

Oracle Fusion Cloud Human Resources

Configure Organization Calculation Cards for the US

FA Latest



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1 What are organization calculation cards for the US?

You define organization calculation cards at the payroll statutory unit (PSU) and tax reporting unit (TRU) levels. The info you store in them helps the HR and payroll processes calculate various component groups, such as tax rates and overrides.

- Use the Legal Entity Calculation Cards task to configure calculation cards at the PSU level.
 The data you enter applies to all TRUs attached to the PSU.
- Use the Legal Reporting Unit Calculation Cards task to configure calculation cards at the TRU level.
 Settings at the TRU level override those at the PSU level.
- Settings on the employee Tax Withholding card can override both.

Organization calculation cards capture:

- Tax rates for state unemployment insurance (SUI) and state disability insurance (SDI)
- Self-adjustment settings such as self-adjust, quarterly self-adjust, or no self-adjust
- Federal tax withholding rule
- State resident wage accumulation rule
- Overrides such as a supplemental earnings tax rates

There are multiple steps involved with defining organization calculation cards.

What you want to do	How you do it
Create the PSU card	Use the Legal Entity Calculation Cards task from your implementation project.
Create the TRU card	Use the Legal Reporting Unit Calculation Cards task from your implementation project.
Define federal tax rules	The US Oracle payroll tax engine (USOPTe) provides all statutory compliance for the payroll process. However, you can set various federal tax rules on the PSU cards. You set these on the Federal component groups.
Define regional tax rules	You can set various regional tax rules on the PSU cards, such as for state, county, and city. You set these on the Regional component groups.

2 How to Create Payroll Statutory Unit Cards for the US

To define organization calculation cards at the payroll statutory unit (PSU) level:

1. Start the Legal Entity Calculation Cards task from your implementation project.
2. Click **Create**.
3. Provide the effective date, and select **Calculation Rules for Tax Reporting and Payroll Statutory Unit**.
4. Click **Continue**.
5. If regional components don't exist in **Component Groups**:
 - a. Click **Regional**.
 - b. Click **Create** from the **Actions** menu.
 - c. Create nodes for each state you need.
6. Click **Save and Close**.

3 How to Create Tax Reporting Unit Cards for the US

Once you've defined your tax reporting units (TRUs), you can define your TRU organization cards.

You can set TRU-level overrides using the Legal Reporting Unit Calculation Cards task. This includes flat rate federal (FIT) and state income tax (SIT) overrides for retiree payments.

4 How to Define Federal Tax Rules on the Organization Cards for the US

The US Oracle payroll tax engine (USOPTe) provides all statutory compliance for the payroll process. However, you can set the following on the organization cards.

- Federal tax rules, such as:
 - Supplemental calculation method for federal income tax (FIT)
 - Regular and supplemental FIT calculation methods
 - FIT withholding rules
 - Period-to-date FIT calculation method
 - Self-adjustment methods for federal unemployment tax (FUTA), Social Security, and Medicare
- Flat tax rate overrides for retirees

To configure these:

1. Open the calculation card for editing.
2. In **Component Groups**, click **Federal**.
Calculation Components lists rows for each federal tax.
3. Select the row of the tax you want to edit.
Details updates for the selected tax type.
 If a tax type is missing, click **Create** to add it.
4. Enter the appropriate FIT-specific rules.

Rule	What it does	Where you can find it
Supplemental Tax Calculation Method	Overrides the default tax calculation method for supplemental wages	Calculation Component Details
Regular and Supplemental Tax Calculation Method	Overrides the default tax calculation method for regular and supplemental wages	Enterable Calculation Values on Calculation Cards
Tax Withholding Rules	Determines which states are applicable for courtesy resident taxation	Calculation Component Details
Enable Period-to-Date Tax Calculation	Determines if state and federal taxation is considered based on either the Run or Period-to-date	Calculation Component Details

Rule	What it does	Where you can find it
Enforce Federal Income Tax Look-Back Rule	Enforces the look-back rule from the previous and current year when determining the proper withholding for supplemental earnings	Enterable Calculation Values on Calculation Cards

5. Define any required rate or functional overrides in **Enterable Calculation Values on Calculation Cards**.
6. Repeat to add self-adjustment settings for Social Security, Medicare, and FUTA.

These rules determine how the payroll process adjusts for rate or wage base changes.

7. Click **Save**.

5 How to Define Regional Tax Rules on the Organization Cards for the US

The US Oracle payroll tax engine (USOPT) provides all regional statutory compliance for the payroll process. However, you can set the following on the organization cards.

- Regional tax calculation rules, such as:
 - Supplemental calculation method for state income tax (SIT)
 - Regular and Supplemental SIT calculation methods
 - SIT resident wage accumulation
 - County and city tax withholding rules for SIT (courtesy tax withholding)
 - Self-adjustment methods for state unemployment (SUI) and disability insurance (SDI)
 - SUI and SDI employee and employer rates
 - Voluntary Insurance Disability Plan (VPDI) implementation
 - Eugene, Oregon Community Safety Tax exemptions
 - New York state family leave insurance (FLI)
 - Pennsylvania residence tax info for out-of-state work locations
 - Washington state FLI
- Flat tax rate overrides for retirees

To configure these:

1. Open the PSU calculation card for editing.
2. In **Component Groups**, expand the **Regional** node.
This lists the hierarchy of regional nodes, as you defined them during card creation.
3. Select the node you want to change.
Calculation Components lists rows for each appropriate regional tax.
4. Select the row of the tax you want to edit.
Details updates for the selected tax type.
If a tax type is missing, click **Create** to add it.
5. Select **Calculation Component Details**, and enter the required info.
6. Define any required rate or functional overrides in **Enterable Calculation Values on Calculation Cards**.
7. Repeat for each regional tax type.
8. For states that have additional taxes in conjunction with SUI or SDI, you must increase your SUI employer or SDI employer rates appropriately.
Review your state tax notification to determine if they've introduced special taxes to their overall rate. For example, some taxes require SUI rate adjustment, such as:
 - Massachusetts SUI Workforce Training Fund

- Minnesota SUI Federal Loan Interest Assessment
- Nevada SUI Career Enhancement Program
- Nevada SUI Bond Obligation Assessment

6 How to Configure Tax Withholding Self-Adjustment Methods on the Organization Cards

Use the self-adjustment methods to evaluate earnings and tax amounts to ensure they're correct with a given tax rate. When all subject earnings reach the annual maximum limit, the payroll process no longer calculates the tax.

The various US taxation bodies often announce changes to their tax rates after the changes have gone into effect. You're responsible to ensure your employees' tax withholding values are properly adjusted.

The organization calculation cards provide self-adjustment methods to help the payroll process evaluate the earnings and tax amounts to ensure they're correct with a given tax rate. When all subject earnings reach the annual maximum limit, the process no longer calculates the tax.

Update your calculation cards

The organization calculation cards capture this info for you at the legislative level under **Enterable Calculation Values on Calculation Values**.

- Use the Legal Entity Calculation Cards task to set self-adjust methods for federal and regional taxes at the payroll statutory unit (PSU) level.
- Use the Legal Reporting Unit Calculation Cards task to set these methods at the tax reporting unit (TRU) level. Any settings you make on the TRU organization card override the settings on the PSU organization card.

You can set self-adjustment methods for these taxes.

- Federal Unemployment Tax Act (FUTA)
- Medicare
- Social Security
- State disability insurance (SDI)
- State unemployment insurance (SUI)
- County and city income taxes

There are several self-adjustment options available to you.

Adjustment method	What it does
Bypass collection	Payroll process doesn't calculate taxes for this organization. Use this if you as the employer are exempt from wage accumulation and taxes.

Adjustment method	What it does
	<p>Note: Wage accumulation would still occur for these taxes.</p> <ul style="list-style-type: none"> • FUTA • Medicare • Social Security • SUI
No self-adjust	<p>Payroll process doesn't perform any adjustments based on changes to tax rates.</p> <p>You are responsible for ensuring the correct withholding values for your employees.</p>
Quarterly self-adjust	<p>Payroll process performs adjustments for rate changes on a quarterly basis.</p> <p>Use this method in cases where a state changes its rate midyear. By checking each quarter individually to determine adjustments, it maintains the integrity of the calculations before the change.</p> <p>This is available for state taxes only.</p>
Self-adjust	<p>Payroll process performs adjustments for rate changes during the first available payroll run. It bases the withholding calculations on year-to-date earnings, rather than earnings within a pay period.</p> <p>This method provides the most accurate calculation.</p>
Self-adjust at maximum	<p>Payroll process takes no action until an employee reaches their yearly maximum wage limit. Then it performs any adjustments during the first available payroll run.</p>

Related Topics

- [Configure Organization Calculation Cards for the US](#)
- [Enterable Values on Calculation Cards](#)
- [Federal and Regional Taxes for the US](#)
- [State Unemployment Insurance Tax](#)

7 What happens when I edit my tax reporting unit calculation card info?

Entries you make using the Legal Reporting Unit Calculation Cards task override those you made with the Legal Entity Calculation Cards task.

Related Topics

- [Creating Calculation Cards for Deductions at Different Levels for the US](#)

