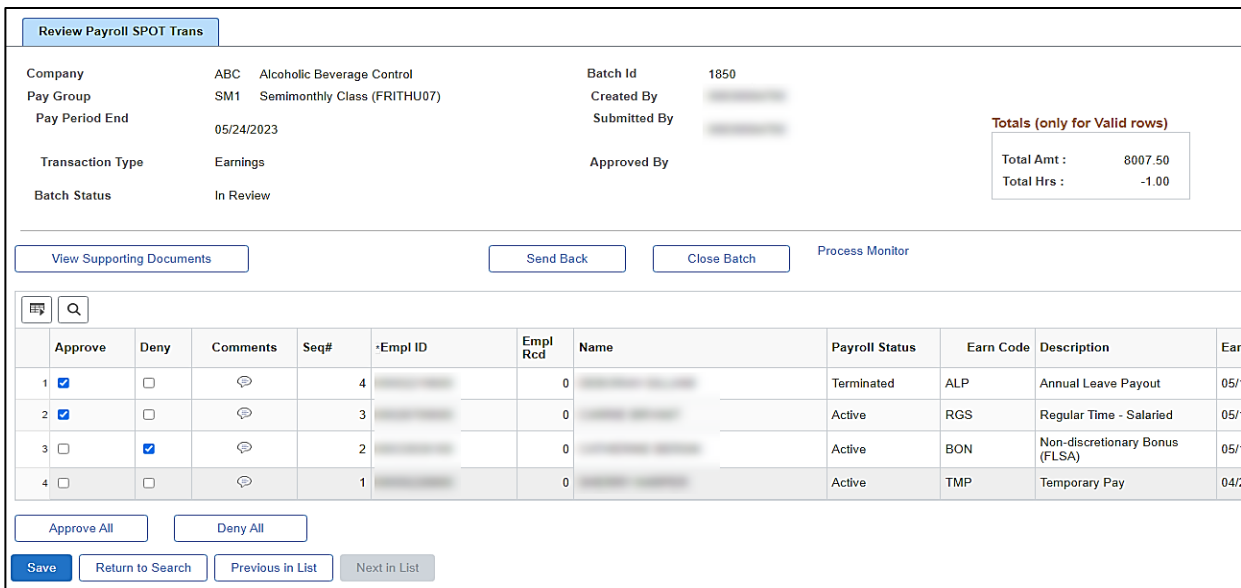


8. Enter a comment explaining why the transaction was denied in the **Comment** field.

Note: Cardinal does not require a comment, but comments are strongly recommended for audit purposes.

9. Click the **OK** button.

The **Review Payroll Spot Trans** tab returns.



Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Ear
<input checked="" type="checkbox"/>	<input type="checkbox"/>		4		0		Terminated	ALP	Annual Leave Payout	05/24/2023
<input checked="" type="checkbox"/>	<input type="checkbox"/>		3		0		Active	RGS	Regular Time - Salaried	05/24/2023
<input type="checkbox"/>	<input checked="" type="checkbox"/>		2		0		Active	BON	Non-discretionary Bonus (FLSA)	05/24/2023
<input type="checkbox"/>	<input type="checkbox"/>		1		0		Active	TMP	Temporary Pay	04/24/2023

10. Choose the appropriate action:

- a. Close the Batch. Go the section of this job aid titled [Closing a SPOT Batch](#).
- b. Send Back the batch. Go to the section of this job aid titled [Sending Back a Batch](#).

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Closing a SPOT Batch

Once all transactions in a batch have been reviewed and either approved or denied, the approver must close the batch for it to be picked up by the SPOT load process. This section will walk you through the process to close the SPOT batch.

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1847		
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By			
Pay Period End	05/24/2023	Submitted By			
Transaction Type	Earnings	Approved By			
Batch Status	In Review				

Totals (only for Valid rows)
 Total Amt : 3350.00
 Total Hrs :

View Supporting Documents

Send Back

Close Batch

Process Monitor

	Approve	Deny	Comments	Seq#	*Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin
<input checked="" type="checkbox"/>	<input type="checkbox"/>		🗨	2	[REDACTED]	0	[REDACTED]	Terminated	ALP	Annual Leave Payout	05/10/2023
<input checked="" type="checkbox"/>	<input type="checkbox"/>		🗨	1	[REDACTED]	0	[REDACTED]	Active	TMP	Temporary Pay	04/25/2023

Approve All

Deny All

Save

Return to Search

Previous in List

Next in List

1. Verify all transactions in the batch have been approved or denied.
2. Click the **Close Batch** button.
3. If all the transactions have been approved or denied, a Confirmation message displays in a pop-up window.

Are you sure you want to close the Batch? (25200,37)

Once Batch is closed it can not be reviewed or edited again. All Approved transactions will be posted to NA Payroll. Are you sure you want to Close the batch?

OK

Cancel

Note: If you try to close a batch and all the transactions have not been approved or denied, a message displays indicating “Some transactions are neither accepted or denied. All transactions must be reviewed and can be accepted or denied”. You will have to click the **OK** button on this message then go back and approve or deny any transaction that may have been missed.

4. Click the **OK** button.

Note: A batch cannot be edited after it has been closed.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT** Trans page returns.

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1847
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Closed	<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> Totals (only for Valid rows) Total Amt : 3350.00 Total Hrs : </div>	

View Supporting Documents

Send Back

Close Batch

Process Monitor Instance 2385210

	Approve	Deny	Comments	Seq#	*Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		2		0		Terminated	ALP	Annual Leave Payout	05/10/2023
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1		0		Active	TMP	Temporary Pay	04/25/2023

Approve All

Deny All

Save

Return to Search

Previous in List

Next in List

5. Verify that the **Batch Status** is “Closed”.

6. Verify that the **Approved By** field updates with your information.

Note: The transactions will be loaded to payroll during the next SPOT Load to Payroll process.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Sending Back a SPOT Batch

This section of the job aid will walk through process to **Send Back** a batch to the Payroll Administrator to make updates.

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[Redacted]
Pay Period End	05/24/2023	Submitted By	[Redacted]
Transaction Type	Earnings	Approved By	
Batch Status	In Review		

Totals (only for Valid rows)

Total Amt :	8007.50
Total Hrs :	-1.00

View Supporting Documents
Send Back
Close Batch
Process Monitor

	Approve	Deny	Comments	Seq#	+Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual Leave Payout
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		3	[Redacted]	0	[Redacted]	Active	RGS	Regular Time - Salaried
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>		2	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)
4	<input type="checkbox"/>	<input type="checkbox"/>		1	[Redacted]	0	[Redacted]	Active	TMP	Temporary Pay

Approve All
Deny All

Save
Return to Search
Previous in List
Next in List

1. Click the **Comments** icon for any transaction in the batch that requires update.

Important: Do not click the Approve or Deny option for any transaction that you want to send back to be updated by the Payroll Administrator. Clicking Approve or Deny will lock the transaction and the Payroll Administrator, will not be able to make updates.

The **SPOT Comments** page displays in a pop-up window.

SPOT Comments page
×

[Help](#)

Empl ID	[Redacted]
Empl Record	0
Seq#	1
Comment	Amount of TMP pay is inaccurate, this should be \$500 and not \$750.

OK
Cancel

2. Enter comments regarding what needs to be updated in the **Comment** section.
3. Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to send it back to the submitter? (25200,98)

The batch will be sent back to the submitter for changes.

OK
Cancel

4. Click the **OK** button to send the batch back to the submitter for updates.

Review Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	05/24/2023	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Sent Back to Submitter		

Totals (only for Valid rows)	
Total Amt :	8007.50
Total Hrs :	-1.00

View Supporting Documents
Send Back
Close Batch
Process Monitor

	Approve	Deny	Comments	Seq#	Empl ID	Empl Recd	Name	Payroll Status	Earn Code	Description	Earns
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		4		0		Terminated	ALP	Annual Leave Payout	05/10
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		3		0		Active	RGS	Regular Time - Salaried	05/10
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>		2		0		Active	BON	Non-discretionary Bonus (FLSA)	05/10
4	<input type="checkbox"/>	<input type="checkbox"/>		1		0		Active	TMP	Temporary Pay	04/25

Approve All
Deny All

Save
Return to Search
Previous in List
Next in List

5. Verify that the **Batch Status** field updates to “Sent Back to Submitter”.

6. Verify that the **Approved By** field is blank.

Note: The Batch is sent back to the Payroll Administrator for updates.

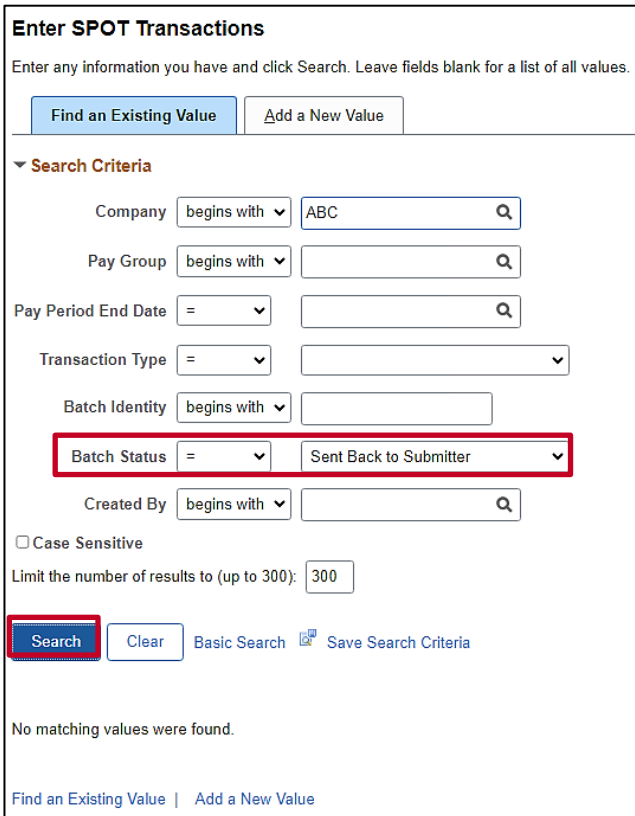
Reviewing Send Back Batches

After a SPOT Approver has taken action on a Batch, the Payroll Administrator can review the Batch.

- If a SPOT transaction was denied and needs to be processed, it will need to be entered in a new batch.
 - If a SPOT transaction was sent back for revisions, the entire batch is sent back. The Payroll Administrator will need to review the comments, make the necessary updates, and resubmit the batch for approval.
1. To review a batch for approval, navigate to the **Enter SPOT Transactions** page using the following path:

Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.



Enter SPOT Transactions

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

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Company begins with

Pay Group begins with

Pay Period End Date =

Transaction Type =

Batch Identity begins with

Batch Status =

Created By begins with

Case Sensitive

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

[Basic Search](#) [Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

2. Enter the appropriate data in the corresponding **Search Criteria** fields.

Note: Using the **Batch Status** field option is helpful when looking for batches that have been Closed or Sent Back to Submitter.

For this scenario, **Sent Back to Submitter** is selected.

3. Click the **Search** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab displays for the applicable batch.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850	Totals (only for Valid rows) Total Amt : 8007.50 Total Hrs : -1.00
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	[Redacted]	
Pay Period End	05/24/2023	Submitted By	[Redacted]	
Transaction Type	Earnings	Approved By	[Redacted]	
Batch Status	Sent Back to Submitter	Modified By	BIX61250	

Attach Files
Upload Files
Process Monitor

	Approve	Deny	Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descrip
1	<input type="checkbox"/>	<input type="checkbox"/>	OK			1	[Redacted] <input style="width: 20px;" type="text"/>	0	[Redacted]	Active	TMP <input style="width: 20px;" type="text"/>	Tempora
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK			2	[Redacted] <input style="width: 20px;" type="text"/>	0	[Redacted]	Active	BON	Non-disc (FLSA)
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			3	[Redacted] <input style="width: 20px;" type="text"/>	0	[Redacted]	Active	RGS	Regular
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			4	[Redacted] <input style="width: 20px;" type="text"/>	0	[Redacted]	Terminated	ALP	Annual L

Validate
Submit

**Total Hours & Amount are updated on Validation

***Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 4
 Rows Error: 4
 Total Rows: 4

Save
Return to Search

4. An **Error Message** bubble icon displays on the line for transactions that require revision.
Note: Transactions that have been marked as approved or denied by the approver cannot be edited.
5. Click the **Comments** icon for the transaction that requires an update.

SPOT Comments page x

[Help](#)

Empl ID	[Redacted]
Empl Record	0
Seq#	1
Comment	Amount of TMP pay is inaccurate, this should be \$500 and not \$750.

OK
Cancel

6. Review the comments in the **Comment** field.
7. Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Enter Payroll SPOT Trans

Company: ABC Alcoholic Beverage Control	Batch Id: 1850	Totals (only for Valid rows) Total Amt : 8007.50 Total Hrs : -1.00
Pay Group: SM1 Semimonthly Class (FRITHU07)	Created By: [Redacted]	
Pay Period End: 05/24/2023	Submitted By: [Redacted]	
Transaction Type: Earnings	Approved By: [Redacted]	
Batch Status: Sent Back to Submitter	Modified By: BIX61250	

Attach Files
Upload Files
Process Monitor

	Approve	Deny	Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descrip
1	<input type="checkbox"/>	<input type="checkbox"/>	OK			1	[Redacted]	0	[Redacted]	Active	TMP	Tempora
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK			2	[Redacted]	0	[Redacted]	Active	BON	Non-disc (FLSA)
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			3	[Redacted]	0	[Redacted]	Active	RGS	Regular
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual L

Validate
Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts
 Rows Valid: 4
 Rows Error: 0
 Total Rows: 4

Save
Return to Search

8. Make the appropriate update per the comment from the Approver.
9. To add a comment regarding the update, click the **Comments** icon.

SPOT Comments page
✕

[Help](#)

Empl ID: [Redacted]

Empl Record: 0

Seq#: 1

Comment:

Amount of TMP pay is inaccurate, this should be \$500 and not \$750.

Updated amount to \$500 and resubmitted to approver

OK

Cancel

Note: Do not overwrite existing comments in this field as it is open and does not lock down comments.

10. Enter your comment below any existing comments.
11. Click the **OK** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** page returns.

Enter Payroll SPOT Trans

Company: ABC Alcoholic Beverage Control Batch Id: 1850
 Pay Group: SM1 Semimonthly Class (FRITHU07) Created By: [Redacted]
 Pay Period End: 05/24/2023 Submitted By: [Redacted]
 Transaction Type: Earnings Approved By: [Redacted]
 Batch Status: Sent Back to Submitter Modified By: BIX61250

Totals (only for Valid rows)

Total Amt : 8007.50
 Total Hrs : -1.00

[Process Monitor](#)

	Approve	Deny	Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input type="checkbox"/>	<input type="checkbox"/>	OK			1	[Redacted]	0	[Redacted]	Active	TMP	Tempora
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK			2	[Redacted]	0	[Redacted]	Active	BON	Non-disc (FLSA)
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			3	[Redacted]	0	[Redacted]	Active	RGS	Regular
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK			4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual L

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid: 4
 Rows Error: 0
 Total Rows: 4

12. Click the **Validate** button.

Enter Payroll SPOT Trans

Company: ABC Alcoholic Beverage Control Batch Id: 1850
 Pay Group: SM1 Semimonthly Class (FRITHU07) Created By: [Redacted]
 Pay Period End: 05/24/2023 Submitted By: [Redacted]
 Transaction Type: Earnings Approved By: [Redacted]
Batch Status: Validated Modified By: 00830084700

Totals (only for Valid rows)

Total Amt : 7757.50
 Total Hrs : -1.00

[Process Monitor](#)

	Approve	Deny	Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Ear
1	<input type="checkbox"/>	<input type="checkbox"/>	OK		1	[Redacted]	0	[Redacted]	Active	TMP	Temporary Pay	04/
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK		2	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)	05/
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK		3	[Redacted]	0	[Redacted]	Active	RGS	Regular Time - Salaried	05/
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK		4	[Redacted]	0	[Redacted]	Terminated	ALP	Annual Leave Payout	05/

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid: 4
 Rows Error: 0
 Total Rows: 4

13. Verify the **Batch Status** is "Validated".

14. Verify the **Row Counts** does not display any row errors.

15. Click the **Submit** button.

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The **Submit Confirmation Message** displays.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

OK
Cancel

16. Click the **OK** button.

The **Enter Payroll SPOT Trans** page returns.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	1850		
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By			
Pay Period End	05/24/2023	Submitted By			
Transaction Type	Earnings	Approved By			
Batch Status	Submitted	Modified By			

Totals (only for Valid rows)

Total Amt :	7757.50
Total Hrs :	-1.00

Attach Files
Upload Files
Process Monitor

Approve	Deny	Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Desc
<input type="checkbox"/>	<input type="checkbox"/>	OK		1		0		Active	TMP	Temp
<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK		2		0		Active	BON	Non-c (FLSA)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK		3		0		Active	RGS	Regul
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK		4		0		Terminated	ALP	Annua

Validate
Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:	4
Rows Error:	
Total Rows:	4

Save
Return to Search

17. Verify that the **Batch Status** is “Submitted”.

18. Verify that the **Modified By** displays your ID.

Note: For additional information on entering SPOT transactions, refer to the [Entering an Earnings Transaction in SPOT](#) or [Entering a Deduction Transaction in SPOT](#) sections of this Job Aid.

Monitoring SPOT Transactions

There are two key SPOT tools to help monitor transactions:

- **Single-Use Payroll Online Transaction (SPOT) Online Query** – This query provides the status information for all SPOT batches for a specific pay period. It can be run by Payroll Run ID or a specific date range.
- **SPOT Transactions Not Loaded to Pay lines Report** - Batches are loaded to the Paysheet Transaction Table after they are closed. The Delivered Paysheet Transaction Process runs according to the operation calendars. This report reflects transactions that are both “Accepted” and “Closed” but do not appear in the employee’s paycheck.

Note: For further information about Reviewing Employee Paychecks, refer to the Job Aid titled **PY381_Review the View Paycheck Page**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

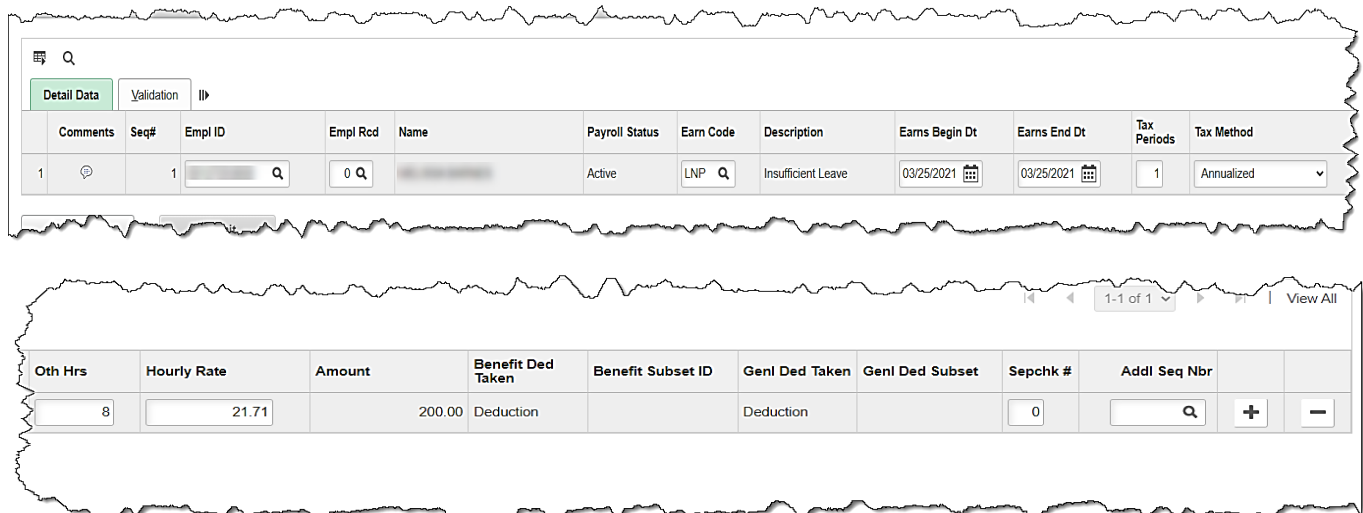
For further information on the **SPOT Online Query** and **SPOT Transaction Not Loaded to Pay lines Report**, see the **Cardinal HCM Payroll Reports Catalog** located on the Cardinal website under **Resources**.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Scenarios

In this section, we will review various scenarios regarding how to enter specific transactions into SPOT. Each scenario will show how to enter the transaction into SPOT and how it displays on the **Review Paycheck** page.

Entering Pay Docking (LNP)

In this scenario, we will enter 8 hours of pay docking for an employee in the current payroll (pay period ending 04/09/2021).



The screenshot shows the SPOT interface with a transaction entry form and a detailed view of the transaction. The top part shows a search bar and tabs for 'Detail Data' and 'Validation'. Below is a table with columns: Comments, Seq#, Empl ID, Empl Rcd, Name, Payroll Status, Earn Code, Description, Earns Begin Dt, Earns End Dt, Tax Periods, and Tax Method. The transaction details are as follows:

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1	[Redacted]	0	[Redacted]	Active	LNP	Insufficient Leave	03/25/2021	03/25/2021	1	Annualized

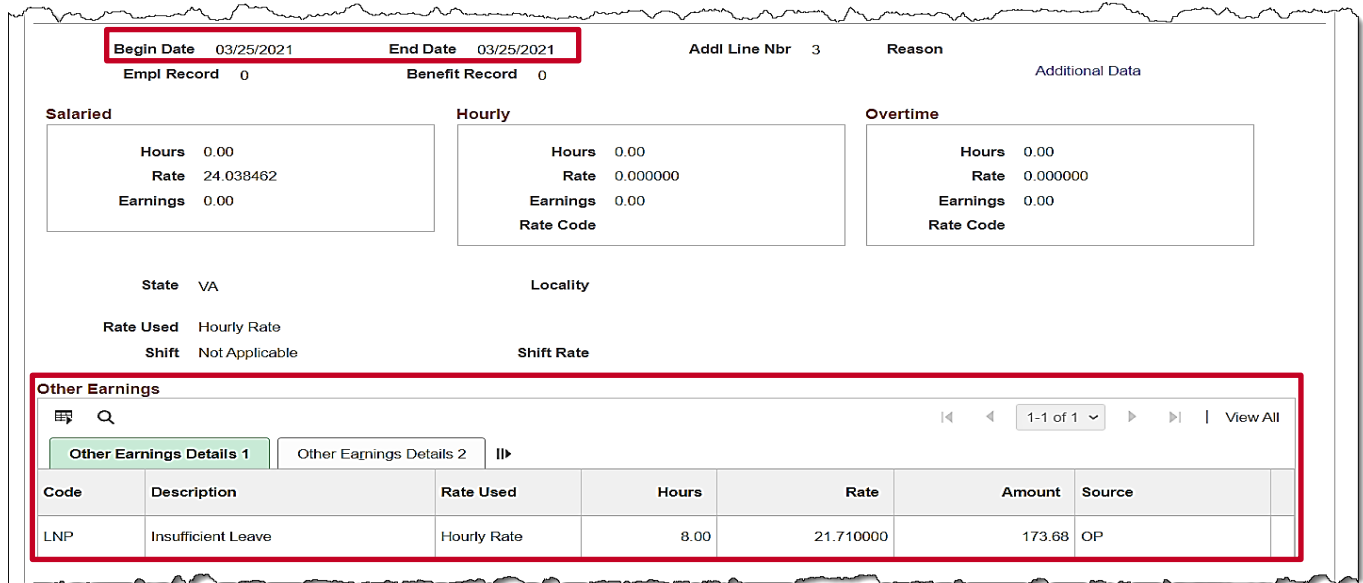
The bottom part shows a detailed view of the transaction with columns: Oth Hrs, Hourly Rate, Amount, Benefit Ded Taken, Benefit Subset ID, Genl Ded Taken, Genl Ded Subset, Sepchk #, and Addl Seq Nbr. The transaction details are as follows:

Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
8	21.71	200.00	Deduction		Deduction		0	[Redacted]

1. Enter/select the following:
 - a. **Empl ID**
 - b. **Empl Rcd:** Defaults to **0**. Update if necessary
 - c. **Earn Code:** LNP
 - d. **Earns Begin Dt:** enter the begin date of the period the employee is being docked
 - e. **Earns End Dt:** enter the end date of the period the employee is being docked
Note: If the pay docking is for a prior period, the employee must have regular pay in that period for the LNP to process. If the employee does not have regular pay, process the LNP in the current period
 - f. **Oth Hrs:** enter the hours to be docked (in this scenario 8)
 - g. **Hourly Rate:** Enter the hourly rate for the period
2. Validate and submit the batch for approval.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page – Pay Docking (LNP)

In the **Other Earnings** section of the **Review Paycheck** page, you are able to view the SPOT transaction that processed for the employee.



Begin Date 03/25/2021 End Date 03/25/2021 Addl Line Nbr 3 Reason Additional Data
Empl Record 0 Benefit Record 0

Salaried
Hours 0.00
Rate 24.038462
Earnings 0.00

Hourly
Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code

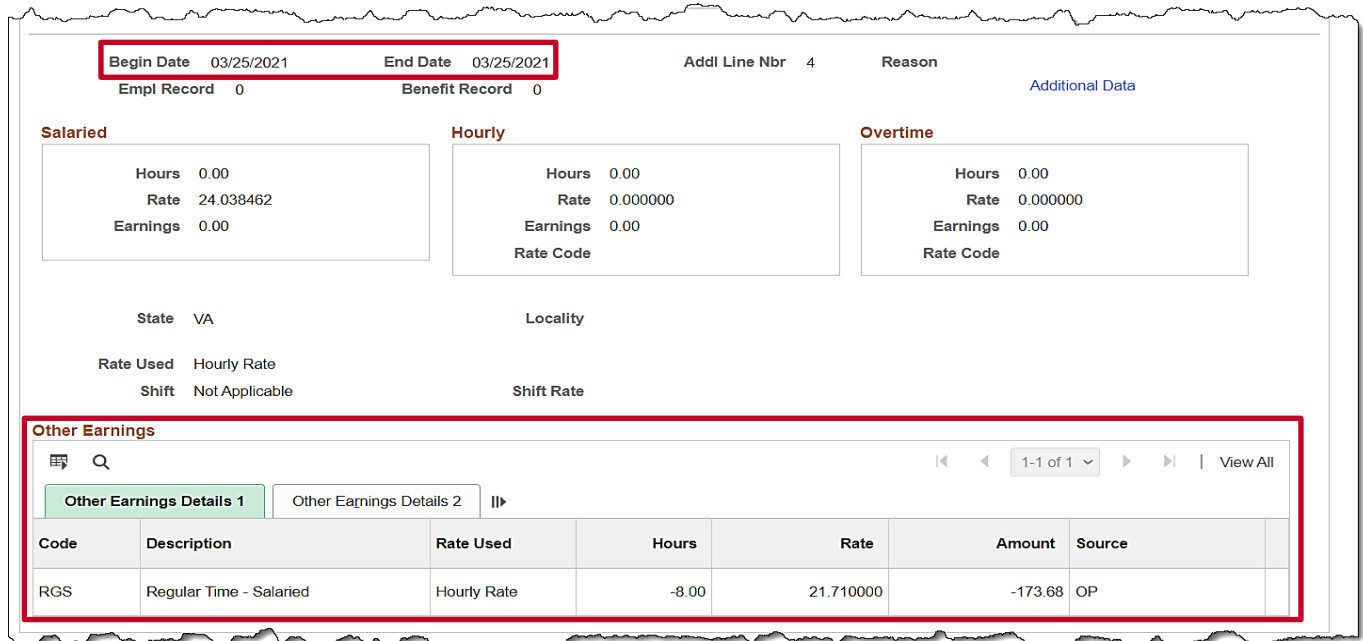
Overtime
Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code

State VA Locality
Rate Used Hourly Rate
Shift Not Applicable Shift Rate

Other Earnings

Code	Description	Rate Used	Hours	Rate	Amount	Source
LNP	Insufficient Leave	Hourly Rate	8.00	21.710000	173.68	OP

The **LNP** displays in the **Other Earnings** section for the specific period that it was entered in SPOT.



Begin Date 03/25/2021 End Date 03/25/2021 Addl Line Nbr 4 Reason Additional Data
Empl Record 0 Benefit Record 0

Salaried
Hours 0.00
Rate 24.038462
Earnings 0.00

Hourly
Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code

Overtime
Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code

State VA Locality
Rate Used Hourly Rate
Shift Not Applicable Shift Rate

Other Earnings

Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-8.00	21.710000	-173.68	OP

A second line for **Regular Time – Salaried (RGS)** is automatically created by Cardinal during the SPOT Load Process for LNP.

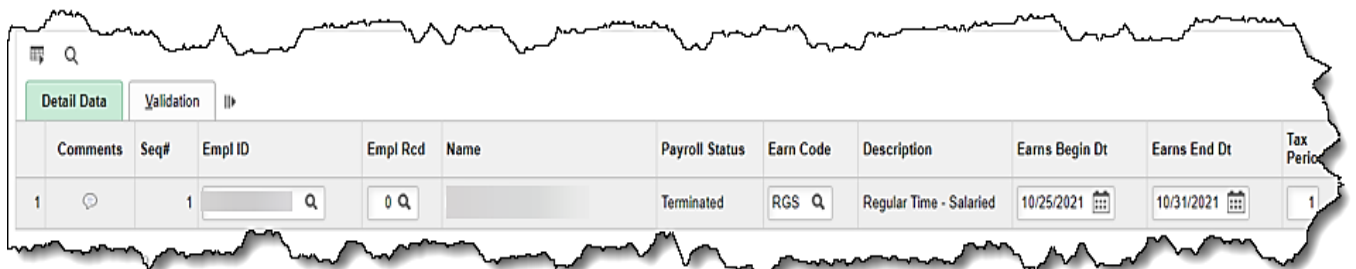
PY381_Using the Single-Use Payroll Online Tool (SPOT)
Entering Adjustments to Regular Pay – Hire or Terminated Mid Pay Period

If an employee is hired/terminated in the middle of the pay period, a reduction of regular pay may be necessary. When an employee is hired or terminated within the pay period, the system calculates partial pay based on an annualized hourly rate and not the pay period hourly rate.

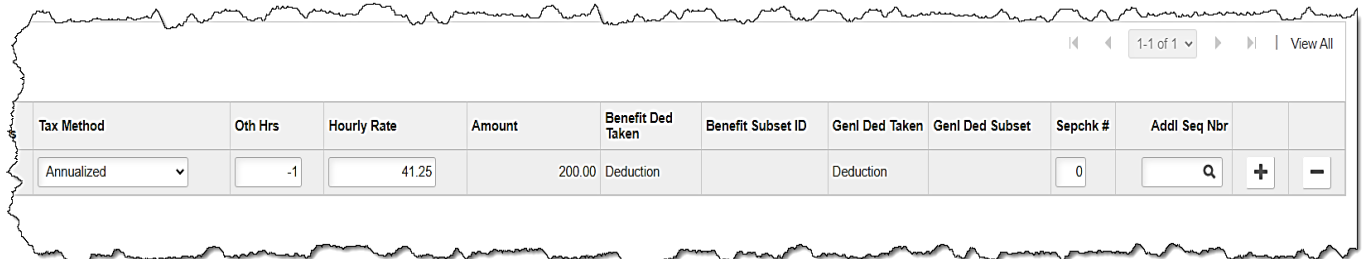
Payroll Administrators will need to calculate what the employee is due using the pay period hourly rate and enter the adjustment in SPOT.

In this scenario, an employee terminates in the middle of the pay period (11/1).

- The system will calculate the partial pay from 10/25 – 10/31 that is due to the employee at an annualized hourly rate.
- You will need to calculate the amount due using the pay period hourly rate then enter the adjustment in SPOT.
- For this scenario, the employee needs to have a pay reduction of \$41.25.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Period
1	1	<input type="text"/>	0		Terminated	RGS	Regular Time - Salaried	10/25/2021	10/31/2021	1



Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
Annualized	-1	41.25	200.00	Deduction		Deduction		0	<input type="text"/>

1. Enter the following:
 - a. **Empl ID**
 - b. **Empl Rcd**: Defaults to 0. Update if necessary
 - c. **Earn Code**: RGS
 - d. **Earns Begin Dt**: enter the begin date of the period the employee terminated
 - e. **Earns End Dt**: enter the employee's last day worked
 - f. **Oth Hrs**: enter -1
 - g. **Hourly Rate**: Enter the amount of pay to be reduced (for this scenario 41.25)
2. Validate and submit the batch for approval.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page – Entering Adjustments to Reg Pay (Hired/Termed Mid Pay Period)

In the **Other Earnings** section of the **Review Paycheck** page, you are able to view the SPOT transaction that processed for the employee.

▼ Earnings
Q | ⏪ | ⏩ | 4 of 4 ▾ | View All

Begin Date 10/25/2021 End Date 10/31/2021

Addl Line Nbr 3 Reason

Additional Data

Empl Record 0 Benefit Record 0

Salaried

Hours	0.00
Rate	24.697596
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA Locality

Rate Used Hourly Rate Shift Not Applicable Shift Rate

Other Earnings

🔍 Q
⏪ | ⏩ | 1-1 of 1 ▾ | View All

Other Earnings Details 1

Other Earnings Details 2

||▶

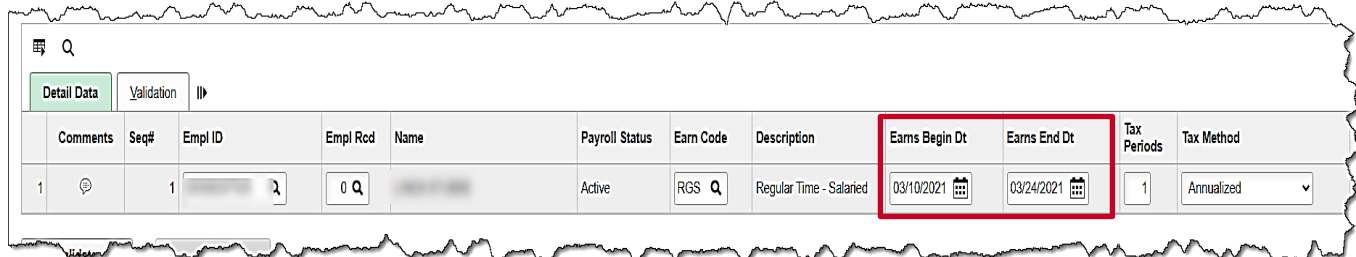
Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-1.00	41.250000	-41.25	OP

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Entering Adjustments to Regular Pay – Change in Compensation from Prior Period

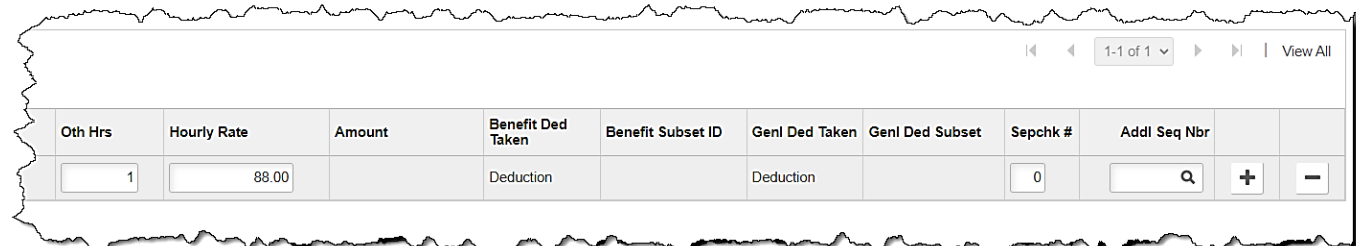
If an employee has a change in compensation, an addition to regular pay may be necessary.

When an employee receives an increase to their regular pay rate in the prior period, the Payroll Administrator will calculate the amount of the increase and enter it into SPOT.

In this scenario, the current pay period is 3/25 – 4/9/2021. The increase is \$1 an hour based on 88 hours in the prior pay period, 3/10 - 3/24/2021. The prior dates will need to be entered in the **Earns Begin Dt** and **Earns End Dt** fields.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1	[REDACTED]	0	[REDACTED]	Active	RGS	Regular Time - Salaried	03/10/2021	03/24/2021	1	Annualized



Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
1	88.00		Deduction		Deduction		0	

1. Enter the following:
 - a. **Empl ID**
 - b. **Empl Rcd**: Defaults to 0. Update if necessary
 - c. **Earn Code**: RGS
 - d. **Earns Begin Dt**: Enter the begin date of the prior pay period
 - e. **Earns End Dt**: Enter the end date of the prior pay period
 - f. **Oth Hrs**: enter 1
 - g. **Hourly Rate**: Enter the amount of pay to be added for the employee, based on your calculation
2. Validate and submit the batch for approval.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page – Change in Compensation for Prior Pay Period

In the **Other Earnings** section of the **Review Paycheck** page, you are able to view the SPOT transaction that processed for the employee.

Begin Date 03/10/2021 **End Date** 03/24/2021 **Addl Line Nbr** 3 **Reason**

Empl Record 0 **Benefit Record** 0 **Additional Data**

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA **Locality**

Rate Used Hourly Rate **Shift Rate**

Shift Not Applicable

Other Earnings

☰ 🔍

⏪ ⏩ 1-1 of 1 ⏪ ⏩ | [View All](#)

Other Earnings Details 1

Other Earnings Details 2

||▶

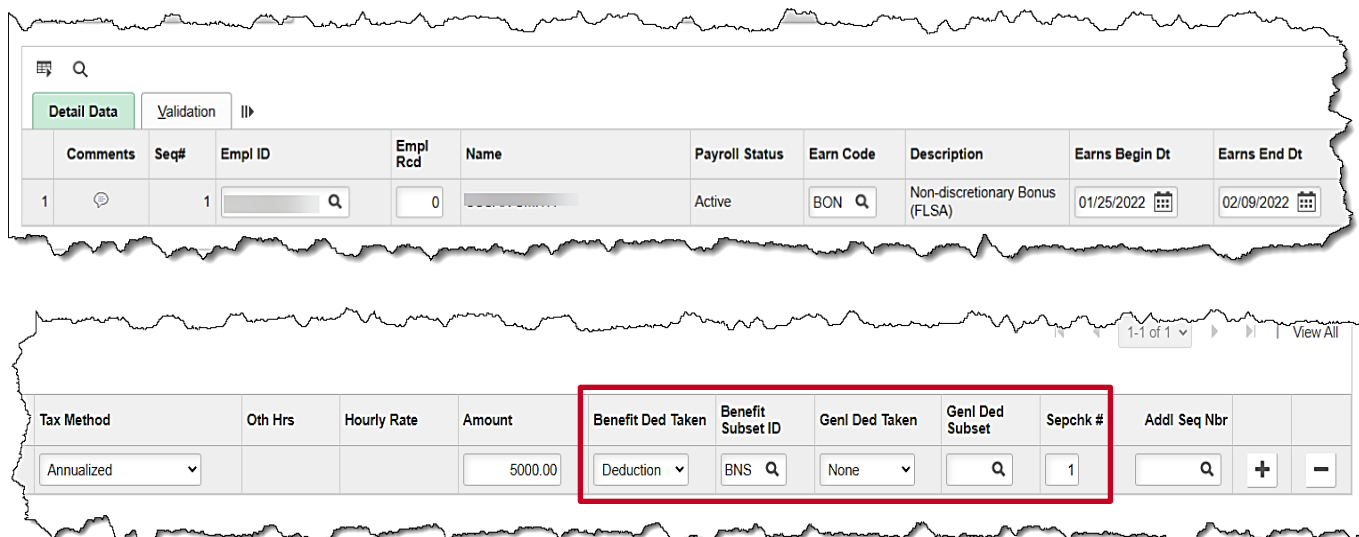
Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	1.00	88.000000	88.00	OP

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Entering a Separate Check – Bonus Payment with One-Time Deferrals

When an employee receives earnings, to be paid on a separate check, the Payroll Administrator will need to enter the SPOT Earnings transaction and update the **Sepchk#** field default value from 0 to 1. If there are deductions that will need to be taken from the separate check, then a SPOT Deduction transaction will need to be entered (after the SPOT Earnings) and the **Sepchk#** field will need to be updated from **0** to **1** to ensure the deductions are taken from corresponding separate check.

Note: If there is more than one separate check with a deduction transaction, enter the next value (2,3, etc.) and make sure the deduction separate check corresponds (2,3, etc.).

In this scenario, the employee is receiving a bonus of \$5,000 for the pay period and deductions will be overridden to take out additional VRS Retirement of \$2,500.

SPOT Earnings Batch


Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1		0		Active	BON	Non-discretionary Bonus (FLSA)	01/25/2022	02/09/2022

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
Annualized			5000.00	Deduction	BNS	None		1	

1. First, enter the SPOT Earnings batch for the Bonus (\$5,000) and change the **Sepchk#** field value from **0** to **1**. This will open the **Benefit Ded Taken** and **Genl Ded Taken** fields.
2. Make the appropriate adjustments to the **Benefit Ded Taken** and **Genl Ded Taken** fields. For this scenario the following are selected:
3. **Benefit Ded Taken:** Subset
4. **Benefit Subset ID:** BNS
5. **Genl Ded Taken:** None (no general deductions will come out of this check)
6. **Genl Ded Subset:** Leave blank

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Deduction Batch

Next, enter the SPOT Deduction batch to take the additional \$2500 from the Bonus.

Note: This would work the same way for other deductions such as deferred compensation.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd	Sepchk #
	1		0		Active	70	VRSMDB	VRSRET	Employee Retirement DB	B	Amount	2500.00	Override	1

7. Enter the same employee that was entered on the earnings batch.
8. Select the appropriate, **Plan Type**, **Benefit Plan**, **Ded Code**, **Ded Class**, **Ded Calc**, and **Amount** for the override (for this scenario \$2500) and select **One Time Cd** of **Override**.
9. In the **One Time Cd** field, select the **Override** option.
10. In the **Sepchk#** field, update the **0** to a **1** to ensure the deduction override is coming out of the correct check.



PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Paycheck Page - Bonus Payment with One-Time Deferrals

In the **Other Earnings** section of the **Review Paycheck** page, you are able to view the SPOT Bonus transaction on the **Paycheck Earnings** tab that processed for the employee on a **Separate Check**.

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Empl ID [redacted] Name [redacted]
 Company ABC Pay Group SM1 Pay Period End 02/09/2022 Page 2 Line 1 **Separate Check 1**

Paycheck Information

Paycheck Status Calculated Paycheck Option Check
 Issue Date 02/16/2022 Paycheck Number
 Off Cycle Reprint Adjustment Corrected Cashed

Paycheck Totals

Earnings	5,000.00
Taxes	1,076.25
Deductions	2,500.00
Net Pay	1,423.75

Earnings [Search] [1 of 2] [View All]

Begin Date 01/25/2022 End Date 02/09/2022 Addl Line Nbr 3 Reason
 Empl Record 0 Benefit Record 0 Additional Data

Salaried **Hourly** **Overtime**

Hours	0.00	Hours	0.00	Hours	0.00
Rate	41.826923	Rate	0.000000	Rate	0.000000
Earnings	0.00	Earnings	0.00	Earnings	0.00
Rate Code		Rate Code		Rate Code	

State VA Locality
 Rate Used Hourly Rate Shift Not Applicable Shift Rate

Other Earnings [Search] [1-1 of 1] [View All]

Other Earnings Details 1 | Other Earnings Details 2 | II>

Code	Description	Rate Used	Hours	Rate	Amount	Source
BON	Non-discretionary Bonus (FLSA)	Hourly Rate			5,000.00	OP



PY381_Using the Single-Use Payroll Online Tool (SPOT)

On the **Paycheck Deductions** tab, you can view the deferred compensation amount (\$2500) coming out on the separate check under the **Deductions** section.

Paycheck Earnings | Paycheck Taxes | **Paycheck Deductions**

Empl ID [redacted] Name [redacted]
Company ABC Pay Group SM1 Pay Period End 02/09/2022 Page 2 Line 1 **Separate Check 1**

Paycheck Information

Paycheck Status	Calculated	Paycheck Option	Check
Issue Date	02/16/2022	Paycheck Number	
<input type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected <input type="checkbox"/> Cashed

Paycheck Totals

Earnings	5,000.00
Taxes	1,076.25
Deductions	2,500.00
Net Pay	1,423.75

▼ Deductions

☰ Q 1-1 of 1 | View All

Deduction Details 1 | Deduction Details 2 | Deduction Details 3 | ||▶

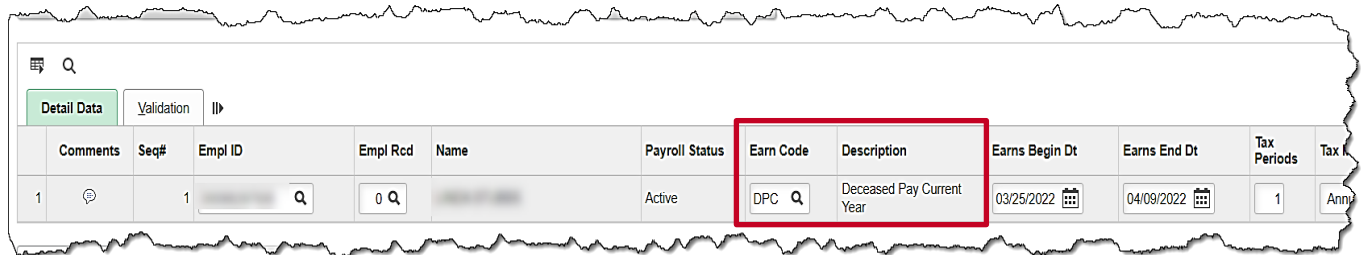
Deduction Code	Description	Class ^	Amount	Calculated Base
VRSRET	Employee Retirement DB	Before-Tax	2,500.00	

▶ Garnishments

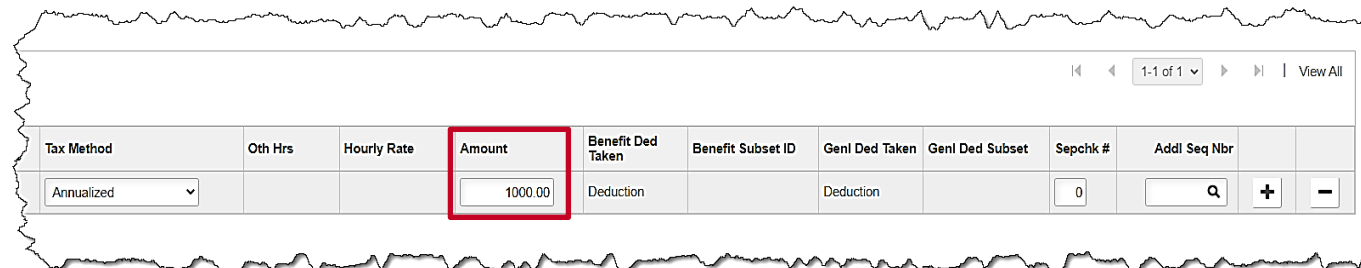
PY381_Using the Single-Use Payroll Online Tool (SPOT)
Deceased Pay

All deceased pay is paid through the AP Expense Module. Payroll Administrators will need to calculate the gross to net pay to include the FICA tax deduction. Be sure to account for rounding differences and any funds due to the agency from the employee (i.e., medical, VSELP). The Net Pay amount requested from AP, should be paid to the Employee's Estate.

- When the payment is not processed in the same year that the employee deceased, there is no further action in Cardinal Payroll.
- When the payment is processed in the same year that the employee deceased, SPOT transactions must be processed for W2 reporting through Cardinal.

SPOT Earnings Batch:


Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax F
1	1	[REDACTED]	0	[REDACTED]	Active	DPC	Deceased Pay Current Year	03/25/2022	04/09/2022	1	Ann



Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
Annualized			1000.00	Deduction		Deduction		0	[REDACTED]

1. Enter the employee deceased employee's ID.
2. Enter the earnings code **DPC (Deceased Pay/Current Year)**.
Note: This earnings code is subject to FICA taxes only.
3. The **Amount** should be a sum of all earnings types owed to the deceased employee. For this scenario **1000.00**.
4. Enter the current pay period in the **Earns Begin Dt** and **Earns End Dt** fields.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Deduction Batch:

When entering the SPOT Deduction batch, determine if the employee has any additional deductions outside of the **Due Agency** that need to be deducted.

Example A:

The screenshot below is an example of the SPOT Deduction page with the **Due Agency** deduction only.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd	Sepchk #
	1		0		Active	00		DUEAGY	Due Agency	A	Amount	923.50	Addition	0

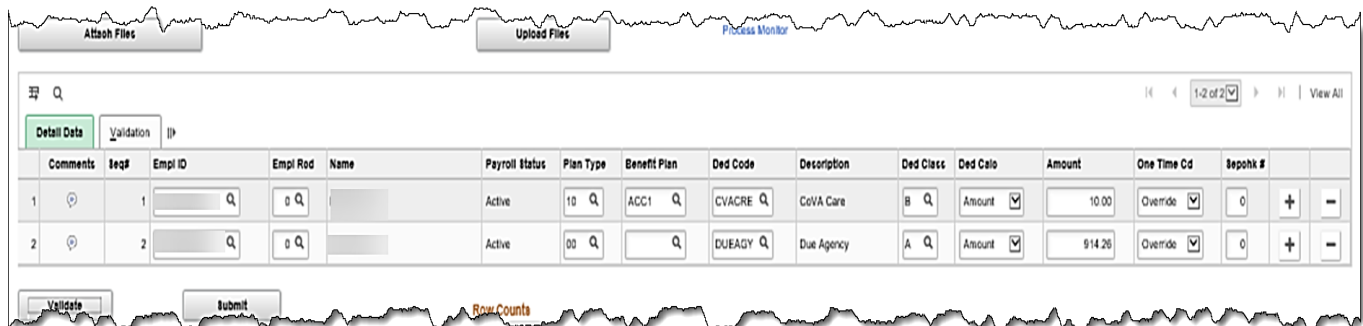
Row Counts: Rows Valid: 1

- Enter the amount paid out to the employee’s estate minus any taxes.

Note: The result is a ZERO NET PAY check.

Example B:

The screenshot below is an example of the SPOT Deduction page with an additional before tax medical deduction.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd	Sepchk #
	1		0		Active	10	ACC1	CVACRE	CoVA Care	B	Amount	10.00	Override	0
	2		0		Active	00		DUEAGY	Due Agency	A	Amount	914.26	Override	0

Row Counts

- Enter any deductions due to the agency by the employee, using the appropriate deduction code. In this scenario a medical deduction of 10.00.
- The net pay amount processed in AP should be entered using the **DUEAGY** deduction code. This prevents the employee’s estate from being overpaid.

Note: The result is a ZERO NET PAY check.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page with Due Agency Deduction - Deceased Pay

On the **Paycheck Earnings** tab in the **Other Earnings** section of the page, you are able to view the SPOT Earnings Transaction for the deceased pay (\$1,000 for this scenario).

Paycheck Earnings		Paycheck Taxes		Paycheck Deductions		
Empl ID		Name		Company	ABC	
		Pay Group	SM1	Pay Period End	04/09/2022	
		Page	1	Line	1	
				Separate Check		
Paycheck Information			Paycheck Totals			
Paycheck Status	Calculated	Paycheck Option	Check	Earnings	1,000.00	
Issue Date	04/15/2022	Paycheck Number		Taxes	76.50	
<input checked="" type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected	Deductions	923.50	
			<input type="checkbox"/> Cashed	Net Pay	0.00	
<div style="display: flex; justify-content: space-between;"> ▼ Earnings Q < < 1 of 2 > > View All </div>						
Begin Date	04/01/2022	End Date	04/09/2022	Addl Line Nbr	3	
Empl Record	0	Benefit Record	0	Reason	Not Specified	
				Additional Data		
Salaried		Hourly		Overtime		
Hours	0.00	Hours	0.00	Hours	0.00	
Rate	37.163462	Rate	0.000000	Rate	0.000000	
Earnings	0.00	Earnings	0.00	Earnings	0.00	
Rate Code		Rate Code		Rate Code		
State	VA	Locality				
Rate Used	Hourly Rate	FLSA Rate				
Shift	Not Applicable	Shift Rate				
<div style="display: flex; justify-content: space-between;"> Other Earnings Q < < 1-1 of 1 > > View All </div>						
Other Earnings Details 1		Other Earnings Details 2				
Code	Description	Rate Used	Hours	Rate	Amount	Source
DPC	Deceased Pay Current Year	Hourly Rate			1,000.00	OP



PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Paycheck Page with Due Agency Deduction - Deceased Pay (continued)

On the Paycheck Taxes tab, you are able to view the taxes that were deducted from the deceased pay. When there are no deductions, the Taxable Gross equals the deceased pay amount (\$1,000 for this scenario).

Paycheck Earnings		Paycheck Taxes		Paycheck Deductions	
Empl ID		Name		Pay Period End	04/09/2022
Company	ABC	Pay Group	SM1	Page	1
				Line	1
					Separate Check
Paycheck Information			Paycheck Totals		
Paycheck Status	Calculated	Paycheck Option	Check	Earnings	1,000.00
Issue Date	04/15/2022	Paycheck Number		Taxes	76.50
<input checked="" type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected	Deductions	923.50
			<input type="checkbox"/> Cashed	Net Pay	0.00

Taxes						
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1-4 of 4 View All						
Tax Details 1		Tax Details 2		Tax Tips		
Tax Entity	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal				MED/EE	1,000.00	14.50
US Federal				Med/ER	1,000.00	14.50
US Federal				OASDI/EE	1,000.00	62.00
US Federal				OASDI/ER	1,000.00	62.00

1042 Taxes							
<input type="checkbox"/> <input type="checkbox"/> 1-1 of 1 View All							
State	Country	Tax Rate	Taxable Gross	Tax Amount	Income Code	Income Type	Withholding Allowance
		0.000000		0.00			



PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Paycheck Page with Due Agency Deduction – Deceased Pay (continued)

On the Paycheck Deductions tab, in the Deductions section of the page, you are able to view the Due Agency amount that was entered in the SPOT Deduction batch.

Paycheck Earnings		Paycheck Taxes		Paycheck Deductions	
Empl ID		Name		Company	ABC
Pay Group	SM1	Pay Period End	04/09/2022	Page	1
Line	1	Separate Check			
Paycheck Information			Paycheck Totals		
Paycheck Status	Calculated	Paycheck Option	Check	Earnings	1,000.00
Issue Date	04/15/2022	Paycheck Number		Taxes	76.50
<input checked="" type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected	Deductions	923.50
			<input type="checkbox"/> Cashed	Net Pay	0.00
▼ Deductions					
<input type="text"/> 1-1 of 1 View All					
Deduction Details 1		Deduction Details 2		Deduction Details 3	
Deduction Code	Description	Class	Amount	Calculated Base	
DUEAGY	Due Agency	After-Tax	923.50		
▶ Garnishments					
▼ Net Pay Distribution					
<input type="text"/> 1-1 of 1 View All					
Check/Advice Number	Account Type	Bank ID	Account Number	Amount	

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page with Additional Before-Tax Medical Deduction

On the **Paycheck Earnings** tab in the **Other Earnings** section of the page, you are able to view the SPOT Earnings Transaction for deceased pay (\$1,000 for this scenario).

Paycheck Earnings	Paycheck Taxes	Paycheck Deductions				
Empl ID <input type="text"/> Name <input type="text"/> Company ABC Pay Group SM1 Pay Period End 04/09/2022 Page 1 Line 1 Separate Check						
Paycheck Information Paycheck Status Calculated Paycheck Option Check Issue Date 04/15/2022 Paycheck Number <input checked="" type="checkbox"/> Off Cycle <input type="checkbox"/> Reprint <input type="checkbox"/> Adjustment <input type="checkbox"/> Corrected <input type="checkbox"/> Cashed		Paycheck Totals Earnings 1,000.00 Taxes 75.74 Deductions 924.26 Net Pay 0.00				
Earnings 1 of 3 View All						
Begin Date 04/01/2022 End Date 04/09/2022 Addl Line Nbr 3 Reason Not Specified Empl Record 0 Benefit Record 0 Additional Data						
Salaried Hours 0.00 Rate 37.163462 Earnings 0.00 Rate Code	Hourly Hours 0.00 Rate 0.000000 Earnings 0.00 Rate Code	Overtime Hours 0.00 Rate 0.000000 Earnings 0.00 Rate Code				
State VA Locality Rate Used Hourly Rate FLSA Rate Shift Not Applicable Shift Rate						
Other Earnings 1-1 of 1 View All						
Other Earnings Details 1 Other Earnings Details 2						
Code	Description	Rate Used	Hours	Rate	Amount	Source
DPC	Deceased Pay Current Year	Hourly Rate			1,000.00	OP



PY381_Using the Single-Use Payroll Online Tool (SPOT)

Review Paycheck Page with Additional Before-Tax Medical Deduction (continued)

On the **Paycheck Taxes** tab, you can view the taxes that were deducted from the deceased pay.

Note: The **Taxable Gross** for FICA taxes were reduced due to the before tax medical. If there were no before tax medical deductions, the **Taxable Gross** would equal the deceased pay amount.

Paycheck Earnings | **Paycheck Taxes** | Paycheck Deductions

Empl ID [redacted] Name [redacted]
 Company ABC Pay Group SM1 Pay Period End 04/09/2022 Page 1 Line 1 Separate Check

Paycheck Information

Paycheck Status Calculated Paycheck Option Check
 Issue Date 04/15/2022 Paycheck Number
 Off Cycle Reprint Adjustment Corrected Cashed

Paycheck Totals

Earnings	1,000.00
Taxes	75.74
Deductions	924.26
Net Pay	0.00

Taxes

☰ Q 1-4 of 4 View All

Tax Details 1 | Tax Details 2 | Tax Tips ||▶

Tax Entity	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal				MED/EE	990.00	14.36
US Federal				Med/ER	990.00	14.36
US Federal				OASDI/EE	990.00	61.38
US Federal				OASDI/ER	990.00	61.38

1042 Taxes

☰ Q 1-1 of 1 View All

State	Country	Tax Rate	Taxable Gross	Tax Amount	Income Code	Income Type	Withholding Allowance
		0.000000		0.00			

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page with Additional Before-Tax Medical Deduction (continued)

On the **Paycheck Deductions** tab, in the **Deductions** section of the page, you are able to view the deductions that were entered in SPOT Deduction batch.

Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

Empl ID
Name

Company ABC
Pay Group SM1
Pay Period End 04/09/2022
Page 1
Line 1
Separate Check

Paycheck Information

Paycheck Status	Calculated	Paycheck Option	Check
Issue Date	04/15/2022	Paycheck Number	
<input checked="" type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected
		<input type="checkbox"/> Cashed	

Paycheck Totals

Earnings	1,000.00
Taxes	75.74
Deductions	924.26
Net Pay	0.00

▼ Deductions

1-2 of 2
View All

Deduction Details 1
Deduction Details 2
Deduction Details 3

Deduction Code	Description	Class	Amount	Calculated Base
DUEAGY	Due Agency	After-Tax	914.26	
CVACRE	CoVA Care	Before-Tax	10.00	

▶ Garnishments

--

▼ Net Pay Distribution

1-1 of 1
View All

Check/Advice Number	Account Type	Bank ID	Account Number	Amount

Adjusting VRS Retirement Benefit Deductions

Adjustments to the VRS Retirement Benefit Deductions may be needed for scenarios such as when an employee terminates in the middle of the month, or a retro pay rate change has been made. The adjustment can be made with a one-time override on the 'VRS' Earnings Code or the impacted Retirement Benefit Deductions. How you key the adjustment will depend on whether the employee is enrolled in the Retirement Plan.

Employee Enrolled in the Retirement Plan

- When the employee is enrolled in the Retirement Plan, the VRS Earnings Code (VRS Contribution Base) can be entered as a SPOT Earnings batch.
- Enter the appropriate Amount as a positive to add to the amount already established as an Additional Pay or a negative to reduce the amount. The impacted retirement benefit deductions will adjust based on the transaction that is keyed.

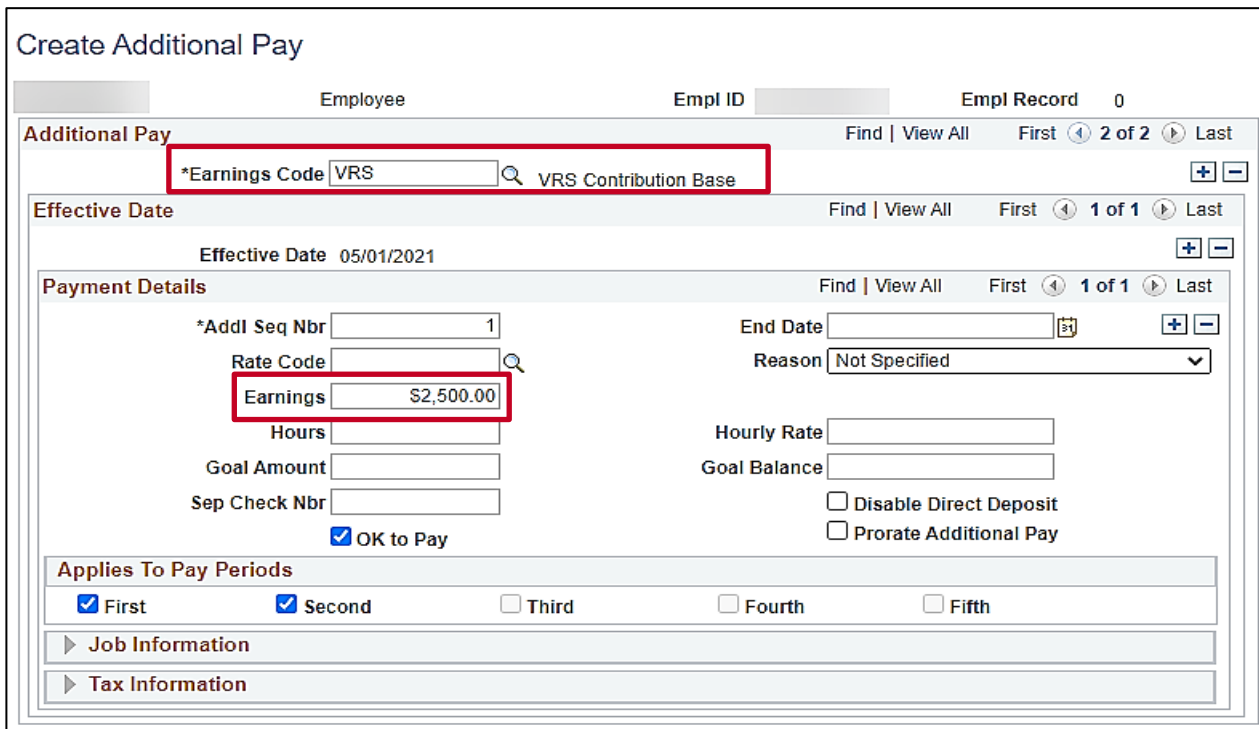
For this scenario, the pay period is 5/25 – 6/09 and the employee is terminating on 6/09 in the (employee worked through 6/9 and term date is 6/10). The VRS contribution base will need to be increased.

Additional Pay Page

You can navigate to this page using the following path:

Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay

This page shows the **VRS Contribution Base** for the employee.



Create Additional Pay

Employee _____ Empl ID _____ Empl Record 0

Additional Pay Find | View All First 2 of 2 Last

*Earnings Code VRS Contribution Base

Effective Date Find | View All First 1 of 1 Last

Effective Date 05/01/2021

Payment Details Find | View All First 1 of 1 Last

*Addl Seq Nbr End Date

Rate Code Reason

Earnings

Hours Hourly Rate

Goal Amount Goal Balance

Sep Check Nbr

OK to Pay Disable Direct Deposit Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

▶ Job Information

▶ Tax Information

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Retirement Plan Page

The **Retirement Plans** page displays the plan type and indicates whether it is still Active or not.

Menu > Benefits > Enroll in Benefits > Retirement Plans

Retirement Plans

Employee ID: [Redacted] Benefit Record Number: 0

Plan Type 70 Employee Retirement DB

Coverage

Deduction Begin Date: 04/25/2021

Participation Election: **Elect** Waive Terminate

Benefit Program: Salaried Employee Benefit Pgm

Benefit Plan: VRSMDB VRS 5% EE Pay Defined Benefit

Election Date: 06/28/2021

Payroll Status: Active

Option Code: 18

Plan Type 7W Group Term Life

Coverage

Deduction Begin Date: 04/25/2021

Participation Election: **Elect** Waive Terminate

Benefit Program: Salaried Employee Benefit Pgm

Benefit Plan: GTLR Group Term Life-Regular

Election Date: 06/28/2021

Payroll Status: Active

Option Code: 2

Plan Type 7X Retiree Health Credit

Coverage

Deduction Begin Date: 04/25/2021

Participation Election: **Elect** Waive Terminate

Benefit Program: Salaried Employee Benefit Pgm

Benefit Plan: RTCRDR Retiree Health Credit-Regular

Election Date: 06/28/2021

Payroll Status: Active

Option Code: 2

Plan Type 7Y VSDP LTD

Coverage

Deduction Begin Date: 04/25/2021

Participation Election: **Elect** Waive Terminate

Benefit Program: Salaried Employee Benefit Pgm

Benefit Plan: VSDPR LTD/VSDP-Regular

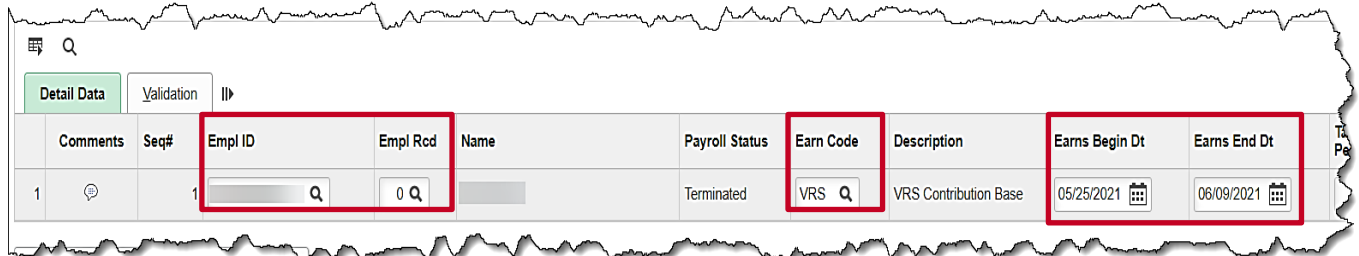
Election Date: 06/28/2021

Payroll Status: Active

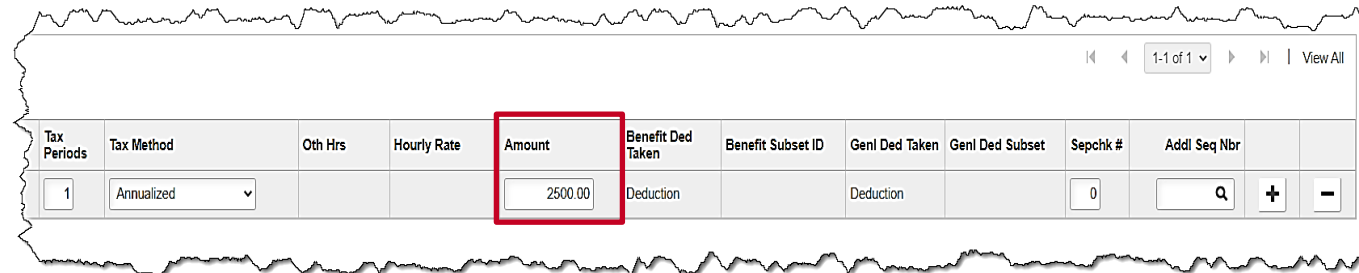
Option Code: 1

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Earnings Batch

Once you have determined the contribution base, verified the plan and that it is still active, enter the SPOT batch.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earnings Begin Dt	Earnings End Dt
1	1	<input type="text"/>	0		Terminated	VRS	VRS Contribution Base	05/25/2021	06/09/2021



Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
1	Annualized			2500.00	Deduction		Deduction		0	

1. Enter the **Empl ID** and **Empl Rcd**.
2. Enter the earning code **VRS** (VRS Contribution Base).
3. Enter the current pay period in the **Earnings Begin Dt** and **Earnings End Dt**, for the days worked during the pay period (in this scenario 5/25 – 6/9).
4. Enter the **Amount** for the VRS Contribution Base pay period amount (from the Additional Pay page). This will double the contribution for the month.
5. Validate and submit the batch.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page – Employee Enrolled in in the Retirement Plan
Prior to VRS Adjustments

The screenshots below show the **Paycheck Earnings** tab, **Special Accumulators** section and **Paycheck Deductions** tab, **Deductions** section, where you are able to view the VRS deductions. These screenshot shows how it displays prior to VRS Adjustments.

For more information, see the Job Aid titled **PY381_General and Benefit Deductions** located on the Cardinal Website in **Job Aids** under **Learning**.

▼ **Special Accumulators**

1-8 of 10 | View All

Code	Description	Hours	Earnings	Empl Record
403	Annuity Basis	88.00	2,083.33	0
457	457 Max Basis	88.00	2,083.33	0
941	941 Total Gross	88.00	2,091.83	0
CBS	VRS Creditable Compensation		2,500.00	0
CMS	Fiscal YTD Salaries for APA	88.00	2,083.33	0
GRS	Reserved for Gross Wages	88.00	2,091.83	0
ORP	Optional Retirement Base	88.00	2,083.33	0
OTE	Other Earnings		8.50	0

▼ **Deductions**

1-10 of 10 | View 8

Deduction Details 1 | Deduction Details 2 | Deduction Details 3 | ||

Deduction Code	Description	Class	Amount	Calculated Base
CVACRE	CoVA Care	Before-Tax	188.00	
CVACRE	CoVA Care	Nontaxable Benefit	901.00	
DEFCMP	457 Deferred Compensation	Before-Tax	100.00	
DEFCMP	457 Deferred Compensation	Nontaxable Btax Benefit		
FLXMED	Medical FSA	Before-Tax	25.00	
VRSRET	Employee Retirement DB	Before-Tax	125.00	2,500.00
VRSRET	Employee Retirement DB	Nontaxable Benefit	361.50	2,500.00
GRPLFR	Group Term Life	Nontaxable Benefit	33.50	2,500.00
RETHCR	Retiree Health Credit	Nontaxable Benefit	28.00	2,500.00
SDLTDR	VSDP LTD	Nontaxable Benefit	15.25	2,500.00

PY381_Using the Single-Use Payroll Online Tool (SPOT)
Paycheck Deductions after SPOT Adjustments

On the **Paycheck Earnings** tab, in the **Other Earnings** section of the page, you are able to view the VRS contribution base amount that was entered in SPOT.

▼ Earnings
4 of 4
View All

Begin Date 05/25/2021 End Date 06/09/2021 Addl Line Nbr 3 Reason

Empl Record 0 Benefit Record 0 Additional Data

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00
Rate Code	

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA Locality

Rate Used Hourly Rate FLSA Rate

Shift Not Applicable Shift Rate

Other Earnings

Other Earnings Details 1
Other Earnings Details 2
||>

Code	Description	Rate Used	Hours	Rate	Amount	Source
VRS	VRS Contribution Base	Hourly Rate			2,500.00	OP

PY381_Using the Single-Use Payroll Online Tool (SPOT)

The screenshots below show the **Paycheck Earnings** tab, **Special Accumulators** section and **Paycheck Deductions** tab, **Deductions** section, where you are able to view the VRS deductions. These screenshot shows how it displays after VRS Adjustments.

▼ **Special Accumulators**

🔍 1-8 of 10 | View All

Code	Description	Hours	Earnings	Empl Record
403	Annuity Basis	96.00	2,083.33	0
457	457 Max Basis	96.00	2,083.33	0
941	941 Total Gross	96.00	2,091.83	0
CBS	VRS Creditable Compensation		5,000.00	0
CMS	Fiscal YTD Salaries for APA	88.00	2,083.33	0
GRS	Reserved for Gross Wages	88.00	2,091.83	0
ORP	Optional Retirement Base	96.00	2,083.33	0
OTE	Other Earnings		8.50	0

▼ **Deductions**

🔍 1-12 of 12 | View 8

Deduction Details 1 | Deduction Details 2 | Deduction Details 3 | ▶▶

Deduction Code	Description	Class	Amount	Calculated Base
CVACRE	CoVA Care	Before-Tax	188.00	
CVACRE	CoVA Care	Nontaxable Benefit	901.00	
IMPLIF	Imputed Life	Taxable Benefit	5.00	100,000.00
DEFCMP	457 Deferred Compensation	Before-Tax	100.00	
DEFCMP	457 Deferred Compensation	Nontaxable Btax Benefit		
FLXMED	Medical FSA	Before-Tax	25.00	
VRSRET	Employee Retirement DB	Before-Tax	250.00	5,000.00
VRSRET	Employee Retirement DB	Nontaxable Benefit	723.00	5,000.00
GRPLFR	Group Term Life	Nontaxable Benefit	67.00	5,000.00
RETHCR	Retiree Health Credit	Nontaxable Benefit	56.00	5,000.00
SDLTDR	VSDP LTD	Nontaxable Benefit	30.50	5,000.00
FLXFEE	Flex Administrative Fee	Before-Tax	2.10	

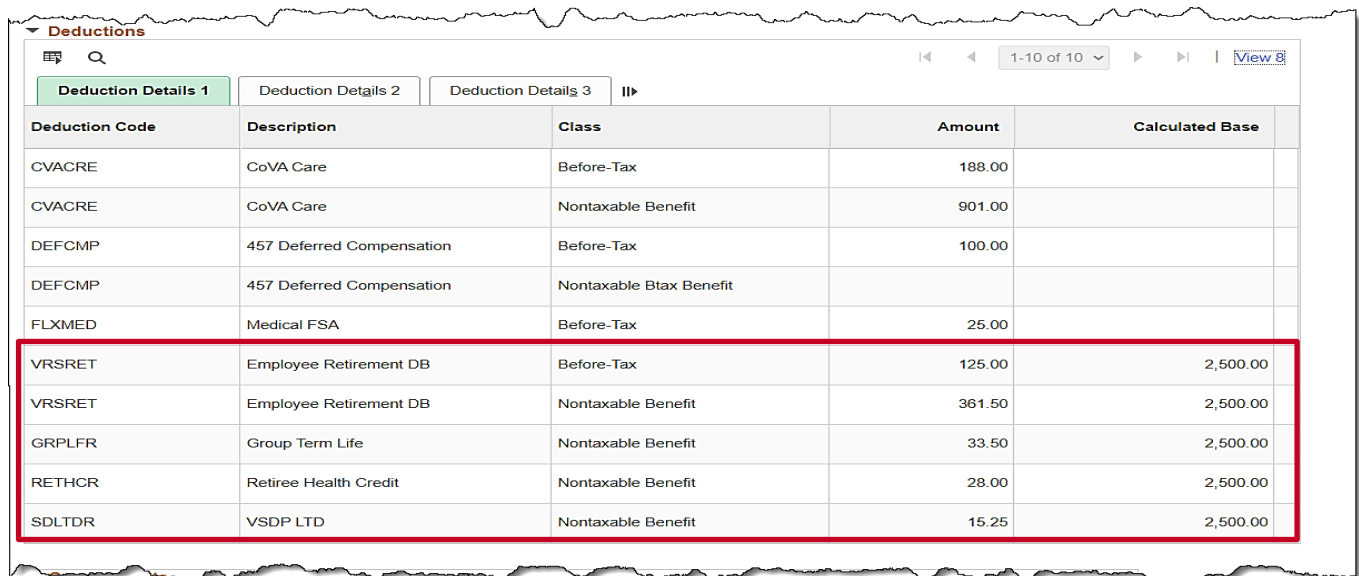
PY381_Using the Single-Use Payroll Online Tool (SPOT)
Employee Not Enrolled in the Retirement Plan

When an employee has been terminated and no longer enrolled in the retirement plan, you will need to enter a SPOT Deduction batch to override the impacted retirement benefit deductions. You can navigate to the **Retirement Plans** or **Savings Plans** pages to see this information using the following path:

Menu > Benefits > Enroll in Benefits > Retirement Plans

Menu > Benefits > Enroll in Benefits > Savings Plans

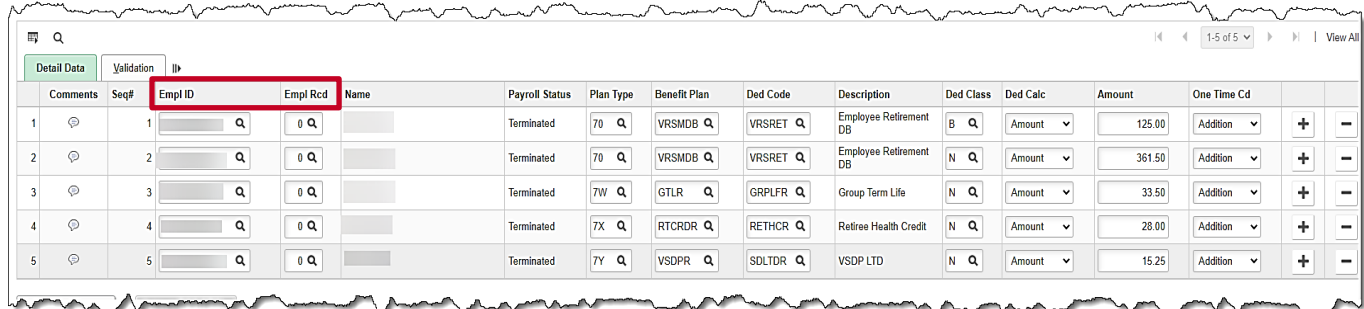
The screenshot below is an example of a prior paycheck showing the VRS retirement deductions and the amount that will be used for SPOT entries.



Deduction Code	Description	Class	Amount	Calculated Base
CVACRE	CoVA Care	Before-Tax	188.00	
CVACRE	CoVA Care	Nontaxable Benefit	901.00	
DEFCMP	457 Deferred Compensation	Before-Tax	100.00	
DEFCMP	457 Deferred Compensation	Nontaxable Btax Benefit		
FLXMED	Medical FSA	Before-Tax	25.00	
VRSRET	Employee Retirement DB	Before-Tax	125.00	2,500.00
VRSRET	Employee Retirement DB	Nontaxable Benefit	361.50	2,500.00
GRPLFR	Group Term Life	Nontaxable Benefit	33.50	2,500.00
RETHCR	Retiree Health Credit	Nontaxable Benefit	28.00	2,500.00
SDLTDR	VSDP LTD	Nontaxable Benefit	15.25	2,500.00

SPOT Deduction Page

Once you have gathered the amounts, enter the VRS retirement deductions in SPOT.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd		
1	1		0		Terminated	70	VRSMDB	VRSRET	Employee Retirement DB	B	Amount	125.00	Addition	+	-
2	2		0		Terminated	70	VRSMDB	VRSRET	Employee Retirement DB	N	Amount	361.50	Addition	+	-
3	3		0		Terminated	7W	GTLR	GRPLFR	Group Term Life	N	Amount	33.50	Addition	+	-
4	4		0		Terminated	7X	RTCRDR	RETHCR	Retiree Health Credit	N	Amount	28.00	Addition	+	-
5	5		0		Terminated	7Y	VSDPR	SDLTDR	VSDP LTD	N	Amount	15.25	Addition	+	-

1. Enter the **Empl ID** and **Empl Rcd**.
2. Enter the appropriate retirement benefit deductions.
3. The **Amount** entered in this example, is the prior pay period amount.
4. The One Time Cd select Addition.

Note: You can use the **Override** Code as well. In that case, you would enter the total amount that would need to be deducted from the pay.

5. Repeat steps 1-4 until all VRS retirement deductions have been entered.
6. Validate and submit the Batch.

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Entry for an Additional Pay

When entering a SPOT transaction for an additional pay, you must select the appropriate sequence number.

In this scenario, we need to make an adjustment for Temporary pay. The employee is owed \$100 because the effective date was entered incorrectly.

Additional Pay Page

You can navigate to this page using the following path:

Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay

This page shows the Temp pay which should have had an effective date of 03/10/2023.

Create Additional Pay

Employee [REDACTED] Empl ID [REDACTED] Empl Record 0

Additional Pay Find | View All First 2 of 3 Last

Earnings Code TMP Temporary Pay

Effective Date Find | View All First 1 of 1 Last

Effective Date 03/29/2023

Payment Details Find | View All First 1 of 1 Last

Addl Seq Nbr 1	End Date
Rate Code	Reason Not Specified
Earnings \$100.00	
Hours	Hourly Rate
Goal Amount \$1,000.00	Goal Balance \$500.00
Sep Check Nbr	<input type="checkbox"/> Disable Direct Deposit
<input checked="" type="checkbox"/> OK to Pay	<input type="checkbox"/> Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

▶ **Job Information**

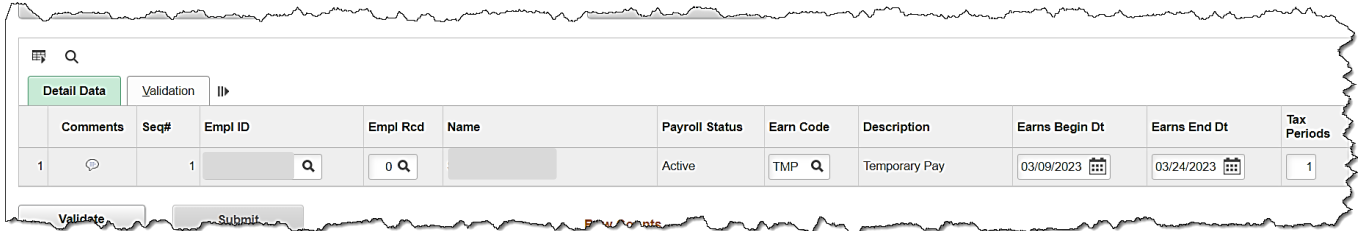
▶ **Tax Information**

Save Return to Search Notify Refresh

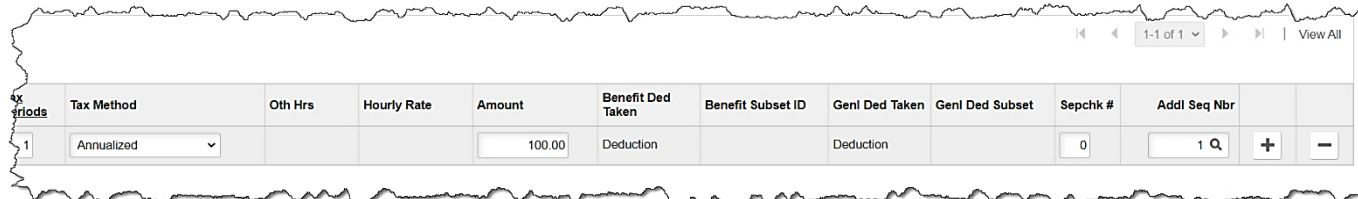
Update/Display Include History

PY381_Using the Single-Use Payroll Online Tool (SPOT)
SPOT Earnings Batch

In order for the **Goal Amount** to update on the **Additional Pay** record there must be matching additional sequence number in SPOT.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods
1	1	<input type="text" value=""/>	0	<input type="text" value=""/>	Active	TMP	Temporary Pay	03/09/2023	03/24/2023	1



Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr
Annualized			100.00	Deduction		Deduction		0	1

1. Enter/select the following:
 - a. Enter the **Empl ID**
 - b. **Empl Rcd**: Defaults to **0**. Update is necessary
 - c. **Earn Code**: select the appropriate code. For this scenario TMP
 - d. **Earns Begin Date**: enter the begin date of the period when the temporary pay should have started
 - e. **Earns End Dt**: enter the end date of the period
 - f. **Amount**: Enter the amount for the temporary pay owed to the employee
 - g. **Add'l Seq Nbr**: Enter the additional sequence number associated with the temporary pay
2. Validate and submit the batch for approval.