



Creating, Updating, and Stopping General Deductions Overview

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

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

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

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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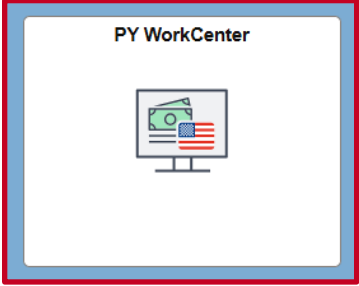
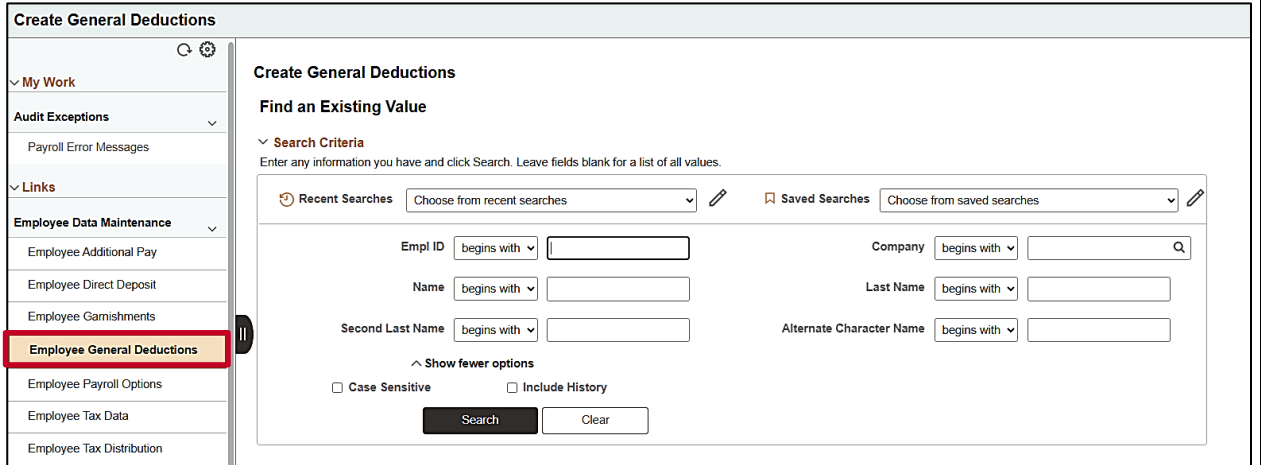


PY381 Creating, Updating, and Stopping General Deductions

Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 , after Step 1; Section 3 , after Step 1; Section 4 , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.

Creating a New General Deduction

Step	Action
1.	Navigate to the Create General Deduction page by clicking on the PY WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following path in the WorkCenter: Links > Employee Data Maintenance > Employee General Deductions Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create General Deductions page using the following navigation path: NavBar > Payroll for North America > Employee Pay Data USA > Create General Deductions

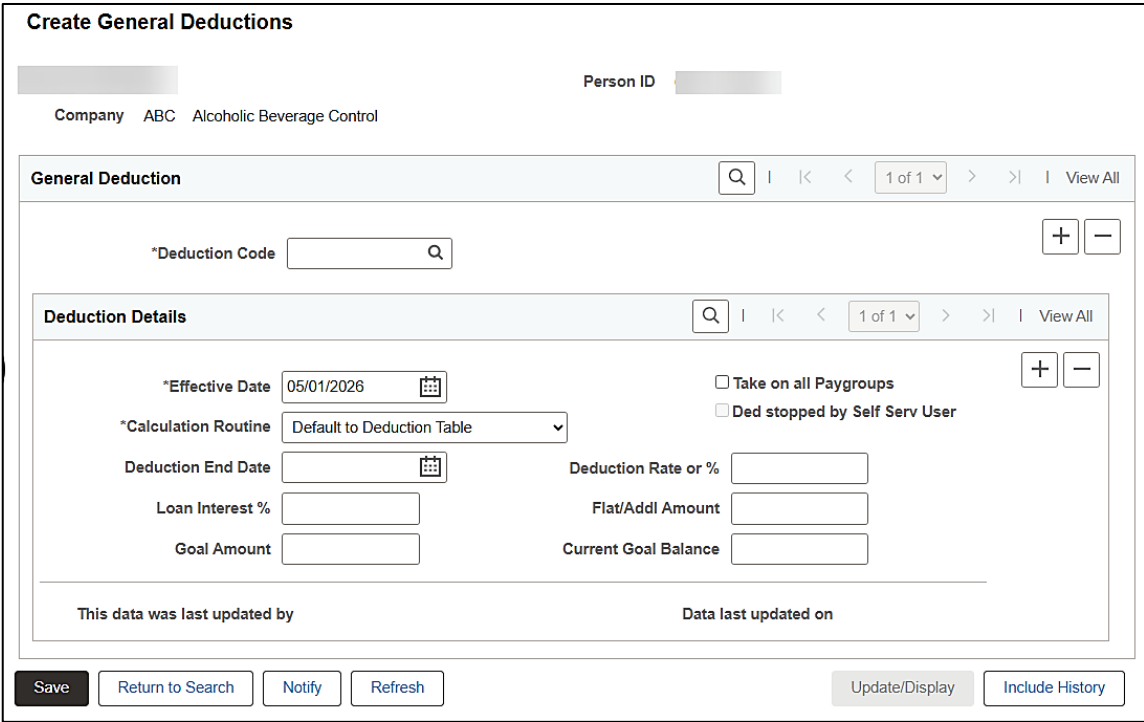
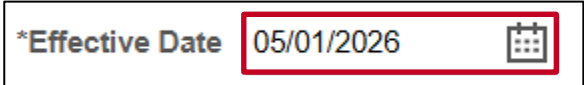


Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

Step	Action
	The Create General Deductions Find an Existing Value Search page displays. Create General Deductions Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Company begins with Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with
4.	Click the Search button. Search Clear

PY381 Creating, Updating, and Stopping General Deductions

Step	Action
	The Create General Deductions page displays. 
5.	Enter/select the applicable Deduction Code using the Deduction Code Look-Up icon. 
	For further information about Deduction Codes, see the Job Aid titled PY381 General and Benefits Deduction Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
6.	The Effective Date field defaults to the current system date. Update this date by entering it in this field or using the Calendar icon as needed. 

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Step	Action
	Cardinal does not pro-rate general deductions. • If the effective date is within the pay period, the deduction will be deducted with the full amount. • If the effective date is prior to the current pay period, the Payroll Administrator will need to do a retroactive calculation and enter the retroactive amount in SPOT. • If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
	The Take on all Paygroups checkbox option defaults to unchecked. It may be checked for employees with multiple jobs in different Pay Groups. ☐ Take on all Paygroups Use this option to have the system take a deduction every time it issues a check to the employee. For employees with multiple jobs in different Pay Groups, this field will control whether the deduction will process on all Pay Groups or only the Primary Pay Group. If an employee has multiple jobs within the company: • When checked, the deduction will be taken from all jobs. • When unchecked, the deduction will only be taken from the primary job (Pay Group). which can be viewed on the Update Payroll Options page. See the section of this Job Aid titled Updating the Primary Paygroup for more information.
7.	The Calculation Routine field defaults to “Default to Deduction Table”. Select the appropriate value using the dropdown button provided. See the table below for the field options and descriptions. *Calculation Routine Default to Deduction Table ▼

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Step	Action																								
	The Calculation Routine field options are listed below. Note that not all options are used in Cardinal. <table><tr><th>Calculation Routine Options</th><th>Description</th></tr><tr><td>Default to Deduction Table</td><td>Select this value to use the calculation routine that is specified on the Deduction Table.</td></tr><tr><td>Flat Amount</td><td>Select this value to calculate the deduction as a flat amount and enter the amount in the Flat/Additional Amount field.</td></tr><tr><td>Percent of Federal Gross</td><td>Not used in Cardinal</td></tr><tr><td>Percent of Net Pay</td><td>Select this value to calculate the deduction as a percent of the employee's net pay. Enter the percent in the Deduction Rate or % field. Net pay is determined at the time that the deduction is calculated. Establish the priority of the calculation on the Deduction table.</td></tr><tr><td>Percent of Special Earnings</td><td>Not used in Cardinal</td></tr><tr><td>Percent of Total Gross</td><td>Not used in Cardinal</td></tr><tr><td>Percentage</td><td>Select this value to calculate the deduction as a percentage. Enter the percentage in the Deduction Rate or % field.</td></tr><tr><td>Rate x Hours Worked</td><td>Not used in Cardinal</td></tr><tr><td>Rate x Special Hours</td><td>Not used in Cardinal</td></tr><tr><td>Rate x Total Hours</td><td>Not used in Cardinal</td></tr><tr><td>Special Deduction Calculation</td><td>Not used in Cardinal</td></tr></table>	Calculation Routine Options	Description	Default to Deduction Table	Select this value to use the calculation routine that is specified on the Deduction Table.	Flat Amount	Select this value to calculate the deduction as a flat amount and enter the amount in the Flat/Additional Amount field.	Percent of Federal Gross	Not used in Cardinal	Percent of Net Pay	Select this value to calculate the deduction as a percent of the employee's net pay. Enter the percent in the Deduction Rate or % field. Net pay is determined at the time that the deduction is calculated. Establish the priority of the calculation on the Deduction table.	Percent of Special Earnings	Not used in Cardinal	Percent of Total Gross	Not used in Cardinal	Percentage	Select this value to calculate the deduction as a percentage. Enter the percentage in the Deduction Rate or % field.	Rate x Hours Worked	Not used in Cardinal	Rate x Special Hours	Not used in Cardinal	Rate x Total Hours	Not used in Cardinal	Special Deduction Calculation	Not used in Cardinal
	Calculation Routine Options	Description																							
	Default to Deduction Table	Select this value to use the calculation routine that is specified on the Deduction Table.																							
	Flat Amount	Select this value to calculate the deduction as a flat amount and enter the amount in the Flat/Additional Amount field.																							
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	Rate x Special Hours	Not used in Cardinal																							
	Rate x Total Hours	Not used in Cardinal																							
Special Deduction Calculation	Not used in Cardinal																								
8.	Optionally, enter or select a deduction end date using the Deduction End Date Calendar icon. Deduction End Date 																								

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Step	Action
	If the effective date is within the pay period, the deduction will be deducted with the full amount. To deduct a partial amount due to mid-pay period changes, calculate the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
9.	If the "Percent of Net Pay" or "Percentage" calculation routine was selected during Step 8, enter the applicable deduction rate or deduction percentage in the Deduction Rate or % field. *Calculation Routine Percent of Net Pay ▼ Deduction Rate or %
	The Loan Interest % field is not being utilized in Cardinal. Loan Interest %
10.	If the "Flat Amount" calculation routine was selected during Step 8, enter the flat amount for the deduction in the Flat/Addl Amount field. *Calculation Routine Flat Amount ▼ Flat/Addl Amount
11.	Optionally, enter a total goal amount for the deduction in the Goal Amount field. Goal Amount
	If entered, the deduction will automatically stop once the goal amount is reached (i.e., Goal Amount = Current Goal Balance).



PY381 Creating, Updating, and Stopping General Deductions

Step	Action
	The screenshot below displays a Sample Deduction (with applicable data entered/selected). Create General Deductions Person ID Company ABC Alcoholic Beverage Control General Deduction Q < < 1 of 1 > > View All *Deduction Code AGYMSC Q Agency Miscellaneous + - Deduction Details Q < < 1 of 1 > > View All *Effective Date 05/01/2026 Take on all Paygroups ☐ *Calculation Routine Flat Amount Ded stopped by Self Serv User ☐ Deduction End Date Deduction Rate or % Loan Interest % Flat/Addl Amount \$25.00 Goal Amount Current Goal Balance This data was last updated by Online User Data last updated on 05/01/2026

Save

Return to Search

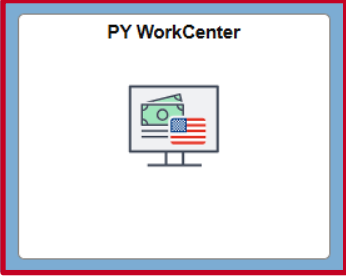
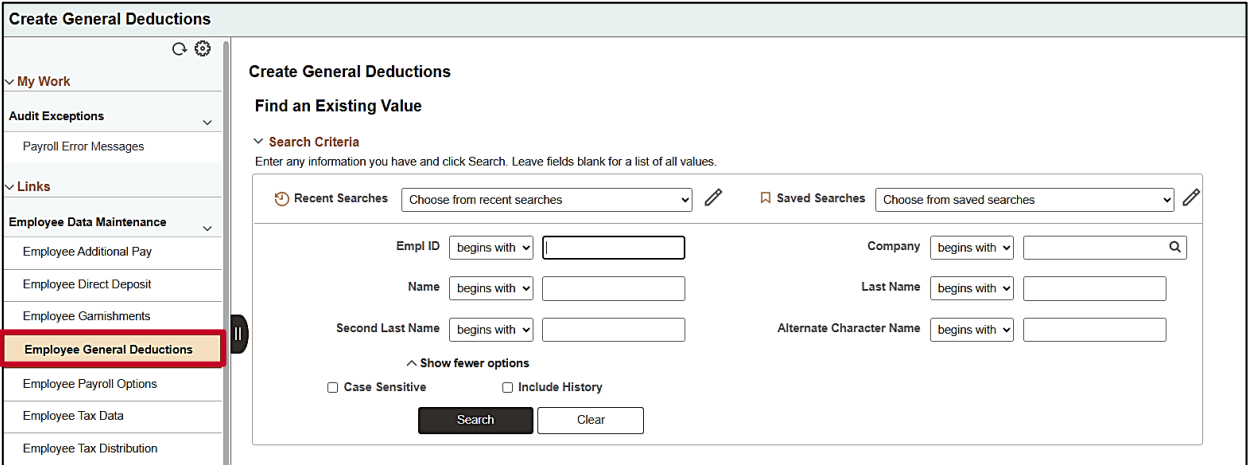
Notify

Refresh

Update/Display

Include History

Updating a General Deduction

Step	Action
1.	Navigate to the Create General Deduction page by clicking on the PY WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following path in the WorkCenter: Links > Employee Data Maintenance > Employee General Deductions Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create General Deductions page using the following navigation path: NavBar > Payroll for North America > Employee Pay Data USA > Create General Deductions



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Step	Action
	The Create General Deductions Find an Existing Value Search page displays. Create General Deductions Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Company begins with Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear Save Search



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Step	Action
------	--------

The **Create General Deductions** page displays.

Create General Deductions

Person ID

Company ABC Alcoholic Beverage Control

General Deduction

|<<<

>>>

1 of 2

>

>>

|

View All

*Deduction Code

CVC

Combined Virginia Campaign

+

-

Deduction Details

|<<<

>>>

1 of 1

>

>>

|

View All

*Effective Date

01/22/2025

*Calculation Routine

Flat Amount

Deduction End Date

Loan Interest %

Goal Amount

☐ Take on all Paygroups

☐ Ded stopped by Self Serv User

Deduction Rate or %

Flat/Addl Amount

\$25.00

Current Goal Balance

This data was last updated by

Online User

Data last updated on

04/30/2026

Save

Return to Search

Notify

Refresh

Update/Display

Include History

5. Navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section if the employee has more than one General Deduction.

General Deduction

|<<<

>>>

1 of 2

>

>>

|

View All

*Deduction Code

CVC

Combined Virginia Campaign

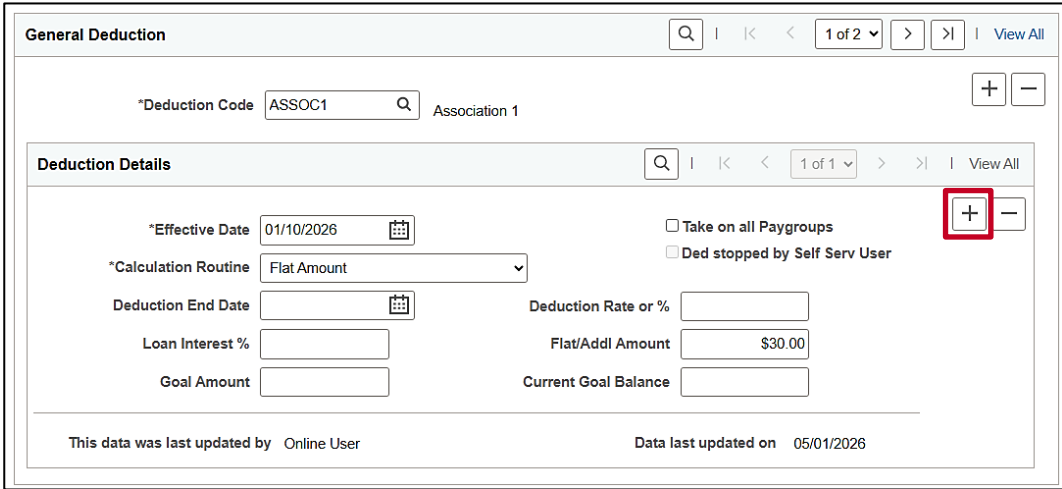
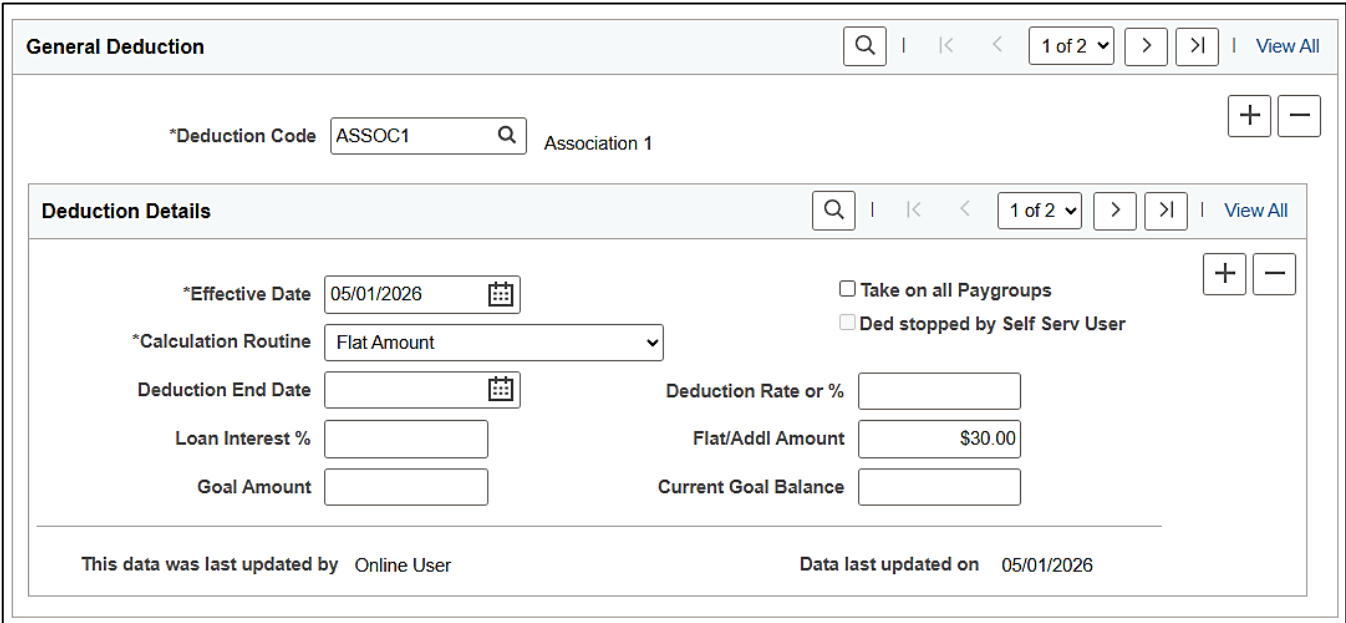
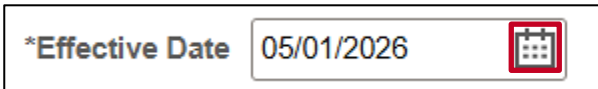
+

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Payroll Job Aid

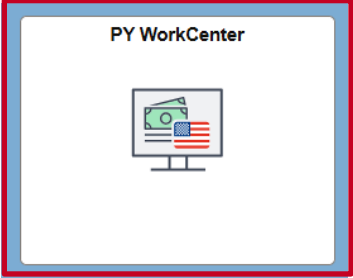
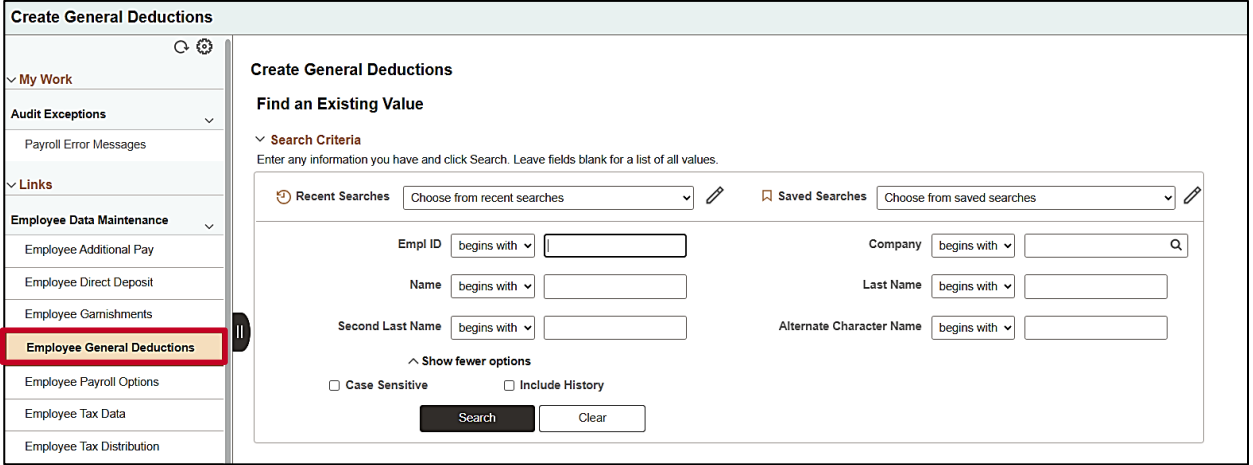
PY381 Creating, Updating, and Stopping General Deductions

Step	Action
6.	Once the correct deduction is displayed, click the Add a New Row icon (+) within the Deduction Details section. The data from the previous row automatically transfers to the new row. 
A new effective dated row displays for the deduction.	
	
7.	The Effective Date field defaults to the current system date. Update this date using the Calendar icon as needed. 

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Step	Action
	If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction update will take effect in the future pay period. For further information on effective dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
8.	Review and update the applicable information in the corresponding field(s). Refer to the Creating a New General Deduction section within this Job Aid for specific data entry guidance.
9.	Once all updates are completed, click the Save button. Save Return to Search Notify Refresh

Manually Stopping a General Deduction

Step	Action
1.	Navigate to the Create General Deduction page by clicking on the PY WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following path in the WorkCenter: Links > Employee Data Maintenance > Employee General Deductions Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create General Deductions page using the following navigation path: NavBar > Payroll for North America > Employee Pay Data USA > Create General Deductions



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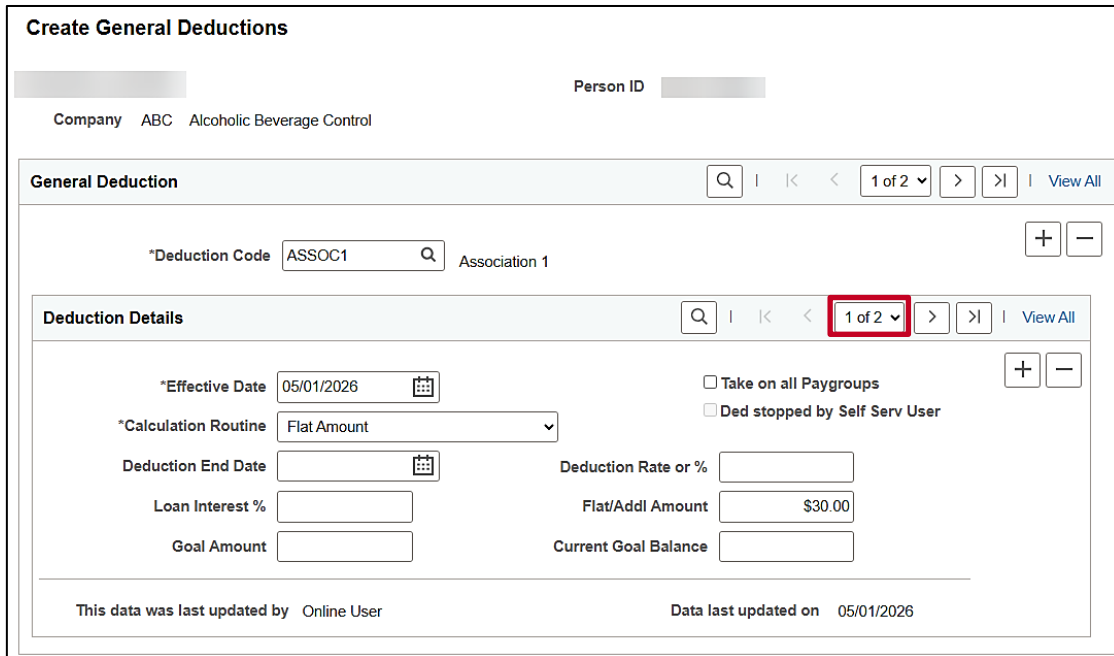
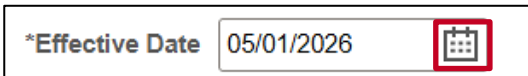
Step	Action
	The Create General Deductions Find an Existing Value Search page displays. Create General Deductions Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Company begins with Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear Save Search



PY381 Creating, Updating, and Stopping General Deductions

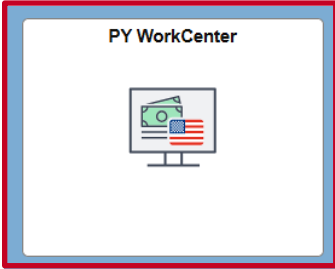
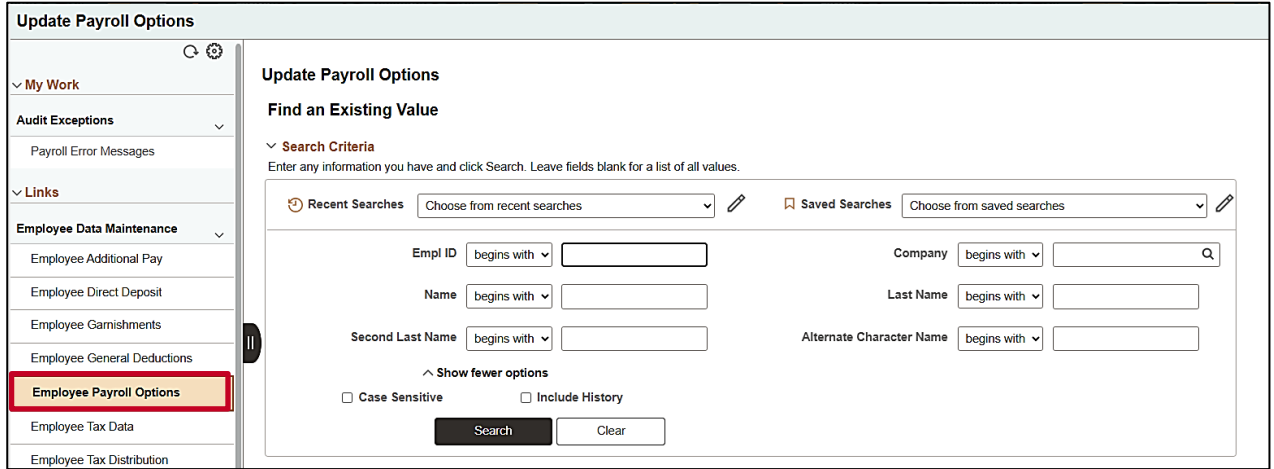
Step	Action
	The Create General Deductions page displays. Create General Deductions Person ID Company ABC Alcoholic Beverage Control General Deduction 1 of 2 > > View All *Deduction Code ASSOC1 Association 1 + - Deduction Details 1 of 1 > > View All *Effective Date 01/10/2026 *Calculation Routine Flat Amount Deduction End Date Loan Interest % Goal Amount ☐ Take on all Paygroups ☐ Ded stopped by Self Serv User Deduction Rate or % Flat/Addl Amount \$30.00 Current Goal Balance This data was last updated by Online User Data last updated on 05/01/2026
5.	If the employee has multiple deductions defined, navigate to the applicable deduction using the navigational arrows or View All link within the General Deductions section. General Deduction 1 of 2 > > View All *Deduction Code ASSOC1 Association 1 + -
6.	Once the correct deduction is displayed, click the Add a New Row icon (+) within the Deduction Details section. The data from the previous row automatically transfers to the new row. + -

PY381 Creating, Updating, and Stopping General Deductions

Step	Action
	A new effective dated row displays for the deduction (Row 1 of 2 in this scenario). 
7.	The Effective Date field defaults to the current system date. Update this date using the Calendar icon as needed. 
	If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction update will take effect in the future pay period. For further information on effective dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
8.	Enter or select the applicable date for the deduction to stop in the Deduction End Date field. 
9.	Click the Save button. 

Updating the Primary Pay Group

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

Step	Action
1.	Navigate to the Update Payroll Options page by clicking on the PY WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following path in the WorkCenter: Links > Employee Data Maintenance > Employee Payroll Options Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Update Payroll Options page using the following navigation path: NavBar > Payroll for North America > Employee Pay Data USA > Update Payroll Options



Step	Action
	The Update Payroll Options Find an Existing Value page displays. Update Payroll Options Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Company begins with Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with Show fewer options ☐ Case Sensitive ☐ Include History Search Clear
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with
4.	Click the Search button. Search Clear



PY381 Creating, Updating, and Stopping General Deductions

Step	Action
	The Payroll Options page displays with the Payroll Options 1 tab displayed by default. Payroll Options 1Payroll Options 2 ID Company ABC Paycheck Delivery Option ☒ Company Distribution ☐ Postal Service Distribution Mail Option ☒ Home Address ☐ Mailing Address ☐ Check Address Update Check Address Employee's Current Address Country USA United States Address Save Return to Search Notify Refresh Update/Display Include History Payroll Options 1 Payroll Options 2
5.	Click the Payroll Options 2 tab to view the Primary Pay Group for the employee. Payroll Options 1 Payroll Options 2



Payroll Job Aid

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Step	Action
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The **Payroll Options 2** page displays.

Payroll Options 1

Payroll Options 2

ID

Company

ABC

Primary PayGroup BW3 Q

Paycheck Location Option

☒ Home Department Location

☐ Job Location

☐ Other Location

Other Location Information

Set ID

Q

Location Code

Q

Mail Drop ID

Paycheck Name

Deductions Taken

*Deductions Taken

No Override

Deduction Subset ID

Q

6. Click the **Primary PayGroup Look up** icon.

Primary PayGroup BW3 Q

The **Look Up Primary PayGroup** page displays in a pop-up window.

Look Up Primary PayGroup

Empl Record

=

Help

Search

Clear

Cancel

Basic Lookup

Search Results

View 100

|<

<

1-2 of 2

>

>|

Empl Record	Effective Date	Pay Group
0	05/10/2022	BW3
1	06/10/2025	SM1



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

Step	Action
7.	Select the appropriate option by clicking the corresponding link in the Pay Group field. 1 06/10/2025 SM1
The Payroll Options 2 page redisplays. Payroll Options 1 Payroll Options 2 ID Company ABC Primary PayGroup SM1 Paycheck Location Option ☒ Home Department Location ☐ Job Location ☐ Other Location Other Location Information Set ID Location Code Mail Drop ID Paycheck Name Deductions Taken *Deductions Taken No Override Deduction Subset ID Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Payroll Options 1 Payroll Options 2	
8.	Confirm that the appropriate value displays in the Primary PayGroup field.
9.	Click the Save button. Save Return to Search