CoreLogic®

Job Aid

Option to Apply Overhead and Profit to Taxes Claims Connect

Version 7.3

Issue 1
April 3rd, 2024

Option to Apply Overhead and Profit to Taxes

This job aid will guide a User on the steps to apply overhead and profit to taxes at the claim level and/or at the estimate level in Claims Connect. This only applies to taxes that are <u>not</u> set to be applied to overhead and profit.

The following tasks are described in this document:

- Configuring the Option to Apply Overhead and Profit to taxes at the Claim level
- Configuring the Option to Apply Overhead and Profit to taxes at the Estimate level

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.*
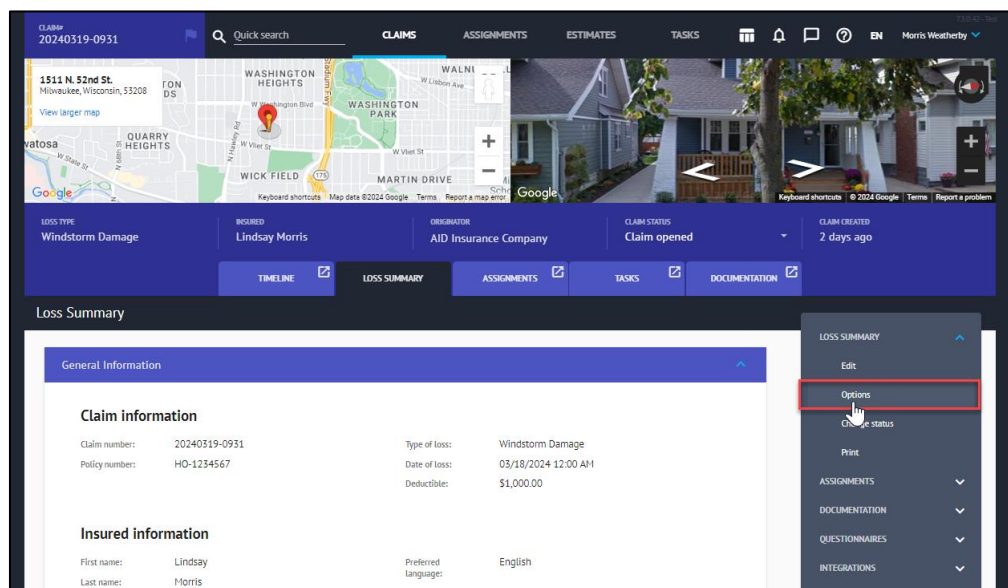
Configuring the option to Apply Overhead and Profit to Taxes at the Claim level
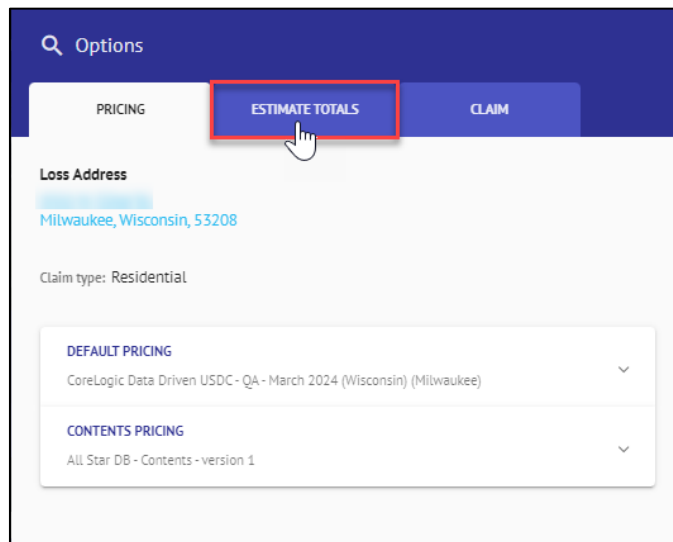
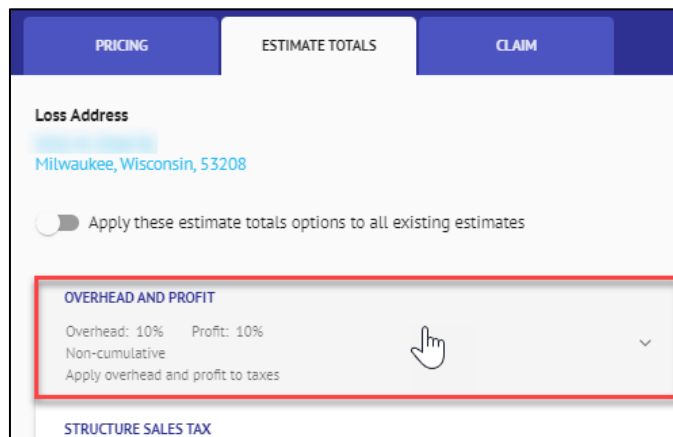1. Within a claim, navigate to the **Loss Summary page**.
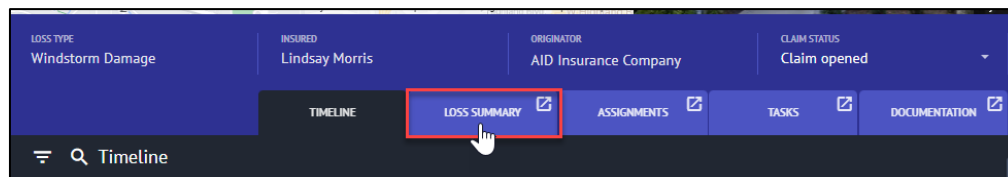
2. From the Loss Summary page, click **Options** from the Loss Summary section of the quick action menu.
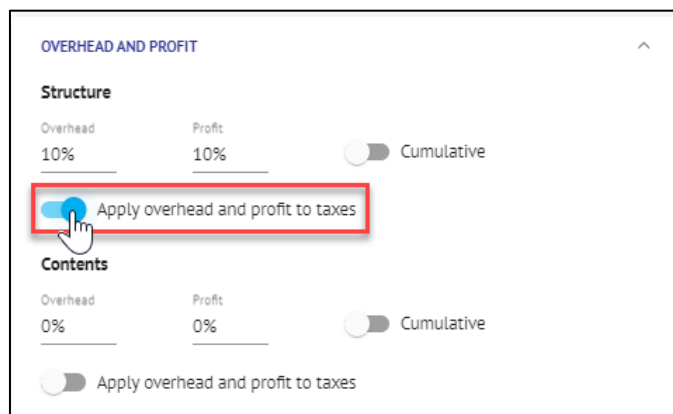
3. Select **Estimate Totals** to open the Estimate Totals tab from the Options blade.

4. Click anywhere on the **Overhead and Profit** drawer to expand it open.
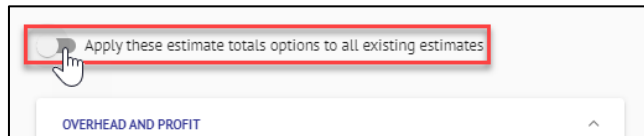

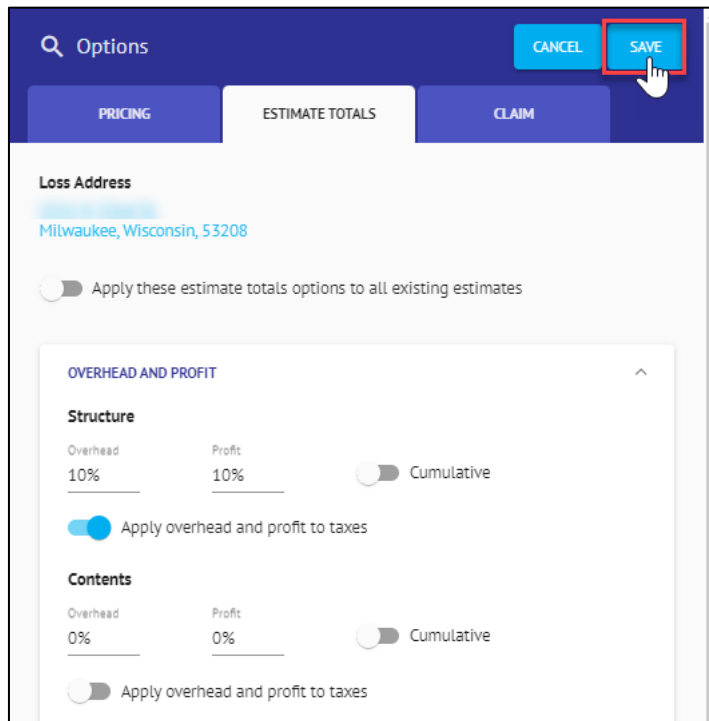5. Toggle the switch to enable **Apply overhead and profit to taxes** for the claim.

Note: *It is possible that depending on company-configured default settings, this toggle may already be switched ON. Toggling the switch in this scenario will turn the setting off for the claim.*

The Contents section will only appear if a company has Contents Estimating enabled.

6. To apply this setting to all newly created and existing estimates, toggle the **Apply these estimate totals options to all existing estimates** switch**.**
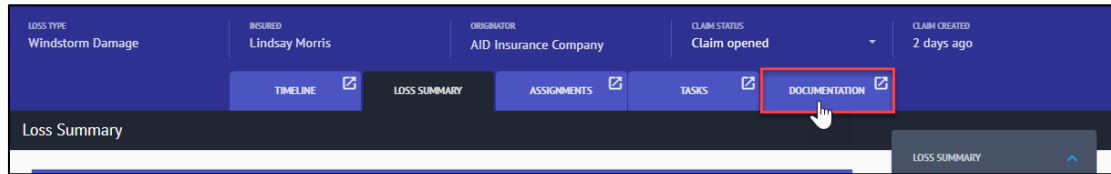

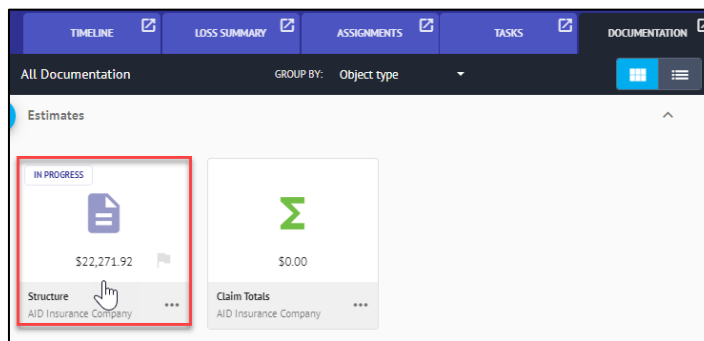7. Click **Save** to close the blade and save the settings changes.

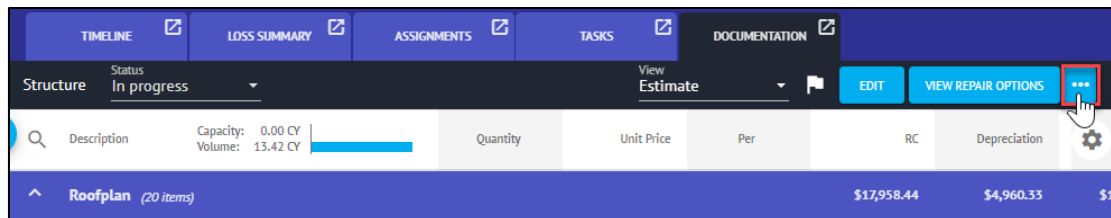## Configuring the option to Apply Overhead and Profit to Taxes at the Estimate level

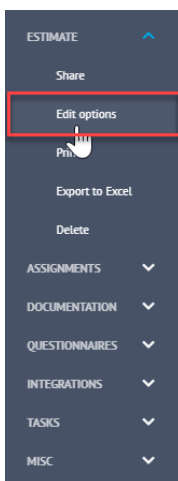1. Navigate to the **Documentation** page.

2. Select the estimate to open by clicking anywhere on the estimate card.
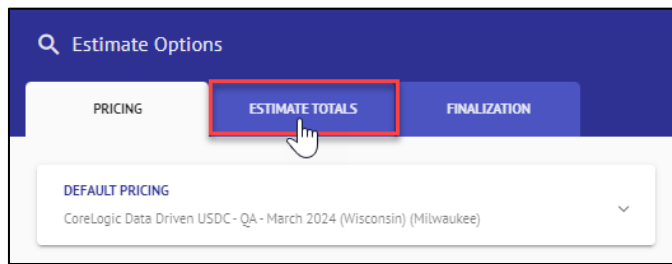

3. Once the estimate is open, click the **Ellipsis** button in the top right.
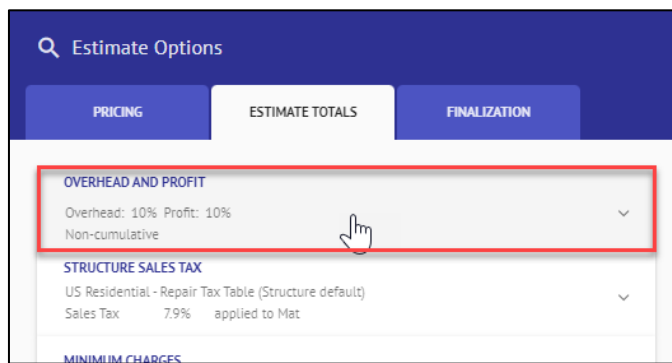

4. Select **Edit Options** from the ellipsis menu.
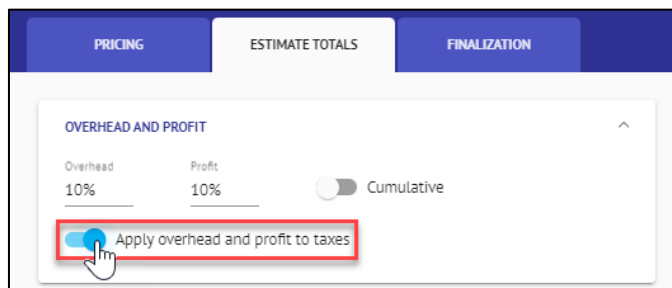
5. From the Estimate Options, open the **Estimate Totals** tab.

6. Click anywhere on the **Overhead and Profit** drawer to expand it open.

7. Toggle the switch to enable **Apply overhead and profit to taxes** for the estimate.

Note: *It is possible that depending on company-configured default settings, this toggle may already be switched ON. Toggling the switch in this scenario will turn the setting off for the estimate.*

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8. Click **Save** to close the blade and save the changes to the settings.

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