PY381 Creating, Updating, and Stopping General Deductions

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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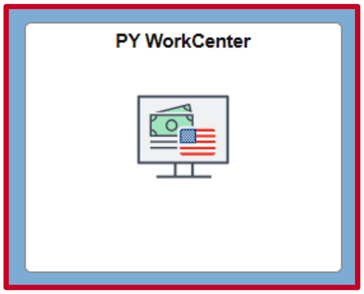
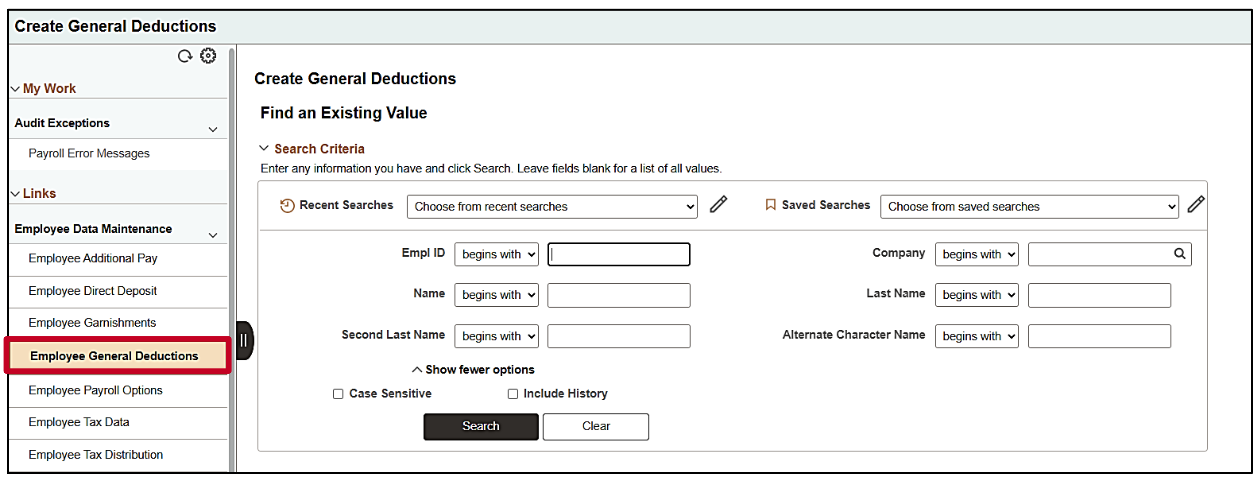
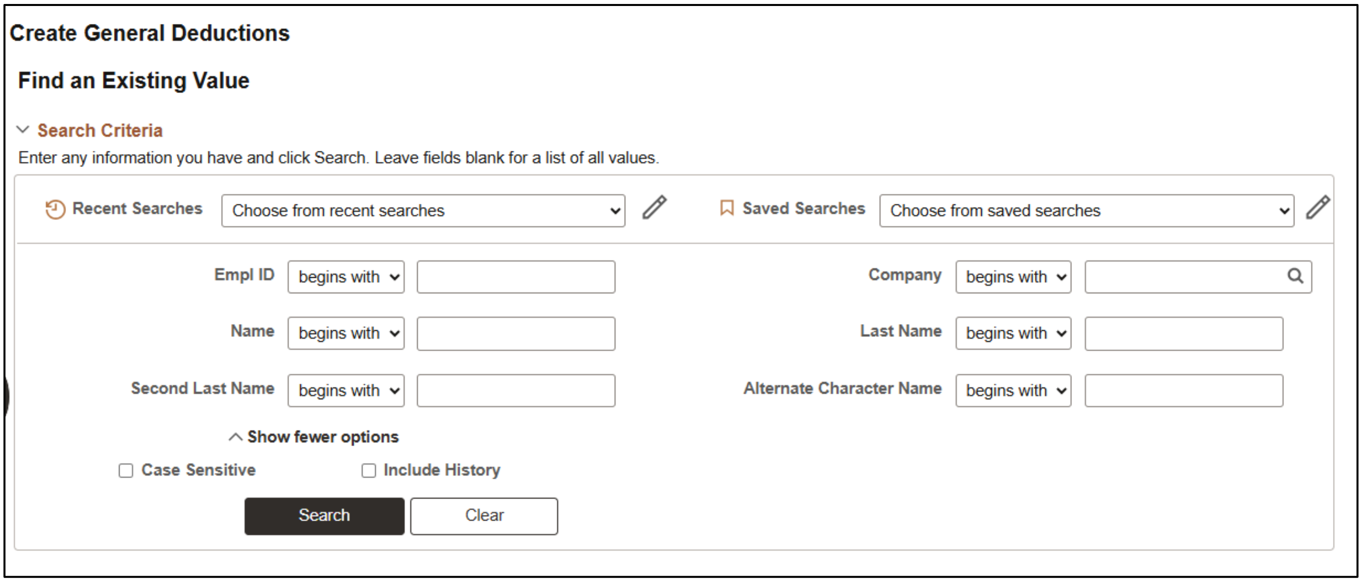
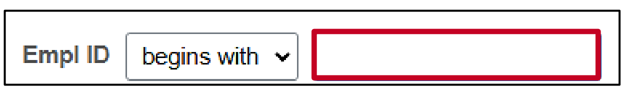
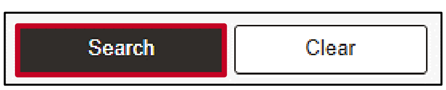
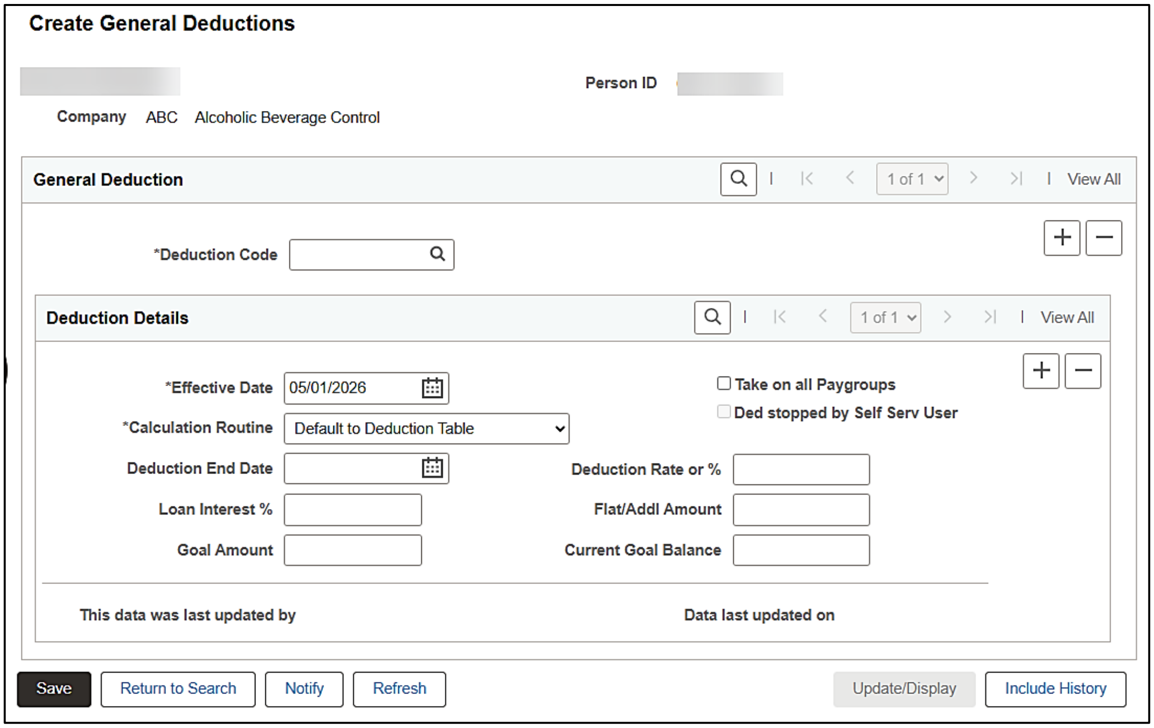
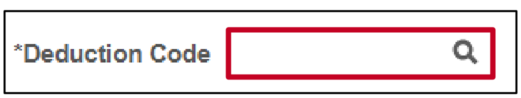
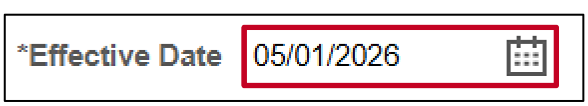
Revision History

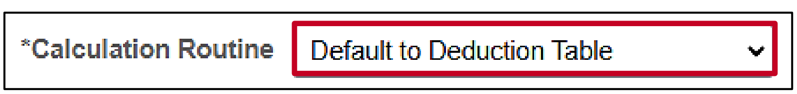
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1; Section 2, after Step 1; Section 3, after Step 1; Section 4, after Step 1). Added reference information to the Overview of the Cardinal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

Step	Action
	The **Create General Deductions Find an Existing Value Search** page displays. 
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. 
4.	Click the **Search** button. 

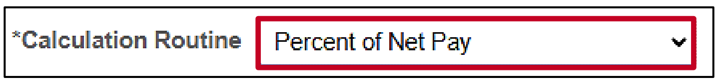
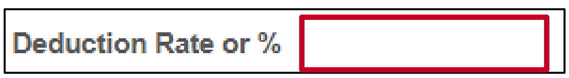
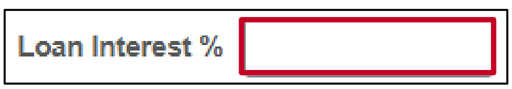
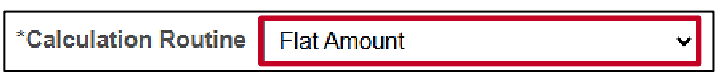
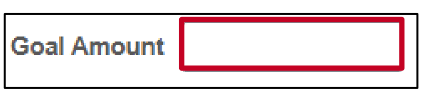
Step	Action
The **Create General Deductions** page displays. 	
5.	Enter/select the applicable **Deduction Code** using the **Deduction Code Look-Up** icon. 
	For further information about Deduction Codes, see the Job Aid titled **PY381 General and Benefits Deduction Codes**. This Job Aid can be found 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. 

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.  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. 

Step	Action
	The **Calculation Routine** field options are listed below. Note that not all options are used in Cardinal.

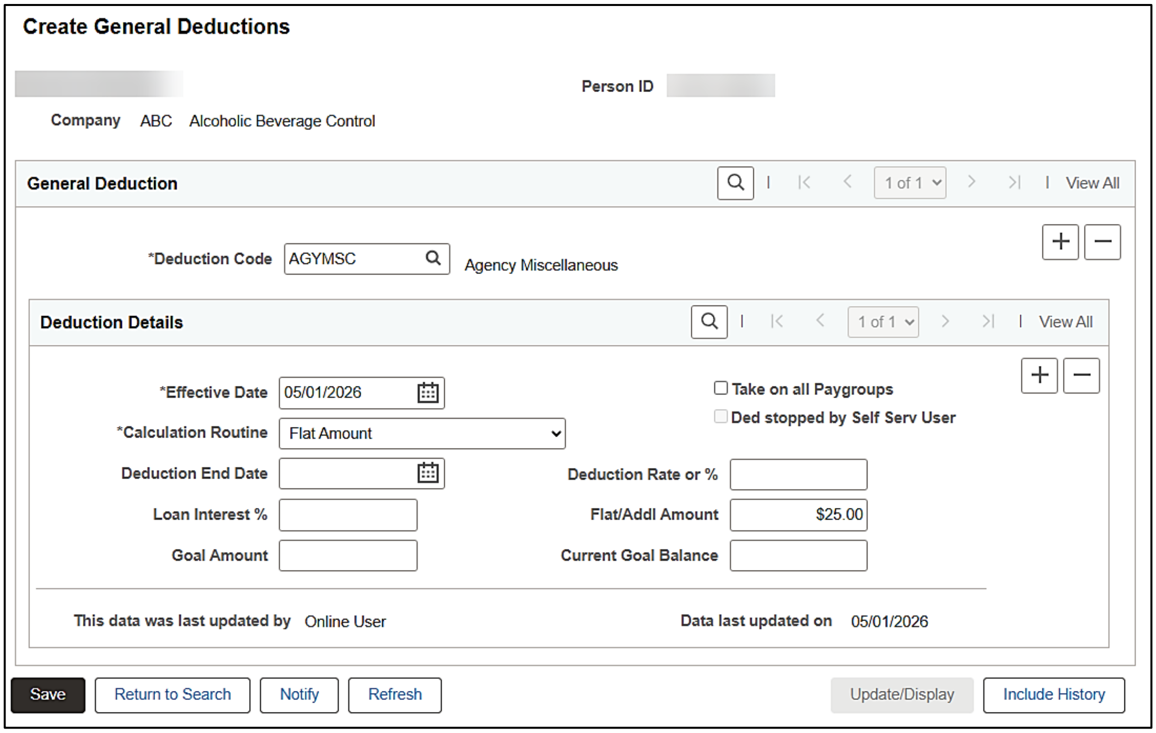
Calculation Routine Options	Description
Default to Deduction Table	Select this value to use the calculation routine that is specified on the Deduction Table.
Flat Amount	Select this value to calculate the deduction as a flat amount and enter the amount in the **Flat/Additional Amount** field.
Percent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

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

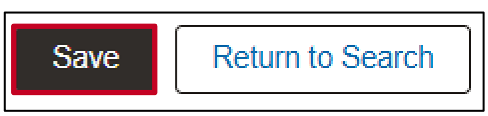
Step	Action
	If the effective date is within the pay period, the deduction will be deducted with the full amount. To deduct a partial amount due to mid-pay period changes, calculate the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll 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.  
	The **Loan Interest %** field is not being utilized in Cardinal. 
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.  
11.	Optionally, enter a total goal amount for the deduction in the **Goal Amount** field. 
	If entered, the deduction will automatically stop once the goal amount is reached (i.e., Goal Amount = Current Goal Balance).

Step	Action

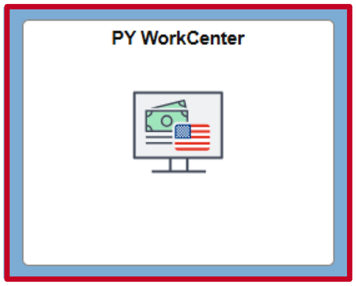
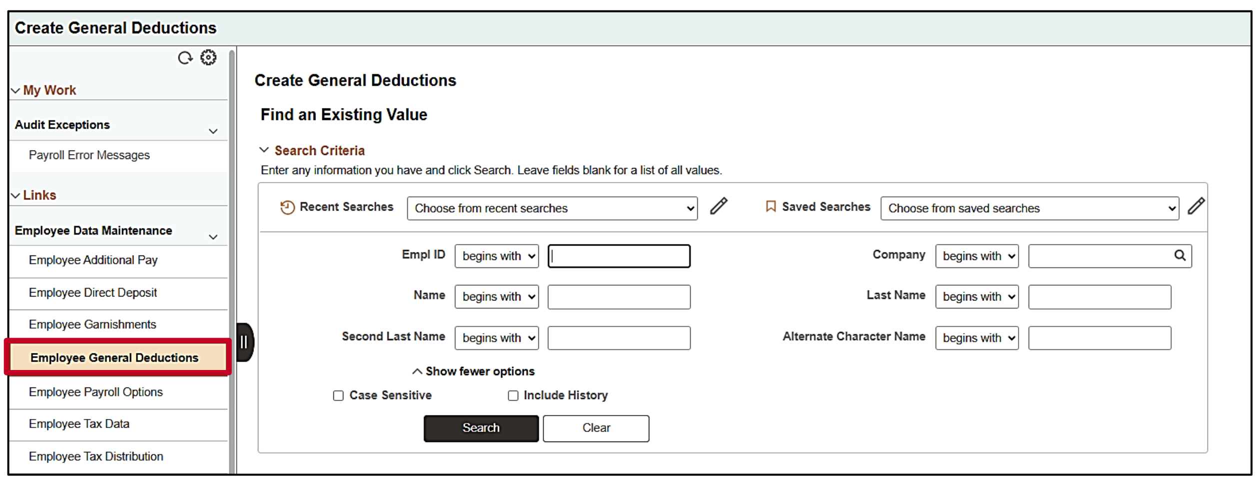
The screenshot below displays a Sample Deduction (with applicable data entered/selected).



Step	Action
i	To add an additional general deduction, click the **Add a New Row** (**+**) icon within the **General Deductions** section and repeat **Steps 5-11**.
12.	Once all deductions are entered, click the **Save** button.

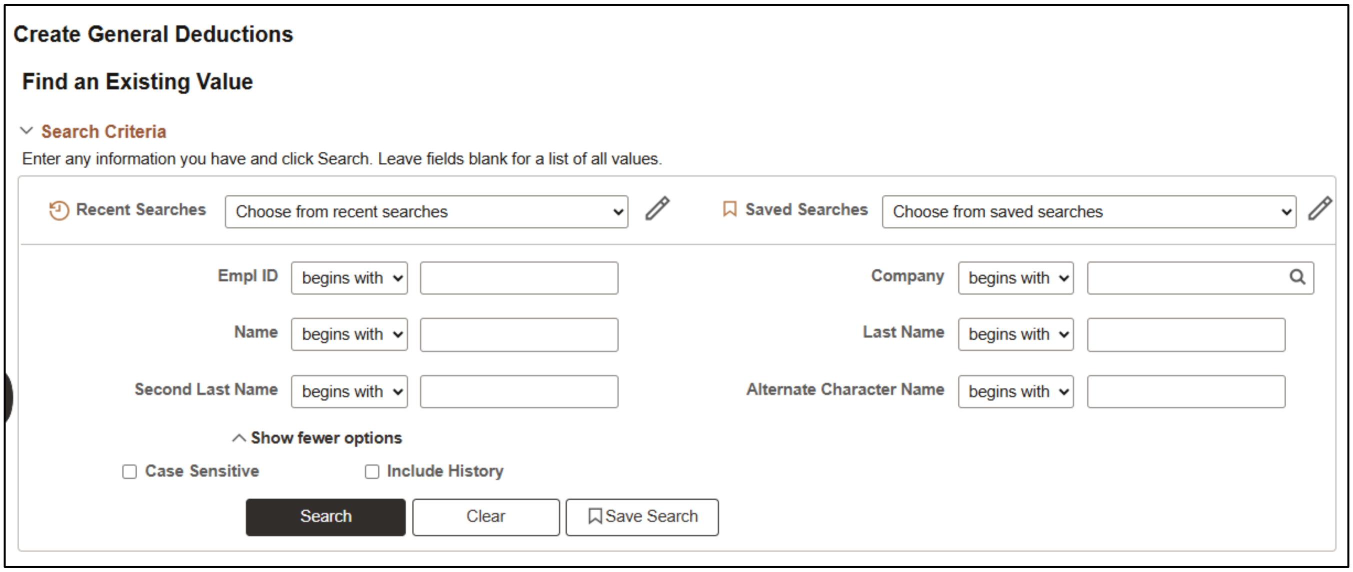


Updating a General Deduction

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**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Create General Deductions Find an Existing Value Search** page displays.



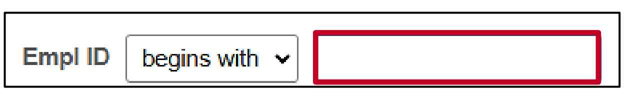
</td></tr>
<tr><td></td><td>

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**.

</td></tr>
<tr><td>3.</td><td>

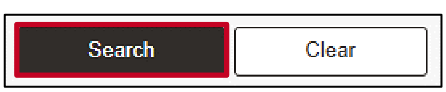
Enter the employee's Employee ID in the **Empl ID** field.

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.



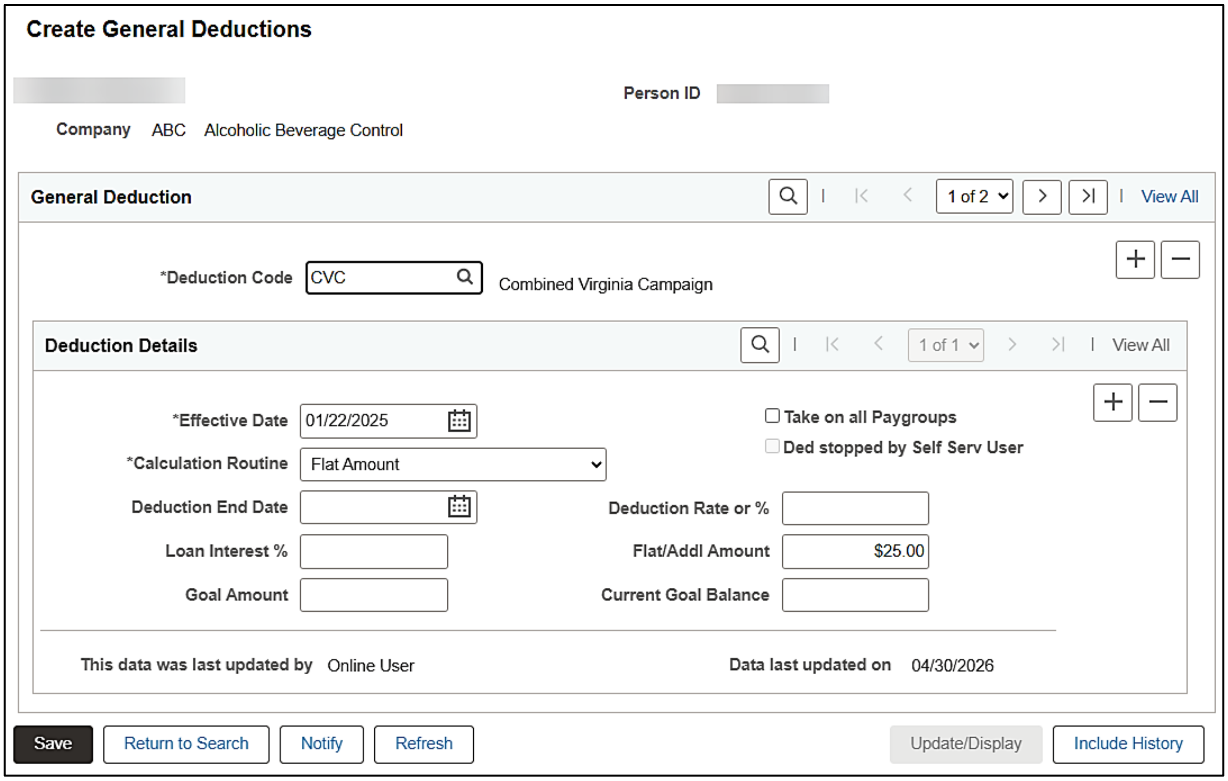
</td></tr>
<tr><td>4.</td><td>

Click the **Search** button.

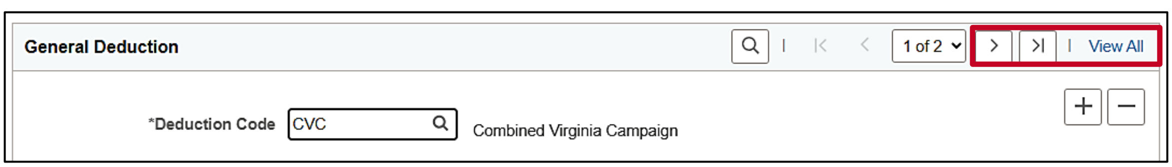


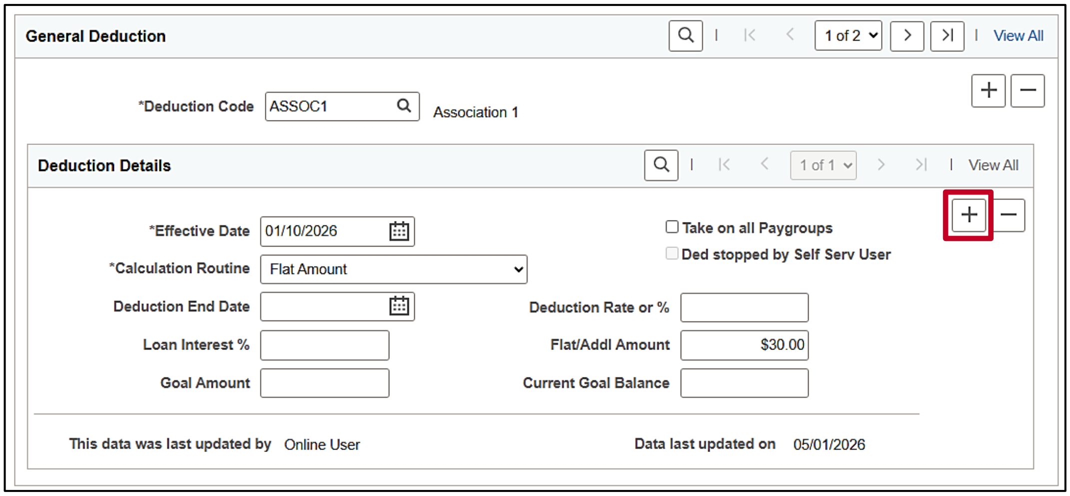
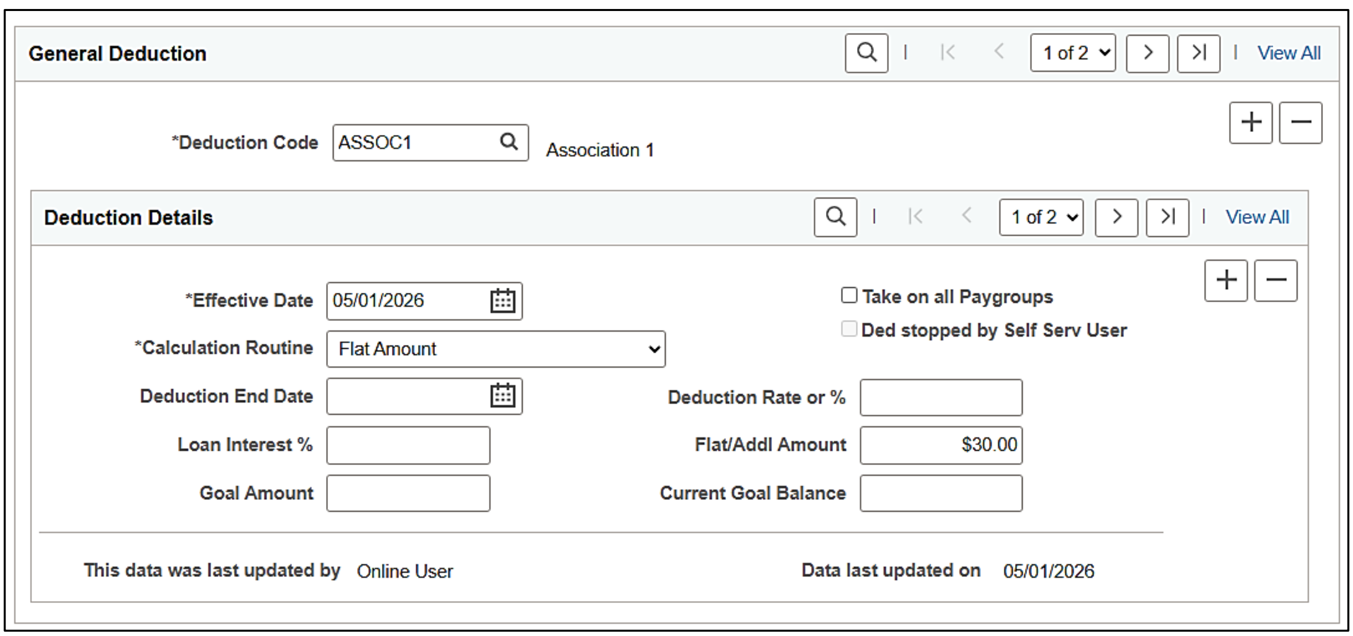
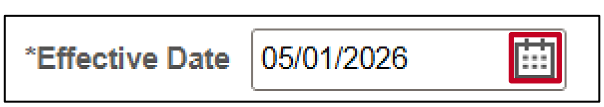
</td></tr>
</table>

Step	Action
The **Create General Deductions** page displays.	



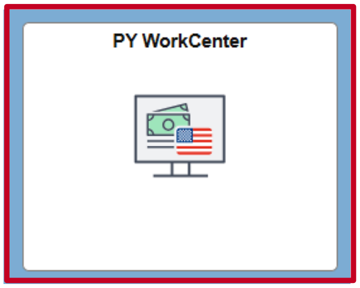
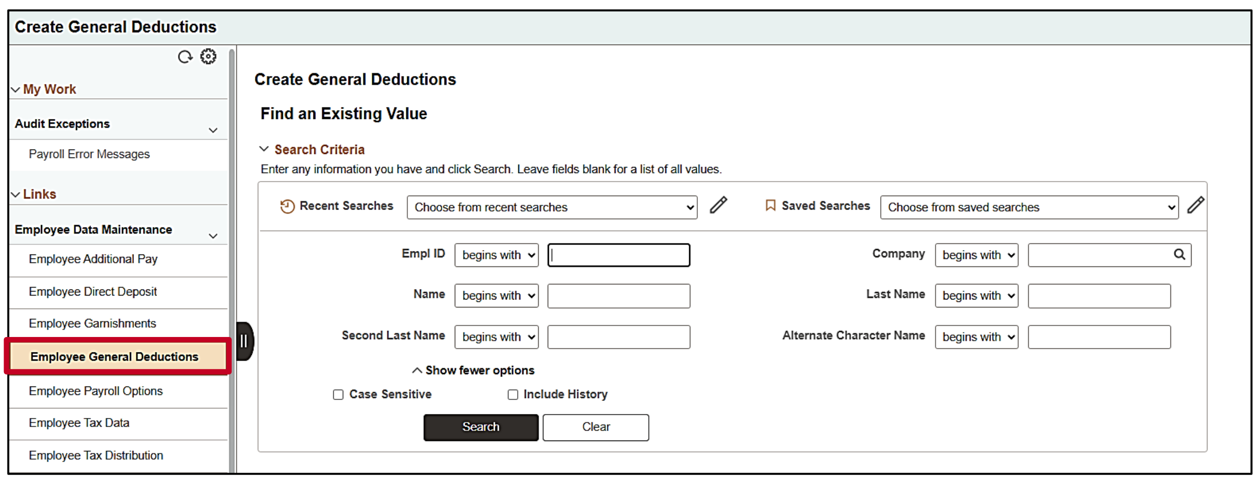
Step	Action
5.	Navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section if the employee has more than one General Deduction.

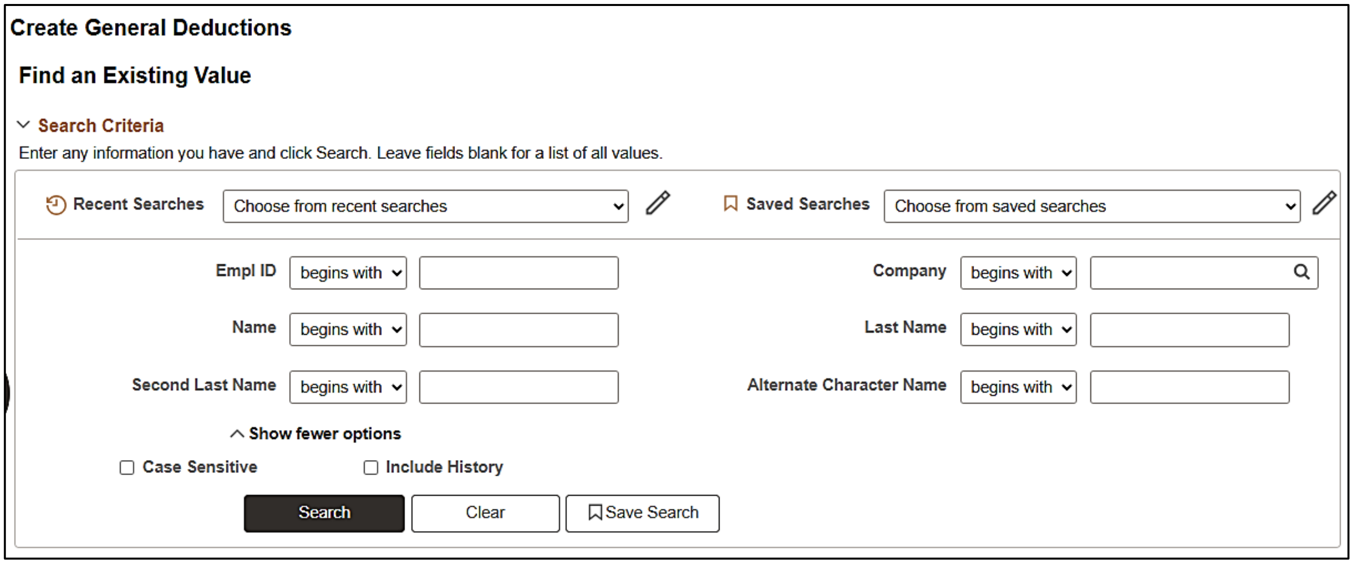
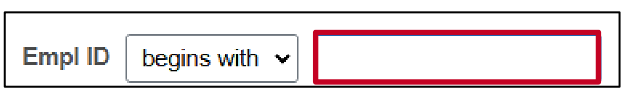
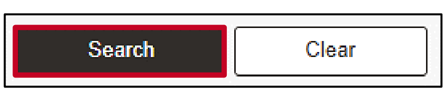


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6.</td><td>Once the correct deduction is displayed, click the Add a New Row icon (+) within the Deduction Details section. The data from the previous row automatically transfers to the new row.

</td></tr>
<tr><td colspan="2">A new effective dated row displays for the deduction.

</td></tr>
<tr><td>7.</td><td>The Effective Date field defaults to the current system date. Update this date using the Calendar icon as needed.

</td></tr>
</table>

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. 

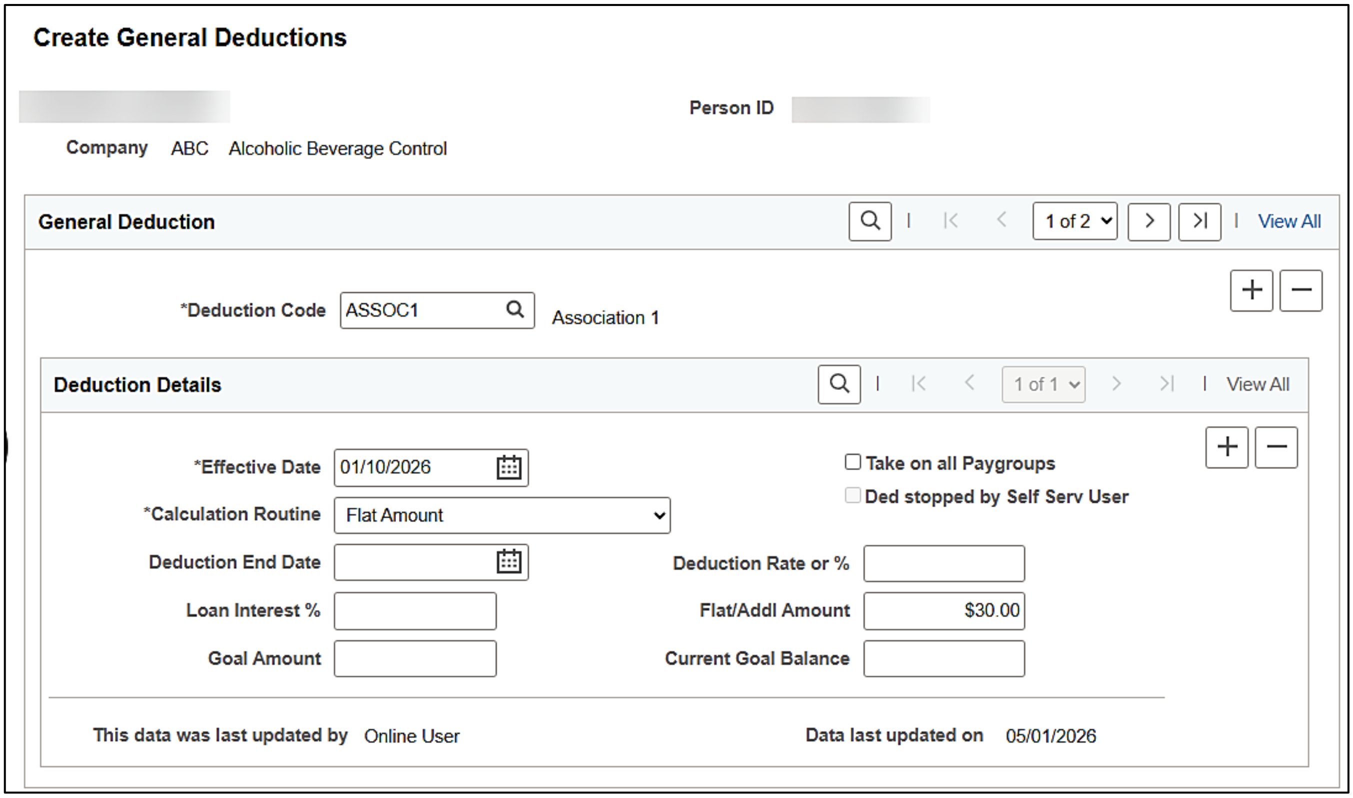
Manually Stopping a General Deduction

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**

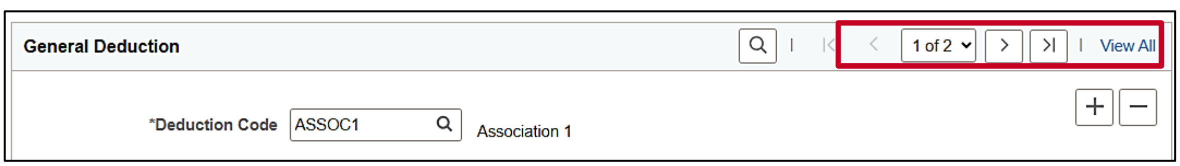
Step	Action
	The **Create General Deductions Find an Existing Value Search** page displays. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **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. 
4.	Click the **Search** button. 

Step	Action

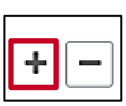
The **Create General Deductions** page displays.



Step	Action
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.

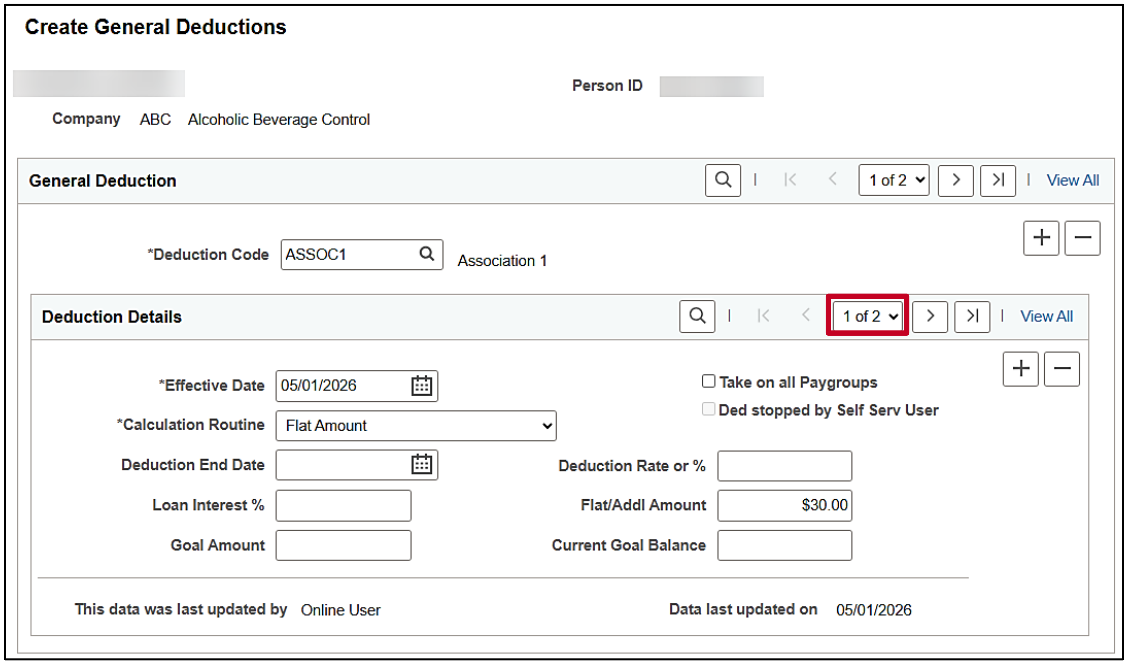


Step	Action
6.	Once the correct deduction is displayed, click the **Add a New Row** icon (**+**) within the **Deduction Details** section. The data from the previous row automatically transfers to the new row.



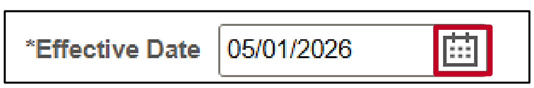
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

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



</td></tr>
<tr><td>7.</td><td>

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



</td></tr>
<tr><td></td><td>

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**.

</td></tr>
<tr><td>8.</td><td>

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

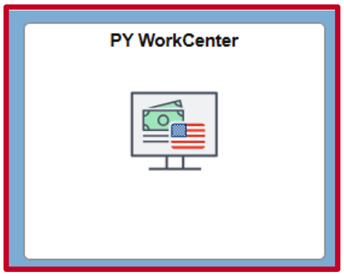
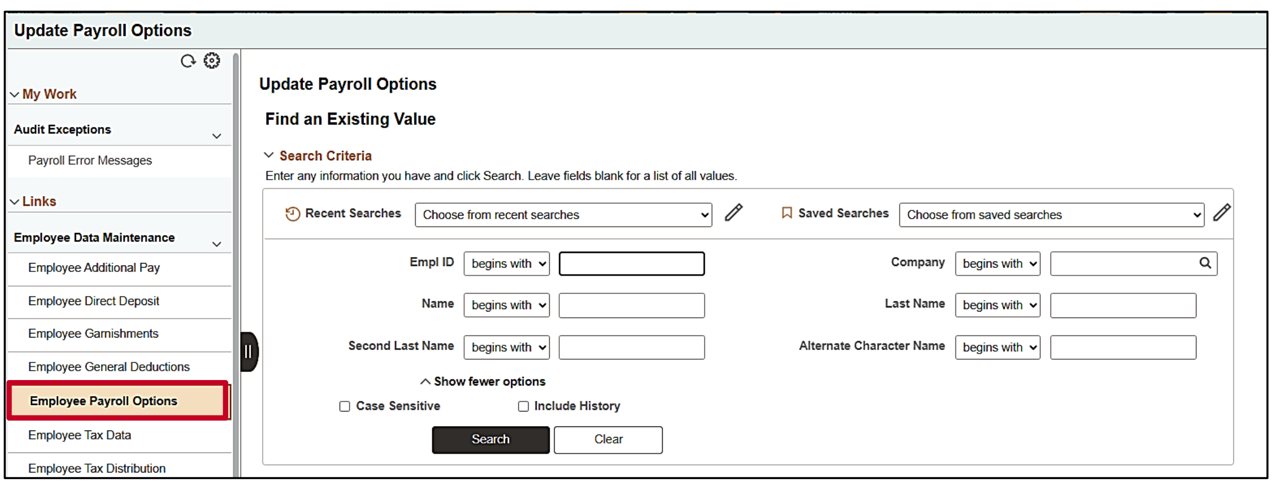
</td></tr>
<tr><td>9.</td><td>

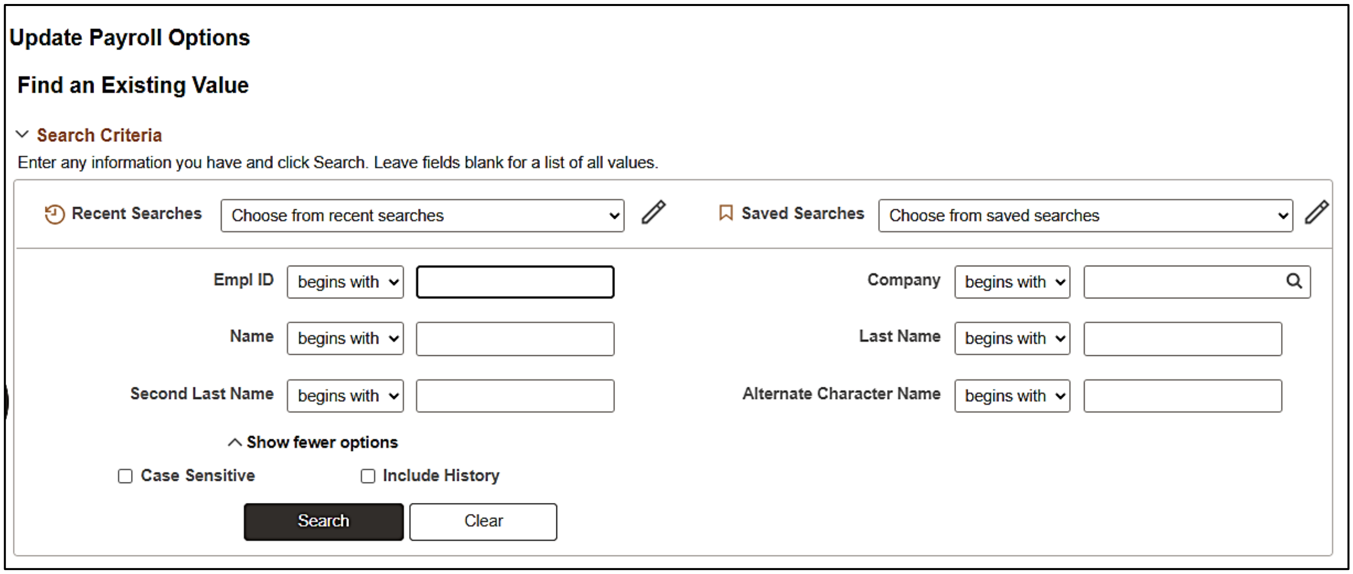
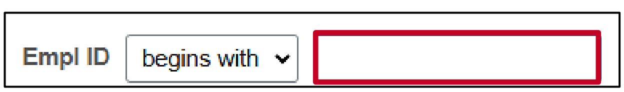
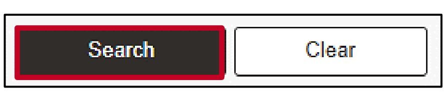
Click the **Save** button.

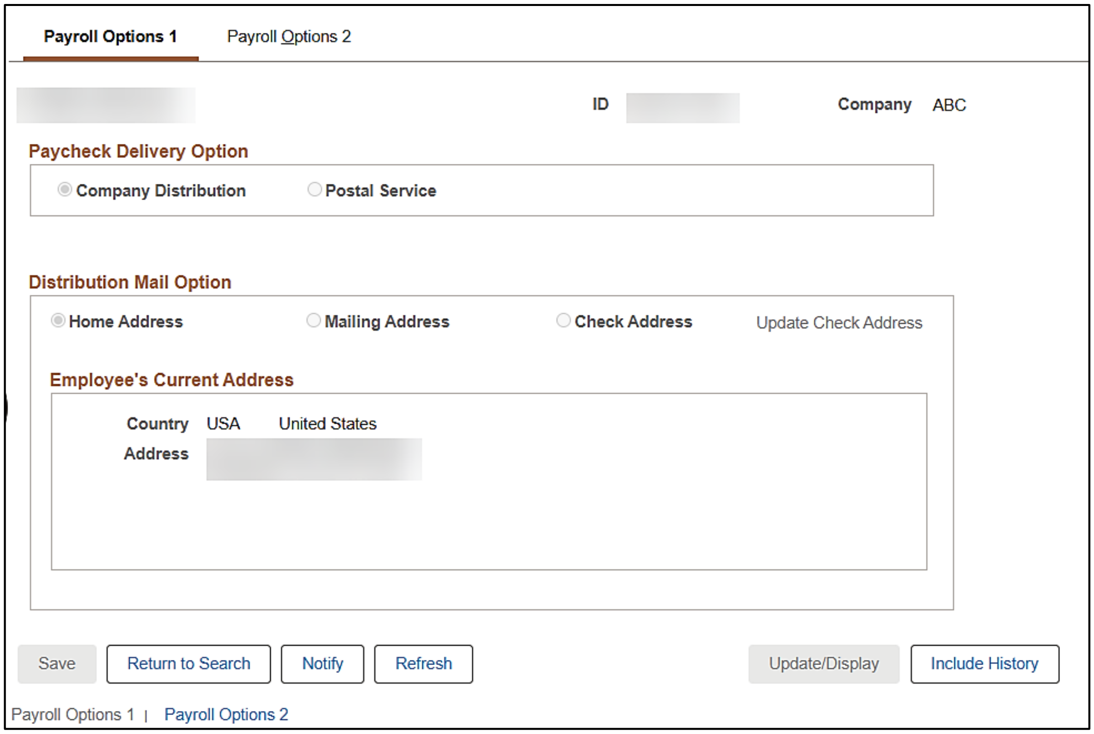
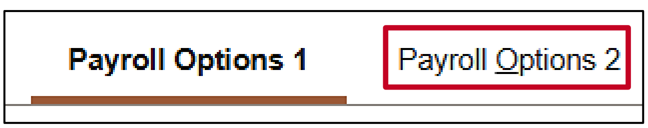
</td></tr>
</table>

Updating the Primary Pay Group

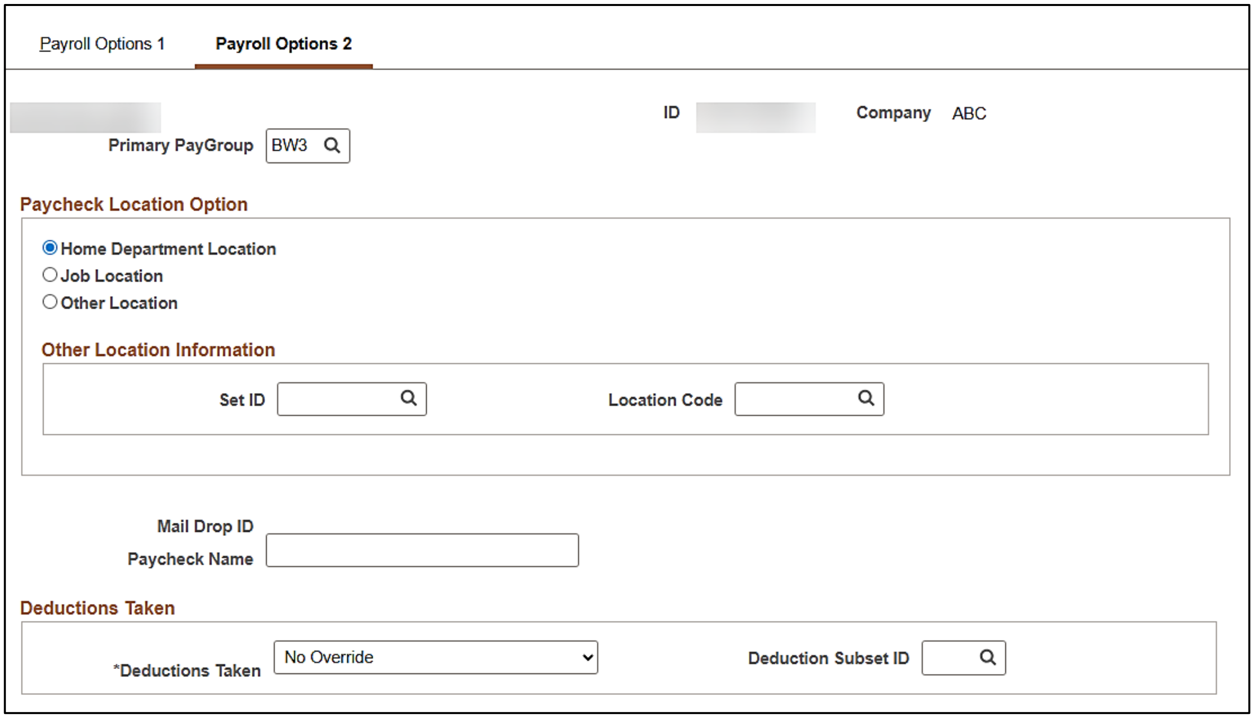
This field is populated based on the Job Data record (**PayGroup** field on the **Payroll** page that corresponds with the **Job Indicator** on the **Work Location** page). An exception to this is when Job Data is updated in Correction mode. When this occurs, the **Primary PayGroup** field may need to 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. 
	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. 
4.	Click the **Search** button. 

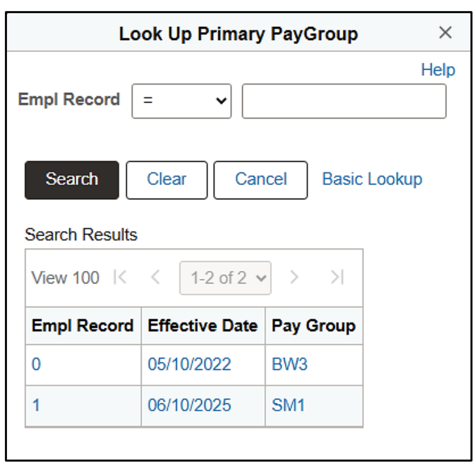
Step	Action
The **Payroll Options** page displays with the **Payroll Options 1** tab displayed by default. 	
5.	Click the **Payroll Options 2** tab to view the Primary Pay Group for the employee. 

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



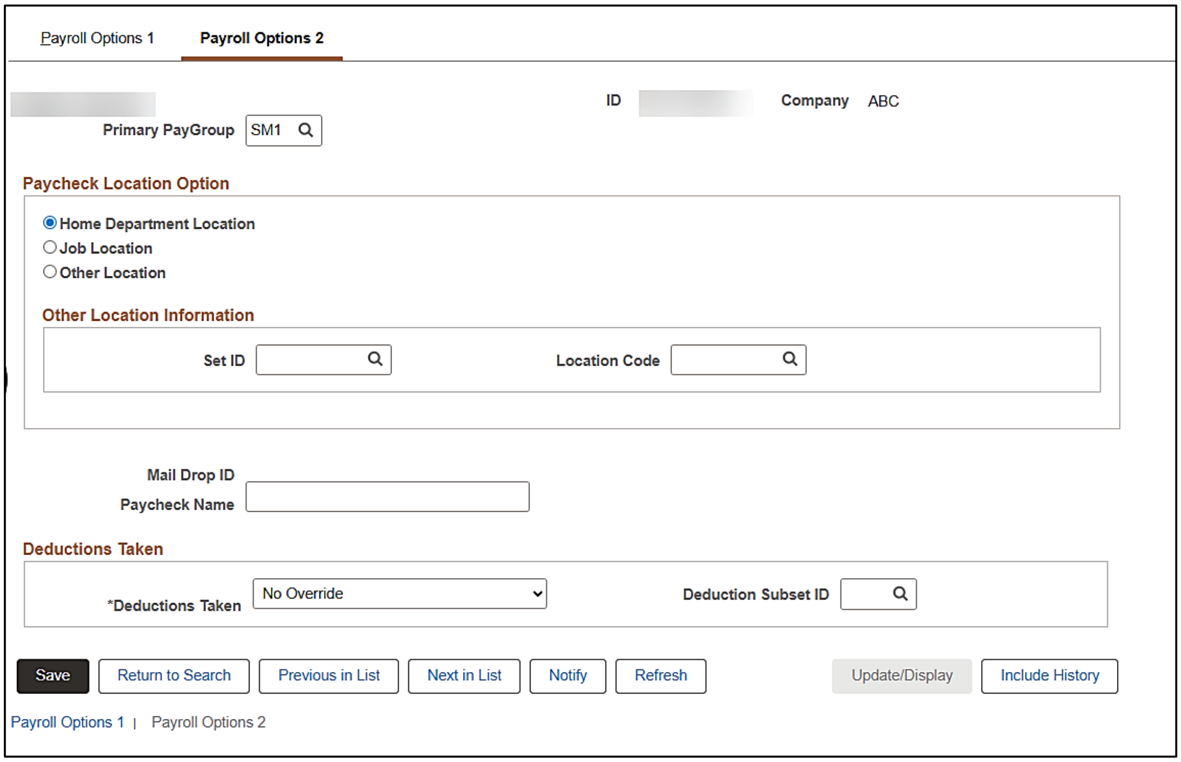
Step	Action
6.	Click the **Primary PayGroup Look up** icon.

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



Step	Action
7.	Select the appropriate option by clicking the corresponding link in the **Pay Group** field. 

The **Payroll Options 2** page redisplays.



Step	Action
8.	Confirm that the appropriate value displays in the **Primary PayGroup** field.
9.	Click the **Save** button.