Job Aid

Multiple Tax Tables

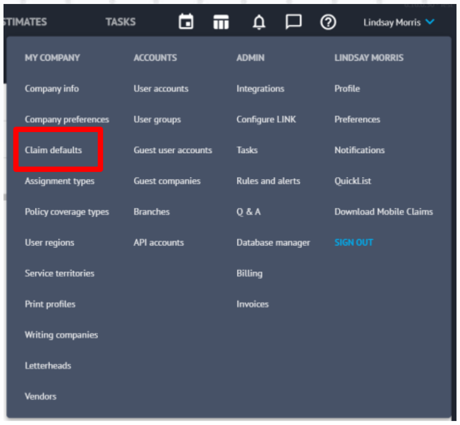
Index

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

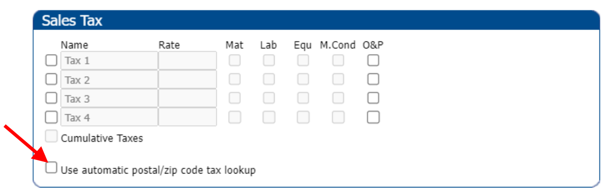
Step 1

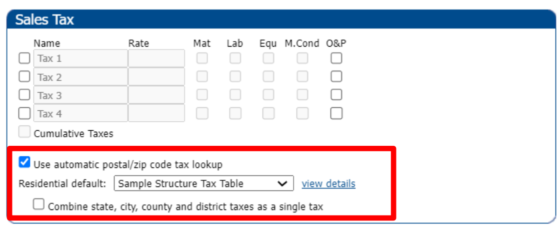
To set company-wide tax table defaults, a company admin will click on Claim Defaults from the My Company section of the Navigation menu inside Claims Connect.



Step 2

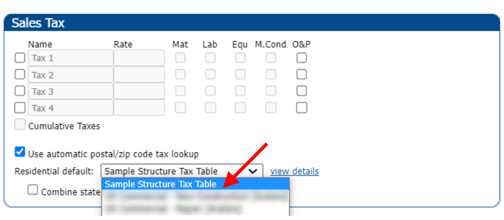
In Claim Defaults, a company admin will then navigate to the Sales Tax section of the Estimating tab and check the box next to 'Use automatic postal/zip code tax lookup'. This will result in the Residential default dropdown to be visible.

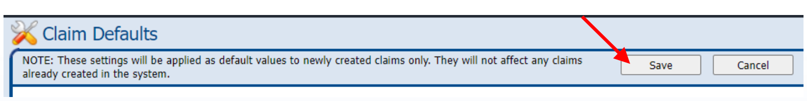




Step 3

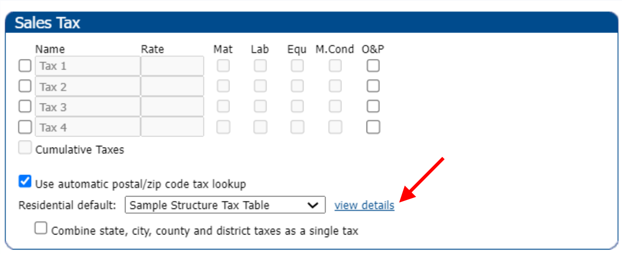
The company admin will click on the dropdown next to 'Residential default' to display the available tax tables and select the one that the company desires to set as the default tax table for Residential claims. Then click 'Save' at the top of the Claim Defaults screen to save the changes.

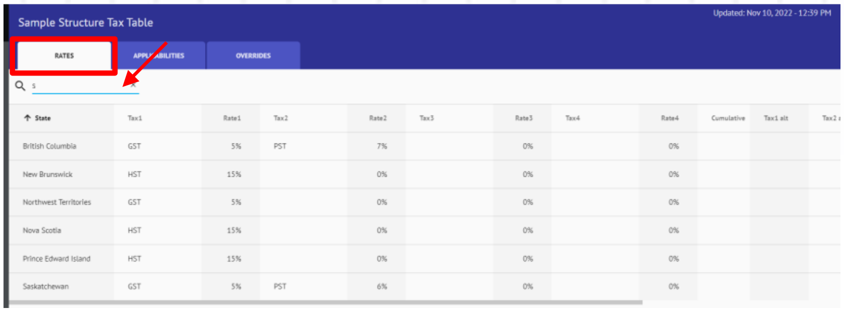


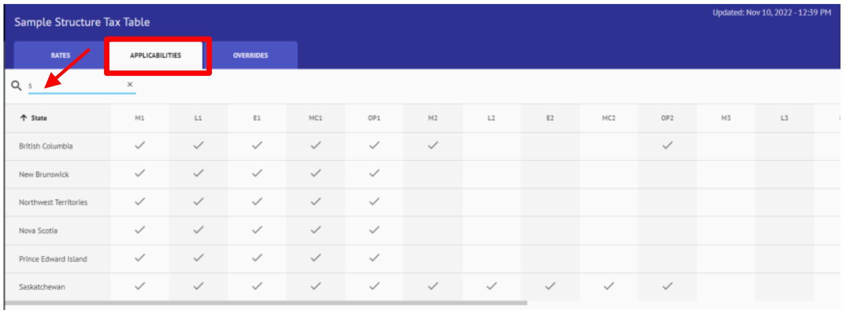


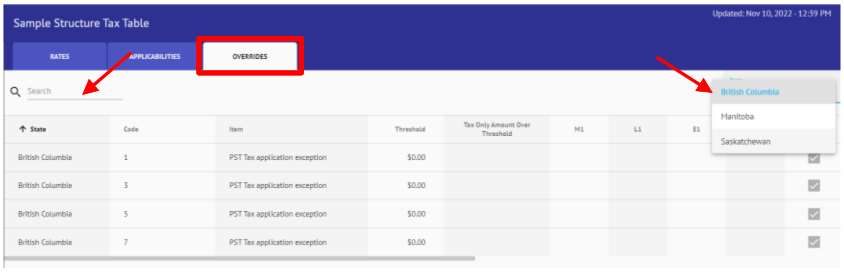
Step 4

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.







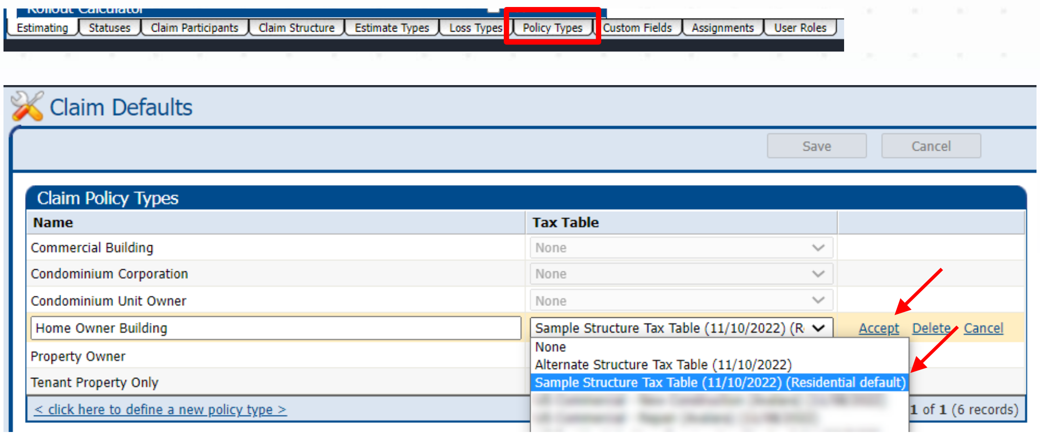


Setting Tax Table Defaults at the Policy Level – Company Admin

Step 1

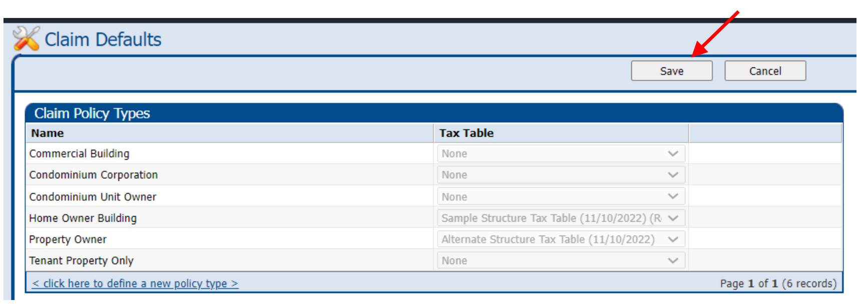
If a specific policy type requires a different tax table than the company default tax table, a company admin will click on the ‘Policy Types’ tab at the bottom of the Claim Defaults page to access that screen, click on the dropdown next to the policy type and select the tax table wished to be applied 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.



Step 2

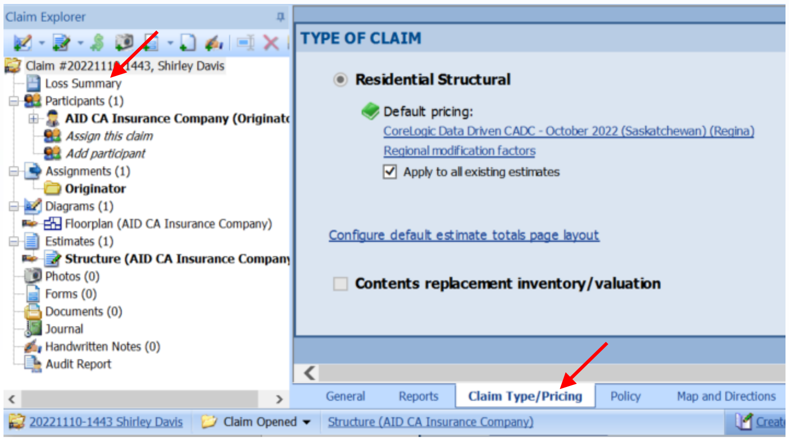
Repeat Step 1 for as many policy types your company wishes to have different default tax tables. Then click ‘Save’ to apply the changes.

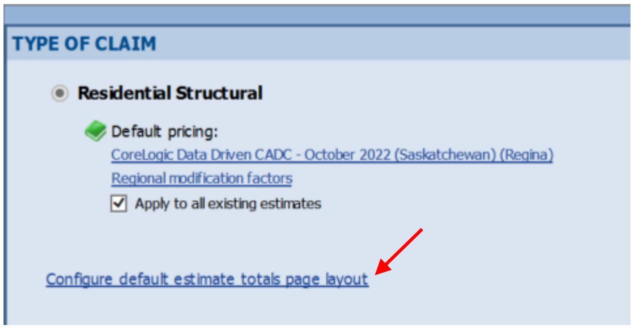


Setting Tax Tables at the Claim Level – Mobile Claims

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.

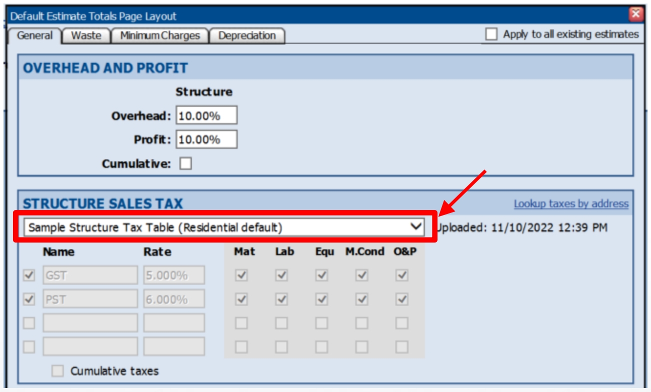




Step 2

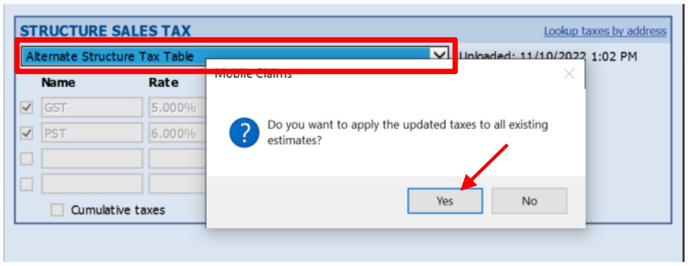
From here, the user will see the default Tax Table selected in the dropdown menu. If the default Tax Table is not applicable to the type of estimate that the user is creating, select a different available Tax Table from the dropdown menu that will then apply to the claim.

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



Step 3

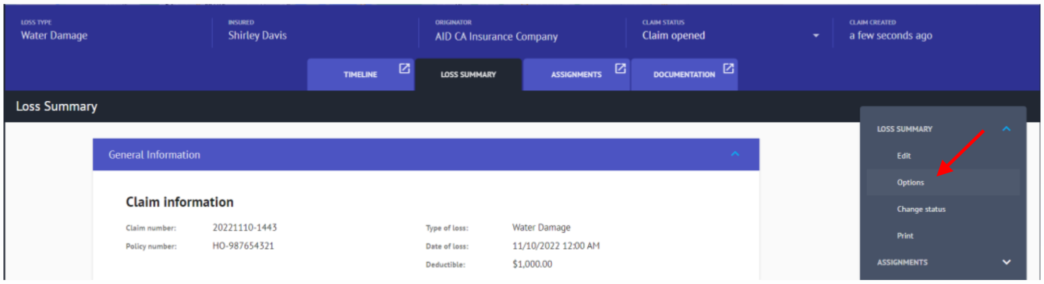
Click 'Yes' from the verification dialog that pops up if the user wishes to apply the selected Tax Table to all existing estimates in the claim or 'No' if the user wishes to only apply the Tax Table to newly created estimates.



Setting Tax Tables at the Claim Level – Claims Connect

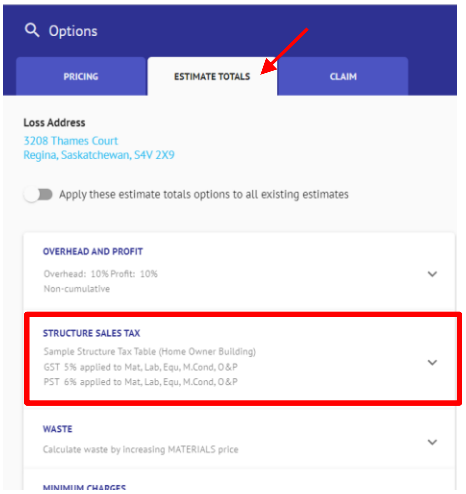
Step 1

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

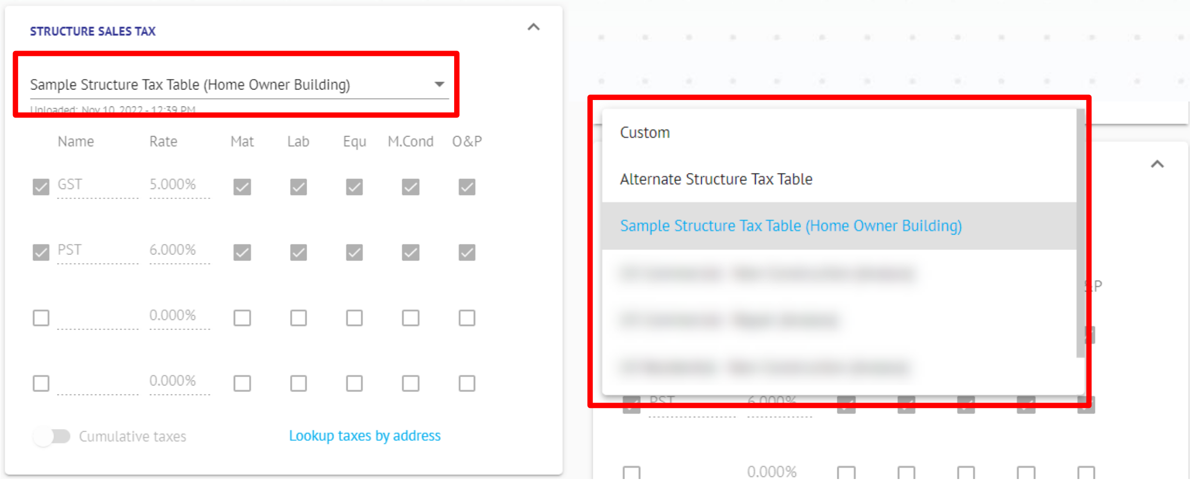
Within the 'Options' blade, click on the 'Estimate Totals' tab to be presented with estimate details, including the Sales Tax information for Structure.



Step 3

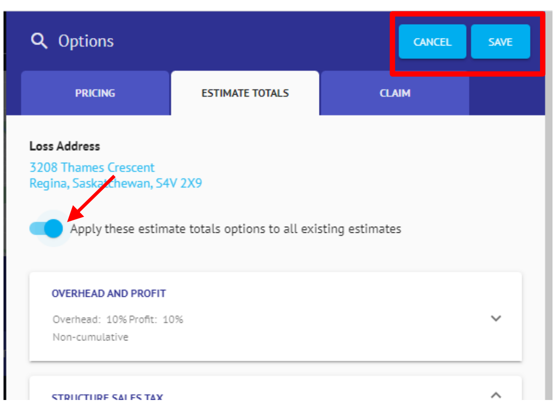
Click anywhere on the Structure Sales Tax section to open it further and view additional details about the selected Tax Table, as well as to be presented with the dropdown menu to change the default Tax Table for the claim. Select the desired Tax Table.

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



Step 4

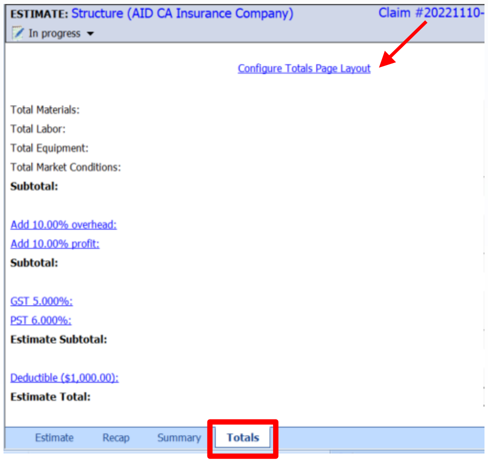
To apply the estimate totals options to all existing estimates, toggle the switch on, or leave it off if you wish to only apply changes to newly created estimates. Then click ‘Save’ to apply the changes to the claim or click ‘Cancel’ to discard the changes made.



Setting Tax Tables at the Estimate Level – Mobile Claims

Step 1

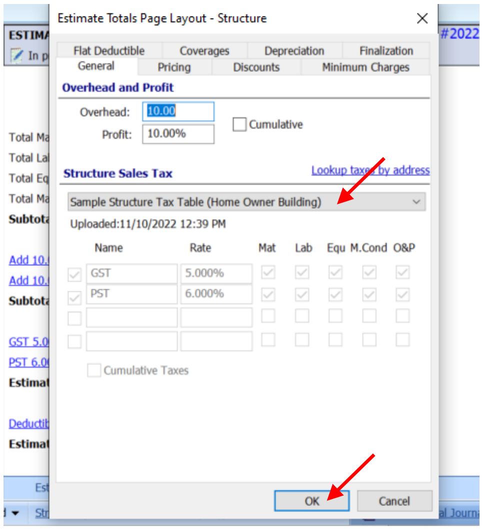
If a specific estimate requires a different tax table than the company default tax table, click on the Totals tab at the bottom of the page when viewing an estimate, and then click on “Configure Totals Page Layout” to access the estimate details.



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.

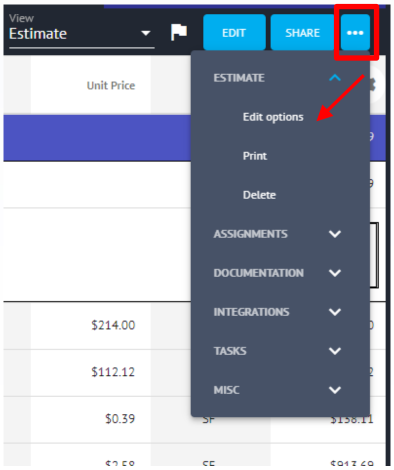
Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.



Setting Tax Tables at the Estimate Level – Claims Connect

Step 1

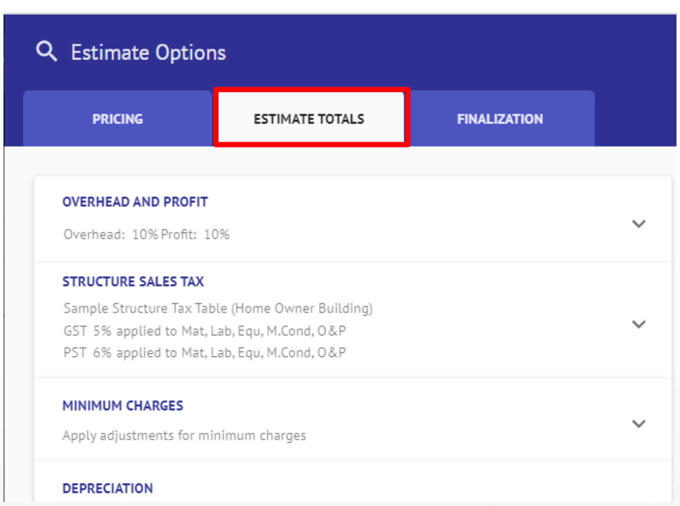
If a specific estimate requires a different tax table than the company default tax table, click on the ellipses button next to ‘Share’ within the estimate in Claims Connect and select ‘Edit options’ from the dropdown menu to access the Estimate Options blade.

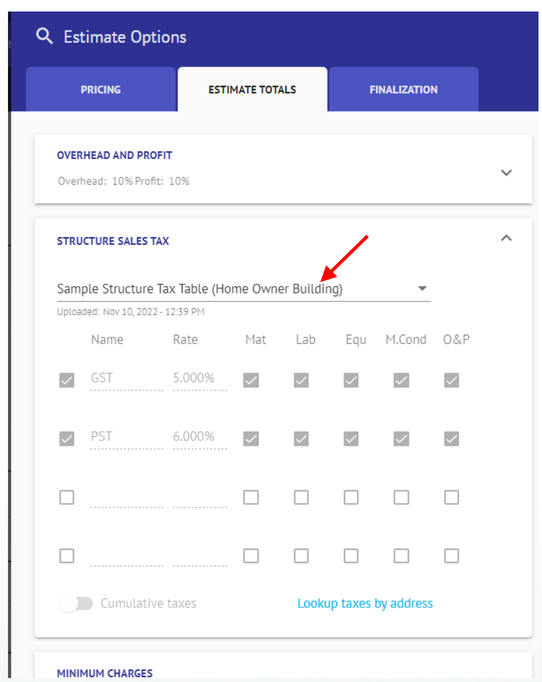


Step 2

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.

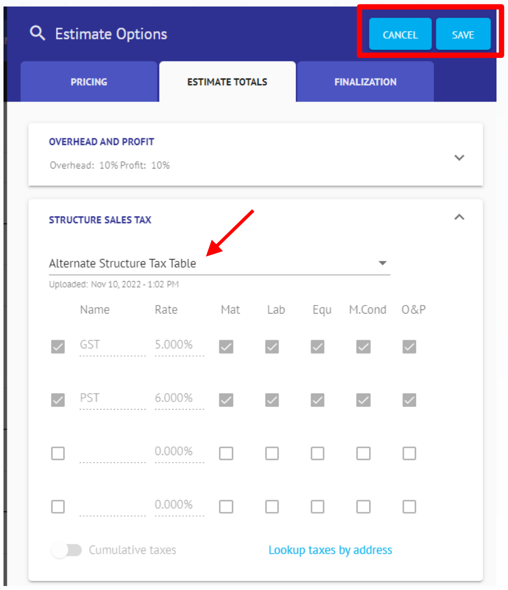
Settings of the selected Tax Table will populate in the chart below and will be grayed out to the user.





Step 3

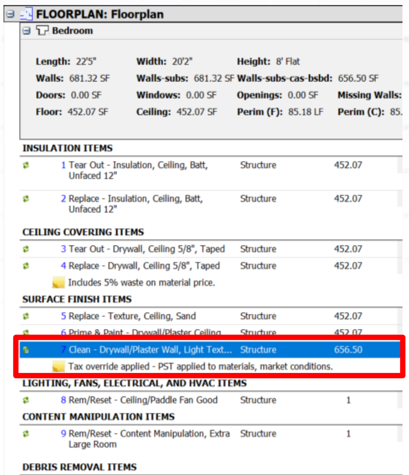
Once a Tax Table has been selected from the dropdown, the ‘Save’ and ‘Cancel’ buttons will appear at the top of the blade. Select ‘Save’ to apply the changes or ‘Cancel’ to discard the changes.

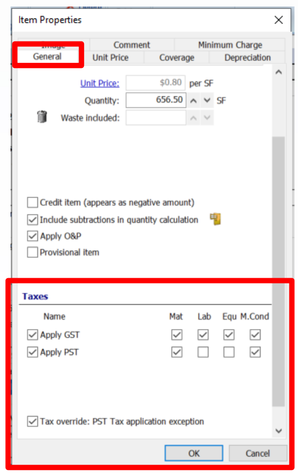


Applying Taxes & Overrides at the Line Item Level – Mobile Claims

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.

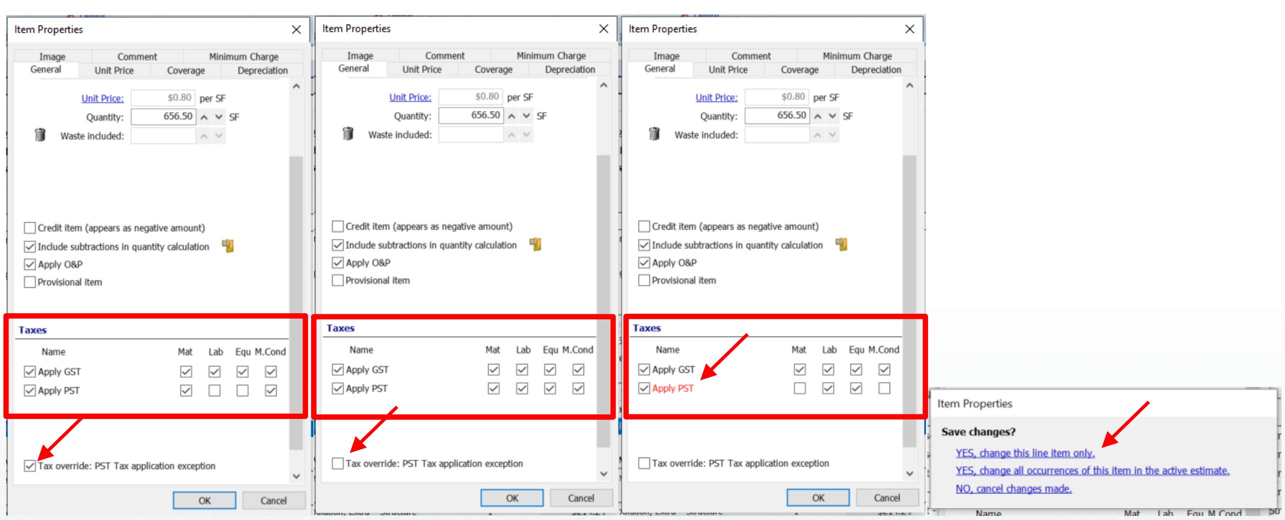




Step 2

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.

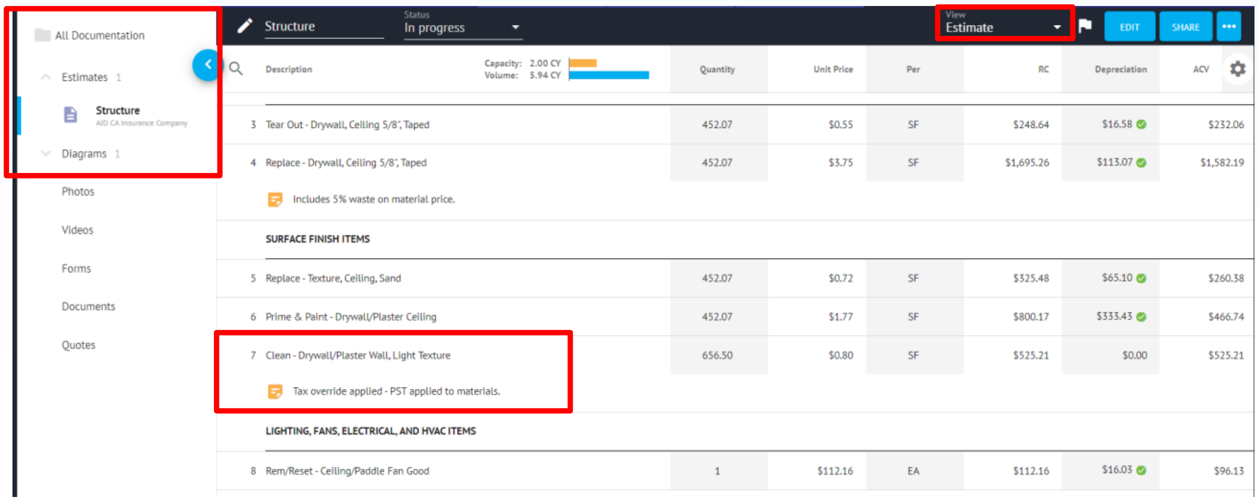
All tax application settings are editable by the user at the line item level in a claim.



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

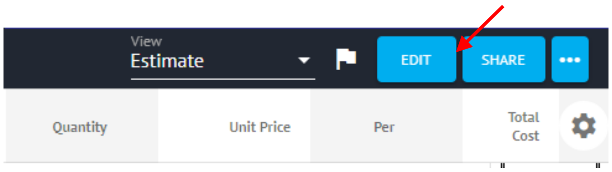
Step 1

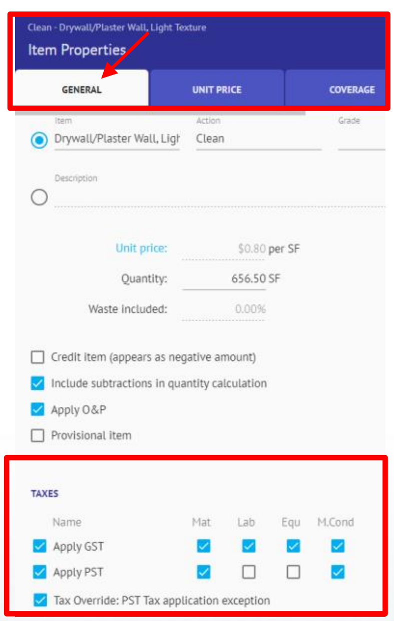
If a line item has been added to an estimate that has a defined tax override applied to it based on tax law in that geographic region and for that specific trade/material, the user will see an automatic note populate for that line item, as well as see the tax settings within the Item Properties window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

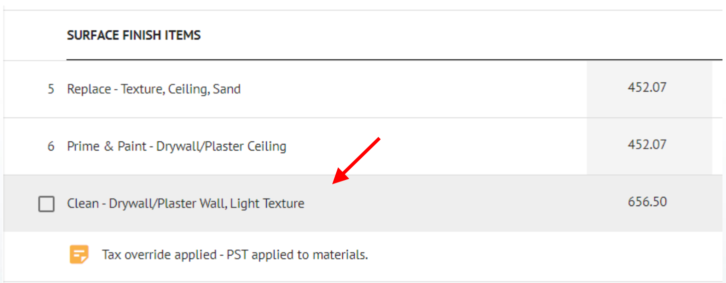


Step 2

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.



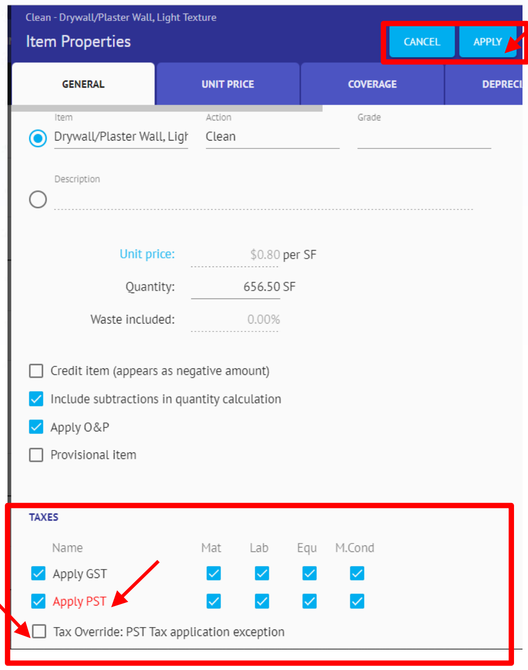




Step 3

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.



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.