Oracle Fusion Cloud Human Resources

How do I load payroll tax info for the US?

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G36293-01

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Get Help

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⊘ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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Thanks for helping us improve our user assistance!

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Chapter 1
How Do I Load Payroll Tax Info for the US

1 How Do I Load Payroll Tax Info for the US

Oracle provides the tax info necessary for you to perform calculations and process payroll. Oracle Cloud Operations installs all required info as part of the regular patching.

Once the files are installed, you must run the Load Payroll Tax Information for US flow.

- Run it as part of the initial setup for your implementation project.

- Run it monthly for the Federal and State categories to ensure you receive the latest changes.

- Running it for the local categories can be resource intensive, so you may consider running it for them less frequently.

This flow updates the appropriate predefined calculation value definitions.

Depending on what category you select, this is what the flow does.

Tax category	What it does
Federal	Oracle Fusion Human Capital Management for the US provides predefined federal-level calculation value definitions, and new definitions can be added with each release. Every time you run this process, it may update them. There are multiple federal-level calculation value definitions, such as Social Security wage limits and Federal unemployment tax (FUTA) credit reduction rates.
State	State-level calculation value definitions are predefined, and new ones can be added with each release. Every time you run this process, it can update them. There are multiple state-level calculation value definitions, such as state unemployment insurance (SUI) and state disability insurance (SDI) wage limits.
City, tax district County School District	The first time you run this process, it delivers all local-level calculation value definitions. When you implement payroll from your legacy system, run this process for these levels before you convert any local W-4 data.

You can run tasks from the following locations.

- Define Earning and Deduction Definitions task grouping in your implementation project
- **Payroll** on **My Client Groups**

To make sure the payroll process has the latest info, there are some tasks you need to perform.

What you want to do	Here's how you do it
Update your tax info	1. Have the tax code data installed. For further info, see How Do I Install Payroll Tax Data Files in the Help Center.

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What you want to do	Here's how you do it
	2. Upload the tax info. For further info, see How Do I Upload Payroll Tax Info in the Help Center. 3. Optionally, upload any tax info for a specific region only. For further info, see How Do I Upload Payroll Tax Info for a Specific Region in the Help Center. 4. Resolve upload errors. For further info, see How Do I Resolve Payroll Tax Info Upload Problems in the Help Center. 5. Review the Load Payroll Tax Information log file. For further info, see How Do I Review the Load Payroll Tax Info Log File in the Help Center. You perform these operations on a monthly basis.
Manage the tax info	• Verify tax info For further info, see How Do I View My Payroll Tax Info in the Help Center. • Revert to an older version of the tax code For further info, see How Do I Revert to an Older Payroll Tax Code Version in the Help Center.

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Chapter 2
Payroll Tax Info

2 Payroll Tax Info

How Do I Install Payroll Tax Data Files

Oracle Cloud Operations installs these files for you. You automatically receive a notification when the file is available for installation.

Once the files are installed, run the Load Payroll Tax Information for US flow to update your tax data. Run it as part of your initial setup for the implementation project as well as monthly.

How Do I Upload Payroll Tax Info

After the geography data files are installed, use the Load Geographies for US flow to load data into your installation after an update.

1. In **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Search for your US legislative data group (LDG).
4. Search for and select **Load Payroll Tax Information for US**.
5. Specify the following values.

Field name	What you enter
Data Location	Location of the file to be used only if it's different from the default location.
Allow Upload of Older Version	Allow an older version of the data file to be uploaded, replacing newer data.
Geographic Category	Run for Federal and State each month. Run for City, County, and School District as needed. **Note:** Federal and state runs can take a couple hours to process. Lower-level runs can take longer.

6. Click **Submit**.

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How Do I Upload Payroll Tax Info for a Specific Region

After the geography data files are installed, use the Load Geographies for US flow to load a specifc region's data into your installation.

1. Run the Load Payroll Tax Information for US flow.
2. Select the appropriate value in **Geographic Category**.

How Do I Resolve Payroll Tax Info Upload Problems

If you receive errors when you run the task, run the US Payroll JIT Validation test from the Diagnostic Dashboard. For further info, see Diagnostic Tests for the US in the Help Center.

If you're unable to resolve the issue, log a service request with Oracle Support.

If you're an On-Premise customer, contact your DBA or third-party provider for assistance.

How Do I Review the Load Payroll Tax Info Log File

To view the log:

1. From the Navigator, select **Tools** and then **Scheduled Processes**.
2. Search for and select these processes.

   - Load US Postal Code Geographies
   - Load US Geography Identifiers
   - Load US Master Geographies

3. Click **View Log** for each, and check them for useful info.

How Do I View My Payroll Tax Info

Use the Calculation Value Definition task to view the following tax info.

- Federal tax info
- State tax info
- Pretax info

View Federal Tax Info

1. Start the Calculation Value Definitions task.

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2. Select a US legislative data group (LDG).
3. In **Value Definition Group**, enter `Federal Tax Information`, and click **Search**.

   This displays all federal-level value definition groups, such as the Medicare employer tax rate, Social Security employee wage limit, and Federal Unemployment Tax Act (FUTA) employer rate.
4. Click a group's link to view its detailed info.

View State Tax Info

1. Start the Calculation Value Definitions task.
2. Select a US LDG.
3. In **Value Definition Group**, enter `State Tax Information.`
4. In **Name**, type the state you want to query and click **Search**.

   This displays all value definition groups for that state, such as the state unemployment insurance (SUI) wage limit.
5. Click a group's link to view its detailed info.

View Pretax Info

1. Start the Calculation Value Definitions task.
2. Select a US LDG.
3. In **Value Definition Group**, enter `Pretax` and click **Search**.

   This displays all deferred compensation value definition groups.

   This info isn't loaded as a result of the Load US Payroll Tax Information flow. The US localization provides a set of predefined calculation value definitions for deferred compensation.
4. Click a group's link to view its detailed info.

How Do I Revert to an Older Payroll Tax Code Version

To revert to an older version:

1. Run the Load Payroll Tax Information for US flow.
2. Select **Yes** in **Allow Upload of Older Version**.

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