

5.12 SALES TAX CONFIGURATION (US)

1. COMPANIES CAN CHOOSE TO CUSTOMIZE DEFAULT TAX SETTINGS PER STATE

- Claims Connect
- Have the option to customize sales tax account options by state
- Sales Tax settings may be modified in Claims Connect by an account Administrator
- A checkmark indicates **APPLY** sales tax

Claim Defaults

NOTE: These settings will be applied as default values to newly created claims only. They will not affect any claims already created in the system.

Save Cancel

Overhead and Profit ☐ Copy to branches

Overhead: 10.00% Overhead:
Profit: 10.00% Profit:
Calculate on: ☒ Cumulative ☐ Total Cost
Calculate on: ☒ Total Cost ☐ ACV

Sales Tax ☐ Copy to branches

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> State Tax	7.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Cumulative Taxes

☒ Use automatic postal/zip code tax lookup
Default to: ☒ Sales Tax [Customize Tax Options](#) ☐ Privilege Tax [Customize Privilege Tax Options](#)
☐ Combine state, city, county and district taxes as a single tax
☐ Use O&P defaults when available

☒ Use Symbility Claims Connect defaults

Tax Applicability

State	Cumulative	Mat	Lab	Equ	M.Cond	O&P
Alabama	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Alaska	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Arizona	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Arkansas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
California	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Colorado	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Connecticut	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Delaware	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
District of Columbia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Florida	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Georgia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Hawaii	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Idaho	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Illinois	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Indiana	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Iowa	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	use claim defaults
Kansas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	use claim defaults
Kentucky	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Louisiana	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults
Maine	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	use claim defaults

Page 1 of 3 (52 records)

2. APPLYING TAX ON O&P CAN BE DONE SEPARATELY FOR EACH TAX LINE

- Mobile Claims users
- A checkmark indicates **APPLY** sales tax
- If a state has specific requirements on how to apply special taxes like "Service tax", this information will have to be established by the user.

