

Multiple Tax Tables

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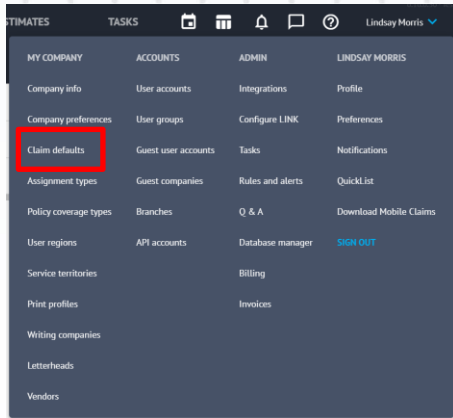
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Disclaimer: This job aid was created using a demo insurance company with generic settings. Please refer to your specific carrier guidelines for proper claim and estimate settings.

Company Defaults Configuration – Company Admin

Step 1

To set company-wide tax table defaults, a company admin will click on Claim Defaults from the My Company section of the Navigation menu inside Claims Connect.



Step 2

In Claim Defaults, a company admin will then navigate to the Sales Tax section of the Estimating tab and check the box next to 'Use automatic postal/zip code tax lookup'. This will result in the Residential default dropdown to be visible.

The left screenshot shows the 'Sales Tax' configuration screen. The 'Use automatic postal/zip code tax lookup' checkbox is checked, and a red arrow points to it. The right screenshot shows the 'Residential default' dropdown menu, which is now visible and set to 'Sample Structure Tax Table'. A red box highlights the dropdown and the 'view details' link.

Step 3

The company admin will click on the dropdown next to 'Residential default' to display the available tax tables and select the one that the company desires to set as the default tax table for Residential claims. Then click 'Save' at the top of the Claim Defaults screen to save the changes.

The left screenshot shows the 'Sales Tax' configuration screen. The 'Residential default' dropdown menu is open, and 'Sample Structure Tax Table' is selected. A red arrow points to the dropdown. The right screenshot shows the 'Claim Defaults' screen with the 'Save' button highlighted by a red arrow.

Step 4

The company admin can click 'View Details' next to the selected Residential default tax table to view the Rates, Applicabilities and Overrides of that particular table. A company admin can enter text into the Search field on each tab to narrow the results for the displayed states. The Overrides tab provides a dropdown in the upper right to select the desired state to view.

Sales Tax

<input type="checkbox"/>	Tax 1		<input type="checkbox"/>	Mat	<input type="checkbox"/>	Lab	<input type="checkbox"/>	Equ	<input type="checkbox"/>	M.Cond	<input type="checkbox"/>	O&P
<input type="checkbox"/>	Tax 2		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Tax 3		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Tax 4		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Cumulative Taxes											

☒ Use automatic postal/zip code tax lookup

Residential default: Sample Structure Tax Table [view details](#)

☐ Combine state, city, county and district taxes as a single tax

Sample Structure Tax Table Updated: Nov 10, 2022 - 12:39 PM

RATES **APPLICABILITIES** **OVERRIDES**

Q 5

State	Tax1	Rate1	Tax2	Rate2	Tax3	Rate3	Tax4	Rate4	Cumulative	Tax1 alt	Tax2
British Columbia	GST	5%	PST	7%		0%		0%			
New Brunswick	HST	15%		0%		0%		0%			
Northwest Territories	GST	5%		0%		0%		0%			
Nova Scotia	HST	15%		0%		0%		0%			
Prince Edward Island	HST	15%		0%		0%		0%			
Saskatchewan	GST	5%	PST	6%		0%		0%			

Sample Structure Tax Table Updated: Nov 10, 2022 - 12:39 PM

RATES **APPLICABILITIES** **OVERRIDES**

Q 5 x

State	H1	L1	E1	HC1	OP1	H2	L2	E2	HC2	OP2	H3	L3
British Columbia	✓	✓	✓	✓	✓	✓				✓		
New Brunswick	✓	✓	✓	✓	✓							
Northwest Territories	✓	✓	✓	✓	✓							
Nova Scotia	✓	✓	✓	✓	✓							
Prince Edward Island	✓	✓	✓	✓	✓							
Saskatchewan	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Sample Structure Tax Table Updated: Nov 10, 2022 - 12:39 PM

RATES **APPLICABILITIES** **OVERRIDES**

Q Search

State	Code	Item	Threshold	Tax Only Amount Over Threshold	H1	L1	E1
British Columbia	1	PST Tax application exception	\$0.00				✓
British Columbia	3	PST Tax application exception	\$0.00				✓
British Columbia	5	PST Tax application exception	\$0.00				✓
British Columbia	7	PST Tax application exception	\$0.00				✓

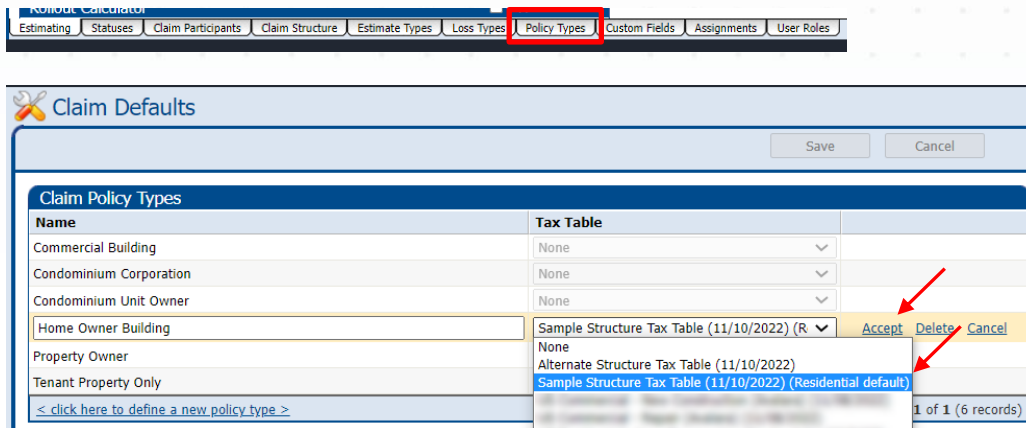
British Columbia
Manitoba
Saskatchewan

Setting Tax Table Defaults at the Policy Level – Company Admin

Step 1

If a specific policy type requires a different tax table than the company default tax table, a company admin will click on the 'Policy Types' tab at the bottom of the Claim Defaults page to access that screen, click on the dropdown next to the policy type and select the tax table wished to be applied as default for that policy type. Click 'Accept' to apply the selection, and 'Save' at the top of the page to save the settings.

All policy types tax tables will default to 'None' if a specific tax table is not selected.



Claim Defaults

Save Cancel

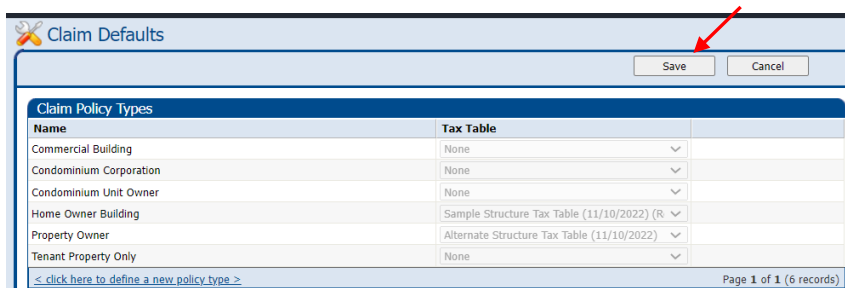
Name	Tax Table
Commercial Building	None
Condominium Corporation	None
Condominium Unit Owner	None
Home Owner Building	Sample Structure Tax Table (11/10/2022) (R) ✓
Property Owner	None
Tenant Property Only	Alternate Structure Tax Table (11/10/2022)
Sample Structure Tax Table (11/10/2022) (Residential default)	

< click here to define a new policy type >

1 of 1 (6 records)

Step 2

Repeat Step 1 for as many policy types your company wishes to have different default tax tables. Then click 'Save' to apply the changes.



Claim Defaults

Save Cancel

Name	Tax Table
Commercial Building	None
Condominium Corporation	None
Condominium Unit Owner	None
Home Owner Building	Sample Structure Tax Table (11/10/2022) (R) ✓
Property Owner	Alternate Structure Tax Table (11/10/2022)
Tenant Property Only	None

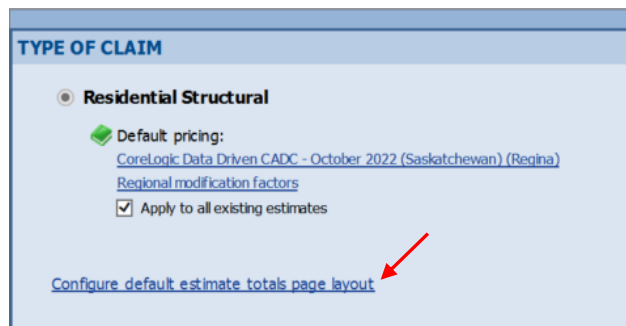
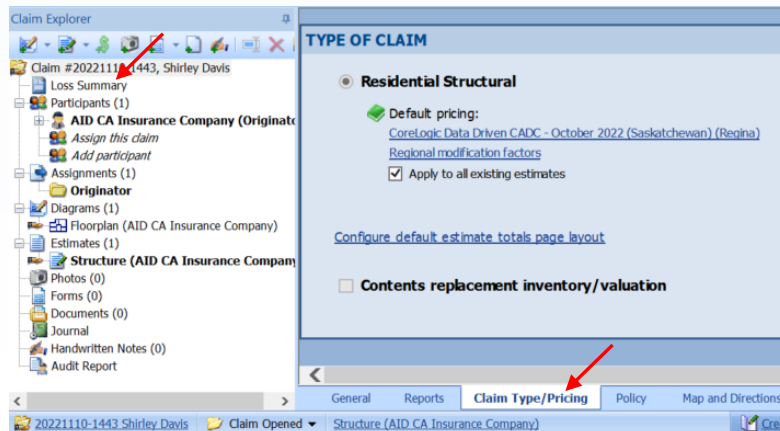
< click here to define a new policy type >

Page 1 of 1 (6 records)

Setting Tax Tables at the Claim Level – Mobile Claims

Step 1

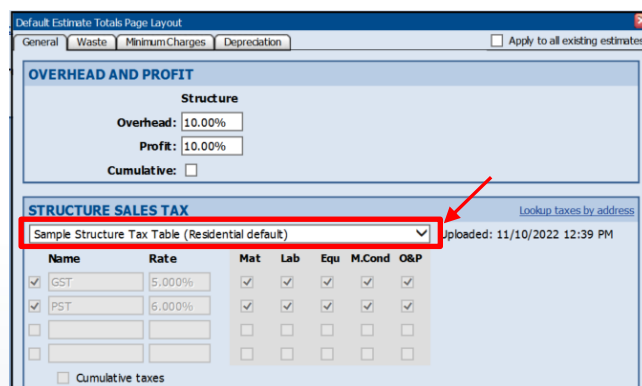
If a claim requires a different tax table than the company default tax table, click on 'Loss Summary' from the Claim Explorer tree within a claim in Mobile Claims and navigate to the 'Claim Type/Pricing' screen by clicking on the tab at the bottom of the page. Then click the 'Configure default estimate totals page layout' link to access the tax settings for the claim.



Step 2

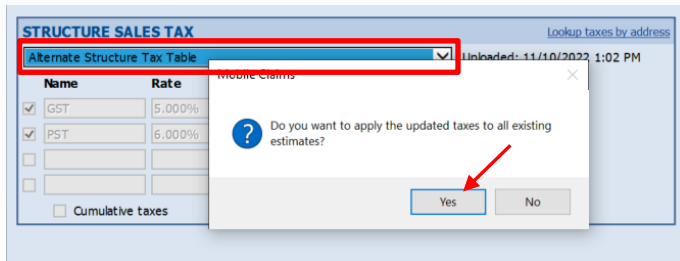
From here, the user will see the default Tax Table selected in the dropdown menu. If the default Tax Table is not applicable to the type of estimate that the user is creating, select a different available Tax Table from the dropdown menu that will then apply to the claim.

Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.



Step 3

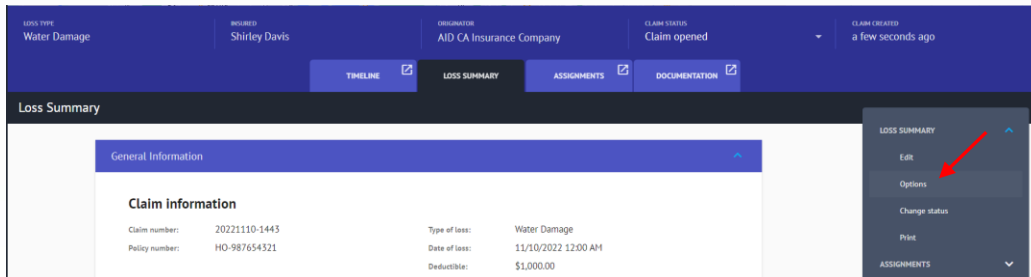
Click 'Yes' from the verification dialog that pops up if the user wishes to apply the selected Tax Table to all existing estimates in the claim or 'No' if the user wishes to only apply the Tax Table to newly created estimates.



Setting Tax Tables at the Claim Level – Claims Connect

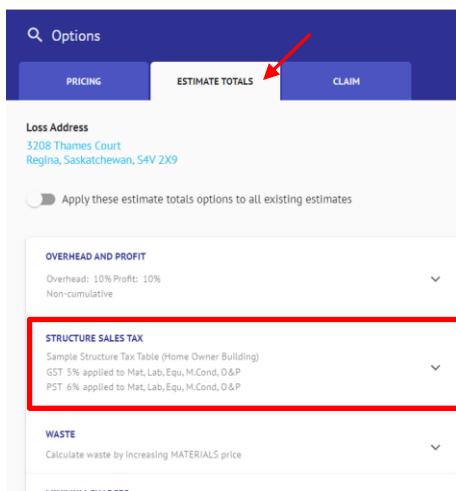
Step 1

If a claim requires a different tax table than the company default tax table, click on the 'Loss Summary' tab within a claim in Claims Connect and then click 'Options' in the dropdown to open the 'Options' blade.



Step 2

Within the 'Options' blade, click on the 'Estimate Totals' tab to be presented with estimate details, including the Sales Tax information for Structure.



Step 3

Click anywhere on the Structure Sales Tax section to open it further and view additional details about the selected Tax Table, as well as to be presented with the dropdown menu to change the default Tax Table for the claim. Select the desired Tax Table.

Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> GST	5.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> PST	6.000%	<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 type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Cumulative taxes [Lookup taxes by address](#)

Step 4

To apply the estimate totals options to all existing estimates, toggle the switch on, or leave it off if you wish to only apply changes to newly created estimates. Then click 'Save' to apply the changes to the claim or click 'Cancel' to discard the changes made.

Options

ESTIMATE TOTALS

Loss Address
3208 Thames Crescent
Regina, Saskatchewan, S4V 2X9

☒ Apply these estimate totals options to all existing estimates

OVERHEAD AND PROFIT
Overhead: 10% Profit: 10%
Non-cumulative

STRUCTURE SALES TAX

Setting Tax Tables at the Estimate Level – Mobile Claims

Step 1

If a specific estimate requires a different tax table than the company default tax table, click on the Totals tab at the bottom of the page when viewing an estimate, and then click on “Configure Totals Page Layout” to access the estimate details.

ESTIMATE: Structure (AID CA Insurance Company) Claim #20221110-
In progress
Configure Totals Page Layout
Total Materials:
Total Labor:
Total Equipment:
Total Market Conditions:
Subtotal:
Add 10.00% overhead:
Add 10.00% profit:
Subtotal:
GST 5.000%:
PST 6.000%:
Estimate Subtotal:
Deductible (\$1,000.00):
Estimate Total:
Estimate Recap Summary Totals

Step 2

On the General tab, click on the dropdown menu within the Structure Sales Tax section to select a different available Tax Table to apply to this specific estimate. The tax details will update in the sections below, then click ‘OK’ to save the changes or ‘Cancel’ to discard the changes.

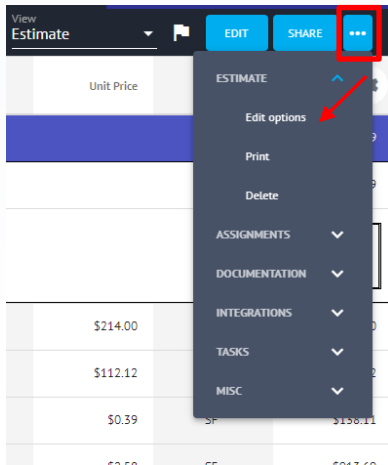
Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.

Estimate Totals Page Layout - Structure
Flat Deductible General Coverages Pricing Depreciation Discounts Finalization Minimum Charges
Overhead and Profit
Overhead: 10000
Profit: 10.00%
Cumulative
Structure Sales Tax
Lookup taxes by address
Sample Structure Tax Table (Home Owner Building)
Uploaded: 11/10/2022 12:39 PM
Name Rate Mat Lab Equ M.Cond O&P
GST 5.000%
PST 6.000%
Cumulative Taxes
OK Cancel

Setting Tax Tables at the Estimate Level – Claims Connect

Step 1

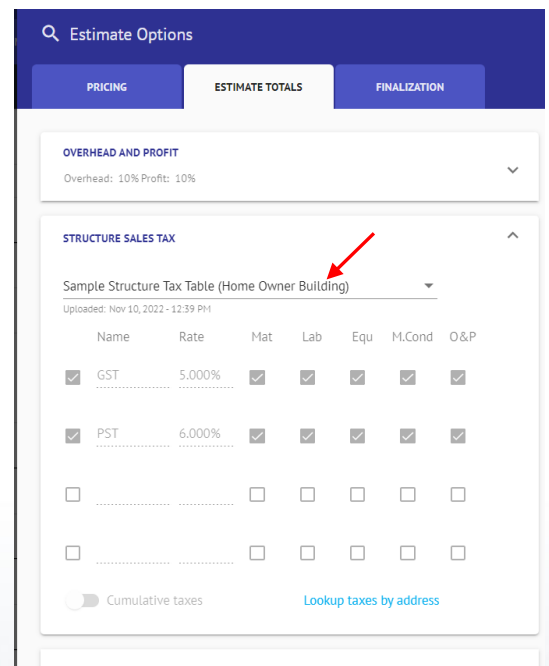
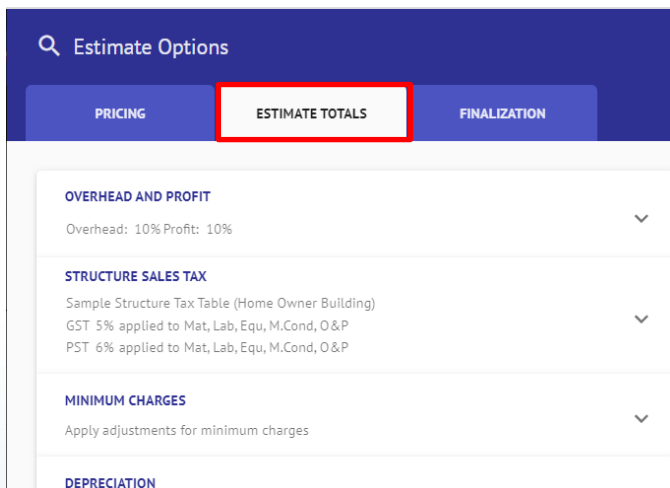
If a specific estimate requires a different tax table than the company default tax table, click on the ellipses button next to 'Share' within the estimate in Claims Connect and select 'Edit options' from the dropdown menu to access the Estimate Options blade.



Step 2

Within the Estimate Options blade, click on the Estimate Totals tab to view the settings. Click anywhere on Structure Sales Tax section to expand it and view additional details about the default Tax Table, as well as to be presented with the dropdown menu to change the Tax Table for the estimate. Select the desired Tax Table from the dropdown menu.

Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.



Step 3

Once a Tax Table has been selected from the dropdown, the 'Save' and 'Cancel' buttons will appear at the top of the blade. Select 'Save' to apply the changes or 'Cancel' to discard the changes.

The screenshot shows the 'Estimate Options' interface. At the top, there are three tabs: 'PRICING', 'ESTIMATE TOTALS', and 'FINALIZATION'. The 'ESTIMATE TOTALS' tab is active. In the top right corner, there are two buttons: 'CANCEL' and 'SAVE', which are highlighted with a red rectangle. Below the tabs, there are two expandable sections. The first section is 'OVERHEAD AND PROFIT', which is expanded and shows 'Overhead: 10% Profit: 10%'. The second section is 'STRUCTURE SALES TAX', which is also expanded. It features a dropdown menu labeled 'Alternate Structure Tax Table' with a red arrow pointing to it. Below the dropdown, it says 'Uploaded: Nov 10, 2022 - 1:02 PM'. There is a table with columns: Name, Rate, Mat, Lab, Equ, M.Cond, and O&P. The table contains four rows of tax entries. The first two rows are checked, and the last two are not. At the bottom of the section, there is a toggle for 'Cumulative taxes' and a link 'Lookup taxes by address'.

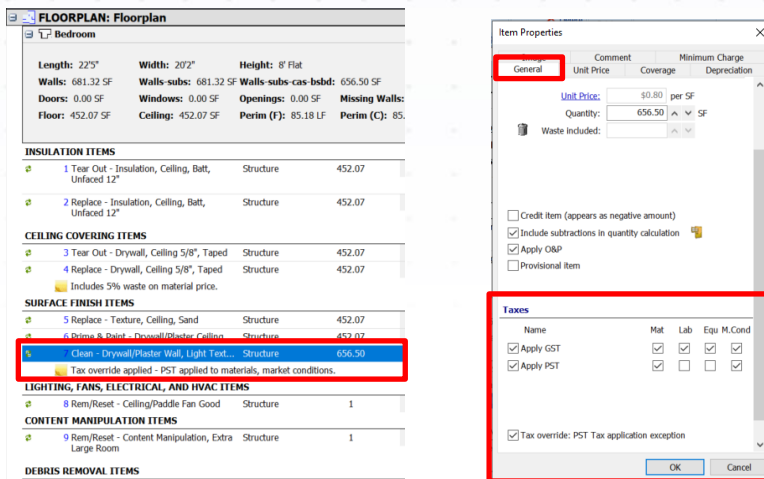
Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> GST	5.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> PST	6.000%	<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 type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Cumulative taxes [Lookup taxes by address](#)

Applying Taxes & Overrides at the Line Item Level – Mobile Claims

Step 1

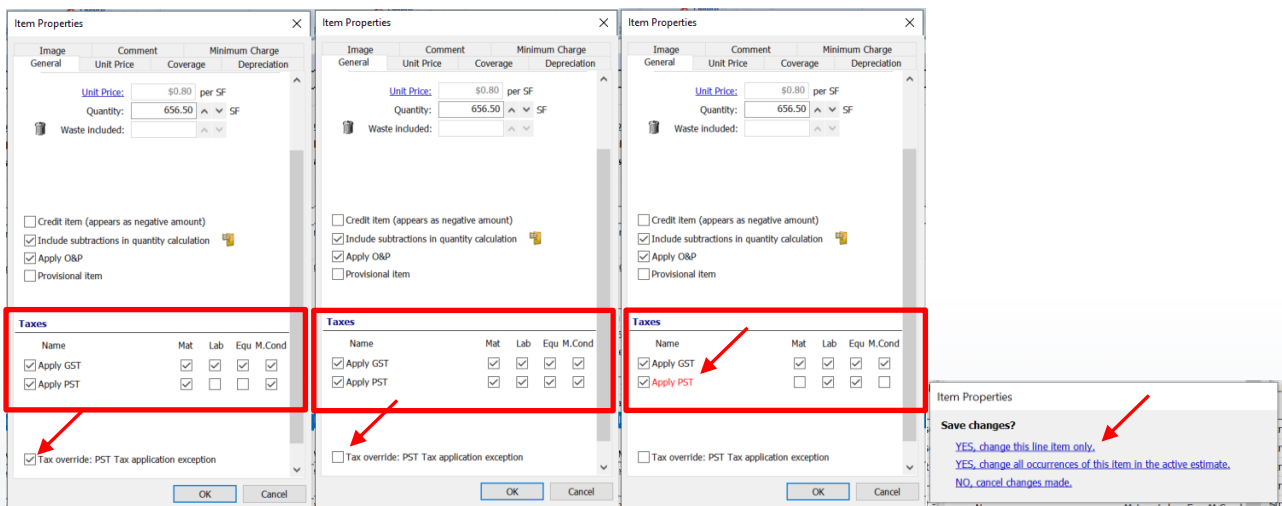
If a line item has been added to an estimate that has a defined tax override applied to it based on tax law in that geographic region and for that specific trade/material, the user will see an automatic note populate for that line item. The user will also see the tax settings within the Item Properties window in the General tab. Double click on the line item within the estimate to view the Item Properties. In the Taxes section of the General tab, if an override has been applied to that item, the user will see the Override reason with the box defaulted to checked to apply the override.



Step 2

To change the tax override settings as applied by Mobile Claims for that line item, simply uncheck the Tax Override box and the default tax settings for that geographic region will then be applied to the line item. All GST & PST tax settings are editable by the user on the line-item level. Mobile Claims will revert the tax settings to the default for that region. If the user makes any customizations to the tax settings that are outside of the tax override settings or the default tax table settings, those changes will be shown in Red. Click 'OK' to save any changes made, or 'Cancel' to discard changes. If 'OK' was clicked, an additional dialog box will populate. Click the 'Save changes?' option that best suits your needs. The line item note will update as well to reflect the changes.

All tax application settings are editable by the user at the line item level in a claim.



Applying Taxes and Overrides at the Line Item Level – Claims Connect

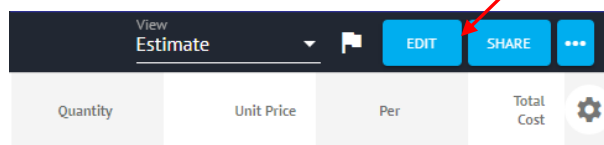
Step 1

If a line item has been added to an estimate that has a defined tax override applied to it based on tax law in that geographic region and for that specific trade/material, the user will see an automatic note populate for that line item, as well as see the tax settings within the Item Properties window under the General tab.

Description	Quantity	Unit Price	Per	BC	Depreciation	ACV
3 Tear Out - Drywall, Ceiling 5/8", Taped	452.07	\$0.55	SF	\$248.64	\$16.58	\$232.06
4 Replace - Drywall, Ceiling 5/8", Taped	452.07	\$3.75	SF	\$1,695.26	\$113.07	\$1,582.19
Includes 5% waste on material price.						
SURFACE FINISH ITEMS						
5 Replace - Texture, Ceiling, Sand	452.07	\$0.72	SF	\$325.48	\$65.10	\$260.38
6 Prime & Paint - Drywall/Plaster Ceiling	452.07	\$1.77	SF	\$800.17	\$333.43	\$466.74
7 Clean - Drywall/Plaster Wall, Light Texture	656.50	\$0.80	SF	\$525.21	\$0.00	\$525.21
Tax override applied - PST applied to materials.						
LIGHTING, FANS, ELECTRICAL, AND HVAC ITEMS						
8 Rem/Reset - Ceiling/Paddle Fan Good	1	\$112.16	EA	\$112.16	\$16.05	\$96.13

Step 2

Click on 'Edit' at the top of the Estimate view in Claims Connect and click on the line item to be able to view the 'Item Properties' blade for the item. In the Taxes section of the General tab on the blade, the user will see the tax settings applied to that item and, if an override has been applied to that item, the user will see the Override reason with the box defaulted to checked to apply the override.



SURFACE FINISH ITEMS	
5 Replace - Texture, Ceiling, Sand	452.07
6 Prime & Paint - Drywall/Plaster Ceiling	452.07
<input type="checkbox"/> Clean - Drywall/Plaster Wall, Light Texture	656.50
Tax override applied - PST applied to materials.	

Item Properties

GENERAL UNIT PRICE COVERAGE

Item: Drywall/Plaster Wall, Light Texture Action: Clean Grade:

Description:

Unit price: \$0.80 per SF

Quantity: 656.50 SF

Waste included: 0.00%

☐ Credit item (appears as negative amount)

☒ Include subtractions in quantity calculation

☒ Apply O&P

☐ Provisional item

TAXES

Name	Mat	Lab	Equ	M,Cond
<input checked="" type="checkbox"/> Apply GST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Apply PST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Tax Override: PST Tax application exception				

Step 3

To change the tax override settings as applied by Claims Connect for that line item, simply uncheck the Tax Override box and the Claims Connect will revert the tax settings on that item to the default tax settings for that region. The user may also edit the tax applications as needed. The changes to the tax application will show in Red. 'Apply' and 'Cancel' buttons will appear at the top of the blade. Select 'Apply' to apply the changes or 'Cancel' to discard the changes.

All tax application settings are editable by the user at the line item level in a claim.

Item Properties

CANCEL APPLY

GENERAL UNIT PRICE COVERAGE DEPRECIATION

Item: Clean Drywall/Plaster Wall, Light Texture

Description: Clean

Unit price: \$0.80 per SF

Quantity: 656.50 SF

Waste included: 0.00%

☐ Credit Item (appears as negative amount)

☒ Include subtractions in quantity calculation

☒ Apply O&P

☐ Provisional Item

TAXES

Name	Mat	Lab	Equ	M.Cond
<input checked="" type="checkbox"/> Apply GST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Apply PST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Tax Override: PST Tax application exception				

Step 4

If 'Apply' was clicked, an additional dialog box will populate. Select the option that best suits your needs for the line item(s) and estimate. The line item note will update to reflect the changes, as well.

Apply changes this line item only

Apply changes to all occurrences of this item in the active estimate

Cancel