Oracle Fusion Cloud Human Resources

How do I manage HCM info for a legal reporting unit?

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1 How do I manage HCM info for a legal reporting unit?

View HCM Info for a Legal Reporting Unit

You can search for a legal reporting unit (LRU) in the Legal Reporting Unit HCM Information search page and view the details.

1. Go to **My Client Groups > Show More**.
2. In the **Workforce Structures** area, click **Legal Reporting Unit HCM Information**.
3. On the Legal Reporting Unit HCM Information search page, search for a legal reporting unit by name or registration number.
4. Click a name link to open the legal reporting unit page and view the details.

You can also do the following:

- Filter the legal reporting units based on the name, registration number, whether it identifies registration, parent legal entity, or whether the legal entity is a legal employer or payroll statutory unit (PSU).
- Sort the search results using the **Sort By** option, or export the results using the **Export** option similar to the other workforce structures pages.

Tips

Here are some key points to note about HCM info for an LRU:

- All the pages specific to the tax reporting unit details, reporting establishment details, and core contexts are displayed in the **Info Group** drop-down list.
- Only those EFF segments having a value are displayed on the view page. Segments without a value aren't displayed.
- Only those EFF contexts with at least one segment having a value are displayed on the view page. Contexts with no segments having a value aren't displayed.
- EFF segments having a long label are truncated. The full label is displayed when you hover over the label.

Classify a Legal Reporting Unit

When legal reporting units (LRUs) are created, they can’t be marked as a Tax Reporting Unit (TRU) or Reporting Establishment (RE). You need to classify them in the Legal Reporting Unit HCM Information page.

In the search results on the Legal Reporting Unit HCM Information page, you can see that the **Tax Reporting Unit** and **Reporting Establishment** are marked as **No** for some LRUs. That's because the option of classifying the LRU as a TRU or an RE isn’t available while creating the LRU.

> **Note:** When you click the name link for an LRU record before it's classified as a TRU or RE, instead of navigating to the view page, the **Manage Legal Reporting Unit Classification** panel drawer opens.

To classify a legal reporting unit as a TRU or RE:

1. In the **Manage Legal Reporting Unit Classification** panel drawer, select the **Tax Reporting Unit** or **Reporting Establishment** or both checkboxes, depending on how you want to classify the LRU, and click **OK**.
2. Click the name of the LRU.

   You're now taken to the Edit Legal Reporting Unit HCM Information guided process, where you can enter the data for the LRU.
3. In the **Info to include** step of the guided process, select the **Reporting establishment details** step if required and click **Continue**.

   If the LRU is both a TRU and RE, then the **Tax reporting unit details** step is included as a required step. The **Reporting establishment details** step is an optional step that you can choose to add if required.

   > **Note:** You can hide the **Info to Include** step in this Redwood process using the **Hide Info to Include** page property in VB Studio. For details, see *Hide Info to Include Step*.
4. In the **When and why** step, you can't set the effective start date and effective end date. That's because this is the first time you're entering the data and classifying the LRU as a TRU or RE or both. Click **Continue**.
5. In the **Tax reporting unit** details step, the default TRU details are displayed. You can enter the required data and click **Continue**.
6. In the **Reporting establishment details** step, select the **Reporting Name** and **Manager** and click **Submit**.

   You will see that the TRU and RE are marked as **Yes** or **No**, depending on how you marked them.
7. Click the LRU name link, and you will be taken to the view page.

Modify the Classification for a Legal Reporting Unit

You may want to change the classification types after you have classified an LRU as a TRU or RE or both.

After an LRU has been defined as a TRU or RE, when you click the name link for the LRU on the LRU search page, it will always take you to the view page for the LRU.

To modify the classification types that you've already defined for an LRU:

1. Go to **My Client Groups > Show More**.
2. In the **Workforce Structures** area, click **Legal Reporting Unit HCM Information**.
3. On the Legal Reporting Unit HCM Information search page, search for a legal reporting unit by name or registration number.
4. Select the corresponding LRU row on the search page and click the **Manage Legal Reporting Unit Classification** button.

   The **Manage Legal Reporting Unit Classification** panel drawer opens on the side of the page. You can modify the classification here.
5. Select or clear each of the **Tax Reporting Unit** and **Reporting Establishment** checkboxes as required, and click **OK**.

   You will be taken to the Edit Details guided process.
6. Complete the steps for the guided process as described in the Classify a Legal Reporting Unit topic of this playbook.

Correct HCM Info for a Legal Reporting Unit

To correct the HCM info for an LRU:

1. Go to **My Client Groups > Show More**.
2. In the **Workforce Structures** area, click **Legal Reporting Unit HCM Information**.
3. On the Legal Reporting Unit HCM Information search page, search for a legal reporting unit that you want to correct.
4. Click the name link to open the legal reporting unit page, and click **Correct**.

   You're now taken to the Edit Legal Reporting Unit HCM Information guided process, where you can enter the data for the LRU.
5. In the **Info to include** step of the guided process, select the **Reporting establishment details** step and click **Continue**.

   If the LRU is both a TRU and RE, then the **Tax reporting unit details** step is included as a required step. The **Reporting establishment details** step is an optional step that you can choose to add if required.
6. In the **When and why** step, click **Continue**.
7. In the **Tax reporting unit details** step, make any changes as required and click **Continue**.
8. In the **Reporting establishment details** step, make any changes as required and click **Submit**.

   You can view the record to see the changes.

Update HCM Info for a Legal Reporting Unit

To update the HCM info for a legal reporting unit:

1. On the Legal Reporting Unit HCM Information search page, search for the legal reporting unit that you want to update.
2. Click the name link to open the legal reporting unit page, and click **Update**.

   You're now taken to the Edit Legal Reporting Unit HCM Information guided process, where you can enter the data for the LRU.
3. In the **Info to include** step of the guided process, select the **Reporting establishment details** step if required. Click **Continue**.

   If the LRU is both a TRU and RE, then the **Tax reporting unit details** step is included as a required step. The **Reporting establishment details** step is an optional step that you can choose to add if required.
4. In the **When and why** step, set an **Effective Start Date** and select an **Action Reason**. Click **Continue**.
5. In the **Tax reporting unit details** step, let's say you add a Tax Reporting Unit type. Click **Submit**.
6. In the **Reporting establishment details** step, make any changes as required and click **Submit**.
7. To view the updated record, click the first link in the **History** section (Changes) of the first record.

   You can see the updates: **Action Reason** added as **Reorganization**, the tax reporting unit type, and the legal employer.

Delete HCM Info for a Legal Reporting Unit

If you have updated the HCM info for a legal reporting unit (LRU) record, you can delete the record. You're taken back to the old view page where you have only one record.

> **Note:** You can't delete a record if it's the first date-effective record.

To delete the HCM info for a legal reporting unit:

1. On the **Legal Reporting Unit HCM Information** search page, search for and click the LRU that you want to delete.

   On the LRU view page, the **History** section shows the date-effective records.
2. In the **History** section, click the date-effective link to open the record that you want to delete.
3. Click **Delete This Record**.

The record is deleted and no longer shows up in the **History** section.