

Oracle Fusion Cloud Human Resources

**How do I configure organization
calculation cards for the US?**

FA Latest



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1 What are organization calculation cards for the US?

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

You 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. You use the Legal Reporting Unit Calculation Cards task to configure calculation cards at the TRU level.

Note: Settings at the TRU level override those at the PSU level. Settings on the employee Tax Withholding card 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 create 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 | Calculation Component Details |
| 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 (USOPTe) 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.
Consult with your state tax authorities to determine if they have introduced special taxes to their overall rate notification. 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