

Oracle Fusion Cloud Human Resources

Tax Jurisdictions Card for the US

FA Latest



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Contents

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1	What Is the Tax Jurisdictions Card?	1
	What Is the Tax Jurisdictions Card?	1
2	What Are Tax Jurisdictions?	3
	Tax Jurisdictions for the US	3
	How do I override the jurisdictions on an employee's Tax Jurisdictions card for the US?	3
	How does the US Tax Jurisdiction Overrides Report identify overrides?	3
	How Tax Jurisdictions Are Determined	4
	How the Payroll Process Uses Tax Jurisdictions	4
3	How Do I Use the Tax Jurisdictions Card?	7
	View the Tax Jurisdictions Card	7
	Create and Update the Tax Jurisdictions Card	8
	Automatically Create the Tax Jurisdictions Card	8
	Automatically Update the Tax Jurisdictions Card	9
	Manually Create and Update a Tax Jurisdictions Card	9
	Manually Define a Tax Jurisdictions Card for a Single Employee	10
	Manually Define Tax Jurisdictions Cards for Multiple Employees Using HDL	10
	Override Resident Tax Jurisdiction for Multiple Employees Using HDL	11
	How do I set overrides on the Tax Jurisdictions card?	16
	How can I override city-level earnings and taxable wage accumulation?	17
	How do employee tax addresses determine tax jurisdictions?	17
	How do I keep tax jurisdictions in sync?	18
4	Reports and Processes	19
	Sync Calculation Cards for the US	19
	US Tax Jurisdiction Evaluation Process	20

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1 What Is the Tax Jurisdictions Card?

The Tax Jurisdictions Card captures all applicable jurisdictions related to an employee's resident and work tax addresses. The payroll process uses this info to accumulate and withhold taxes.

This card is available only if you have the **Payroll** or **Payroll Interface** product extension. Employees automatically get this card during the onboarding process.

There are multiple actions you can perform on this card.

What you want to do	How you do it
View the card	As the employer, use the Calculation Entries task.
Create the card automatically	Automatic card creation is based on your Oracle Cloud HCM license. It is available to Payroll and Payroll Interface extensions only. For most employees, the New Hire process automatically creates the Tax Jurisdictions card. In rare cases, if the card is not automatically created, you can do so manually using the Calculation Entries task or running the Tax Jurisdiction Evaluation Process. For further info, see How Do I Automatically Create the Tax Jurisdictions Card in the Help Center.
Update the card automatically	Whenever an employee's resident or work location address changes, a sync process automatically updates their resident and work tax addresses on the Tax Jurisdictions card. For further info, see How Do I Automatically Update the Tax Jurisdictions Card in the Help Center.
Create and update the card manually	There are a couple ways to do this. • Calculation Entries task • HCM Data Loader (HDL) For further info, see How Do I Manually Create and Update a Tax Jurisdictions Card in the Help Center.

2 What Are Tax Jurisdictions?

Tax Jurisdictions for the US

Tax jurisdictions help the payroll process determine a person's tax withholding by identifying which state and local bodies have tax authority over them. They are based on the person's resident and work tax addresses.

The Tax Jurisdictions card stores the derived tax jurisdictions and their resident and work tax addresses. You can use the Calculation Entries task to override these jurisdictions as needed.

To be able to accurately determine your employees' tax jurisdictions, you must:

- Be running the Payroll license
- Have full address validation enabled, and all employee and location addresses validated to rooftop accuracy
- Ensure all employees have a Tax Jurisdictions card

How do I override the jurisdictions on an employee's Tax Jurisdictions card for the US?

The Tax Jurisdictions card derives the employee tax jurisdictions based on their resident and work tax addresses.

There're a couple ways you can override these jurisdictions.

- You can enter the override directly on the card.
- You can override the location's tax jurisdiction through the Manage Locations task.

How does the US Tax Jurisdiction Overrides Report identify overrides?

The US Tax Jurisdiction Overrides Report generates a list of work and resident tax jurisdiction overrides on employee Tax Jurisdictions cards. Use it to compare them against the derived jurisdictions to ensure proper tax calculation and reporting.

For work tax jurisdictions, it compares:

- Jurisdictions derived from the work location addresses
- Location overrides defined in **Work Tax Jurisdictions** on the Manage Locations task

For resident tax jurisdictions, the report compares:

- Jurisdictions as derived on the Tax Jurisdictions card
- Jurisdiction overrides defined on the Tax Jurisdictions card

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Related Topics

- [US Tax Jurisdiction Overrides Report](#)

How Tax Jurisdictions Are Determined

The tax jurisdictions for employees and locations are derived based on the geospatial coordinates of verified addresses.

Note: If a person or location has an address record that hasn't been assigned geospatial coordinates, the Tax Jurisdictions card bases its jurisdictions context on the address itself. It doesn't automatically detect local tax jurisdictions for these addresses.

How employee jurisdictions are determined

You can view an employee's resident and work tax jurisdictions their Tax Jurisdictions card.

- Unless overridden, their resident tax jurisdiction is determined by their home address.
You can override the resident tax jurisdiction with a resident tax address on their person record.
- Unless overridden, their work tax jurisdiction is determined by their work location address.
You can override the work tax jurisdiction with a location override on the location record.

The Tax Jurisdictions and Tax Withholding cards automatically sync to ensure that address changes on the tax card result in the appropriate updated jurisdictions. This includes:

- **School District** on the Ohio regional component
- **School District** on the applicable Kentucky county regional component
- **Resident PSD Code**, **Resident School District**, and **Work PSD Code** on the Pennsylvania PSD component

Note: You can disable this sync by setting the **Calculation Card Jurisdiction Sync** calculation value definition to **N**. With this sync disabled, you can still use the Sync Calculation Card for US process.

How location jurisdictions are determined

You can view a location's tax jurisdictions in **Work Tax Jurisdictions** on the Manage Locations task.

How the Payroll Process Uses Tax Jurisdictions

When you perform a payroll run, the process uses tax jurisdictions in several ways.

1. The process determines if there are any earnings with jurisdiction overrides entered as element entries on the elements (tagged earnings).

For example, you want to enter 8 hours of time worked in a different location than where the person normally works. When tagged as such, the payroll process taxes the calculated pay for those units of time at the designated jurisdiction. If the employee doesn't have withholding elections for the tagged jurisdiction, the process automatically calculates the tax at the highest withholding status or allowance elections.

2. It determines if there's any allocation configured on Employee Earnings Distribution Override card.
3. It determines the tax jurisdictions.
 - If the employee has a Tax Jurisdictions card, it uses the jurisdictions provided.
 - Otherwise, it derives the jurisdiction context from the address record, such as state, county, and city.
4. It determines the related withholding status and any additional info from the Tax Withholding card.
5. Based on this, it extracts the relevant regional tax data from the value definitions and values by criteria available in the application.
6. It determines state reciprocity rules.
7. It calculates the taxes.

3 How Do I Use the Tax Jurisdictions Card?

View the Tax Jurisdictions Card

The Tax Jurisdictions card captures all applicable jurisdictions related to an employee's resident and work tax addresses.

Note: All employees can view their Tax Jurisdictions card in Self-Service. To restrict employee access, you need to define an employee role that excludes the HRX_VIEW_US_TAX_JURISDICTIONS_PRIV privilege. Assign it to the appropriate people, and remove the default Employee Abstract role.

Region	Includes this info
Resident Tax Jurisdictions	All local tax jurisdictions, based on the employee's resident tax address. The content on this component is derived and read only. However, you can set overrides by clicking Override. Click Revalidate and Sync to update the derived local tax jurisdictions and sync them to the employee's Tax Withholding card.
Tax Withholding Overrides	Any local jurisdiction overrides you have defined on employee's Tax Withholding card, such as: - Ohio school districts on the Ohio regional component - Kentucky school districts on the Kentucky county regional component - Pennsylvania political subdivision (PSD) codes and school districts on the Pennsylvania PSD regional component Clicking the override navigates you to the person's Tax Withholding card and opens the appropriate regional component for editing.
Regional Tax Info	Consists of these attributes. - Tax reporting unit (TRU) association info - Primary work address - State of unemployment insurance (SUI) - State of disability insurance (SDI) - State of long-term care (LTC) - State of family medical leave insurance (FMLI) These attributes are defined on the employee's Tax Withholding card. Clicking the tax info in the Tax Jurisdictions card navigates you to the person's Tax Withholding card and opens the US Taxation component for editing.
Work Tax Jurisdictions	Tax jurisdictions associated with the employee's assigned work location. You can change this content by: Selecting a different work location on the person's assignment.

Region	Includes this info
	Changing the Work Tax Jurisdiction info for the location through the Locations task. This changes the info for all employees associated with the location. Note: For locations in Pennsylvania, the sync process captures the work PSD codes on the employee's Tax Withholding card based on their location. However, if you override the code on the location, you must run the Sync Calculation Cards for the US process to update the tax card.

Create and Update the Tax Jurisdictions Card

You have multiple options related to creating and updating Tax Jurisdictions card.

What you want to do	How you do it
Create the card automatically	- For most employees, the New Hire process automatically creates the Tax Jurisdictions card. In rare cases, if the card is not automatically created, you can do so manually using the Calculation Entries task. - For workers with unverified addresses, when you run the Address Validation Process in Final mode, it creates any missing Tax Jurisdictions cards as well as verifies their addresses.
Update the card automatically	Whenever an employee's resident or work location address changes: - A sync process automatically updates the derived local tax jurisdictions on the Tax Jurisdictions card. You can't disable this sync. - Their Tax Withholding card is updated to keep it in sync with the address changes. You can disable this sync.
Create and update the card manually	In cases where you need to manually create or update the Tax Jurisdictions card, use either the Calculation Entries task or HCM Data Loader (HDL).

Automatically Create the Tax Jurisdictions Card

You use the Manage Features by Country or Territory task to activate localization-specific functionality for your enterprise. When you select Payroll or Payroll Interface for the United States, your workers automatically receive a Tax Jurisdictions card whenever you:

- Define them through the New Hire task
- Assign them a new payroll relationship
- Convert their employee data through batch loaders

- Run the Address Validation Process flow

Here's how to set up automatic Tax Jurisdictions card creation:

1. Use the Manage Features by Country or Territory task to set **Selected Extension** to:
 - Payroll
 - Payroll Interface
2. Configure the address validation method to:
 - Full address verification service
 - Address verification without search

Automatically Update the Tax Jurisdictions Card

Whenever an employee's resident or work location address changes, a sync process automatically updates the addresses on their Tax Jurisdictions card. You can't disable this sync.

Whenever an employee's tax address changes, a process updates the appropriate tax jurisdictions on the Tax Jurisdictions card. This includes local jurisdictions, such as the school district or Pennsylvania political subdivision (PSD) code.

The calculation card sync process updates the Tax Withholding card with these changes. They are displayed on the Tax Jurisdictions card as overrides. Clicking the override navigates you to the person's Tax Withholding card and opens the appropriate regional component for editing.

- Ohio school districts on the **Ohio** regional component
- Kentucky school districts on the Kentucky county regional component
- Pennsylvania PSD codes and school districts on the **Pennsylvania PSD** regional component

You can disable this process.

The Tax Jurisdictions card automatically syncs with any changes you make to the tax reporting unit (TRU) associations on the tax card.

Manually Create and Update a Tax Jurisdictions Card

The Hire and Address Validation processes automatically create employee Tax Jurisdictions cards. In cases where one or more employees don't have a Tax Jurisdictions card, you can define them manually.

What you want to do	How you do it
Define a card for a single employee	Use the Calculation Entries task.
Define cards for multiple employees	Create an HCM Data Loader (HDL) file using the CalculationCard business object.

What you want to do	How you do it
Override resident tax jurisdictions for multiple employees	Create an HCM Data Loader (HDL) file using the CalculationCard business object.

Manually Define a Tax Jurisdictions Card for a Single Employee

To manually define the card, use the Calculation Entries task.

1. In the task, search for the employee record, and click **Add**.
2. Enter the effective as-of date.
Select the effective date same as the payroll relationship start date of the employee.
3. Select **Tax Jurisdictions**.
4. Click **Submit**.

Manually Define Tax Jurisdictions Cards for Multiple Employees Using HDL

To define Tax Jurisdictions cards for multiple employees, create an HCM Data Loader (HDL) file using the **CalculationCard** business object.

To create default Tax Jurisdictions cards, you won't need to pass any card component or card component details. You just need to include this METADATA block for each employee.

For this attribute	This is what you enter
LegislativeDataGroupName	Legislative data group (LDG) of the card you're creating This field appears on all records within your CalculationCard.dat file for Tax Jurisdictions card.
DirCardDefinitionName	Tax Jurisdictions
AssignmentNumber PayrollRelationshipNumber	Identifiers of the employee owning the card
EffectiveStartDate	Start date of the card This is usually the employee's hire date.
CardSequence	Unique numerical identifier for the card

For this attribute	This is what you enter
	- For employees with multiple cards, this is a sequential identifier, based on the order the card was created, starting with 1. - For employees with only one card, this is always 1.

Here's an example of a file that generates default Tax Jurisdictions cards for three employees.

```
METADATA|CalculationCard|LegislationDiscriminator|LegislativeDataGroupName|DirCardDefinitionName|
DirCardDefinitionId|AssignmentNumber|EffectiveStartDate|EffectiveEndDate|LegislativeDataGroupId|
SourceSystemOwner|SourceSystemId|CardSequence|DirCardId|TaxRepUnitName|PayrollStatutoryUnitName
MERGE|CalculationCard||ZHRX_USVS_ST LDG One|Tax Jurisdictions||E955940008195913|2014/01/01|4712/12/31||||
1|||
MERGE|CalculationCard||ZHRX_USVS_ST LDG One|Tax Jurisdictions||E955940008195914|2022/10/01|4712/12/31||||
1|||
MERGE|CalculationCard||ZHRX_USVS_ST LDG One|Tax Jurisdictions||E955940008195915|2025/03/17|4712/12/31||||
1|||
```

Override Resident Tax Jurisdiction for Multiple Employees Using HDL

To apply resident tax jurisdiction overrides to multiple employees, use an HCM Data Loader (HDL) file with the **CalculationCard** business object.

To override the system-derived resident tax jurisdictions, you must include an override component:

1. Include the **CalculationCard** METADATA block for each employee card you're updating.

For this attribute	This is what you enter
LegislativeDataGroupName	LDG of the card you're updating
DirCardDefinitionName	Tax Jurisdictions
AssignmentNumber PayrollRelationshipNumber	Identifiers of the employee owning the card
EffectiveStartDate	Start date of the card This is usually the employee's hire date.
CardSequence	Unique numerical identifier for the card For employees with multiple cards, this is a sequential identifier, based on the order the card was created, starting with 1.

For this attribute	This is what you enter
	For employees with only one card, this is always 1.

For example:

```
METADATA|CalculationCard|LegislationDiscriminator|LegislativeDataGroupName|DirCardDefinitionName|
DirCardDefinitionId|AssignmentNumber|EffectiveStartDate|EffectiveEndDate|LegislativeDataGroupId|
SourceSystemOwner|SourceSystemId|CardSequence|DirCardId|TaxRepUnitName|PayrollStatutoryUnitName
MERGE|CalculationCard||ZHRX_USVS_ST LDG One|Tax Jurisdictions||E955940008195913|2024/01/01|
4712/12/31||||1|||
```

- For each card you are modifying, add a **CardComponent** METADATA block to create the Override component.

For this attribute	This is what you enter
DirCardCompld	
AssignmentNumber PayrollRelationshipNumber	Identifiers of the employee owning the card
EffectiveStartDate	Start date of the card component
EffectiveEndDate	End date of the card component
ComponentSequence	
CardSequence	Unique numerical identifier for the card - For employees with multiple cards, this is a sequential identifier, based on the order the card was created, starting with 1. - For employees with only one card, this is always 1.
DirCardCompDefId	
DirCardCompDefName	
LegislativeDataGroupName	LDG of the card you're updating
DirCardDefinitionName	
Context1	State's 2-digit Geocode identifier

For this attribute	This is what you enter
Context2	Not used for jurisdiction overrides
Context3	Not used for jurisdiction overrides
Context4	Not used for jurisdiction overrides
Context5	Not used for jurisdiction overrides
Context6	Not used for jurisdiction overrides
ParentDirCardCompld	
DirCardId	
SourceSystemOwner	
TaxRepUnitName	
PayrollStatutoryUnitName	
ParentDirCardCompDefName	
ParentComponentSequence	

- For each override you're making, add a **CalculationValueDefinition** METADATA block.

This block identifies the field being overridden.

For this attribute	This is what you enter
EffectiveStartDate	Start date of the override
EffectiveEndDate	End date of the override
LegislativeDataGroupName	LDG of the card you're updating

For this attribute	This is what you enter
ValueDefinitionName	
AssignmentNumber	Identifiers of the employee owning the card
PayrollRelationshipNumber	
DirCardDefinitionName	
DirCardCompDefName	
SourceId	
SourceSystemOwner	
ComponentSequence	
CardSequence	Unique numerical identifier for the card - For employees with multiple cards, this is a sequential identifier, based on the order the card was created, starting with 1. - For employees with only one card, this is always 1.
Context1	State's 2-digit Geocode identifier
Context2	
Context3	
TaxRepUnitName	
PayrollStatutoryUnitName	

4. For each override you're making, add a **EnterableCalculationValue** METADATA block.

This block identifies the calculation value definition associated with the field.

For this attribute	This is what you enter
EffectiveStartDate	Start date of the override

For this attribute	This is what you enter
EffectiveEndDate	Date when you discontinue the override
LegislativeDataGroupName	LDG of the card you're updating
ValueDefinitionName	
AssignmentNumber PayrollRelationshipNumber	Identifiers of the employee owning the card
DirCardDefinitionName	
DirCardCompDefName	
Value1	
ValueDefnId	
SourceSystemOwner	
SourceSystemId	
ComponentSequence	
CardSequence	Unique numerical identifier for the card - For employees with multiple cards, this is a sequential identifier, based on the order the card was created, starting with 1. - For employees with only one card, this is always 1.
TaxRepUnitName	
PayrollStatutoryUnitName	

For this attribute	This is what you enter

Here's an example that defines County, City, and Within City Limits overrides.

```
METADATA|CardComponent|DirCardCompId|AssignmentNumber|EffectiveStartDate|EffectiveEndDate|
ComponentSequence|CardSequence|DirCardCompDefId|DirCardCompDefName|LegislativeDataGroupName|
DirCardDefinitionName|Context1|Context2|Context3|Context4|Context5|Context6|ParentDirCardCompId|
DirCardId(SourceSystemId)|SourceSystemOwner|SourceSystemId|TaxRepUnitName|PayrollStatutoryUnitName|
ParentDirCardCompDefName|ParentComponentSequence

METADATA|CalculationValueDefinition|EffectiveStartDate|EffectiveEndDate|LegislativeDataGroupName|
ValueDefinitionName|AssignmentNumber|DirCardDefinitionName|DirCardCompDefName|SourceId(SourceSystemId)|
SourceSystemOwner|SourceSystemId|ComponentSequence|CardSequence|Context1|Context2|Context3|
TaxRepUnitName|PayrollStatutoryUnitName

METADATA|EnterableCalculationValue|EffectiveStartDate|EffectiveEndDate|LegislativeDataGroupName|
ValueDefinitionName|AssignmentNumber|DirCardDefinitionName|DirCardCompDefName|Value1|
ValueDefnId(SourceSystemId)|SourceSystemOwner|SourceSystemId|ComponentSequence|CardSequence|
TaxRepUnitName|PayrollStatutoryUnitName

MERGE|CalculationCard||ZHRX_USVS_ST LDG One|Tax Jurisdictions||E955940008195913|2024/01/01|
4712/12/31|||1|||
MERGE|CardComponent||E955940008195913|2024/04/01|4712/12/31|1|1||Resident Tax Jurisdictions Override|
ZHRX_USVS_ST LDG One|Tax Jurisdictions|36|||1|||Resident Tax Jurisdictions|1

MERGE|CalculationValueDefinition|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|County|E955940008195913|Tax
Jurisdictions|Resident Tax Jurisdictions Override|||1|1|||

MERGE|EnterableCalculationValue|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|County|E955940008195913|Tax
Jurisdictions|Resident Tax Jurisdictions Override|113|||1|1|

MERGE|CalculationValueDefinition|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|City|E955940008195913|Tax
Jurisdictions|Resident Tax Jurisdictions Override|||1|1|||
MERGE|EnterableCalculationValue|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|City|E955940008195913|Tax
Jurisdictions|Resident Tax Jurisdictions Override|3040|||1|1|

MERGE|CalculationValueDefinition|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|Within City Limits|
E955940008195913|Tax Jurisdictions|Resident Tax Jurisdictions Override|||1|1|||

MERGE|EnterableCalculationValue|2024/04/01|4712/12/31|ZHRX_USVS_ST LDG One|Within City Limits|
E955940008195913|Tax Jurisdictions|Resident Tax Jurisdictions Override|E|||1|1|
```

How do I set overrides on the Tax Jurisdictions card?

To manually override derived resident tax jurisdictions on an employee's Tax Jurisdictions card:

1. Open the Tax Jurisdictions card for editing.
2. Set the effective as-of date to when you want the override to begin.
3. Click **Override**.
4. Select the state of the overriding jurisdiction, and click **OK**.
5. Set the appropriate values for the override.
6. Click **Save**.

Related Topics

- [How can I override city-level earnings and taxable wage accumulation?](#)

How can I override city-level earnings and taxable wage accumulation?

When defining a resident or user override on the Tax Jurisdictions card, you can use **Within City Limits** to override city-level earnings and taxable wage accumulation.

You can select from these values.

Value	What it does
Yes	The Jurisdictions Card considers this address within city limits. This is the default setting for unverified addresses. The payroll process: 1. Tracks city-level earnings 2. Tracks applicable city taxable wages 3. Calculates applicable city taxes
No, track earnings but exclude from taxation	The Jurisdictions Card considers this address outside city limits, and the city is a taxing entity. The payroll process: 1. Tracks city-level earnings 2. Doesn't track applicable city taxable wages 3. Doesn't calculate applicable city taxes
No, don't track earnings	Explicitly exempts the address from city tax. Select this value only as a administrative-level override. The payroll process: 1. Doesn't track city-level earnings 2. Doesn't track applicable city taxable wages 3. Doesn't calculate applicable city taxes

How do employee tax addresses determine tax jurisdictions?

An employee's work tax address helps determine their tax jurisdictions. Normally, this is the person's assigned location address, unless they are work-at-home or their circumstances require a work tax address override.

The Tax Jurisdictions card stores this info, and the payroll process uses it to help calculate the person's tax withholding. If the employee record isn't associated with a card, the payroll process uses the jurisdiction context of the address record.

These addresses must use the Supplemental Taxation and Reporting Address style.

How do I keep tax jurisdictions in sync?

Unless disabled, Oracle Fusion Cloud maintains an automatic sync between a worker's Tax Jurisdictions card and their Tax Withholding card. This updates local jurisdictions with any changes to address data.

You can disable this sync by setting the **Calculation Card Jurisdiction Sync** calculation value definition to **N**.

4 Reports and Processes

Sync Calculation Cards for the US

Your employees' payroll and HR data is interconnected and shared across tasks. Normally, when you make a change in one area, a sync process automatically makes the appropriate updates everywhere else.

There are cases where you must manually sync the employee's Tax Withholding Card.

- You have updated a location's political subdivision (PSD) code on the location's Work Tax Jurisdictions section through the Locations task.
- You have disabled the automatic sync through the Calculation Jurisdictions Card Sync calculation value definition, but you want to update your employee tax cards with the derived local tax jurisdictions from their Tax Jurisdictions cards.
- An employee has changed home addresses, and the appropriate regional components of their tax card need to be updated.
 - Resident Pennsylvania Subdivision (PSD) code
 - Ohio or Kentucky school district

In these cases, run this process to update your employees' tax cards after making changes.

Note: When you run this process manually, it updates only your latest changes. It doesn't update historical data.

Run this process whenever you make changes to a person's address data and you have disabled the automatic sync process.

1. From **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Enter your US legislative data group (LDG).
4. Search for and select **Sync Calculation Cards**.

Process parameters

Mode

Select the action you want the process to take.

- Default Primary Address and State of Disability and Unemployment

Updates the person's primary work address on the **US Taxation** component on their Tax Withholding card. Based on the primary address, it syncs the state unemployment (SUI) and disability insurance (SDI) states.

- Sync local jurisdictions

Copies the derived tax local jurisdiction info from the person's Tax Jurisdictions card to the appropriate regional components of their Tax Withholding card.

- Sync Pennsylvania work PSD codes

Updates the person's work Pennsylvania subdivision (PSD) code based on their location data. Use this mode whenever you make changes to the PSD code on location's work tax jurisdiction info.

Calculation Card

Select **Employee Withholding Certificate**.

Payroll Statutory Unit

To sync calculation cards for employees in a specific payroll statutory unit (PSU), select it here.

Leave blank to run for employees in all PSUs.

Tax Reporting Unit

To sync calculation cards for employees in a specific tax reporting unit (TRU), select it here.

Leave blank to run for employees in all TRUs.

Payroll

To sync calculation cards for employees attached to a specific payroll definition, select it here.

Leave blank to run against all definitions.

Person

To sync calculation cards for a specific person, select them here. If the person has multiple payroll relationships, this process syncs the cards attached to all of them.

Leave blank to run against all employees.

Payroll Relationship

To sync calculation cards for a specific payroll relationship, select it here.

Leave blank to run against all employees and all their payroll relationships.

Process Configuration Group

Select the process configuration group if you have defined one. Use a process configuration group to provide sets of processing parameters, primarily related to logging and performance. If you don't select a process configuration group, the process uses the parameters in the default group.

US Tax Jurisdiction Evaluation Process

Oracle updates its geography data as needed, and we deliver it to you as part of your regular patching cadence. Run the US Tax Jurisdiction Evaluation Process whenever new geography boundaries are updated.

This includes:

- Tax jurisdictions on employee Tax Jurisdictions cards
- Tax jurisdictions info on locations

To run this process:

1. In **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Select your US legislative data group (LDG).
4. Search for and select **US Tax Jurisdiction Evaluation Process**.

Flow parameters

Effective Date

Select an effective date for the changes the process will be making.

Address Type

Select the type of address you want to validate.

State

Select a state. Leave blank to process changed jurisdictions in all states.

Person

Select a person to process any addresses associated with only them.

Use this only when processing addresses with the Person address type.

Note: The report ignores this field if you selected a payroll relationship group.

Location

Select a location to process any addresses associated with only it.

Use this only when processing addresses with the Location address type.

Payroll Relationship Group

Use payroll relationship groups to process addresses associated for a group of person records. Leave blank to process all person records.

Use this parameter only when processing addresses with the Person address type.

Reporting Mode

Run this process in Draft mode to review the output report to see the impacted records. Run the flow in Final mode to commit the changes.

Flow output

This flow produces a report suitable for viewing in a spreadsheet application, such as Microsoft Excel.

Section	Columns and descriptions
Address Data	Describes the person or location address data. It includes: Address type

Section	Columns and descriptions
	• Person or location • Record details • Person or location name • Address • Street address of a person or location • Latitude • Longitude
Tax Jurisdictions (Before)	Describes the original jurisdictions data. It includes: • State • County • City • Within city limits • Tax district • School district • Pennsylvania PSD code • Special tax district • Override exists
Tax Jurisdictions (After)	Describes the adjusted jurisdictions data. It includes: • State • County • City • Within city limits • Tax district • School district • Pennsylvania PSD code • Special tax district • Fields impacted