



# Job Aid

## Option to Apply Overhead and Profit to Taxes Administrators – Claims Connect

**Version 7.3**

Issue 1  
April 3<sup>rd</sup>, 2024

# Option to Apply Overhead and Profit to Taxes

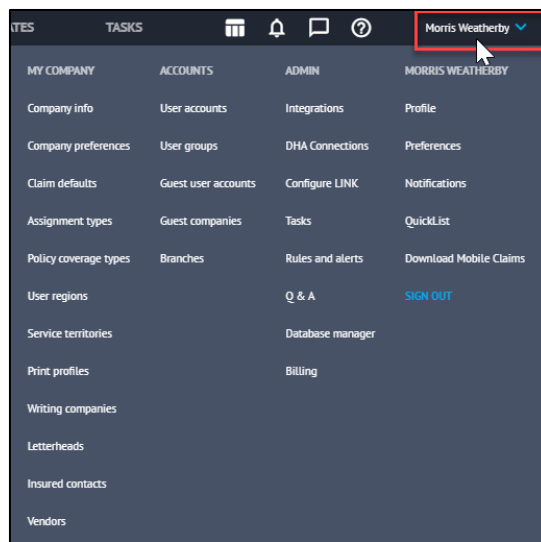
This job aid will guide an 'administrator' user of a company through the steps to configure default claim settings for the application of overhead and profit to taxes. This only applies to taxes that are not set to be applied to overhead and profit.

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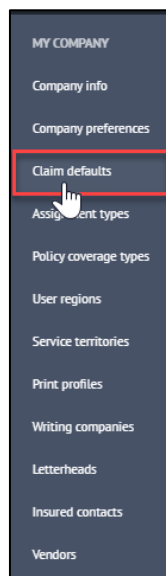
**Note:** This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

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1. Navigate to the super menu in the upper right-hand corner.



2. Select **Claim defaults** from the My Company list.



- On the Estimating tab of Claim Defaults, go to the **Overhead and Profit** section.

The screenshot shows the 'Claim Defaults' window with the 'Estimating' tab selected. The 'Overhead and Profit' section is highlighted with a red arrow. It contains two columns: 'Structure' and 'Contents'. Each column has input fields for 'Overhead' and 'Profit', both set to 10.00% and 0.00% respectively. There are checkboxes for 'Cumulative' and 'Apply overhead and profit to taxes' for both columns. The 'Apply overhead and profit to taxes' checkbox for the 'Structure' column is highlighted with a red box.

**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]

**Pricing Databases**

- Default pricing database: [selected]
- Default contents pricing database: [selected]
- Use automatic postal/zip code region lookup using ranges specified in CoreLogic Data Driven USDC March 2024
- Always update database version to latest available

**Overhead and Profit**

Structure		Contents	
Overhead:	10.00%	Overhead:	0.00%
Profit:	10.00%	Profit:	0.00%
<input type="checkbox"/> Cumulative		<input type="checkbox"/> Cumulative	
<input type="checkbox"/> Apply overhead and profit to taxes		<input type="checkbox"/> Apply overhead and profit to taxes	

**Sales Tax**

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Estimating] [Statuses] [Claim Participants] [Claim Structure] [Estimate Types] [Loss Types] [Policy Types] [Custom Fields] [User Roles]

- Check the box next to **Apply overhead and profit to taxes** to turn the setting on for the particular estimate type.

This close-up shows the 'Overhead and Profit' section. The 'Apply overhead and profit to taxes' checkbox for the 'Structure' column is checked and highlighted with a red box. A mouse cursor is pointing at the checkbox.

**Overhead and Profit**

Structure		Contents	
Overhead:	10.00%	Overhead:	0.00%
Profit:	10.00%	Profit:	0.00%
<input type="checkbox"/> Cumulative		<input type="checkbox"/> Cumulative	
<input checked="" type="checkbox"/> Apply overhead and profit to taxes		<input type="checkbox"/> Apply overhead and profit to taxes	

**Note:** 'Contents' will only display in this section if Contents Estimating is enabled for your company.

- Click **Save** at the top of the page to save the updated Claim Defaults and to apply the settings to newly created claims.

This screenshot shows the top of the 'Claim Defaults' window. The 'Save' button is highlighted with a red box, and a mouse cursor is clicking it.

**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]

**Pricing Databases**



## About CoreLogic

CoreLogic is the leading provider of property insights and solutions, promotes a healthy housing market and thriving communities. Through its enhanced property data solutions, services and technologies, CoreLogic enables real estate professionals, financial institutions, insurance carriers, government agencies and other housing market participants to help millions of people find, buy and protect their homes. For more information, please visit [corelogic.com](https://corelogic.com).

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