Oracle Fusion Cloud Human Resources

What is the Reporting Information card for the US?

FA Latest

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Author: JOLAWSON

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1 What Is the Reporting Information Card for the US?

The Reporting Information card provides additional info for person-level state and federal reporting for both employees and retirees. Most of these fields are for third-party quarterly tax filing.

Use the Calculation Entities task to update this card.

It includes these calculation components.

Calculation component	What it's for
Reporting Information	Sets values on the **Federal** component, including values for third-party reporting and federall configuration. For use with employees. You must manually create this component before you can set any values.
Retiree Reporting Information	Sets values on the **Federal** component. For use with retirees. Every retiree automatically gets this component.
State Reporting Information	Sets values on the **Regional** component that require both a state and tax reporting unit (TRU).
Regional Tax Information	Sets values on the **Regional** component that are state dependent but apply to all TRUs. You must manually create this component before you can set any values.

2 How do I configure ADP third-party reporting on the Reporting Information card?

You use the card's **Third-Party Interfaces** component detail to set ADP-specific values for your third-party tax filing.

When you add the **Reporting Information** calculation component to the card's **Federal** component, it automatically creates this component detail section.

1. Open the person's Reporting Information card for editing.
2. Add the **Reporting Information** calculation component to the **Federal** component group.

   This creates these **Third-Party Interfaces** component details.

   - **Reporting Information**
   - **Third-Party Interfaces**
3. Expand **Third-Party Interfaces**.
4. Set these values.

Field name	How you use it
ADP Special Processing Required	Indicate whether you're excluding the employee's year-end forms from main population printing. The default is **No**.
ADP Special Sort Code	Provide additional data for sort options G and E in the ADP client maintenance system.

5. Save your work.

For further info, see Oracle Cloud Human Capital Management for the United States: Payroll Third-Party Tax Filing Interface (1594079.1) on My Oracle Support.

3 How do I configure federal reporting info on the Reporting Information card?

You use the card's **Reporting Information** component detail to configure reporting info at the federal level.

When you add the **Reporting Information** calculation component to the card's **Federal** component, it automatically creates this component detail section.

1. Open the person's Reporting Information card for editing.
2. Add the **Reporting Information** calculation component to the **Federal** component group.

   This creates these **Third-Party Interfaces** component details.

   - **Reporting Information**
   - **Third-Party Interfaces**
3. Expand **Reporting Information**.
4. Set these values.

Field name	How you use it
Legal Representative	Identify this person as a legal representative of the company.
Corporate Officer	Identify this person as a corporate officer or their relationship with a corporate officer. As this is required by multiple states, specify it at the federal level. **Note:** Most states require **Yes** or **No** values for this field; however, Washington DC allows others. If you select a value other than **Yes** or **No** for any state other than Washington DC, processes like the Third-Party Tax Filing Interface interpret the value as **No**.
Eligible for Retirement Plan	Employee eligibility for employer-sponsored retirement plans is based on a combination of: - Amounts fed to specific balances - Kinds of retirement plans in which the employees are participating In some cases, you must manually select this value to **Yes** to ensure proper reporting on Form W-2. An employee is automatically marked as eligible for the retirement plan on Box 13 of their W-2 when any of the following balances has a value greater than $0. - W2 401k

Field name	How you use it
	◦ W2 403b ◦ W2 408k ◦ W2 501c ◦ W2 Pension Plan ◦ W2 Roth 401k ◦ W2 Roth 403b
Reporting Location for Work-At-Home Employees	Select from a list of locations that have already been defined for work-at-home employees. Leave blank if the employee isn't work-at-home. Used for multiple worksite reporting.
Family Member with Majority Interest	Designate if the employee or a family member owns majority interest of this business.
Probationary Code	Identify employees hired on a trial basis.

5. Save your work.

For further info, see Oracle Cloud Human Capital Management for the United States: Payroll Third-Party Tax Filing Interface (1594079.1) on My Oracle Support.

4 How do I configure retiree info on the Reporting Information card?

You use the card's **Retiree Reporting Information** component to configure reporting info for retirees. The card creates this component automatically when you onboard the retiree.

This Federal component includes these values for Form 1099-R.

To set these values:

1. Open the Reporting Information card for editing.
2. In **Calculation Card Overview**, click **Federal**.
3. In **Calculation Components**, click **Retiree Reporting Information**.

   Add it if it doesn't exist.
4. In **Calculation Component Details**, expand **Retiree Reporting Information**.

Field name	How you use it
Account Number	Form 1099-R account, policy, or other identifying number.
Annuity Percentage	Annuity percentage as displayed in the % value of Box 8.
FATCA Filing Requirement	Identifies the payer is satisfying their Chapter 4 account reporting requirement.
First Year of Designated Roth Contribution	The year of the first Roth contribution, as displayed on Box 11.
Taxable Amount Not Determined	Identifies that the payer was unable to determine the taxable amount as displayed in Box 2b.
Total Distribution	Identifies a total distribution that closes out the retiree's account as displayed in Box 2b.
Total Distribution Percentage	When a total distribution is made to multiple people, identifies this person's percentage, as displayed in Box 9a.
Traditional, SEP, or SIMPLE IRA	Identifies the person is receiving a traditional IRA, SEP, or SIMPLE distribution.
Distribution date for 6050Y death benefits	Identifies the date that these types of benefits were paid.

5 How do I configure state-specific info on the Reporting Information card?

You use the **State Reporting Information** calculation component to capture state-specific reporting info for employees.

The card adds this calculation component to each state regional component where the person works.

1. Open the Reporting Information card for editing.
2. In **Calculation Card Overview**, click **Regional**.
3. Select the appropriate state.

   Add it if it doesn't exist.
4. In **Calculation Components**, click **State Reporting Information**.

   Add it if it doesn't exist.
5. In **Calculation Component Details**, click **Add Row**.
6. Select the state's calculation component, and click **OK**.

This section includes these values.

State	Field name	How you use it
Alaska	Geographic Code	Two-digit code that identifies the employee's primary place of work.
Alaska	Occupational Code	Identifies the employee's occupation category. **Note:** For further info, see the Alaska Department of Labor and Workforce Development website. Search for the Alaska Occupation and Geographic Coding Resources page.
California	Wage Plan Code	Used to override the value specified at the payroll statutory unit (PSU) and TRU levels. For further info, see the California Employment Development Department website. Search for the Electronic Filing Guide for the Quarterly Wage and Withholding Program. Choices include: • State Unemployment Insurance only • SDI without unemployment insurance • Voluntary disability insurance • No voluntary, SUI insurance, or disability

State	Field name	How you use it
		• SUI and SDI • State Unemployment Insurance with religious exemption • Voluntary disability insurance and SUI
Maine	Seasonal Worker	Identifies the person as a seasonal worker.
Missouri	Seasonal Worker	Identifies the person as a seasonal worker.
North Carolina	Seasonal Worker	Identifies the person as a seasonal worker.
Vermont	Health Care Status	Designates if the employee is considered covered or not covered. Used in the calculation of Vermont health care deduction reporting.

6 How do I configure regional tax info on the Reporting Information card?

You use the **Regional Tax Information** calculation component to capture reporting info for employees that apply to both their state and tax reporting unit (TRU). You must manually create this component before you can set any values.

This applies to these jurisdictions.

- New York
- Puerto Rico

To set these values:

1. Open the Reporting Information card for editing.
2. In **Calculation Card Overview**, click **Regional**.
3. In **Calculation Components**, click **Create**.
4. Select **Regional Tax Information**, the state, and the TRU. Click **OK**.
5. In **Enterable Calculation Values on Calculation Cards**, click **Create**.
6. Search for and select the calculation value you want to set.
7. Set the value, and click **OK**.

This section includes these values.

State	Field name	How you use it
New York	Part Year Resident	Use this field to identify if an employee is a part-year resident of New York City. Selecting **Yes** ensures the year-end archive process populates the actual wages earned in Box 18 on the person's W-2. Selecting **No** populates the wages from Box 1 on the W-2 in Box 18. **Note:** New York City requires wages for full-year residents to be reported as federal wages from Box 1 on the W-2. Part-year resident wages must be actual wages during the period they were residents of New York City.
Puerto Rico	Domestic services	Populates the appropriate check box on the Form W-2PR. Select **Yes** if the employee received wages for domestic services in a private home, local college club, or local chapter of a college fraternity.
	Others	Populates the appropriate check box on the Form W-2PR. Select **Yes** if the employee received wages for any other service required by the Hacienda through regulations.

State	Field name	How you use it
	Services rendered by a minister of a church or by a member of a religious order	Populates the appropriate check box on the Form W-2PR. Select **Yes** if the employee received wages for services by a minister of a church or by a member of a religious order.
	Services rendered by a qualified physician under Act 14-2017	Populates the appropriate check box on the Form W-2PR. Select **Yes** if the employee received services rendered by a qualified physician under Act 14-2017.
	W-2PR control number	Sets the W-2PR control number for the person. Required for Puerto Rico year-end reporting. **Note:** If you enter a value here, the Assign Control Number for Puerto Rico Employees process doesn't override it. It's your responsibility to ensure the number you enter is valid and doesn't conflict with others. For further info, see Assign Control Number for Puerto Rico Employees in the Help Center.
	W-2cPR control number	Sets the W-2cPR control number for the person. Required for Puerto Rico year-end reporting.