

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Overview of 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.

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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (<u>Section 1</u> , after Step 1; <u>Section 2</u> , after Step 1; <u>Section 3</u> , after Step 19; <u>Section 4</u> , after Step 1; <u>Section 5</u> , after Step 1; <u>Section 6</u> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Entering an Earnings Transaction in SPOT

Step	Action
1.	Navigate to the Enter SPOT Transactions page using the following path:
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The Enter SPOT Transactions Find an Existing Value page displays.

← Cardinal Homepage			Enter SPOT Transactions	
Enter SPOT Transactions				
Find an Existing Value			⊕Add a New Value	,
✓ Search Criteria Enter any information you have and cl	ick Search. Leave fields blank for a list of all value:	s.		
Recent Searches Choose	from recent searches	Saved Searches	Choose from saved searches	• /
Company	begins with 🗸]		
Pay Group	begins with 🗸]		
Pay Period End Date	= • Q]		
Transaction Type				
Batch Identity	begins with			
Batch Status		٦		
∧ Show	fewer options	J		
Case	Sensitive			
	Search			
For more informat "Overview of the 0 Website in Job A	tion pertaining to the C Cardinal HCM Search I ids under Learning .	ardinal HCM S ² ages". This J	Search pages, refer to the Job Aid is located on the	e Job Ai Cardina
Click the Add a N	ew Value tab.			



Step	Action
The Add a	a New Value page displays.
	← Cardinal Homepage Enter SPOT Transactions
	Enter SPOT Transactions
	Add a New Value Q Find an Existing Value
	Batch Identity NEXT "Company Q "Pay Group Q "Pay Period End Date Q "Transaction Type Earnings v Add
i	The Batch Identity field defaults to "NEXT" and cannot be edited. This number automatically generates when the SPOT Batch is saved.
3.	Click the Company Look Up icon and select the company's 3-digit alpha code. *Company Q
4.	Click the Pay Group Look Up icon and select the applicable pay group. *Pay Group Q
i	Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When a batch is validated, an error message displays for employees not in the Pay Group entered in this field.
5.	Click the Pay Period End Date Look Up icon and select the applicable pay period end date. *Pay Period End Date
6.	Verify that the Transaction Type field defaults to "Earnings". *Transaction Type Earnings



Step	Action
İ	There are only two values for this field which are "Earnings" or "Deduction". See the section of this Job Aid titled Entering a Deduction Transaction in SPOT for details on entering SPOT deduction transactions.
7.	Click the Add button.
	Add
The Ente	r SPOT Trans page displays.

Company Pay Group Pay Period Er Transaction ¹ Batch Status	nd Type	DLI De SM1 Se 08/09/2024 Earnings New	pt of Labor ar mimonthly Cla	nd Industry ass (SATFRI07)		Batch Id Created E Submitter Approved Modified B	NEXT y V_TRN_P1 d By By By	r38101	Process Monitor	Totals (only for Total Amt : Total Hrs :	Valid rows)							
ΠQ	Attacti Files																	
Status	Comments	Seq#	Empl ID		Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns E	Begin Dt	Earns End	Dt	Tax Periods	Tax Method		
Validate **Total Hours & **Valid Row and	Amount are upda	Subm ated on Val	it dation ved on Validati	ion		1	Row Counts Rows Valid: Rows Error: Total Rows:											
i	The tab.	Hea	ader	sectio	on po	pulate	es with t	he info	rmatic	n previo	usly e	entere	ed or	n the	e Ad	daN	lew	Va
	The tab. The	Hea Bat	ader ch S	sectio	on po field	pulate upda	es with t	he info	rmatic	on previo	usly e	entere he ba	ed or atch a	n the	e Ad	d a N udes:	lew	Va
	The tab. The • •	Hea Bat New Crea Vali Moc Sub In R Clos	ader ch S / – w ated date lifiec mitte evie sed -	section Status hen a d – whe d – w d after ed – w w – w – after	on po field new en the hen the vhen t vhen t	pulate upda batch batc he bat datio the ba he ap	es with t tes base i is initia h is sav tch is va n – whe atch is s prover i ver has	he info ed on t red alidatec en the b submitte submitte submitte	rmatic he act batch i ed for wing t ted the	ion previo ion take s change approva he batch e batch t	usly e n on t ed aft l n for a ro pay	he ba	ed or atch a lidation	and	e Ad	d a N	lew	Va
	The tab.	Hea Bat New Crea Vali Moc Sub In R Clos	ader ch S / – w ated date lifiec evie sed - Sta	section Status Then a d – whe d – whe d – w after ed – w w – w - after tus	on po field new en the hen the vhen t vhen t	pulate upda batch batc he bat datio the ba he ap approv	es with t tes base i is initia h is sav tch is va n – whe atch is s prover i ver has Nev	he info ed on t red alidatec en the b submitte submitte submitte	rmatic he act batch i ed for wing t ted th	on previo ion take approva he batch e batch t	usly e n on t ed aft l n for a o pay	entere he ba er va pprov rroll	ed or atch a lidatio	and	Ad	d a N	lew	Va



Step	Action
8.	Click the Comments icon if there are comments for the transaction. If not, skip to Step 12.
The SPO	Γ Comments page displays in a pop-up window.
	SPOILComments page × Help Empl ID Empl Record 0 Seq# 1 Comment OK Cancel
9.	Enter comments as applicable in the Comment field.
10.	Click the OK button.



The Enter Payroll SPOT Trans page redisplays. Image: Spot and Sp	Step	Actior	ı											
Image: Section of the additional section of the addoted is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match or of the allowable values. Image: Section of the allowable values.	he Ente	r Payro	II SPOT Tra	ans p	age re	edisplay	S.							
Image: Section of the sectin the field which is cu	Enter Payroll S	POT Trans			Date Id	NEXT								
New New Pred N	Pay Group Pay Period End Transaction Type Batch Status	DLI L SM1 S 08/09/20: Earnings New	lept of Lador and industry iemimonthly Class (SATFRI07) 24		Greated By Submitted Approved B	NEXT V V_TRN_PY By By	38101		Totals (only for Total Amt : Total Hrs :	Valid rows)				
In the second of the secon	Att	ach Files				Upload File	95	Process Monitor						
Image: Second of the second	(Tav		
Image: Second Secon	Status C	©	Empl ID	Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Periods	Annualized	J
Image: Second	Validate	Sub	mit										L	
 The Seq# field auto-populates and is read-only. Seq# I Click the Empl ID Look Up icon and select the applicable employee's Employee ID. Empl ID Impl ID Impl ID If an Employee ID is entered and is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match one of the allowable values. Invalid value – press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused. 	**Total Hours & Amo **Valid Row and Em	ount are updated on Vi	alidation ated on Validation			Row Counts Rows Valid: Rows Error: Total Rows:								
 Click the Empl ID Look Up icon and select the applicable employee's Employee ID. Empl ID If an Employee ID is entered and is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match one of the allowable values. Invalid value - press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused. 	U	Seq#	1					-						
If an Employee ID is entered and is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match one of the allowable values. Invalid value – press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused.	11.	Click t	he Empl ID	Loo	k Up id	con and	select	the ap	oplicable	employe	e's Emplo	oyee	ID.	
 If an Employee ID is entered and is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match one of the allowable values. Invalid value press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused. 			Q											
Invalid value press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused.	i	lf an E highlig one of	mployee ID hted in red the allowal) is er and a ble va	ntered an erro Ilues.	and is r or messa	not valio age wil	d for th I displa	ne Pay G ay indica	Group prev ating that t	viously se he value	electe does	ed, it will be a not match	ə n
hyperlink associated with field, which is currently focused.		Invalid va	alue press the pr	ompt but	ton or hype	erlink for a lis	t of valid va	alues (15,1	1)	owable values h	w pressing the l	Promotil	button or	
ОК		hyperlink	associated with fi	eld, which	h is current	tly focused.	owabie valu	ies. Tou C	an see the all	owable values b	y pressing the l	rompt	DULLOTE OF	
								OK]					



Step	Action
12.	Click the Empl Rcd Look Up icon and select the applicable Employee Record.
	0 9
i	This field defaults to "0".
13.	Verify that the correct employee's name displays in the Name field (auto-populates based on the Employee ID selected).
14.	Review the Payroll Status field. This field populates based on the Payroll Status from the employee's Job Data. Payroll Status Active
i	A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is "Terminated".
15.	Click the Earn Code Look Up icon and select the appropriate Earnings Code. For this scenario, "BON" is selected.



Step	Action
İ	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:
	 LSH – Leave Share STD – Short Term Disability WCL – VSDP Work Comp Pay WCP – Workers Comp WCS – Work Comp Supplement
16.	Verify that the Description field auto-populates correctly based on the Earnings Code selected. Description Non-discretionary Bonus (FLSA)
1	If it is not accurate, update the Earn Code field as applicable.
17.	Enter or select the appropriate earnings begin and end dates using the Earns Begin Dt and Earns End Dt Calendar icons.
i	These fields are required fields for all earnings transactions. If left blank, an error will occur when the Validate button is clicked.
18.	The Tax Periods field defaults to "1" and refers to the number of Pay Periods covered by the earnings payment. Tax Periods
i	The Tax Periods field is used in conjunction with the "Annualized" tax method.



Step	Action								
19.	Click the Tax Method dropdown button and select the appropriate tax method.								
	Tax Method	~							
1	 There are two selections available for Tax Method: Annualized – this tax method multiples 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. 								
20.	Next, enter the applicable field information based on the type of Earning Code. The Oth Hrs , Hourly Rate , and Amount fields are available only if applicable based upon the value selected in the Earn Code field. For this scenario, the Amount is entered.								
	Oth Hrs	Hourly Rate	Amount						
			0.00						
1	 The following guidelines apply for entry of the Oth Hrs, Hourly Rate, and Amount fields. Oth Hrs: Enter the applicable number of hours in the Oth Hrs field to one decimal place (e.g., 8.0) Hourly Rate: Enter the applicable hourly rate in the Hourly Rate field to two decimal places (e.g., 22.55) Amount: 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 								
21.	Click the ho	rizontal scrollbar at t	the bottom of the	e page to scroll to	the right a	s needed.			
i	The Benefi not enabled	t Ded Taken, Benef I. Entry of these field	it Subset , Genl ds is triggered ba	Ded Taken , and ased on the value	Genl Ded in the Sep	Subset fields are chk# field.			
	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #				
	Deduction		Deduction		0				



Step	Action
22.	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 one or more separate checks.
	 If this value will remain as "0", proceed to Step 27 If this value will be changed to "1" (or higher), proceed to the next Step.
	Sepchk #
i	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.
	Complete Steps 23 - 26 to make the appropriate updates to each of these fields if applicable.
23.	 Click the Benefit Ded Taken dropdown button and select the applicable value based on the following: Deduction – all benefit deductions are taken from the earnings
	None – no benefit deductions are taken from the earnings
	Subset – a subset of benefit deductions is taken from the earnings
	Benefit Ded Taken
	Deduction V
i	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.
24.	Click the Benefit Subset ID Look Up icon and select the applicable value based on the following:
	• BNS (Bonus) – Annuity and Deferred Compensation deductions will be taken from the
	 GRN (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken
	 SPT (SPOT Allow) – Not used by Cardinal LVS (Leave Share) – All deductions will be taken from the earnings
	Benefit Subset ID



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Step	Action
25.	 Click the Genl Ded Taken dropdown button and select the applicable value based on the following: Deduction – all benefit deductions are taken from the earnings None – no benefit deductions are taken from the earnings Subset – a subset of benefit deductions is taken from the earnings
i	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.
26.	 Click the Genl Ded Subset Look Up icon and select the applicable value based on the following: BNS (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings GRN (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken SPT (SPOT Allow) – Not used by Cardinal LVS (Leave Share) – All deductions will be taken from the earnings
27.	Enter the additional pay sequence number in the Addl Seq Nbr field if the SPOT transaction is related to additional pay that contains a "Goal Balance". If this is not applicable, leave this field blank and proceed to the next Step.
İ	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.



Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Step	Action									
28.	To create additional SPOT transactions, click the Add a Row (+) icon and then repeat Steps 12-27.									
29.	Click the Delete a Row (-) icon to delete a line (SPOT transaction) as needed.									
30.	Click the horizontal scrollbar to scroll to the left.									
31.	Click the Save button to save the batch so that additional transactions can be entered. If the batch is ready to be submitted, go to Step 34.									
The Ente	r SPOT Trans page refreshes.									
Enter	New Window Help Personalize Page									
Company Pay Grou Pay Peri Transac Batch S	yy DL Dept of Labor and Industry Batch Id 276 up SM1 Semimoratily Class (SATFRIO7) Created By iode End 0609/2024 Submitted By Totals (only for Valid rows) ction Type Eamings Approved By Total Amt : Total Amt : ctatus Created Modified By Total Amt :									
	Attach Files Process Monitor									
Sta	Q State Seq# Empl ID Empl Rd Name Payroll Status Earn Code Description Earns Begin Dt Earns End Dt Tax Method Image: State Image: State <t< th=""></t<>									
**Total Ho **Valid Ro Save	uns & Amourt are updated on Validation Rows Valid: w and Error Row Count are updated on Validation Rows Error: Total Rows:									
32.	Verify that the Batch Id field populates with a number. For this scenario "276".									
	Batch Id 276									
33.	Verify that the Batch Status field updates to "Created".									
	Batch Status Created									

After a batch is saved, additional items can still be added as needed.

i



Step	Action
34.	To submit the batch for approval, click the Validate button. Cardinal will validate all of the individual fields as well as combinations of fields.

The Enter SPOT Trans page redisplays and the Batch Status field updates to "Validated".

Company DLi Dept of Labor and Industry *ay Group SM1 Semimonthy Class (SATFRI07) Pay Period End 08/09/2024 Transaction Type Earnings			Batch Id Created B Submitter Approved	276 y i By By			Totals (only for Valid rows) Total Amt : 200.00							
Batch Status		Validated			Modified E	Зу			Iotal Hrs :					
	Attach Files					Upload Files	Pro	ocess Monitor						
щ Q														
Status	Commen	s Seq#	Empl ID	Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method	
1 OK	ø		٩ ــــــــــــــــــــــــــــــــــــ	0 Q			Active	BON Q	(FLSA)	07/25/2024 📰	08/09/2024 📰	1	Annualized	
Validate		Submi	t			Row Counts								
otal Hours &	Amount are u	dated on Vali	dation			Rows Valid:	1							
Total Hours & / /alid Row and	Amount are u Error Row C	dated on Vali unt are updat	dation ed on Validation			Rows Valid: Rows Error: Total Rows:	1							
Fotal Hours & / /alid Row and	Amount are u Error Row C	dated on Valie unt are updat	dation ed on Validation			Rows Valid: Rows Error: Total Rows:	1							
Total Hours & J Valid Row and Save	Amount are u Error Row C	ine To itch: Tot Tot	tation et on Validation tals (only cal Amt – th cal Hrs – th	for V he sum	alid r m of t	Rows Valid: Rows Error: Total Rows: Cows) sec the values	ction pro	ovides ed in t ed in th	the follow he Amoun he Oth Hrs	ing sumi t field fo field for	mary info r the batc the batcl	rmati ch	on for th	ne



Step	Action
i	The Row Counts section provides the following summary information for the batch: Rows Valid – the number of valid rows in the batch Rows Error – the number or rows in the batch containing errors Total Rows – the total number of rows in the batch (sum of Rows Valid and Rows Error fields) Row Counts Rows Valid: 1 Rows Error: 1
35.	Verify that the Rows Error field is blank indicating that all rows are valid. If there are no errors, go to Step 40. If the Rows Error field populates with a number, this indicates the number of rows with an error. Each error row must be reviewed and corrected as applicable.
Example	of a batch with an error.
Status	Review Status Error Msg Comments Seq# Empl ID Empl Rcd Name Payroll Status Earn Code Description Earns Begin D
1 OK	Image: Constraint of the second se
2 Error	P Q Q O Active TMP Q Temporary Pay 07/25/2024
Validate **Total Hours & Ar **Valid Row and E Save	Submit Row Counts mount are updated on Validation Rows Valid: 1 irror Row Count are updated on Validation Rows Error: 1 Total Rows: 2 2
	The Status field updates with one of the following values:
	• OK – no errors
	Error – issue with the line
	The Status field populates with "Error" for all lines containing an error and a Bubble icon populates in the Error Msg field for all lines containing an error.
36.	Click the Bubble icon in the Error Msg field to view the error message.



Step	Action				
The SPO	FReview Notes pag	ge displays ir	n a pop-up window.		
			SPOT Review Notes page	×]
				Help	
		Empl ID			
		Empl Record	0		
		Seq#	2		
		Notes	Amount cannot be zero for Ern_Cd- TMP;		
		ОК	lancel		
37.	Review the Notes	field to deter	mine the error.		
	Netes	mount cannot be z	ero for Ern. Cd- TMP [.]		
	Notes		or or engod thin ,		
38.	Click the OK button	n.			
	OK	Cancel			



Step	р	Acti	ion										
The Er	nte	Pay	roll	SPO	Tra	ans page	redispl	ay	/S.				
	Ente	Payroll SPC	OT Trans	;									
F	Company DLI Dept of Labor and Industry Pay Group SM1 Semimonthly Class (SATFRIO7) Pay Period End 08/09/2024 Transaction Type Earnings Batch Status Validated				Bato Cre Sut App Moo	Batch Id 276 Created By Submitted By Approved By				Totals (only for Valid rows) Total Amt : 200.00 Total Hrs :			
[Attac	h Files						Upload Files	Process Monitor			
	F	٦											
	St	tus Erro	or Msg	Comments	Seq#	Empl ID	Empl	Rcd	I Name	Payroll Status	Earn Code	Description	Earns Begin Dt
	1 O			ø		1 0	۸ 0	۹		Active	BON Q	Non-discretionary Bonus (FLSA)	07/25/2024
	2 Er	or	9	ø		2 0	2 0	۹		Active	TMP Q	Temporary Pay	07/25/2024
	∖ **Total H **Valid R Save	alidate urs & Amour w and Error	Row Con	Submit dated on Valida unt are updated	tion on Valida	tion			Rows Valid: 1 Rows Error: 1 Total Rows: 2				
39.		Upd	ate	the ap	oplic	able field	s to cor	re	ect the identified e	rrors.			
40.		Clic	k th	e Vali	date	e button.							
		Validate											
i		All li The	ne Su	items bmit k	in a outto	batch mu on is not e	st pass nabled	va ur	alidation before th ntil all lines are va	ne batch Ilidated	can be succes	e submitted f sfully.	or approval.



Step	Action	1									
The Enter	Payrol	I SPC	OT Trans	s page	e refres	hes.					
Enter Payro	II SPOT Trans										
Company Pay Group Pay Period En Transaction T Batch Status	Company DLI Dept of Labor and Industry Pay Group SM1 Semimonthly Class (SATFRI07) Pay Period End 08/09/2024 Transaction Type Earnings Batch Status Validated						Batch Id 276 Created By Submitted By Approved By Modified By				
	Attach Files]				Upload Files	Pro	cess Monitor		
■ Q											
Status	Comments	Seq#	Empl ID		Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt
1 OK	Ð	1		۹	0 Q			Active	BON Q	Non-discretionary Bonus (FLSA)	07/25/2024
2 OK	P	2		٩	0 Q			Active	TMP Q	Temporary Pay	07/25/2024
Save 41.	Verify t	that th	ne Batch	n Stati	us field	update	es to "Valida	ated".			
	Batch S	itatus		Valid	ated						
42.	Verify f	that th Counts ws Valio ws Erro tal Row	d: s:	s Erro	r field is	s blank	indicating t	hat all err	ors hav	e been correc	ted.
43.		ne Su Validat	e		submi Subr	t the ba	atch for revie	ew.			



Step	Action
A Submit	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?
44.	Click the OK button to submit the batch for review.
İ	A batch cannot be edited after it has been submitted.
The Ente	Payroll SPOT Trans page refreshes.
	Enter Payroll SPOT Trans Company DL Dept of Labor and Industry Batch Id 276 Pay Group SM1 Semimonthly Class (SATFRI07) Created By Pay Period End 08/09/2024 Submitted By Totals (only for Valid rows) Transaction Type Earnings Approved By Total Amt : 300.00 Batch Status Submitted Modified By Total Hrs :
	Attach Files Upload Files Process Monitor
	Status Comments Seq# Empl D Empl Red Name Payroll Status Earn Code Description Earns Begin D Earns End Dt 1 0K Impl D 1 0 Impl D Active BON Non-discretionary Bonus (FLSA) 07/25/2024 08/09/2024 2 0K Impl D 1 0 Impl D Active TMP Temporary Payro 07/25/2024 08/09/2024
	Validate Submit Row Counts **Total Hours & Amount are updated on Validation Rows Valid: 2 Rows Error: Rows: 2 Save Return to Search 2
45.	Verify that the Batch Status field updates to "Submitted".
	Batch Status Submitted
46.	Verify that the Submitted By field updates as appropriate with the user's ID.
	Submitted By



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Entering a Deduction Transaction in SPOT

Step	Action
1.	Navigate to the Enter SPOT Transactions page using the following path:
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The Enter SPOT Transactions Find an Existing Value page displays.

← Cardinal Homepage		Enter SPOT Tran	sactions
Enter SPOT Transactions			
Find an Existing Value		٢	(+) Add a New Value
✓ Search Criteria			
Enter any information you have and click	Search. Leave fields blank for a list of all values.		
Recent Searches Choose fro	om recent searches 🗸 🗸	Saved Searches Choose from saved searches	· · //
Company	begins with 🗸		
Pay Group	begins with V		
Pay Period End Date	= v Q		
Transaction Type	= •		
Batch Identity	begins with v		
Batch Status			
Created By			
△ Show fe	ever options		
Case Se	ensitive		
s	Clear		
For more information "Overview of the Care in Job Aids under Le	pertaining to the Cardina dinal HCM Search Pages' earning.	I HCM Search pages, re ". This Job Aid is located	fer to the Job Aid titled I on the Cardinal Website
Click the Add a New	Value tab.		
F			



Step	Action		
The Ac	ld a New Valu	e page displays.	
	Cardinal H	omepage	Enter SPOT Transactions
	Enter SPOT	Transactions	
	Add a New	Value	Q Find an Existing Value
	Batch	Identity NEXT	
	*C4	ompany Q	
	*Pay		
	*Transacti	on Type Earnings V	
	Add		
A	The Batch Id	entity field defaults to "NEXT" and c	annot be edited.
	This number	automatically generates when the S	POT Batch is saved.
3.	Click the Cor	npany Look Up icon and select the	company's 3-digit alpha code.
	*Company	Q	
4.	Click the Pay	Group Look Up icon and select the	applicable pay group.
	*Pay Group		
	r ay oroup	~	
İ	Employees e selected. Wr Group entere	ntered in the SPOT batch must be in ten a batch is validated, an error me d in this field.	the Pay Group entered for the Pay Period ssage displays for employees not in the Pay
5.	Click the Pay	Period End Date Look Up icon and	d select the applicable pay period end date.
	*Pay Perio	End Date Q	
6.	Click the Tra	nsaction Type dropdown button and	I select "Deduction".
	*Transactior	Type Earnings	✓



Step	Action
7.	Click the Add button.
	Add
The En	ter Bayrell SPOT Trans page displays

The Enter Payroll SPOT Trans page displays

Company Pay Group Pay Period End	C S	LI Dept M1 Semi 8/09/2024	of Labor ar monthly Cl	nd Industry lass (SATFRI07)	Batch Id Created Submitt	NEXT By ed By			Totals (only	for Valid rows)				
Transaction Typ	pe C	eduction				Approve	d By			Total Amt					
Batch Status	Ν	ew				Modified	ГВу								
A	ttach Files						Upload F	files	Process Monit	tor					
Eş Q Status	Comments	Senti I	mol ID		Empl Red	Name		Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc	P
1	P	1	- mpr to	Q	0 Q	rame		Fujion Status	Q	Q	Q	Description	Q	Amount	~
Validate	nount are undat	Submit	tion				Row Counts								
**Valid Row and E	rror Row Count	are updated	on Validat	tion			Rows Valid:								
							Total Rows:								
Smin															
The He	ader	sec	tior	п рор	ulate	s witl	h the in	format	ion p	reviou	sly ent	ered on	the A	dd a	Nev
L The He ab.	ader	sec	tior	n pop	ulate	s witl	h the in	format	ion p	reviou	sly ent	ered on	the A	dd a	Ne
The He ab. The Ba Nev Cre Vali Mod Sub In R	ader tch S ated date difiec omitte sed -	sec Statu hen - w d - I aft ed - w - aft	tion us f a r her whe er V	ield u new b n the en the Valid nen th he ap	ulate updat batch batch atior ne ba e app oprov	s with is ini is ini n is s ch is ch is n – w atch is prove	h the in ased or tiated aved validat hen the s subm er is rev as subn	format format ed e batch itted fo riewing nitted t	ion p ction is ch r app the l he ba	taken hanged broval batch f	sly ent on the I after or app payrol	ered on batch a validatic roval I	the A and inc	dd a	Ne
The He ab. The Ba Nev Cre Vali Mod Sub In R Clos Batch	ader tch S ated date difiec omitte sed -	sec itatu hen – w d – I aft ed – w – aft tus	tion us f a r her whe er v wh er t	ield u new b n the en the Valid hen th he ap	ulate updat batch batch atior ne ba e app oprov	s with is ini is ini n is sa ch is ch is n – w atch is prove ver ha	h the in ased or tiated aved validat hen the s subm er is rev as subn	format the ad ed batch itted fo viewing nitted t	ion p ction is ch r app the b	taken hanged broval batch f atch to	sly ent on the I after or app payrol	ered on batch a validatic roval I	the A and inc	dd a	Ne



Step	Action
8.	Click the Comments icon if there are comments for the transaction. If not, skip to Step 12.
The SP	OT Comments page displays in a pop-up window.
	SPOT Comments page × Help Empl ID Empl Record 0 Seq# 1 Comment OK Cancel
9.	Enter comments as applicable in the Comment field.
	Comment
10.	Click the OK button.
	OK Cancel



Step	Action
The En	ter Payroll SPOT Trans page redisplays.
	Enter Payroll SPOT Trans
	Company DL Dept of Labor and Industry Batch Id NEXT Pay Group SMI Semimonithy Class (SATFR07) Created By Pay Pariod End 08002024 Submitted By Totals (only for Valid rows) Transaction Type Deducion Approved By Total Amt : Batch Status New Modified By Total Amt :
	Attach Files Upload Files Process Monitor
	Implication Status Comments Seg# Emp1 ID Emp1 Rcd Name Payroll Status Plan Type Benefit Plan Ded Code Description Ded Class Ded Cole Ra 1 Implication Implication <t< th=""></t<>
	Save
1	The Seq# field auto-populates and is read-only. Seq# 1
11.	Click the Empl ID Look Up icon and select the applicable employee's Employee ID.
	Empl ID Q
1	If an Employee ID is entered and is not valid for the Pay Group previously selected, it will be highlighted in red and an error message will display indicating that the value does not match one of the allowable values.
	Invalid value – press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink associated with field, which is currently focused.
	OK



Step	Action
12.	Click the Empl Rcd Look Up icon and select the applicable Employee Record.
ĺ	This field defaults to "0".
13.	Verify that the correct employee's name displays in the Name field (auto-populates based on the Employee ID selected). Name
14.	Review the Payroll Status field. This field populates based on the Payroll Status from the employee's Job Data. Payroll Status Active
i	A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is "Terminated".
15.	Click the Plan Type Look Up icon and select the applicable Plan Type.
1	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.	Click the Benefit Plan Look Up icon and select the applicable Benefit Plan. Benefit Plan Q



Step	Action
17.	Click the Ded Code Look Up icon and select the applicable Deduction Code. Ded Code Q
i	When the Validate button is clicked, the Deduction Code selected is verified as a valid code for the Benefit Plan selected. An error will occur if this is an invalid combination.
18.	Verify that the Description field auto-populates correctly based on the Deduction Code selected. If it is not accurate, then update the Ded Code field. Description Non-discretionary Bonus (FLSA)
19.	Click the Ded Class Look Up icon and select the appropriate Deduction Classification. Ded Class
1	The following values are available, but only valid values display based on the Deduction Code previously selected: • Before-Tax • After-Tax • Non-Taxable • Tax Ben • Taxable
20.	Click the Ded Calc dropdown button and select the appropriate deduction calculation option. Ded Calc Amount
1	The option of "Amount" is typically selected. The "Percentage" option can be selected when the Deduction Code is "DUEAGY" and a percentage of net pay needs to be entered. Confirm with SPO prior to selecting any other deduction calculation options.



Step	Action						
i	The Rate/Percent field enables when the Deduction Code is "DUEAGY" and the Deduction Calculation is "Percentage". This allows the entry of a percentage of net pay to be collected.						
	Ded Code	Description	Ded Class	Ded Calc	Rate/Percent		
	DUEAGY Q	Due Agency	A Q	Percentage ~			
21.	Click the One Tin	ne Cd dropdown butt	on and sele	ct the appropriate	e code.		
	One Time Cd Addition ~						
i	This field defaults Addition – Addition 	to "Addition". The fo	ollowing opti uction(s)	ons are available	:		
	 Override – Al Refund – Am field if this opt 	ter amount that woul ount due back to the ion is selected	d have beer employee;	n deducted DO NOT enter a	negative value in the Amount		
22.	The Sepchk# fiel regular check for	d defaults to "0" indic the Pay Period being	ating that th processed	e deductions will	be taken from the employee's		
	Sepchk #						
j	For a separate ch separate check ne deductions are ta	eck, the Sepchk# va umber entered on the ken from the correct	alue will be ç e SPOT ear check.	greater than "0" a nings batch. This	nd should correspond with the swill ensure that the		
	An error will occu check is entered	r when the batch is v prior to entering the c	alidated if a correspondir	SPOT deduction	transaction for a separate s transaction.		
23.	To create addition 23.	nal SPOT transaction	is, click the	Add a Row (+) ic	on and then repeat Steps 12-		
	+						
ĺ	Click the Delete a	a Row (-) icon to dele	ete a line (SI	POT transaction)	as needed.		
24.	Click the horizont	al scrollbar to scroll to	o the left as	needed.			



Step	Action
25.	Click the Save button to save the batch so that additional transactions can be entered.
	If the batch is ready to be submitted, go to Step 29.
	Save

The Enter SPOT Trans page redisplays.

	Enter Payroll SPOT Yrans
	Company DL Dept of Lator and Industry Batch Id 277 Pay Group SM1 Semimority Class (SATFR07) Created By Pay Period End 08/09/02/24 Submitted By Totals (only for Valid rows) Transaction Type Deduction Approved By Totals (only for Valid rows) Batch Status Created Modified By Total Amt :
	Status Comments Sequil Empl ICD Empl Rcd Name Payroll Status Plan Type Benefit Plan Ded Code Description Ded Class Ded Calcs Ded Calc Rate/Percent 1 0 0 0 Active 10 Active 0 Cold Cold Calc B Q Amount v Percent
	Validate Submit **Total Hours & Amount are updated on Validation Rows Valid: Rows Valid: Rows Error: Total Rows:
	Save
26.	Verify that the Batch Id field populates with a number. For this scenario "27". Batch Id 277
27.	Verify that the Batch Status field updates to "Created".
	Batch Status Created
i	After a batch is saved, additional items can still be added as necessary.
28.	To submit the batch for approval, click the Validate button. Cardinal will validate all of the individual fields as well as combinations of fields.



Step	Action
The En	ter Payroll SPOT Trans page redisplays and the Batch Status updates to "Validated".
	Enter Payroll SPOT Trans
	Company DL Dept of Labor and Industry Batch Id 277 Pay Group SM1 Semimorithy Class (SATFRIO7) Created By Totals (only for Valid rows) Pay Period End 08/09/2024 Submitted By Totals (only for Valid rows) Transaction Type Deduction Approved By Total Amt : 25.00
	Batch Status Validated 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 Ded Class 1 OK Image: Comments 1 Image: Comments 0 Image: Comments Active 10 Image: Comments CoVACRE CoVACRE B Image: CovACRE
	Validate
	**Total Hours & Amount are updated on Validation **Valid Row and Error Row Count are updated on Validation **Valid Row and Error Row Count are updated on Validation Total Rows: 1
	Save
	The Totals (only for Valid rows) section provides the following summary information for the batch: • Total Amt – the sum of the values entered in the Amount field for the batch Totals (only for Valid rows) Total Amt : 25.00
1	 Rows Valid – the number of valid rows in the batch Rows Error – the number or rows in the batch containing errors Total Rows – the total number of rows in the batch (sum of Rows Valid and Rows Error fields)
	Rows Valid: 1 Rows Error: 1 Total Rows: 1
29.	Verify that the Rows Error field is blank indicating that all rows are valid. If there are no errors, go to Step 38.
	If the Rows Error field populates with a number, this indicates the number of rows with an error. Each error row must be reviewed and corrected as applicable.



Step	Action								
Example of a batch with an error.									
1 DK	s Peview Status Error Msg Con	nments Seq# Empl ID P 1	Empl Q 0	Rcd Name	Payroll Status Active	Plan Type	Benefit Plan	Ded Code CVACRE Q	
2 Fror	9	۶ 2	٩ 0	٩	Active	00 Q	٩	ASSOC1 Q	
**Total Hours **Valid Row Save	tate	tion	Row Cou Rows Rows Total F	nts Valid: 1 Error: 1 I tows: 2					
	The Status field	updates with or	ne of the fo	ollowing value	es:				
	• OK – no erro	rs							
	• Error – issue	with the line							
	The Status field populates in the	populates with Error Msg field	"Error" for for all line	all lines conta es containing a	aining an error an error.	and a	Bubble id	con	
30.	Click the Bubble	icon in the Err	or Msg fie	ld to view the	error messag	e.			
	9								
The SP	OT Review Notes	s page displays	in a pop-	up window.					
			SPOT Revi	ew Notes page	>	:			
					Hel	р			
		Empl ID							
		Empl Record	0						
		Seq#	2 Deduction Cla	ss not selected :					
		Notes	Deddelon old	so not science ,					
		ОКСа	ancel		&				
						:			



Step	Action										
31.	Review the Notes field to determine the error.										
	Notes Deduction Class not selected ;										
32.	Click the OK button.										
The En	ter Payroll SPOT Trans page redisplays.										
33.	Update the applicable fields to correct the identified errors.										
34.	Click the Validate button. Validate										
i	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.										



Step	Action							
The Enter Payroll SPOT Trans page refreshes.								
	Net Hoode 1 fee Enter Payroll SPOT Trans Company DL Dept of Labor and Industry Batch Id 2/7 Pay Group SM1 Semimorthy Class (SATFRIO7) Created By Pay Period End 080/9/2024 Submitted By Totals (only for Valid rows) Transaction Type Deduction Approved By Totals (only for Valid rows) Tetal Amt : 25:00							
	Attach Files							
	1 Q 1 Q Active 10 Q CVACRE Q CVACRE Q CVACRE Q CVACRE Q Q Q Active 00 Q Accide B Q Q Q Q Accide Q Accide Q Q Q Q Accide Q <td< th=""></td<>							
35.	Verify that the Batch Status field updates to "Validated". Batch Status Validated							
36.	Verify that the Rows Error field is blank indicating that all errors have been corrected. Row Counts Rows Valid: 2 Rows Error: Total Rows: 2							
37.	 Click the Submit button to submit the batch for review. Validate Submit 							
A Subr	nit 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							



Step	Acti	on												
. 38.	Click	k the OK	C butto	n.										
		OK	Can	cel										
e En	nter Pa	ayroll S	РОТ Т	rans	page i	efrest	hes.							,
(Enter Payroll SPOT Trans Company DLI Dept of Labor and Industry Batcl Pay Group SM1 Semimonthly Class (SATFRI07) Creat Pay Period End 08/09/2024 Sub Transaction Type Deduction Appi Batch Status Submitted Mod Mod Mod Submitted Mod			Batch Id Created B Submitted Approved Modified B	277 By Totals (only for Valid rows) Ay Total Amt : 25.00									
	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	Ded Class
	1 OK		Þ	1		C)		Active	10	ACC4	CVACRE	CoVA Care	в
	2 0K 2 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: Total Rows: 2								
9.	Save Verit	fy that th	ne Bato	ch St	atus fi	eld up	dates to "Su	ıbm	itted".					
0.	Verit	fy that th	ne Sub y	mitte	ed By f	ield u	pdates as ar	opro	opriate w	ith tl	ne use	r's ID.		



PY381_Using the Single-Use Payroll Online Tool (SPOT)

Using the 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 100 lines. If more than 100 lines need to be uploaded, separate them and upload it as a separate batch.

Step	Action							
1.	From the internet browser, enter <u>cardinalproject.virginia.gov</u> .							
	V 🄌 Home Cardinal X +							
	← → C 😋 cardinalproject.virginia.gov							
The Car	dinal Project website displays.							
W	Cardinal Project An official website of the Commonwealth of Virginia Here's hew you know >							
	W-2S NOW ÁVAILABLE IN CARDINAL <u>LEARN MORE</u> ×							
	Q Search our Site							
	Welcome to Cardinal. How Can We Help You? Core User Locality User Employee Self-Service User							
	Li Meetlennd							
2.	Click the Resources option.							
	RESOURCES							



Step	Action						
The Res	The Resources menu options display.						
	IONS RESOURCES LEARNING Resources Overview Forms Security Reports Catalog Agency Interface Layouts HCM Update Templates						
3.	Click HCM Update Templates list item.						
	HCM Update Templates						
4.	Select the SPOT Template to be used (SPOT Earnings Template in this scenario).						
	SPOT Deductions Template						
	SPOT Earnings Template						
The sele	ected template downloads.						
	Ct Port SPOT Earnings Template.xlsx 87.4 KB • Done						
5.	Click the downloaded template to open the file.						
	SPOT Earnings Template.xlsx 87.4 KB • Done						


Step	Actio	n													
The Template opens with the Instructions tab displayed by default.															
	AutoSave (· C ^I · · ▼ SPOT Earning	gs Template.xlsx • Saved to th	iis PC → 🛛 🔎	Search						(wa –	o ×	
	File Home	Calibri	Layout Formulas Dat	ta Review View Au E = = = ≫ - ‡ E = = = = = ■	itomate Help Wrap Text	General	v Conditio	nal Format as	Cell Insert Del	kete Format	Ž Z P	Analyze Se	ensitivity Add-i	ns	
	Clipboard IS	$[\vdots [\times \checkmark f_{x}]$	Font 15	Alignment	merge & center	iş Numb	r r	ng * Table * S Styles	Styles Y Y Y	r v 🔗	 Filter Y Select Editing 	Y Data Analysis S	Sensitivity Add-ir	s ^	
	1 Rev: 4/11/20 2 INSTRUCTION	A 23 NS FOR ENTERING	S AND SAVING THE EARNII	B NGS TEMPLATE	с		D E F	- G	н і	I	κL	MP	N O	Î	
	4 Column Code 5 EMPLID	ollowing fields on	the Earnings Template Tab Column Employ	Name Spe ee ID 11	cial Data Entry Cor digit employee ID	siderations									
	6 EMPL_RCD 7 ERNCD		Employ Earning	ee Record Number s Code Val Dat	id 3 char earnings o e Format: MMDDY	ode YYY									
	EARNS_BEGIN	_DT	Earning	s Begin Date Usu Dat	ally the FLSA Perio e e Format: MMDDY	d Begin YYY									
	9 CHARD_CHD_C		Hours	For Neg	ally the FLSA Peric mat: HH.00 gatives are allowed	d End Date									
	12 HOURLY_RATE		Farning	Rate For For Neg	mat XXXX.XX (no s mat: XXXX.XX (no s gatives are allowed o Amount is require	ymbols) symbols)									
	15		0	the the D'-	column blank. Do O (zero) character. Take Benefit Dedu	not enter								_	
	DED_TAKEN		Benefit	Deductions Taken Dec Dec	n't take any Benefit luctions, 'S' - Take luctions	a Subset of									
	DED TAKEN G	ENI structions SP(General OT Earnings Template	Deduction Subset	Take General Dedi n't take any Genera	ictions, 'N' - I		: 4						·	
			_												
6.	Revie	w the	Instructi	ons tab.											
	KEN G	ENI tructio	ons SP	OT Farnin	as Ter	nplate	her								
					. <u>9</u>										
7.	Click t	he SF	OT Earn	ings Ter	nplate	e tab.									
	KEN G	FNI		OT [T	Ge	er:								
	Ins	tructio	ons SP	OT Earnin	igs rer	npiate									
The SP	OT Ear	ninas	Templat	e tab dis	plays										
File Hom	insert Page Layo	ut Formulas	Data Review View Au	itomate Help				_						Comments	හි Share ~
Paste S Fo	t Calibri py ~ B I rmat Painter	 ⊻ ⊞ ⊘		> 22 Wrap Text Ξ ΞΞ Ξ Merge & Center	General	• ← 0 ← 00 Con Forr	nditional Format as natting ~ Table ~	mal Bar Id Ne	d v eutral v	nsert Delete Forma	t ∑ AutoSum	× Z∇ Sort & Find & Filter × Select ×	Analyze Sensi Data	tivity Add-ins	
G17	$[X \land f_x]$	Font	6	Alignment	Tsi Numb	er G	1	Styles	1 .	Cells	E	iting	Analysis Sensi	tivity Add-ins	~
A	В	C	D	E	F	6	н			ĸ	L	м	N	0	Addl Seq t Enter the sequence
							Hours - Enter Hours in HH.00	Hourly Rate - Enter houlry	Earnings Amount - Enter amount, no	Take Benefit Deductions? D -	Enter Subset ID	Take General Deductions? D -	Enter Subset ID	Sep Chk - If payment is	number fr the addition pay record relation to
Employee I	Empl Rcd Enter Employee Record that	Earning Code -	Earnings Begin Date - Usually FLSA Period Begin Date	Earnings End Date - Usually FLSA Period Begin	Tax Periods -	Tax Method -	format Example: 10 hrs and 30 minutes would be	rate in format 99.99 if different from	dollar sign Example: \$100 would be 100.00 or 100. possitivor	Deductions Taken, N - No Deductions	for Benefit Deductions if Benefit Deductions	Deductions Taken, N - No Deductions	for General Deductions if General	with regular check put 0, if or a separate check_ctart with	this entry. this is not related to Addl Pay
1 Employee I 2 3	this payment	Earning Code	(Format - MMDDYYYY)	(Format - MMDDYYYY)	Default to 1	(Annualized)	allowed	rate	allowed	Subset	Taken = S	Subset	Taken = S	1	leave blar
4 5 6 7															
8 9 10															
12 13 14															
15															



Step	Action
8.	Enter the transactions starting in Row 2 on the template following the instructions listed on the Instructions tab until all transactions for the batch have been entered.
	File Manne Inset Page Laynet Formulas Dulas Review View Automate Help Constrained Page Laynet Comments @Same Image Logical
	Employee ID Record Have Earnings Begin Date- Earnings End Date-
	Itemplayee ID this payment Taken = 5 Subset Taken = 5 Subset Taken = 5 Item = 5
9.	Use the mouse or track pad to right click in the cell labeled "1" to select the entire Header row.
	A B C D E F G H J K L M N O P A B C D E F G H J K L M N O P A B C D E F G H J K L M N O P A B C D E F G H J K L M N O P A B C D E F G H H J K L M N O P Addisp Addisp F <td< th=""></td<>
10.	Click the Delete icon and select the Delete Sheet Rows menu item to delete the entire Header row.
	AutoSave or Soft Examples 20000004.stor - Saved > Pate tormals Data Review View Automate Help Pate Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Help Pate Soft Comptone Insert Page Layout Formulas Data Review View Automate Review Insert Page Page Page Comptone Insert Page Page Page Page Page Page Page Page
	Enter Valid Corresponds to Enter Valid Date End Tax Pendods- Default to A 10.50, negatives Taken, S-Use Deductions Taken, S-Use Deductions 1 Employees It is anyoneet Earning Code (Format - MMDDYYY) (Format - MMDDYYY) Default to A 10.50, negatives rate allowed Subset Taken = 5 Subset Taken = 5 2 0133207400 0
	4 00017780000 0 LNP 07252024 00092024 1 A 5 23.1 D D 5 0017057900 0 BON 07252024 00092024 1 A 5 23.1 D D D 6 00129376600 0 TMP 0724024 1 A 1 A 250 D D D



Payroll Job Aid

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Step	Action							
11.	Click the File button on the Excel Ribbon at the top of the page.							
	🗴 AutoSave 💽 Off 🖟 🏷 ~	େ ୍ ⇒ SPOT Ea	irnings Temp	late_08092024.xlsx • Saved ∨			♀ Search	
	File <u>Home</u> Insert Page Lay	out Formulas [Data Rev	iew View Automate Hel	lp			
	Paste Cut Paste Copy ~ B I		~ <u>A</u> ~	v\$\$ ~ € Ξ Ξ = ■	Wrap Text Merge & Center) ~	Number \$ ~ % 9	v 00. 0.→ 0 00.	Conditio
	Clipboard	Font	آيا ا	Alignment		Numbe	r Is	- official and a second s
	$\boxed{ D30 \qquad \checkmark} : \boxed{\times \checkmark f_x}$							
	▲ A B	C BON	07252024	D	E	F 1	G	
1	2	0 ALP	07252024	08092024		1	A	
	4	0 BON	07252024	08092024		1	S	
	6		07102024	07242024		1	Α	
The Exc	cel File options page dis	plays.					1	
		SP(
		e		Good morning				
		🛈 Hom		✓ New				
		🕒 New		A B C				
		Dpen		2 3 4				
		🔠 Get A	dd-ins	6 7				
		Info		Blank workbook				



𝒫 Search

Recommended for '

Save

Save As

Print Share Export



Step	Action							
13.	Select a destination using the Save Destination dropdown menu.							
14.	Enter a unique name for the file in the File Name field. File name: SPOT Earnings Template.xlsx							
15.	Click the Save as type dropdown menu and select the "CSV (Comma Delimited) option.							



Step	Action
16.	Click the Save button.
	Save as type: CSV (Comma delimited) (*.csv) Authors: Perez, Barb - DOA Tags: Add a tag Title:
	Hide Folders Tools Tools Cancel
A Micro	soft Excel Warning Message displays.
	Microsoft Excel
	The selected file type does not support workbooks that contain multiple sheets. • To save only the active sheet, click OK. • To save all sheets, save them individually using a different file name for each, or choose a file type that supports multiple sheets. OK Cancel
17.	Click the OK button.
	OK Cancel
A secon	d Microsoft Excel Warning Message displays.
	Microsoft Excel SPOT Earnings 042418 version 1.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? To keep this format, which leaves out any incompatible features, dick Yes. To preserve the features, dick No. Then save a copy in the latest Excel format. To see what might be lost, dick Help. Yes No Help
18.	Click the No button.
	Yes No Help
i	The file is now saved and ready to be uploaded.
19.	Navigate to the Enter SPOT Transactions page using the following path:
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Step	Action
The Ent	er SPOT Transactions Find an Existing Value page displays.
	← Cardinal Homepage Enter SPOT Transactions
	Enter SPOT Transactions
	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
	Company begins with v Q
	Pay Group begins with V Q
	Pay Period End Date = V Q
	Batch Status =
	Created By begins with v Q
	∽ Show fewer options
	Case Sensitive
1	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 .
20.	Click the Add a New Value tab.
	⊕Add a New Value



Step	Action							
The Ad	The Add a New Value page displays.							
	Enter SPOT Transactions							
	Enter SPOT Transactions							
	Add a New Value Q Find an Existing Value							
	Batch Identity NEXT "Company Q "Pay Group Q "Pay Period End Date Q "Transaction Type Earnings							
A	The Batch Identity field defaults to "NEXT" and cannot be edited.							
	number automatically generates when the SPOT Batch is saved.							
21.	Click the Company Look Up icon and select the company's 3-digit alpha code.							
	*Company Q							
22.	Click the Pay Group Look Up icon and select the applicable pay group.							
	*Pay Group Q							
i	Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When a batch is validated, an error message displays for employees not in the Pay Group entered in this field.							
23.	Click the Pay Period End Date Look Up icon and select the applicable pay period end date.							
	*Pay Period End Date Q							
24.	Click the Transaction Type dropdown button and select the appropriate option ("Earnings" or "Deduction").							
	*Transaction Type Earnings							



Step	Action
25.	Click the Add button.
The Ent	er SPOT Trans page displays.
	Enter Payroll SPOT Trans Company DLl Degt of Labor and Industry Batch 1d NEXT Pay Group SMI Semimorthly Class (SATFRIO7) Created By V_TRN_PY38101 Pay Period End 0600/2024 Submitted By Total (only for Valid rows) Transaction Type Earnings Approved By Total Amnt : Batch Status New Modified By Total Hins :
	Status Comments Segle Empl ID Empl Red Name Payroll Status Earn Code Description Earns End Dt Parinda Tot Method 1 Image: Comments 1 Image: Comments Imag
i	The Header section populates with the information previously entered on the Add a New Value tab.
i	 The Batch Status field updates based on the action taken on the batch and includes: 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 Status New
26.	Click the Attach Files button.
	Attach Files



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Step	Action						
The SPOT Attachments page displays in a pop-up window.							
	SPOT Attachments page ×						
Company Pay Grou Pay Peri- Transac Batch St	Ny DLI Dept of Labor and Industry Batch Id NEXT up SM1 Semimonthly Class (SATFRI07) Created By iod End 08/09/2024 Submitted By titon Type Eamings Approved By titatas Next Modified By)					
	Attached File Description Add Process Instance						
	Cancel	4					
27.	Click the Add button.						
The File	e Attachment page opens in a pop-up window.						
	File Attachment Choose File No file chosen Upload Cancel						
28.	Click the Choose File button.						
i	Depending on the browser used, a Browse button may appear in place of the Choose File button.						



Step	Action								
The Op	en files page	displays in a pop-u	p window.						
	Open X								
÷	\rightarrow \checkmark \uparrow	« Desktop > PPS > PY381 Age	ncy Payroll Mgmt >	SPOT	∨ C s	earch SPOT 🔎			
Or	Organize - New folder								
>	📤 Angela - Comm	Name		Status	Date modified	Type Si			
	i	SPOT Earnings Template_080	092024.csv	\odot	8/12/2024 11:02 AM	Microsoft Excel Comma			
	📑 Documents 🖈	SPOT Earnings Template_080	092024.xlsx	\odot	8/12/2024 10:57 AM	Microsoft Excel Workshe			
	🛓 Downloads 🖈								
	Pictures 🖈								
	Videos 🖈								
	File nam	e:			A	Open Cancel			
						t			
29.	Navigate to	and select the appl	icable file.						
	M1_0809202	24.csv	3	2/3/2025 8:56 AM	Microsoft Excel Co	2 KB			
	Be sure to s	elect the .csv file.							
30.	Click the Op	en button.							
	Open	Cancel							



Step	Action		
The File	Attachment page	ge refreshes with the selected file displayed next to the to Choose File butto	n.
		File Attachment × Choose File SM1_08092024.csv Upload Cancel	
31.	Click the Upload	d button. Cancel	
		SPOT Attachments page	x
Compan Pay Gro Pay Per Transac Batch S File/Doc E I SM ¹ OK	y DLI Dept of La up SM1 Semimon iod End 08/09/2024 attion Type Earnings itatus New ument Attachments ⑦ Q Attached File Desc 1_08092024.csv	f Labor and Industry Batch Id NEXT nonthly Class (SATFRI07) Created By Submitted By Approved By Modified By View Delete Process Instance View Delete • • • •	Help
i	The file is now co	connected to the batch but the individual transactions are not uploaded.	



Step	Action						
32.	Enter a description in the Description field as needed. Description						
i	A description is not required.						
33.	Click the Process checkbox. Process						
34.	Click the OK button.						
The Ent	er Payrol SPOT Trans page redisplays.						
35.	Click the Upload Files button.						



Step	Action								
A Succ	essful Upload message displays in a pop-up window.								
	V_PY100_UPLD - AE has been processed successfully. (21001,10)								
1	 If the file does not successfully load, verify the following: All mandatory fields were properly filled out in the template The fields were entered using the correct format per the instructions The file was saved in the .csv format Fix any issues with the file and repeat Steps 27-36. 								
36.	Click the OK button.								
The Ent	er Payroll SPOT Trans page redisplays with the uploaded file data loaded on the page.								
37.	Verify that the Batch Id field populates with a number. For this scenario "276".								
	Batch Id 278								



Step	Action									
38.	Verify that the Batch Status field updates to "Created".									
	Batch Status Created									
39.	Verify that the required fields populated correctly and update if required.									
40.	Click the Validate button.									
	Validate Submit									
i	Edits that occur when keying the batch online are applied when the Validate button is clicked for the uploaded template.									
The Ent	er Payroll SPOT Trans page refreshes.									
	Enter Payroll SPOT Trans									
	Company DLI Dept of Labor and Industry Batch Id 278 Pay Group SM1 Semimonthy Class (SATERIO7) Created By Pay Period End 08/09/2024 Submitted By									
	Transaction Type Earnings Approved By Total Amt : 2825.00 Brack Stature Modified Bu Total Hrs : 5.00									

						r		Process Monitor			
		Attach Files				L	Upload Files	1 TOCESS MONITOR			
5	Q										
	Status	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1	ок		P	1	٩	0 Q		Active	BON Q	Non-discretionary Bonus (FLSA)	07/25/2024 🗰
2	ок		ø	2	٩	0 Q		Terminated	ALP Q	Annual Leave Payout	07/25/2024
3	ок		ø	3	٩	0 Q		Active	LNP Q	Insufficient Leave	07/25/2024
4	ок		¢	4	٩	0 Q		Active	BON Q	Non-discretionary Bonus (FLSA)	07/25/2024
5	ок		ø	6	٩	0 Q		Active	TMP Q	Temporary Pay	07/10/2024
	Validate		Submit			R	ow Counts				
"Tota "Vali	al Hours & id Row and	Amount are updated	d on Validation ire updated on V	/alidation			Rows Valid: Rows Error:	5			
							Total Rows:	5			

41. The **Batch Status** field updates to "Validated".

The **Totals (only for Valid rows)** section provides the following summary information for the batch:

- Total Amt the sum of the values entered in the Amount field for the batch
- Total Hrs the sum of the values entered in the Oth Hrs field for the batch

i



Step	Action
	The Row Counts section provides the following summary information for the batch:
	 Rows Valid – the number of valid rows in the batch Rows Error – the number or rows in the batch containing errors Total Rows – the total number of rows in the batch (sum of Rows Valid and Rows Error fields)
42.	Verify that the Rows Error field is blank indicating that all rows are valid. If there are no errors, go to Step 50.
	If the Rows Error field populates with a number, this indicates the number of rows with an error. Each error row must be reviewed and corrected as applicable.

Example of a batch that contains an error.

	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descri
1 OK			ø	1	٩	0 Q		Active	TMP Q	Tempo
2 OK			ø	2	٩	0 Q		Active	BON Q	Non-dis (FLSA)
з ок			ø	3	۹ ۹	0 Q		Active	RGS Q	Regula
4 Error		9	ø	4	Q	0 Q		Terminated	ALP Q	Annual
The	Status	iold up	dataa y							
The	Status	ieia up	uales v	vitri O		owing va	liues.			
•	OK – no	errors								
•	Error – is	ssue w	ith the	line						
		us field	nopul	ates v	with "Error" fo	or all line	s containing an	error and a	Bubble	icon

error, and a bubble populates in the Error Msg field for all lines containing an error.



Step	Action				
The SP	OT Review Note	s page display	s in a pop-up window.		
			SPOT Review Notes page	×	
				Help	
		Empl ID Empl Record	0		
		Seq# Notes	4 Amount cannot be zero for Ern_Cd- ALP;		
		οκ	Cancel		
45.	Review the Not	es field to dete	rmine the error.		
	Notes	Amount car	nnot be zero for Ern_Cd- ALP;	1	
46.	Click the OK bu	itton.			
	ОК	Cancel			



Step	Acti	ion									
The Pay	ne Payroll SPOT Trans page redisplays.										
		Attach Files					Upioa		monitor		
E	酉 Q										
	Status	Review Status	Error Msg	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Descri
	1 OK			<i>(</i>)	1	٩	<u>0</u> Q		Active	TMP Q	Tempo
:	2 OK			P	2	Q	0 Q		Active	BON Q	Non-dis (FLSA)
:	з ОК			ø	3	٩	0 Q		Active	RGS Q	Regula
	4 Error		₽	Ģ	4	٩	0 Q		Terminated	ALP Q	Annual
**Tot **Va	Validate Submit Row Counts **Total Hours & Amount are updated on Validation Rows Valid: 3 **Valid Row and Error Row Count are updated on Validation Rows Error: 1 Total Rows: 4										
47.	Mak	the cor	rectior	ו as ap	plicab	le.					
48.	Clic	k the Val	idate t	outton.							
		Validat	e		S	Submit					



. .	
Step	Action

	•										
Tł	ne Ent	ter	SPOT Tra	ans pag	e redi	splays and th	e Batch	Status updates to	"Validated	d".	
	Enter I	Payro	II SPOT Trans								
	Company DLI Dept of Labor and Industry Pay Group SM1 Semimonthly Class (SATERI07) Pay Period End 08/09/2024 Transaction Type Earnings							278 Vy	Totals (only	for Valid rows)	
	Batch St	tatus	ype Eal	lidated			Modified By			Total Amt : Total Hrs :	2825.00 5.00
			Attach Files					Upload Files	Process Monitor		
		٦									
	Stat	tus	Review Status	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
	1 OK			Þ	1	٩	0 Q		Active	BON Q	Non-discretionary Bonu (FLSA)
	2 OK			Þ	2	٩	0 Q		Terminated	ALP Q	Annual Leave Payout
	3 OK			©	3	٩	0 Q		Active	LNP Q	Insufficient Leave
	4 OK			(2)	4	Q	0 Q		Active	BON Q	(FLSA)
	5 OK			P	5	Q	υQ		Active	IMP Q	Temporary Pay
	Va **Total Hou **Valid Rou Save	alidate ours & / w and	Amount are updated	Submit d on Validation re updated on V	alidation		R	ow Counts Rows Valid: 5 Rows Error: Total Rows: 5			
	i	A S	ll line item ubmit but	ns in a b tton is n	atch r ot ena	nust pass vali Ibled until all I	dation b ines are	efore the batch car validated success	n be submi fully.	itted for a	approval. The
	49. Verify that the Batch Status field updates to "Validated". Batch Status Validated										
	50.		erify that t Row Count Rows Va Rows Er Total Ro	the Row	/s Err	or field is blar	nk indica	ting that all errors l	nave been	correcte	ed.



Step	Action													
51.	Click the	Submi	t butto	n to	submit	t the	batch	n for re	view.					
	Va	ilidate			Subm	nit								
A Subm	ubmit 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?													
52.	Click the	Click the OK button.												
	OK	OK												
The Ent	er Payroll	SPOT	Trans	; paç	ge refre	eshe	s.							
	Enter Payroll SPOT Trans Company DLI Dept of Labor and Industry Bate Pay Group SM1 Semimonthly Class (SATFRI07) Cree Pay Period End 08/09/2024 Sull Transaction Type Earnings App Batch Status Submitted Mode Mode Attach Files Company Company						278 By y Uplo	ad Files	Process M	Totals (or Total An Total Hr Total Hr	nly for Vali nt : s :	d rows) 2825.00 5.00		
	III Q Status	Review Status	Comments	Sea#	Empl ID	Em	pl Name			Payroll Status	Earn	Description	Earns Begin Dt	-
	1 OK 2 OK 3 OK		P P P		1 2 3		0 0 0			Active Terminated Active	BON ALP LNP	Non-discretionary Bonus (FLSA) Annual Leave Payout Insufficient Leave	07/25/2024 07/25/2024 07/25/2024	a a
	4 OK 5 OK		P		5		0			Active	BON	(FLSA) Temporary Pay	07/25/2024 07/10/2024	c - c
	Validate **Total Hours & Am **Valid Row and En	ount are updated on ror Row Count are up	wiit Validation Validation pdated on Validatio	on		, , ,	Row Counts Rows Valid Rows Error Total Rows	:	5					
53.	Verify that	at the B	atch S	statu	is field	upd	ates t	o "Sub	mitteo	d".				
	Batch St	latus		ę	Submitte	d								



Step	Action
54.	Verify that the Submitted By field updates as appropriate with the user's ID.
	Submitted By



Deleting a SPOT Batch

Payroll Administrators can delete SPOT batches that have not been closed. When a batch is deleted, all transactions within the batch are deleted and will not process. Once a batch is deleted, it cannot be undone.

Utilize the **Delete a Row** icon (-) to delete specific transactions within a batch.

Step	Action								
1.	Navigate to the Delete SPOT Transactions page using the following path:								
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Delete SPOT Transactions								
The Dele t	e SPOT Transactions Find an Existing Value page displays.								
	Cardinal Homepage Delete SPOT Transactions								
	Delete SPOT Transactions								
	Find an Existing Value								
	 ✓ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 								
	Precent Searches Choose from recent searches								
	Batch Identity begins with v								
	Company begins with V Q								
	Pay Group begins with V Q								
	Pay Period End Date = V Q								
	Transaction Type = v								
	Show fewer options Search Clear								
j	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 .								
2.	Enter the SPOT Batch Number in the Batch Identity field.								
	Batch Identity begins with V								
3.	Click the Company Look Up icon and select the company's 3-digit alpha code.								
	*Company Q								



Step	Action												
4.	Click the Search button.												
	Search Clear												
The Dele t	e SPOT Trans page displays for the applicabl	e batch.											
	Delete Payroll SPOT Trans												
	Company DLI Dept of Labor and Industry Batch Id 270 Pay Group SM1 Semimonthly Class (SATFRI07) Created By 1 Pay Period End 07/24/2024 Submitted By 1 Transaction Type Earnings Approved By Batch Status Created 1		Tot Ti	als (only for Valid rows) otal Amt : otal Hrs :									
	View Supporting Documents												
	Status Comments Seq# Empl ID Red Name 1 Image: Comments 1 Image: Comments 0	Active	Earn Code BON	Non-discretionary Bonus	07/10/2023								
	2 0	Terminated	AGY	(FLSA) Misc Agency Specific Pay	07/10/2023								
	3 🗇 3 0	Active	LNP	Insufficient Leave	07/10/2023								
	4 🐵 4 0	Active	BON	Non-discretionary Bonus (FLSA)	07/10/2023								
5.	Delete Batch Return to Search Click the Delete Batch button.												
The Dele t	e Batch confirmation message displays in a p	op-up windo	w.										
2	Are you sure you want to delete the Batch? (25200,38) Once Batch is deleted it can not be opened or edited aga	ain. Are you sur Cancel	e you wa	ant to Delete th	ne batch?								
6.	Click the OK button to delete the batch.												



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Step	Action
The Delet Company	e SPOT Transactions Find an Existing Value page redisplays with the Batch Identity and fields populated with the deleted values.
	Delete SPOT Transactions Enter any information you have and click Search. Leave fields blank for a list of all values.
	▼ Search Criteria
	Batch Identity begins with 🗸 270
	Company begins with V DLI Q
	Pay Group begins with 🗸 🔍
	Pay Period End Date = • Q
	Transaction Type = 🗸
	Limit the number of results to (up to 300): 300
	Search Clear Basic Search 🖾 Save Search Criteria
	The Batch is deleted and cannot be reopened or edited.
1	Deleted SPOT Transactions can be viewed on the SPOT Online Query . For details on the SPOT Online Query (V_PY_SPOT_TRANS_RPT), see the Cardinal HCM Payroll Reports Catalog located on the Cardinal website under Resources .
	If a transaction in a deleted batch needs to be processed, it will need to be entered in a new batch.



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.



Step	Action
1.	Navigate to the Enter SPOT Transactions page using the following path:
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Review SPOT Transactions

The Review SPOT Transactions Find an Existing Value page displays.

Enter any information you have and	d click Search. Leave fields blank for a list of all values.
Batch Ident	dity begins with V
Compa	Iny begins with V Q
Pay Gro	up begins with v Q
Pay Period End Da	ate = V Q
Transaction Ty	npe = v
Batch Stat	tus = 🗸
∧ Sh	ow fewer options
	Search Clear



Step	Action								
i	Enter includ	the applicable/known se e the following:	arch criteria to find the appropriate batch. The search options						
		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: Earnings Deduction						
		Batch Status	Options include: Closed Created Deleted In Review Modified After Validation New Submitted Validated						
i	Enteri Leavir criteria	ng a specific Batch Ider ng the Batch Identity fie a.	itity number opens only that specific batch. Id blank brings in all batches that meet the remaining search						
2.	Click t	he Company Look Up i	con and select the company's 3-digit alpha code.						
	*Con	npany Q							
3.	Click t	he Pay Group Look Up	icon and select the applicable pay group.						
	*Pay	Group Q							
4.	Click t	he Pay Period End Dat	e Calendar icon and select the applicable pay period end date.						
	*Pay	Period End Date	Q						



Payroll Job Aid

PY381_Using the Single-Use Payroll Online Tool (SPOT)

Step	Action
5.	Click the Batch Status dropdown button and select "Submitted".
	Batch Status = V
6.	Click the Search button.
	Search Clear
i	If only one batch meets the search criteria, the Review SPOT Trans page displays.
The Re	eview Payroll SPOT Trans page displays for the selected batch.
	Review Payroll SPOT Trans
	Company DLI Dept of Labor and Industry Batch Id 274

Company Pay Group Pay Period End Transaction Type Batch Status		Dept of 1 Semim 09/2024 nings mitted	f Labor and	Industry s (SATFRI07)	Batch Id 274 Created By Submitted By Approved By			Totals (only for Valid rows) Total Amt : 2825.00 Total Hrs : 5.00			
View Supporting Do	cuments)				Send B	ack Close Batch	Process Monitor				
Approve Der	y com	ments	Sed#		Rcd	Name	Payron status	Earn Code	Description	Eams Begin Dt	
1 🗆 🔹		P		5	(Active	TMP	Temporary Pay	07/10/2024	
2 🗆 🔹		P		4	(Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024	
3 🛛 🗠		P	:	3	(Active	LNP	Insufficient Leave	07/25/2024	
		P	:	2	(Terminated	ALP	Annual Leave Payout	07/25/2024	
4 0 0							Active	BON	Non-discretionary Bonus	07/25/2024	

- 7. Review each of the entries in the batch.
- 8. Take the appropriate action for each entry using one of the following options:
 - Approve: Click the Approve checkbox option next to individual transactions to approve them
 Deny: Click the Deny checkbox option next to individual transactions to deny them. When denying an individual transaction, enter a comment to note why for tracking and audit
 - **Send Back**: To send back an individual transaction, leave the **Approve** and **Deny** checkbox options unchecked



Step	Action
i	SPOT Approvers cannot edit SPOT transactions.
9.	To add a comment, click the Comments icon for the specific transaction.
1	Cardinal does not require a comment, but comments are strongly recommended for audit purposes.
The SF	OT Comments page displays in a pop-up window.
	SPOT Comments page ×
	Empl ID Empl Record 0 Seg# 5 Comment
10.	Enter the applicable comment for the transaction in the Comment field.
	Comment
11.	Click the OK button.



Company DLI Dept of Labor and Industry Pay Group SM1 Semimonthly Class (SATFRI07) Pay Period End 08/09/2024 Transaction Type Earnings					Batch Id 274 Created By Submitted By Approved By Total Amt : 2825.00 Total Hrs : 5.00						65 05 06 06 06 06		
	View Suppor	ting Docume	ents			Send Ba	ick (Close Batch	Process Monitor				
	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt	
1	1 🗹	0	P		5	0			Active	TMP	Temporary Pay	07/10/2024	
2	2 🗹	D	ø		4	0			Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024	
3	3 🔽	D	ø		3	0			Active	LNP	Insufficient Leave	07/25/2024	
4	4 🗆		ø		2	0			Terminated	ALP	Annual Leave Payout	07/25/2024	
5	5 🗹	0	ø		1	0			Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024	
	Approve All		Deny All										
Sa	ve Retu	rn to Search	Previous in	n List	Next in List								



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 covers the process to close a SPOT batch.

Company		15									
Pay Group Pay Period I	End	DLI Dept SM1 Semii 08/09/2024	of Labor and In	idustry (SATFRI07)		Batch Id 2 Created By Submitted By	74		Totals	(only for Valid rows)	
Batch Status	n Type s	Larnings In Review				Approved By			Total	Amt: 2825.00 Hrs: 5.00	
View Supp	porting Docum	ents			Send Ba	ck Close	Batch	Process Monitor			
■ Q					F 1						
Approve	Deny	Comments	Seq#	Empl ID	Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt
1 🗹	D	P	5		0			Active	TMP	Temporary Pay	07/10/2024
2 🗹	٥	۵	4		0			Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024
3 🗹	0	ø	3		0			Active	LNP	Insufficient Leave	07/25/2024
4		P	2		0			Terminated	ALP	Annual Leave Payout	07/25/2024
5 🗹		P	1		0			Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024
Save	eturn to Search		n List Ne	ext in List	he hete				oniod		
. v					ne baic	n nave bee	en appro	oved or d	eniea.		
	lose th	ne Clos	e Bato	h buttor	า.						
. C		Send Ba	ck		Close I	Batch	Proces	ss Monitor			
. c											

OK

Cancel



Step	Action
i	If a user tries to close a batch and all the transactions have not been approved or denied, a message displays indicating that "Some transactions are neither accepted nor denied. All transactions must be reviewed and can be accepted or denied". The user will have to click the OK button on this message then go back and approve or deny any transaction that may have been missed.
3.	Click the OK button.
	OK Cancel
i	A batch cannot be edited after it has been closed.

The **Review SPOT Trans page** refreshes.

Pay Group Pay Period End Transaction Type Batch Status		SM1 Semi 08/09/2024 Earnings Closed	monthly Clas	s (SATFRI07)		Created By Submitted By Approved By		Totals (only for Valid rows)Total Amt :2825.00Total Hrs :5.00			
View Support	rting Docum	ents			Send Ba	Close Batch	Process Monitor	Instance	3418948		
в Q											
Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	
1		ø	6	5	0		Active	TMP	Temporary Pay	07/10/2024	
2		æ	4	4	0		Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024	
3 🖾		P	3	3	0		Active	LNP	Insufficient Leave	07/25/2024	
4		Þ	2	2	0		Terminated	ALP	Annual Leave Payout	07/25/2024	
5 🗹		æ	1	1	0		Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024	
Approve All		Deny All									
ave Reti	urn to Searc	Previous i	n List	Next in List							
Ver	ifv th	at the B	atch	Status f	ield disr	plays "Closed"					
В	atch S	tatus		Clo	osed						
	ify th	at the A	ppro	ved By f	ield upo	dates with the a	opropriate i	nformat	ion.		



Step	Action
i	Only the approved transactions will load to payroll during the next SPOT Load to Payroll process.



Sending Back a SPOT Batch

This section of the job aid covers the process to Send Back a batch to the Payroll Administrator so that updates can be made.

Step	Action											
he Rev	view Pa	yroll SP	OT Tr	ans page.								
Review P	ayroll SPOT Tra	ns										
Company Pay Group Pay Peric Transact Batch Sta	Company DL1 Dept of Labor and Industry Batch Id 275 Pay Group SM1 Semimonthly Class (SATFRI07) Created By Pay Period End 08/09/2024 Submitted By Totals (only for Valid rows) Transaction Type Earnings Approved By Total Amt : 2825.00 Batch Status In Review Total Hrs : 5.00											
View S	Supporting Docun	ients			Send Ba	ack	Close Batch		Process Monitor			
	ve Denv	Comments	Sert#	•Empl ID	Empl	Name			Payroll Status	Farn Code	Description	Farns Begin Dt
1		Ð	5		Rcd				Active	TMP	Temporary Pay	07/10/2024
2 🗹		¢	4		0	-			Active	BON	Non-discretionary Bonus	07/25/2024
3 🔽		P	3		0	-			Active	LNP	Insufficient Leave	07/25/2024
4		P	2		0	1			Terminated	ALP	Annual Leave Payout	07/25/2024
5 🗹		Þ	1		0				Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024
1.	Save Return to Search Previous in List Next in List 1. Do not check the "Approve" or "Deny" checkbox option for any transaction that requires updating.											
Ζ.	2. Click the Comments icon for the applicable transaction(s).											
he SPC	OT Con	nments	page (displays in a	a po	p-up w	indow.					
						SPOT Cor	nments page		×			
	Help Empi ID Empi Record 0 Seq# 4 Comment K Cancel											



Step	Act	ion										
3.	Enter comments regarding what needs to be updated for the transaction in the Comment field.											
	Con	nment	t									
4.	Clic	k the	e OK bu	tton.								
		OK Cancel										
The Re	view	Рау	roll SP	от т	rans pag	ge redis	plays.					
Review	v Payroll Si	POT Trans	5									
Compan Pay Gro Pay Pe	y up riod End		DLI Dept o SM1 Semin 08/09/2024	of Labor and	l Industry ss (SATFRI07)		Batch Id Created By Submitted By	275		Totals	; (only for Valid rows)	
Transa Batch S	action Type Status	2	Earnings In Review				Approved By			Tota Tota	I Amt : 2825.00 I Hrs : 5.00	
View	v Supporting	g Documer	nts			Send Ba	ack C	lose Batch P	rocess Monitor			
	٤											
Арр	prove	Deny	Comments	Seq#	*Empl ID	Empl Rcd	Name		Payroll Status	Earn Code	Description	Earns Begin Dt
1		0	Ð		5	0			Active	TMP	Temporary Pay	07/10/2024
2 🗹					4	0			Active	BON	(FLSA)	07/25/2024
3 🗹					3	0			Active		Insufficient Leave	07/25/2024
5			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		1	0			Active	BON	Non-discretionary Bonus	07/25/2024
	ALIVE DUN (FLSA) U1/25/2024											
Appro	Approve All Deny All Save Return to Search Previous in List Next in List											
5	Clic	k the	Sond	Back	button							
5.		K UIC	Senu	Daur	button.					1		
			Send Bac	k		Close E	atch	Process	Monitor			



Step	Ac	tion									
A Con	firm	ation	messa	ge dis	plays in a	i pop-u	p window				
					Are you su	ure you wa will be ser	nt to send it back It back to the sub	to the submitter? (25200, mitter for changes. Cancel	98)		
6.	Click the OK button.										
Compa Pay G Tran Bater	ew Payroll any roup Period Enc nsaction Ty h Status	SPOT Tran	s DLI Dept of SM1 Semir 08/09/2024 Earnings Sent Back to :	of Labor and nonthly Class	Industry s (SATFRIO7)	Send B	Batch Id Created By Submitted By Approved By ack	275 ose Batch Process Monite	Tot T T	als (only for Valid rows) atal Amt : 2825.00 atal Hrs : 5.00	
A	pprove	Deny	Comments	Seq#	•Empl ID	Empl	Name	Payroll Stat	us Earn Co	de Description	Earns Begin Dt
1	2		P		5			Active	TMP	Temporary Pay	07/10/2024
2	2		P		4	C	-	Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024
3	2		ø	;	3	C		Active	LNP	Insufficient Leave	07/25/2024
4			P	:	2	C		Terminated	ALP	Annual Leave Payout	07/25/2024
5 🖾	2		P		1	C		Active	BON	Non-discretionary Bonus (FLSA)	07/25/2024
App Save	Approve All Deny All Save Return to Search Previous in List Next in List										
7.	Ve	Verify that the Batch Status field updates to "Sent Back to Submitter". Batch Status Sent Back to Submitter									
8.	Ve	rify th pprov	nat the A ed By	Appro	oved By fi	eld is l	olank.				
9.	The Batch is sent back to the Payroll Administrator that entered it so that updates can be made.										



Reviewing Batches Sent Back by the Approver

Case Sensitive

Clear

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

Step	Action									
1.	To review a batch, navigate to the Enter SPOT Transactions page using the following path:									
	NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Loa Paysheets > Enter SPOT Transactions									
The En	ter SPOT Transactio	ons Find an Existing Value page displays.								
	Cardinal Homepage	Enter SPOT Transactions								
1	Enter SPOT Transactions									
	Find an Existing Value	⊕Add a New Value								
	✓ Search Criteria Enter any information you have and c	click Search. Leave fields blank for a list of all values.								
	Recent Searches Choose	e from recent searches V Saved Searches Choose from saved searches V								
	Company	ℓ begins with ▼ Q								
	Pay Group	Q begins with V								
	Pay Period End Date									
	Transaction Type									
	Batch Identity	/ begins with v								
1	Batch Status									
	Created By	/ begins with • Q								
	∧ Show	v fewer options								

 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.
 Enter the appropriate data in the corresponding Search Criteria fields. For this scenario, the Company and Batch Status fields are used.


Step	Action
i	Using the Batch Status field option is helpful when looking for batches in a status of "Closed" or "Sent Back to Submitter".
3.	Click the Search button.
	Search Clear
The Ent	er Payroll SPOT Trans page displays for the applicable batch.

y Group ay Period End		DLI Dept SM1 Sem 08/09/2024	of Labor and I imonthly Class	Industry s (SATFRI07)		Batch Id Created I Submitte	27 By Ind By	5		Totals (only for Valid r	ows)	
ransaction Type	e	Earnings	Cubmittee			Approved	i By			Total Amt : 28 Total Hrs :	25.00 5.00	
atch Status		Sent Back to	Submitter			Wodified	Бу					
At	tach Files.						U	bload Files	Process Monit	or		
в Q												
Approve	Deny	Status	Error Msg	Comments	Seq#	Empl ID		Empl Rcd	Name	Payroll Status	Earn Code	Description
1		ок		Þ		1		(Active	BON	Non-discretionary Bonus (FLSA)
2		ок	9	ø		2	۹	0 Q		Terminated	ALP Q	Annual Leave Payout
3		ОК		Þ		3		(Active	LNP	Insufficient Leave
4		ОК		P		4		(Active	BON	(FLSA)
otal Hours & Am alid Row and En	ount are upo ror Row Cou	lated on Valida Int are update	ation d on Validation	1			Rows Va Rows Er Total Ro	lid: ror: ws:	5			
Save	rn to Search	١										
	n Err	or Me	ssage	(Bubb	ole id	con) dis	plays	on the	line for trar	sactions that	require re	evision.
. A	9											
. A [T	ransa	actions	s that	have b	een	markeo	l as ap	proved	l or denied	by the approv	er canno	t be edited.
. A [T . C	ransa lick tl	actions	s that mmer	have b	een n for	markeo	l as ap	oproveo	l or denied requires up	by the approv	er canno	t be edited.



Step	Action			
The SPO	OT Comm	ients page displays i	in a pop-up window.	
			SPOT Comments page	×
				Help
		Empl ID		
		Empl Record	0	
		Seq#	2	
		Comment	Error in the calculation. Update the pay out amount to 1950.00	
		ОК Саг	ncel	
6.	Review t	he comments in the	Comment field.	
	Commer	nt Error in the 1950.00	calculation. Update the pay out amount to	
7.	Click the	OK button.		
	OK	Cancel		
8.	Make the	e update(s) as applica	able.	
9.	Click the	Comment icon.		
]		



Step	Action			
The SPC	OT Comm	nents page redisplay	/s in a pop-up window.	
			SPOT Comments page	×
				Help
		Empl ID		
		Empl Record	0	
		Seq#	2	
		Comment	Error in the calculation. Update the pay out amount to	
			1950.00	
				3
		ОКСа	ncel	
10.	Enter co	mments below any e	existing comments, as applicable, regarding	the update(s) in the
	Comme	nt field.		
	Comme	nt Error in the	e calculation. Update the pay out amount to	
		1950.00		
	Do not o	verwrite existing con	ments in this field as it is onon and doos no	t lock down commonte
Í				
11	Click the			
11.				
	Oł	Cancel		



Cardinal Payroll Job Aid PY381_Using the Single-Use Payroll Online Tool (SPOT)

Enter Par Company Pay Group Pay Period Transactio Batch State	I End on Type us	POT Trans	DLI Dep SM1 Sen 08/09/2024 Earnings Sent Back to	t of Labor and imonthly Class	Industry ; (SATFRI07)		Batch Id Created By Submitted Approved I	275 By 3y				Totals (only for Valid re Total Amt : 28 Total Hrs :	5.00		Ne
	Atta	ach Files						Upl	oad Files		Process Monitor				
Appro	ove	Deny	Status	Error Msg	Comments	Seq#	Empl ID		Empl Rcd	Name		Payroll Status	Earn Co	de	Description
1			ок		Þ		1		0			Active	BON		Non-discretionary Bonus (FLSA)
2			ок	9	Þ		2	۹	0 Q			Terminated	ALP	۹	Annual Leave Payout
3 🗹			ок		Ð		3		0			Active	LNP		Insufficient Leave
4			ок		ø		4		0			Active	BON		Non-discretionary Bonus (FLSA)
5 🗹			ОК		ø		5		0			Active	TMP		Temporary Pay
Valida **Total Hours **Valid Row a	late s & Amo and Erro Return	unt are upo or Row Cou	Submit dated on Valid unt are update	ation d on Validation				Row Counts Rows Vali Rows Erro Total Row	d: or: s:	5					
12.	CI	ick tl	he Va Valida	lidate te	button	-	Submit								



Step	Action						
The Ent	er Payroll SP	DT Trans page refreshe	es.				
	Enter Pa	roll SPOT Trans					
	Company Pay Group Pay Period Transactio Batch Stat.	DLI Dept of Labor and Industry SM1 Semimonithy Class (SATFRI07) End 08092024 Type Earnings Validated	Batch Id 275 Created By Submitted By Approved By Modified By	Totals (only 1 Total Amt : Total Hrs :	for Valid rows) 3525.00 5.00		
		Attach Files	Upload Files Process Monitor	tor			
	Appro 2 - 3 - 4 -	Deny Status Comments Seque Empl D Image: Im	Empl Rod Name	Payroll Status Active Terminated Active Active Active	Earn Code BON ALP Q LNP BON	Description Non-discretionary Bonus (FLSA) Annual Leave Payout Insufficient Leave Non-discretionary Bonus (FLSA)	
	s = Valid: **Total Hours **Valid Row a Save	OK O Submit Submit Annount are updated on Validation d Error Row Count are updated on Validation	0 Rows Valid: 5 Rows Error: Total Rows: 6	Active	ТМР	Temporary Pay	
13.	Verify that the	Batch Status field up	dates to "Validated".				
	Batch Status	Validated					
14.	Verify that the	Row Counts, Rows E	Error field does not dis	splay a	ny rov	w errors.	
	Row Counts Rows Valie Rows Erro Total Row	d: 5 r: 5 s: 5					
15.	Click the Sub	mit button.					
	Validate	Submi	t				
The Sub	omit Confirma	tion message displays	in a pop-up window.				
		Are you sure you want to submit	the Batch? (25200.36)				
		Once Batch is submitted, it can n	ot be edited. Are you sure you want	to submit t	he batch'	?	
			OK Cancel				



Step	Actio	n															
16.	Click	the	ок	butto	on.												
		UK		La	ncei												
The Ent	er Pay	rol	I SPO	от т	rans	page	refre	shes									
	[Ent	ter Payroll SP	OT Trans													7
		Compa Pay Gr Pay Po Trans	any roup eriod End saction Type	DL SN 08 Ea	J Dept of L 11 Semimon /09/2024 mings	abor and Industry thly Class (SATFR	107)	Bate Cre: Sub App	ch Id ated By omitted By proved By	275				Totals (only for Total Amt : Total Hrs :	Valid rows 3525.0 5.0) 0 0	
		Batch	status	Su	omitted			Wiod	лпеа Бу								
			Atta	ich Files						Uj	oload Files	Pro	ocess Monitor				
			Approve	Deny	Status	Comments	Seq#	Empl ID		Empl	Name			Payroll Status	Earn Code	Description	
		1			ок	P		1		C				Active	BON	Non-discretionary Bonus (FLSA)	
		2			ок	0		2		C				Terminated	ALP	Annual Leave Payout	
		3			ок	@ 0		3		0				Active	BON	Non-discretionary Bonus	
		5			ок	P		5		C				Active	TMP	(FLSA) Temporary Pay	
			Validate		Submit				Po	w Count							
		**Total **Valid	Hours & Amou Row and Error	unt are update	ed on Validation) Validation			Ko	Rows Va	s lid:	5					
		Valid		THOM OUT						Rows Er Total Ro	ror: ws:	5					
		Saw	Return	to Search	I												
	l	Curr		- to octaican	J												
17	Vorify	the	at the	Bat	ch S	tatus f	أماط	unda	tee	to "	Subr	nittod	,,				
17.	veniy	uio			.cn 3	lalus	leiu	upua	105	10	Subi	mileu	•				
	Bato	h S	tatus			Sub	mitte	d									
18.	Verify	' tha	at the	e Mo	difie	d By fi	eld ı	update	es a	ls a	ppro	priate	with	the use	er's II	D.	
_						,		•			•••						
	Modifi	ied E	By														
										— /							
(i)	For a Aid: E	ddit nte	tional ering	i info an E	rmati arnin	on on <mark>gs Tra</mark>	ente Insa	ering S ction	5PO in S	PT ti PO	ransa T an	action: d Ente	s, see erina	e the fo a Dedu	llowi Ictior	ng sectior n Transac	ns in this Job tion in SPOT.
	-																



Monitoring SPOT Transactions

There are two key SPOT tools to help monitor transactions:

- SPOT Online Query (V_PY_SPOT_TRANS_RPT) 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 and can be run for all employees or a specific employee
- SPOT Transactions Not Loaded to Payline 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. This report can be accessed using the following path:

NavBar > Menu > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > SPOT Entries Not on Payline

Note: 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.



Reviewing Employee Paycheck Information

There are two key pages that can be accessed to view employee's paycheck information:

The Review Paycheck Page provides details regarding an employee's earnings, deductions, and taxes. See the Job Aid titled PY381_Overview of the Review Paycheck Page. This Job Aid can be found on the Cardinal website in Job Aids under Learning. Access this page using the following path:

NavBar > Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck

• The **View Self Service Paycheck** page allows Payroll Administrators to see the employee's selfservice view of the paycheck. Access this page using the following path:

NavBar > Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck



SPOT Scenarios

This section reviews 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, 8 hours of pay docking are being entered for an employee in the current payroll (pay period ending 04/09/2021).

Q											
Detail Data	Validatio	n II•									
Commer	ts Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
P		1 Q	0 Q	a	Active	LNP Q	Insufficient Leave	03/25/2021	03/25/2021	1	Annualized

th 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	٩	+	•

- 1. Enter/select the following:
 - Empl ID
 - Empl Rcd: Defaults to "0". Update if necessary
 - Earn Code: "LNP"
 - Earns Begin Dt: enter the begin date of the period the employee is being docked
 - 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
 - Oth Hrs: enter the hours to be docked (in this scenario 8)
 - Hourly Rate: Enter the hourly rate for the period
- 2. Validate and submit the batch for approval.



Review Paycheck Page – Pay Docking (LNP)

In the Other Earnings section of the Review Paycheck page, view the SPOT transaction that processed for the employee.

	Date 03/25/2021	End Date	03/25/2021	Addl Lin	eNbr 3	Reason		
Empl	Record 0	Benefit Re	ecord 0				Additi	ional Data
ried		Но	urly		0\	vertime		
Но	ours 0.00		Hours	0.00		Hours	0.00	
R	ate 24.038462		Rate	0.000000		Rate	0.0000	DO
Earniı	ngs 0.00		Earnings	0.00		Earnings	0.00	
			Rate Code			Rate Code		
Sta	ate VA		Locality					
Rate Us	ed Hourly Rate							
Sh	nift Not Applicable		Shift Rate					
						ы <i>А</i>	1.1.051	
r Earnings			۲				1-1 01	
r Earnings Q								
r Earnings Q ìther Earnin	ngs Details 1 Ot	her Earnings Details 2						
r Earnings Q Ither Earnin	ngs Details 1 Ot	her Ea <u>r</u> nings Details 2	ll⊧ Used	Hours	Rate	A	mount	Source

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

Em	pl Record 0	Bene	fit Record 0	Add			Additional Data	
alaried			Hourly		Ove	ertime		
ŀ	lours 0.00		Hours	0.00		Hours 0	.00	
	Rate 24.038462		Rate	0.000000		Rate 0	.000000	
Eari	nings 0.00		Earnings	0.00		Earnings 0	.00	
			Rate Code			Rate Code		
s	state VA		Locality					
Rate L	Ised Hourly Rate	9						
:	Shift Not Applica	ble	Shift Rate					
her Earning	S							
III Q							-1 of 1 🗸 🕨	View All
Other Earn	ings Details 1	Other Earnings Detail	s 2 ∥▶					
ode	Description	1	Rate Used	Hours	Rate	Amo	ount Source	
	Decides Time Co	lariad	Jourty Data	8.00	21 710000	17	73.69 OP	

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



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
- Payroll will need to calculate the amount due using the pay period hourly rate and then enter the adjustment in SPOT
- For this scenario, the employee needs to have a pay reduction of \$41.25

/ \$	Q etail Data	Validatio	• •	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~	~~^~~	Jan		\	
	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Perio
1	ø	1	٩	0 Q		Terminated	RGS Q	Regular Time - Salaried	10/25/2021	10/31/2021	
~~	~~~~	\sim	m	~~~~	man	\sim			$\sim m$	\sim	$\overline{}$

				Lanna Martin	~	~~~~~~	mun		1-1 of 1 v	₩ '	<u></u> View All
Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Geni Ded Subset	Sepchk #	Addl Seq Nbr		
Annualized V	-1	41.25	200.00	Deduction		Deduction		0	٩	+	-
				_		~			A. A.	_	-

- 1. Enter the following:
 - Empl ID
 - Empl Rcd: Defaults to "0". Update if necessary
 - Earn Code: "RGS"
 - Earns Begin Dt: enter the begin date of the period in which the termination occurred
 - Earns End Dt: enter the employee's last day worked
 - Oth Hrs: enter "-1"
 - Hourly Rate: Enter the amount of pay to be reduced ("41.25" for this scenario)
- 2. Validate and submit the batch for approval.



Review Paycheck Page – Entering Adjustments to Reg Pay (Hired/Termed Mid Pay Period)

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

Earnings					Q 4	4 4	of 4 🗸 🕨		View /
Begin Da	ate 10/25/2021 End D	Date 10/31/2021	Addl Lin	eNbr 3 R	eason				
Empl R	ecord 0 Be	nefit Record 0				Additio	nal Data		
laried		Hourly		Ove	rtime				
Hour	s 0.00	Hours	0.00		Hours (0.00			
Rat	e 24.697596	Rate	0.000000		Rate (0.00000	D		
Earning	s 0.00	Earnings	0.00		Earnings (0.00			
		Rate Code			Rate Code				
State	e va	Locality							
Rate Used	I Hourly Rate								
Shift	t Not Applicable	Shift Rate							
er Earnings						1-1 of 1	▶	l Viev	v All
ner Earnings 雰 Q									_
er Earnings Q Other Earnings	s Details 1 Other Earnings Det	ails 2							
er Earnings Q Other Earnings de Des	s Details 1 Other Earnings Det	tails 2 II► Rate Used	Hours	Rate	Am	ount	Source		



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.

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De	tail Data	Validation	IÞ									
	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	Þ	1	X	0 Q	1000	Active	RGS Q	Regular Time - Salaried	03/10/2021	03/24/2021	1	Annualized •
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Oth Hrs Hou	urly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Geni Ded Subset	Sepchk #	Addi Seq Nbr		
1	88.00		Deduction		Deduction		0	٩	+	-

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



### Review Paycheck Page – Change in Compensation for Prior Pay Period

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

	egin Date 03/10/202	Benefi	03/24/2021		BINDE 3	Reason	Additi	onal Data
laried			Hourly		Ov	vertime		
	Hours 0.00		Hours	0.00		Hours	0.00	
	Rate 24.038462		Rate	0.000000		Rate	0.0000	00
E	arnings 0.00		Earnings	0.00		Earnings	0.00	
			Rate Code			Rate Code		
	State VA		Locality					
Rat	te Used Hourly Rate							
	Shift Not Applical	le	Shift Rate					
-	inas							
r Earni	9							
er Earni Q	5					∢ ∢	1-1 of 1	View All
er Earni Q Other Ea	arnings Details 1	Other Eamings Details	2			14 4	1-1 of 1	View All
er Earni Q Other Ea	arnings Details 1	Other Eagnings Details	2   ▶ ate Used	Hours	Rate	A	1-1 of 1	Source



#### 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 that the deductions are taken from the 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 an additional VRS Retirement amount of \$2,500.

#### SPOT Earnings Batch

1	Q									
	etail Data	Validation								
	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
	Ø	1	٩	0		Active	BON Q	Non-discretionary Bonus (FLSA)	01/25/2022	02/09/2022

5	hannen	Sme Sme	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m	m	~~~~~~	~~~~~~	_~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	᠕ᡎ᠕ᡎ	 1-1 of 1 ▼ ♪ ♪	View All
~	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Geni Ded Taken	Genl Ded Subset	Sepchk #	Addl Seq Nbr	
ξ	Annualized V			5000.00	Deduction V	BNS Q	None 🗸	٩	1	٩	+ -
ž				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	·····		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	······································	~~~~	man And	

- 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:
  - Benefit Ded Taken: "Subset"
  - Benefit Subset ID: "BNS"
  - Genl Ded Taken: "None" (no general deductions will come out of this check)
  - Genl Ded Subset: Leave blank



#### **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.

, ,	Q etail Data	Attaci	Validation		~~~~~		,,,~Uplök,,,,∕res∖	<u> </u>	ur Lund	Mun	$\sim$	V- _/ `	~~~~~	V	- ( ) ( ) · · · · · · · · · · · · · · · ·	"````````````````````````````````````	<ul> <li>View All</li> </ul>
1	Commen	nts S	Seq#	Empl ID	Empl Rcd	Name	Payroll Status Active	Plan Type	Benefit Plan VRSMDB Q	Ded Code	Description Employee Retirement	Ded Class	Ded Calc	Amount 2500.00	One Time Cd	Sepchk #	+ -
سبی	~~~	~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			man province	~~~				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	renount ·				

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



# Payroll Job Aid 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, users 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	eck <u>D</u> eductions											
Empl ID Name Company ABC Pay Group SM1	Pay Period	End 02/09/2022 Pa	ge 2 Paycheol	Line 1	Separate Check 1							
Paycheck Status Calculated Issue Date 02/16/2022 Off Cycle Reprint Adjustment	Paycheck Option Paycheck Numbe t Corre	n Check r ected 🗆 Cashed		Earnings         5,000.           Taxes         1,076.           eductions         2,500.           Net Pay         1,423.	00 25 00 75							
✓ Earnings				Q   (€ ∢ (	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												
Salaried	Hourly		Ov	ertime								
Hours 0.00 Rate 41.826923 Earnings 0.00	Hou Ra Earnin Rate Co	urs 0.00 ate 0.000000 gs 0.00 de		Hours 0.00 Rate 0.0000 Earnings 0.00 Rate Code	000							
State VA	Locali	ty										
Rate Used Hourly Rate	Shift Dat	ta										
Other Famings	annt Ra											
<b>—</b> Q				∢	1 🗸 🗼 🕅 View All							
Other Earnings Details 1 Other Earnings Detail	s2 ∥>											
Code Description	Rate Used	Hours	Rate	Amount	Source							
BON Non-discretionary Bonus (FLSA)	Hourly Rate		~	5,000.00	OP							



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

Paycheck Earnings	Paycheck Taxes Paycheck Dedu	ctions									
Empl ID Company ABC	Name Pay Group SM1	Pay Period End 02/09/2022	Page 2 Line 1	Separate Check							
Paycheck Information			Paycheck Totals								
Paycheck Statu Issue Dat	s Calculated Paych e 02/16/2022 Payche Reprint Adjustment	Earnings         5,000.0           Taxes         1,076.2           Deductions         2,500.0           Net Pay         1,423.0	00 25 00 75								
Deductions C Deduction Details 1	Deduction Details 2 Deduction	I I I of 1 🗸	▶ ▶ I View All								
eduction Code	Description	Class≜	Amount	Calculated Base							
RSRET	Employee Retirement DB	Before-Tax	2,500.00								
Deduction Code     Description     Class     Amount     Calcul       /RSRET     Employee Retirement DB     Before-Tax     2,500.00											



#### **Deceased Pay**

**SPOT Earnings Batch:** 

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 <u>not</u> 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

#### ■ Q Detail Data Validation ID Tax Periods Comments Seq# Empl ID Empl Rcd Name Payroll Status Earn Code Description Earns Begin Dt Earns End Dt Тах Deceased Pay Current Q 0 Q Active DPC Q 03/25/2022 04/09/2022 1 1 Ann Year

									1-1 of 1 🗸 🕨	▶ 1	View
Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Geni Ded Taken	Genl Ded Subset	Sepchk #	Addi Seq Nbr		
Annualized 🗸			1000.00	Deduction		Deduction		0	٩	+	-

- 1. Enter the deceased employee's Employee 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, the amount is "1000.00".
- 4. Enter the current pay period dates in the Earns Begin Dt and Earns End Dt fields.



#### 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.

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1	Ξ, Q													1-1 0	f1 🗸 🕨	)   Vie	w All
	Detail Data	Validati	on II+														
	Commen	s 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 🖗		1 Q	0 Q		Active	00 Q	٩	DUEAGY Q	Due Agency	A Q	Amount 🗸	923.50	Addition 🗸	0	+	-
	Validate		Submit			Row Counts											
۲** ۲۹	otal Hours & Ar bid, Pow, and E	nount are up iccor Row Co	dated on Validation	w	m	Rows Valid:	 	Jan Jan	~~~~~	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~.	man man	Marth	-A.m	~~	w

• 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.

	At	aoh Files	hummen	~~~~	Mundan	Upload Fi			~~~~	~	Process Monitor	$\sim \sim \sim$		$\sim$	Vinni	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	رمسمر	~/~	~~~
퐈	۹		_													1-2 of	2	н	View All
	Comments	Validatio Seq#	n   + Empl ID	Empl Rod	Name	Payroll Status	Plan	Туре	Benefit Pi	an	Ded Code	Description	Ded Class	Ded Calo	Amount	One Time Cd	Sepohk #		
1	۲	1	Q	0 Q		Active	10	۹	ACC1	۹	CVACRE Q	CoVA Care	вQ	Amount 🕑	10.00	Override 💟	0	+	-
2	۲	3	Q.	0 Q		Active	00	۹		۹	DUEAGY Q	Due Agency	A Q	Amount 🗹	914.26	Override 💟	0	+	-
	Validate		Submit	Jun	A manager	Row Counts	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~	An	unn	~~~	5	~

- 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.



# Payroll Job Aid 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, users are able to view the SPOT Earnings Transaction for the deceased pay (\$1,000 for this scenario).

Paycheck Earnings Paycheck Taxes Payc	check <u>D</u> eductions								
Empl ID Name Company ABC Pay Group SM1	Pay Period	End 04/09/2022	Page 1		Line 1	Sep	arate Check		
Paycheck Information Paycheck Status Calculated Issue Date 04/15/2022 Off Cycle Reprint Adjustme	Paycheck Option Paycheck Numbe nt	n Check Fr acted 🗆 Ca	ashed	Paycheck De	Totals Earnings 1,0 Taxes eductions S Net Pay	00.00 76.50 23.50 0.00			
▼ Earnings					Q    4 4	1 of 2	2 🕶 🕨	▶ I V	ïew All
Begin Date 04/01/2022 End D Empl Record 0 Ber	ate 04/09/2022 lefit Record 0	Ado	II Line Nbr 🔅	3 F	Reason Not Specific A	d dditional	Data		
Salaried Hours 0.00 Rate 37.163462 Earnings 0.00 Rate Code	Hourly Hou Ra Earnin Rate Co	rrs 0.00 ate 0.000000 gs 0.00 de		Ove	ertime Hours 0.0 Rate 0.0 Earnings 0.0 Rate Code	) )0000 )			
State VA Rate Used Hourly Rate Shift Not Applicable	Localit FLSA Rat Shift Rat	y ie ie							
Other Earnings	ails 2 II►				∢ ∢ [1-	of1 🗸	▶	View Al	"
Code Description	Rate Used	Hours		Rate	Amou	nt Sou	IFCE		
DPC Deceased Pay Current Year	Hourly Rate				1,000	.00 OP			



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

On the **Paycheck Taxes** tab, users 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 E	Earnings Pay	rcheck Taxes	aycheck <u>D</u> eductions					
Empl II Company	y ABC	Name Pay Group SM1	1 Pa	y Period End 04/09	2022 Page	1 Lin	e 1	Separate Chec
Paycheck In	formation				Pay	check Totals		7
P	aycheck Status	Calculated	Paycheck O	otion Check		Earnings	1,000.00	
	Issue Date	04/15/2022	Paycheck Nu	nber		Taxes	76.50	
Off Cycl	le 📃 Rep	rint 🗌 Adjus	tment 🗆 C	orrected 🛛 🔾	Cashed	Deductions	923.50	
Tax Details	s 1 Tax Deta	ils 2 Tax Tip <u>s</u> Locality	II)	me	Tax Class	Taxable	Gross	Tax Amount
US Federal					MED/EE		1,000.00	14.50
JS Federal					Med/ER		1,000.00	14.50
JS Federal					OASDI/EE		1,000.00	62.00
JS Federal					OASDI/ER		1,000.00	62.00
1042 Taxes	3							
<b>₽</b> Q		1				∢ ∢ [1	-1 of 1 🗸 🕨	▶   View All
State	Country	Tax Rate	Taxable Gross	Tax Amount	Income Code	Income Type	Withholdi	ng Allowance



# Payroll Job Aid 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, users are able to view the Due Agency amount that was entered in the SPOT Deduction batch.

Pay <u>c</u> heck Earnings	Paycheck Taxes Payche	ck Deductions				
Empl ID Company ABC Paycheck Information Paycheck Status Issue Date	Name Pay Group SM1 Calculated 04/15/2022 Reprint Adjustment	Pay Period End Paycheck Option Check Paycheck Number Corrected	04/09/2022	Page 1 Paycheck Total Earni Ta Deducti Net	Line 1 s ngs 1,000.00 xes 76.50 ons 923.50 Pay 0.00	Separate Check
Deductions     Q     Deduction Details 1	Deduction Det <u>a</u> ils 2 De	duction Details 3   ▶		14	<ul> <li>I-1 of 1 ♥</li> </ul>	▶   View All
Deduction Code	Description	Class≜		Amount	t (	Calculated Base
DUEAGY	Due Agency	After-Tax		923.5	50	
► Garnishments ► Net Pay Distribution						
町 Q Check/Advice Number	Account Type	Bank ID	Account Num	ber	1-1 of 1 🗸 🕨 🕨	Amount



#### **Review Paycheck Page with Additional Before-Tax Medical Deduction**

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

Paycheck Earnings Paycheck Taxes Paych	neck <u>D</u> eductions				
Empl ID Name Company ABC Pay Group SM1	Pay Period	End 04/09/2022	Page 1 Paychec	Line 1 k Totals	Separate Check
Paycheck Status Calculated Issue Date 04/15/2022	Paycheck Option Paycheck Numbe It Corre	n Check r ected Ca	ished D	Earnings 1,000.0 Taxes 75.7 Deductions 924.2 Net Pay 0.0	00 74 26 00
▼ Earnings				Q    4	1 of 3 💙 🕨 🕴   View All
Begin Date 04/01/2022 End Da Empl Record 0 Bene	te 04/09/2022 fit Record 0	Ado	II Line Nbr 3	Reason Not Specified Addit	ional Data
Salaried	Hourly		Ov	vertime	
Hours 0.00 Rate 37.163462 Earnings 0.00 Rate Code	Hou Ra Earnin Rate Co	rrs 0.00 ate 0.000000 gs 0.00 de		Hours 0.00 Rate 0.0000 Earnings 0.00 Rate Code	00
State VA Rate Used Hourly Rate Shift Not Applicable	Localit FLSA Rat Shift Rat	У e e			
Other Earnings       IP     Q       Other Earnings Details 1     Other Earnings Details 1	ils 2 II►			i≪ ≪ 1-1 of 1	I ✔ ▶ ▶ I View All
Code Description	Rate Used	Hours	Rate	Amount	Source
DPC Deceased Pay Current Year	Hourly Rate			1,000.00	OP

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

On the **Paycheck Taxes** tab, users 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.

Pay <u>c</u> heck B	Earnings Payc	heck Taxes	Paycheck <u>D</u> eduction	s			
Empl II Compan	D ABC	Name Pay Group SM	1 Pá	ay Period End 04/09	/2022 Page 1	Line 1	Separate Check
Paycheck In P	Iformation aycheck Status C Issue Date 0 le 🛛 Repri	alculated 4/15/2022 nt Adjus	Paycheck C Paycheck Nu stment   (	Dption Check Imber Corrected 🗌 (	Cashed	ck Totals Earnings Taxes Deductions Net Pay	1,000.00 75.74 924.26 0.00
▼ Taxes							
llar Q			_				of 4 🗸 膨 膨 🕴 View All
Tax Detail	s 1 Tax Det <u>a</u> ik	2 Tax Tip <u>s</u>	IIÞ				
Tax Entity	Resident	Locality	Locality N	ame	Tax Class	Taxable Gros	s 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	S						
<b>≕</b> , Q		1				∢ ∢ 1-1 of 1	View All
State	Country	Tax Rate	Taxable Gross	Tax Amount	Income Code Inco	ome Type	Withholding Allowance
		0.000000		0.00			



# Payroll Job Aid 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, users are able to view the deductions that were entered in SPOT Deduction batch.

Paycheck Earnings	Paycheck Taxes Paychee	ck Deductions	]					
Empl ID Company ABC	Name Pay Group SM1	Pay P	Period End	04/09/2022	Page	1 Lin	le 1	Separate Check
Paycheck Information Paycheck Statu Issue Date Off Cycle	s Calculated e 04/15/2022 Reprint 🗌 Adjustment	Paycheck Optio Paycheck Numb Corr	on Check ber rected	Cashed		heck lotals Earnings Taxes Deductions Net Pay	1,000.00 75.74 924.26 0.00	
Deductions     Q     Deduction Details 1	Deduction Details 2	duction Detail <u>s</u> 3	IIÞ			∢ ∢	1-2 of 2 🗸 🕨	▶   View All
Deduction Code	Description	c	Class≜			Amount	c	Calculated Base
DUEAGY	Due Agency	A	After-Tax			914.26		
CVACRE	CoVA Care	E	Before-Tax			10.00		
Garnishments								
I Q						€ € 1-1	of 1 🗸 🗼 🔊	View All
Check/Advice Number	Account Type	Bank ID		Account Numbe	er			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 the adjustment is entered 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 number to add to the amount already established as an Additional Pay or a negative number 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 (employee worked through 6/9 and term date is 6/10). The VRS contribution base will need to be increased.

#### **Additional Pay Page**

Navigate to this page using the following path:

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

This page shows the VRS Contribution Base for the employee.

Create Addit	tional Pay					
	Employee		Empl ID	E	mpl Record 0	
Additional Pay				Find   View All	First ④ 2 of	2 🕑 Last
	*Earnings Code VRS	VRS Contrib	ution Base			+ -
Effective Date				Find View All	First ④ 1 of 1	1 🕑 Last
	Effective Date 05/01/2021					+ -
Payment Deta	ails			Find View All	First 🕢 1 of 1	Last
	*Addl Seq Nbr	1	End Da	ate	Ħ	• -
	Rate Code	<u>a</u>	Reas	on Not Specified		~
	Earnings \$2,500.0	0				
	Hours		Hourly Ra	ate		
	Goal Amount		Goal Balan	ce		
	Sep Check Nbr			Disable Direc	t Deposit	
	🗹 OK to Pay			Prorate Addit	ional Pay	
Applies To I	Pay Periods					
First	🗹 Second	Third	E Fourth	n 🗌 Fif	th	
Job Infor	rmation					
Tax Infor	mation					



# Cardinal Payroll Job Aid 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.

#### NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

eurement Plan	IS									
	Employee		ID		Benefi	it Red	cord N	lumb	er ()	
Plan Type					Q	I	M		1-4 of 4 💙	► ► I View 1
	Plan Type	70 Er	nployee Retirem	ent DB						
Coverage					Q	I		4	1 of 1 🗸 🕨	View All
	Deduction Begin Date Participation Election Benefit Program Benefit Plan	Salaried Employee VRSMDB V	○ Waive Benefit Pgm 'RS 5% EE Pay	C Terminate		ф			Election Date Payroll Status Option Code	06/28/2021 Active 18
	Plan Type	7W Gr	oup Term Life							
Coverage					Q	I	M	•	1 of 1 👻 🕨	View All
	Deduction Begin Date Participation Election Benefit Program Benefit Plan	04/25/2021	<b>Waive</b> Benefit Pgm iroup Term Life-I	C Terminate Regular		¢			Election Date Payroll Status Option Code	06/28/2021 Active 2
	Plan Type	7X Re	etiree Health Cre	edit						
Coverage					Q	I			1 of 1 🗸 🕨	View All
	Deduction Begin Date Participation Election Benefit Program Benefit Plan	04/25/2021 Elect Salaried Employee RTCRDR R	○ Waive Benefit Pgm detiree Health Cr	○ Terminate edit-Regular		¢			Election Date Payroll Status Option Code	06/28/2021 Active 2
	Plan Type	7Y V5	SDP LTD							
Coverage					Q	I			1 of 1 🗸 🕨	View All
	Deduction Begin Date Participation Election Benefit Program	04/25/2021 Elect Salaried Employee	◯ Waive Benefit Pgm	○ Terminate		ф			Election Date Payroll Status	06/28/2021 Active



#### **SPOT Earnings Batch**

Once the contribution base is determined and the active plan has been verified, enter the SPOT batch.



- 1. Enter the **Empl ID** and **Empl Rcd**.
- 2. Enter the earning code "VRS" (VRS Contribution Base).
- 3. Enter the days worked in the current pay period in the **Earns Begin Dt** and **Earns End Dt** fields (5/25 6/9 in this scenario).
- 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.



#### Review Paycheck Page – Employee Enrolled in in the Retirement Plan

#### Prior to VRS Adjustments

The screenshots below show the **Special Accumulators** section of the **Paycheck Earnings** tab and the **Deductions** section of the **Paycheck Deductions** tab. On these tabs, users are able to view the VRS deductions. These screenshots show 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**.

<b>₽</b> Q	■ Q I-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				
DTE	Other Earnings		8.50	0				

R Q			I∢	f 10 🗸 🕨 🕨 🛛 View 8
Deduction Details 1	Deduction Details 2 Ded	duction Detail <u>s</u> 3 II▶		
eduction Code	Description	Class	Amount	Calculated Base
ACRE	CoVA Care	Before-Tax	188.00	
VACRE	CRE CoVA Care		901.00	
EFCMP	CMP 457 Deferred Compensation		100.00	
CMP 457 Deferred Compensation		Nontaxable Btax Benefit		
LXMED	Medical FSA	Before-Tax	25.00	
RSRET	Employee Retirement DB	Before-Tax	125.00	2,500.00
RSRET	Employee Retirement DB	Nontaxable Benefit	361.50	2,500.00
RPLFR	Group Term Life	Nontaxable Benefit	33.50	2,500.00
ETHCR	Retiree Health Credit	Nontaxable Benefit	28.00	2,500.00
DLTDR	VSDP LTD	Nontaxable Benefit	15.25	2,500.00

# Payroll Job Aid 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, users are able to view the VRS contribution base amount that was entered in SPOT.

Earnings				QI	4 ▲	4 of 4 🐱 🕨	I View
Begir	Date 05/25/2021	End Date 06/09/2021	Addl Line Nbr	3 Reason			
Emp	l Record 0	Benefit Record 0			Addit	onal Data	
Salaried		Hourly		Overtime			
н	ours 0.00	Hours	0.00	Но	urs 0.00		
1	Rate 24.038462	Rate	0.000000	R	ate 0.0000	00	
Earn	ings 0.00	Earnings	0.00	Earnin	ngs 0.00		
Rate C	Code	Rate Code		Rate Co	ode		
s	tate VA	Locality					
Rate U	sed Hourly Rate	FLSA Rate					
S	hift Not Applicable	Shift Rate					
ther Earning	5						
III; Q						1 🕶 🕒 🕅	View All
Other Earni	ngs Details 1 Other Eam	ings Details 2 <b>II</b> ▶					
ode	Description	Rate Used	Hours	Rate	Amount	Source	
RS .	VBS Contribution Base	Hourly Rate			2 500 00	OP	



The screenshots below show the **Special Accumulators** section of the **Paycheck Earnings** tab and the **Deductions** section of the **Paycheck Deductions** tab. On these tabs, users are able to view the VRS deductions. These screenshots show how it displays after VRS Adjustments.

<b>≣</b> , Q			4	10 🗸 🕨 🕨   View A
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
DRP	Optional Retirement Base	96.00	2,083.33	0
DTE	Other Earnings		8.50	0

E, Q				[4] ▲	1-12 of 12 🗸 🕨 🕅 View
Deduction Details 1	Deduction Details 2	Deduction Detail	<u>s</u> 3 II		
eduction Code	Description	с	lass	Amount	Calculated Base
VACRE	CoVA Care	В	efore-Tax	188.00	
VACRE	CoVA Care	N	ontaxable Benefit	901.00	
MPLIF	Imputed Life	Ta	axable Benefit	5.00	100,000.00
EFCMP	457 Deferred Compensa	ition B	efore-Tax	100.00	
EFCMP	457 Deferred Compensa	ation N	ontaxable Btax Benefit		
LXMED	Medical FSA	В	efore-Tax	25.00	
RSRET	Employee Retirement DI	в В	efore-Tax	250.00	5,000.00
RSRET	Employee Retirement DI	B N	ontaxable Benefit	723.00	5,000.00
RPLFR	Group Term Life	N	ontaxable Benefit	67.00	5,000.00
ETHCR	Retiree Health Credit	N	ontaxable Benefit	56.00	5,000.00
DLTDR	VSDP LTD	N	ontaxable Benefit	30.50	5,000.00
LXFEE	Flex Administrative Fee	Br	efore-Tax	2.10	



#### **Employee Not Enrolled in the Retirement Plan**

When an employee has been terminated and no longer enrolled in the retirement plan, the user will need to enter a SPOT Deduction batch to override the impacted retirement benefit deductions. Navigate to the **Retirement Plans** or **Saving Plans** pages to see this information using the following paths:

#### NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

#### NavBar > 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 the SPOT entries.

₹ Q					II. I	1-10 of 1	0 ~ > > > View 8
Deduction Details 1	Deduction Details 2	Deduction Det	tail <u>s</u> 3	IÞ			
eduction Code	Description		Class		Amo	unt	Calculated Base
VACRE	CoVA Care		Before	-Tax	18	8.00	
VACRE	CoVA Care		Nontax	able Benefit	90	1.00	
EFCMP	457 Deferred Compensat	ion	Before	-Tax	10	0.00	
EFCMP	457 Deferred Compensat	ion	Nontax	able Btax Benefit			
LXMED	Medical FSA		Before	-Tax	2	5.00	
RSRET	Employee Retirement DB		Before	-Тах	12	5.00	2,500.00
RSRET	Employee Retirement DB		Nontax	able Benefit	36	1.50	2,500.00
RPLFR	Group Term Life		Nontax	able Benefit	3	3.50	2,500.00
ETHCR	Retiree Health Credit		Nontax	able Benefit	2	8.00	2,500.00
DLTDR	VSDP LTD		Nontax	able Benefit	1	5.25	2,500.00



#### **SPOT Deduction Page**

Once the amounts are obtained, enter the VRS retirement deductions in SPOT.

,	۹												M	<ul> <li>1-5 of 5 v</li> </ul>		View
De	tail Data	Validatior	•													
	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	P	1	٩	0 Q		Terminated	70 Q	VRSMDB Q	VRSRET Q	Employee Retirement DB	BQ	Amount 🗸	125.00	Addition ~	+	•
	P	2	٩	0 Q		Terminated	70 <b>Q</b>	VRSMDB Q	VRSRET Q	Employee Retirement DB	N Q	Amount 🗸	361.50	Addition ~	+	•
	P	3	٩	0 Q		Terminated	7W Q	GTLR Q	GRPLFR Q	Group Term Life	NQ	Amount 🗸	33.50	Addition ~	+	•
	P	4	٩	0 Q		Terminated	7X Q	RTCRDR Q	RETHCR Q	Retiree Health Credit	N Q	Amount 🗸	28.00	Addition 🗸	+	ŀ
	$\bigcirc$	5	٩	0 Q		Terminated	7Y <b>Q</b>	VSDPR Q	SDLTDR Q	VSDP LTD	NQ	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. Select "Addition" for the **One Time Cd**.

**Note**: Use the Override Code as applicable. In that case, 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.



#### **SPOT Entry for an Additional Pay**

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

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

#### Additional Pay Page

Navigate to this page using the following path:

#### NavBar > 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 Addit	ional Pay						
	Er	mployee		Empl ID	Er	npl Record	0
Additional Pay				F	ind   View All	First 🧃	) 2 of 3 🜔 Last
	Earnings Code	TMP	Temporary Pay	,			
Effective Date				Fin	d   View All	First 🕢	1 of 1 🕟 Last
	Effective Date	03/29/2023					
Payment Deta	ails		_	Find	View All	First 🕚 1	l of 1 🕑 Last
	Addl Seq Nbr	1		End Date			
	Rate Code		•	Reason No	ot Specified		
	Earnings	\$100.00					
	Hours			Hourly Rate			
	Goal Amount	\$1,000.00		Goal Balance		\$500.00	
	Sep Check Nbr				Disable Direc	t Deposit	
		OK to Pay			Prorate Addi	tional Pay	
Applies To F	Pay Periods						
Sirst	🗹 Sec	ond 🗌	Third	Fourth	🗆 Fit	fth	
Job Infor	rmation						
> Tax Infor	mation						
🗍 Save 🛛 🔯 Re	turn to Search	🖃 Notify 🛛 🕄 Refr	esh	Æ	Update/Dis	play 🗾 🗩	Include History



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

#### **SPOT Earnings Batch**

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

E)	Q											
De	tail Data	Validation	IÞ									
	Comments	Seq#	Empl ID		Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Period
~ / }	Validate	1	Subm	Q Kuna marana	• <b>Q</b>		Active		Temporary Pay	03/09/2023	03/24/2023	
~	Validate	1	Subm	Q iture Oth Hrs	0 Q Hourly Rate	Amount	Active	TMP Q	Temporary Pay	03/09/2023 📰	03/24/2023 III	

- 7. Enter/select the following:
  - Enter the Empl ID
  - **Empl Rcd**: Defaults to "0". Update as needed
  - Earn Code: select the appropriate code. "TMP" for this scenario •
  - Earns Begin Date: enter the begin date of the period when the temporary pay should have • started
  - Earns End Dt: enter the end date of the period
  - **Amount**: Enter the amount for the temporary pay owed to the employee
  - Add'I Seq Nbr: Enter the additional sequence number associated with the temporary pay
- 8. Validate and submit the batch for approval.