

Use this job aid to improve the glass claim payment request process by reducing future administrative efforts and reducing audit recoveries when dealing with tax responsible customers.

To ensure best practices:

1. Confirm on first contact with customer by asking the questions regarding vehicle use: business, farm, commercial, u-drive, taxi or other. Please refer to our [Partner's site for Tax Responsibility examples](#).
2. Talk to the customer prior to signing off on the authorization sheet. They should be confirming tax responsibilities prior to signing authorization and submitting for payment.
3. Ensure system changes are completed in Mitchell Cloud Glass (MCG) and click the update button.

Situation	Name	Total Tax Rate %	% Tax Rate Paid by Customer	Is Material Taxed	Is Labour Taxed
If customer is responsible for taxes	GST PST	Leave as is	Key in customer responsibility based on what customer indicated	Leave as is	Leave as is
If customer is tax exempt for either or both taxes	GST PST	Leave as is	Leave as 0	Uncheck applicable tax	Uncheck applicable tax

Examples:

A) If customer is **responsible for taxes**:

Tax Information					
Name	Total Tax Rate %	% Tax Rate Paid by Insured		Is Material Taxed	Is Labour Taxed
GST	5	100	←	<input checked="" type="checkbox"/> ←	<input checked="" type="checkbox"/> ←
PST	7	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Invoice Total		Insured Payment		Claim Information	
Subtotal	\$857.89	GST	\$42.89	GST	\$0.00
GST	\$42.89	PST	\$0.00	PST	\$60.05
PST	\$60.05	Deductible	\$500.00	Total	\$417.95
Total	\$960.84	Total	\$542.89		

B) If the customer is tax **exempt for either or both taxes** (example below is GST only exempt):

Tax Information					
Name	Total Tax Rate %	% Tax Rate Paid by Insured		Is Material Taxed	Is Labour Taxed
GST	5	0	←	<input type="checkbox"/> ←	<input type="checkbox"/> ←
PST	7	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Invoice Total		Insured Payment		Claim Information	
Subtotal	\$857.89	GST	\$0.00	GST	\$0.00
GST	\$0.00	PST	\$0.00	PST	\$60.05
PST	\$60.05	Deductible	\$500.00	Total	\$417.94
Total	\$917.94	Total	\$500.00		