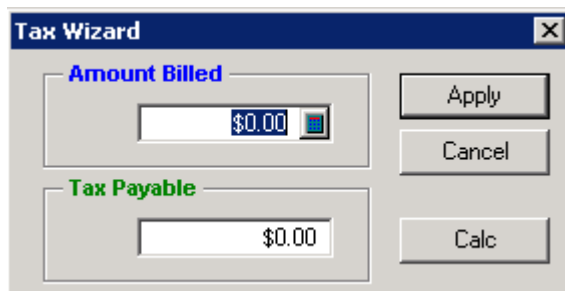


Working with Sales Taxes

During the setup of OD Professional you can enter up to four sales tax rates. Depending on the jurisdiction and the number of sales tax rates, you can either enter each sales tax rate individually or combine them. Please consult with your OD Professional Implementer for additional information and help during the initial setup of OD Professional.

Applying Sales Tax

1. Browse for and make patient active
2. Open Patient Account under the Patient Record
 - *The Patient Account can also be accessed by clicking on the Patient Account task on the ActionManager for scheduled patients.*
3. Select New Invoice tab and enter transactions
4. Place a check in the TX checkbox next to each transaction that the sales tax will be applied to
5. Save all Charges / Transactions
6. Right click on the Invoice
7. Select Calculate Tax 1 on Selection
 - Select Calculate Tax 2, 3 or 4 on Selection (if applicable)
8. The Tax Wizard box will appear:



9. Adjust Amount and click Calc (if applicable)
10. Click Apply

Sales Tax Summary Report

1. Click on Reports (Workspace Manager function tab)
2. Click on Business Management reports and enter user name and password (only available to user with either administrative or reports security access level)
3. Click on Business Management Report No. 12 Sales Tax Summary (Business Management report number may be different, depending on the version of OD Professional you have installed)
4. Select From and To Dates (usually a specific accounting period (e.g. monthly, etc.))
5. Click OK
6. Review, print and close report

Depending on the local/state sales tax regulations and rates, please consult with your accountant to determine which products require a sales tax.