

Tax Reporting in Oracle Fusion Cloud EPM

Bring tax provision, regulatory reporting, workflow, and AI-assisted insight into the connected close.

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Extend the continuous close to tax

The tax close is often one of the most complex parts of the broader financial close. Tax teams depend on consolidated financial data, legal entity detail, jurisdiction inputs, local explanations, and supporting schedules, yet much of this work is still coordinated through spreadsheets, email, and disconnected tools.

Oracle Fusion Cloud EPM helps tax become part of a more continuous, connected close. Tax Reporting connects provision, Country-by-Country Reporting (CbCR), Pillar II reporting support, supplemental data collection, workflow, analysis, and disclosure support in one governed EPM process. Routine inputs can be collected earlier, exceptions can be surfaced sooner, and audit support can be built into the process.

The result is a tax process that supports the same operating model finance is moving toward across the close: fewer last-minute data handoffs, better visibility into ownership and risk, and more time for judgment. Tax teams retain control over rules, calculations, tasks, dashboards, and reports while finance gains a clearer view of tax close status.

AI that tax can govern, audit, and trust

Tax leaders are rightly cautious about AI they cannot explain. Tax provision, return-to-provision analysis, regulatory reporting, and tax close work require governance, security, review steps, audit trails, and human accountability. Oracle embeds AI inside the Oracle Cloud EPM Tax Reporting processes that already carry that finance and tax control context.

The embedded AI driven Insights gives tax a practical on ramp to trusted AI. It can analyze multidimensional tax data to identify trends, anomalies, forecast variance or bias, variations, and potential exceptions that may be missed in manual review. Relevant use cases include return-to-provision analysis and financial data version analytics.

Narrative summaries are generated by AI that can help explain individual or grouped insights, including account-based insights. The RTA Automation AI Assistant can help configure Return to Accrual automation where enabled. Human judgment remains central: tax users review, confirm, override, and approve the work that matters.

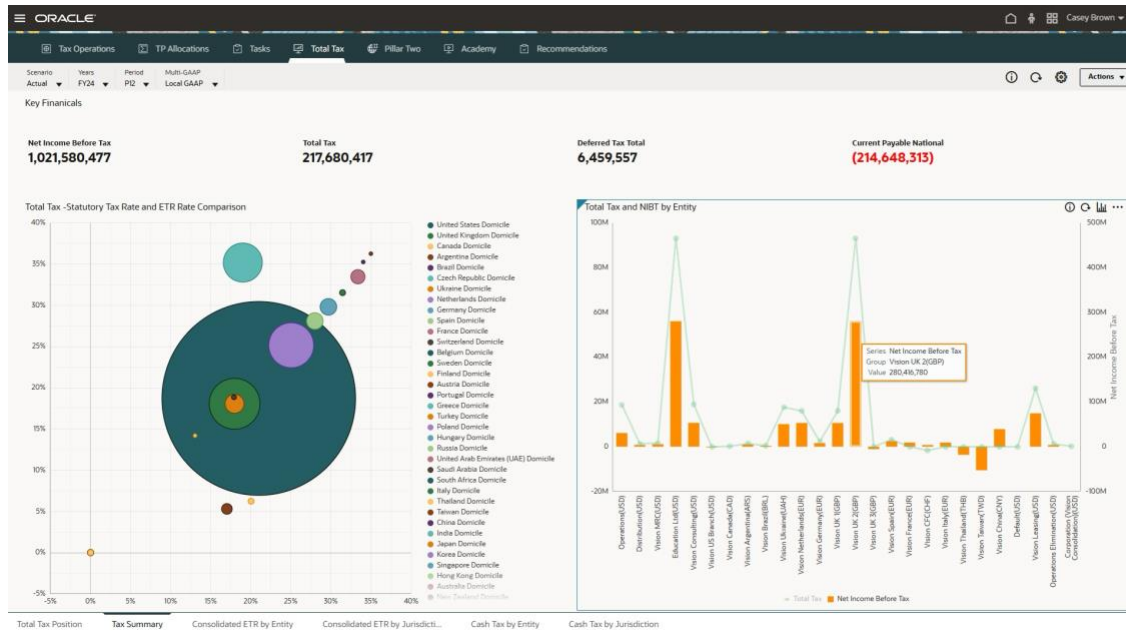
From period-end scramble to connected tax orchestration

The tax close should not collapse into a final-period scramble. Teams collect data from regional owners, review provision inputs, reconcile book and tax differences, monitor deadlines, explain variances, and prepare disclosure support across entities and jurisdictions. When that work is human-coordinated, bottlenecks are hard to see until late in the close.

Tax Reporting brings that work into the same Oracle Cloud EPM foundation used for consolidation, account reconciliation, narrative reporting, and enterprise data management. Supplemental Data Manager supports structured forms, surveys, attributes, attachments, and narrative responses. Task management gives tax leaders visibility into owners, reviewers, due dates, dependencies, priorities, jurisdictions, and status.

Tax teams step in for the decisions that require judgment: unusual movements, material variances, policy exceptions, late inputs, and jurisdiction-specific review. Finance and tax get a clearer view of the process, with supporting detail, commentary, and approvals tied to the same governed close environment.

Figure 1. Tax Reporting in Oracle Cloud EPM has prebuilt dashboards to analyze tax obligations easily.



Embedded intelligence, right out of the box

Tax Reporting in Oracle Cloud EPM is not a disconnected tax tool. It is part of a connected EPM suite that gives tax access to the structures that matter in finance: entities, accounts, hierarchies, dimensions, ownership, currencies, approvals, audit trails, and reporting context. That shared context helps reduce data chaos and keeps tax aligned with the broader close.

The RTA Automation AI Assistant helps users configure Return to Accrual automation through plain English instructions where GenAI is enabled. The assistant can capture scenario, RTA source year, posting period and year, entity, and jurisdiction, then generate the setup after user confirmation.

IPM Insights adds AI-assisted review to the tax process. Instead of manually scanning accounts, entities, jurisdictions, and versions, users can review insights that point to unusual movements, possible exceptions, or areas needing explanation. Because the analysis runs inside Oracle Cloud EPM, it works in the same context as the close, not outside it.

A practical path to a more continuous tax close

Tax teams should not have to replace every process at once to make progress. Oracle Cloud EPM provides a practical adoption path: connect source financial data, standardize collection, automate repeatable tax data movement, and then use embedded AI to surface patterns, exceptions, and review priorities.

The framework can be configured to match reporting models, jurisdictions, process calendars, and internal control requirements. Tax can start with provision, CbCR, RTA, Pillar II data collection, or supplemental data management, then expand toward a more continuous, exception-driven tax close as confidence grows.

Core tax reporting capabilities

Tax Reporting in Oracle Cloud EPM supports the tax reporting cycle from source financial data through provision, CbCR, Pillar II reporting support, workflow, analysis, reporting, and disclosure. These capabilities can work as part of the connected close or be configured for specific tax reporting needs.

- **Tax provision and close alignment** - Supports US GAAP, IFRS, and statutory tax reporting, calculating tax provision from legal entity detail through consolidated disclosure. Built-in calculation, currency, and reporting capabilities help tax teams connect tax entries and disclosure support to the broader close.
- **Country-by-country reporting** - Supports CbCR capabilities aligned to country-level tax reporting needs. Data can be connected to consolidation and financial systems, helping tax maintain transparency and reduce manual collection effort across jurisdictions.
- **Pillar II reporting support** - Supports data collection, calculation support, analysis, workflow, and reporting needs associated with global minimum tax requirements. Tax teams can connect Pillar II work with provision, CbCR, and source financial data where modeled, rather than running it as a separate spreadsheet process.
- **Tax automation and source data integration** - Automates tax data movement from source general ledgers, consolidation systems, and other financial sources. Teams can automate permanent differences, temporary differences, and other tax data flows while preserving traceability back to source data.
- **RTA Automation AI Assistant** - Helps configure Return to Accrual automation through plain English instructions where GenAI is enabled. Users review and confirm generated setup details before applying them, preserving human control over the tax process.
- **IPM Insights and GenAI summaries** - Uses AI-assisted analysis to identify trends, anomalies, forecast variance or bias, variations, and potential exceptions across multidimensional tax data. Narrative summaries can help users explain individual or grouped insights for review.
- **Workflow and tax data collection** - Collects manually entered and supplemental data from regional controllers, tax owners, and business teams through structured forms, surveys, attributes, and workflow. Teams can monitor owners, reviewers, due dates, dependencies, and close status.
- **Reporting, Smart View, and connected EPM** - Includes dashboards, reports, books, bursting, ad hoc analysis, and Oracle Smart View interaction. Data Integration, EPM Integration Agent, REST APIs, and EPM Automate support Oracle, non-Oracle, cloud, and hybrid environments.

In summary

Tax Reporting in Oracle Fusion Cloud EPM helps tax teams move from disconnected spreadsheets and separate tax tools to a governed tax close connected to enterprise finance data. By bringing income tax accounting, provision, CbCR, Pillar II reporting support, workflow, supplemental data collection, embedded AI, and reporting into Oracle Cloud EPM, tax can reduce manual coordination and focus more time on exceptions, review, and decision support.

The value is not only faster tax reporting. It is a better operating model for the close. Tax keeps ownership of tax rules, calculations, tasks, dashboards, and reports, while finance gets better alignment between book data, tax outcomes, status, ownership, and risk.

Oracle Fusion Cloud EPM is the only complete and connected EPM solution, delivering the intelligence, control, and governance finance and tax teams need to move from reporting history to leading better decisions. Contact your Oracle account manager to learn more.

Oracle Fusion Cloud EPM

Oracle Fusion Cloud EPM is the only complete and connected Enterprise Performance Management suite, delivering the intelligence, agility, and governance finance needs to move from systems of record toward systems of outcomes.

Oracle Fusion Cloud EPM provides:

- Financial Consolidation and Close
- Account Reconciliation
- Narrative Reporting
- Tax Reporting
- Planning
- Profitability and Cost Management
- Enterprise Data Management

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