

Tax Job Aid for Glass Claims

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:

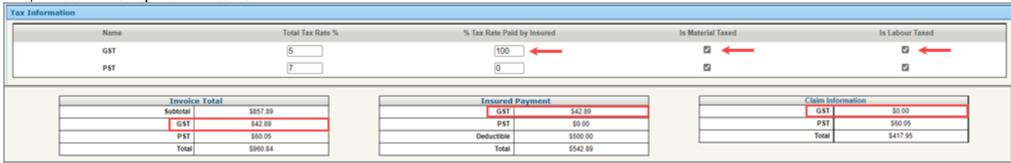
- 1. Confirm on first contact with customer by asking the questions regarding vehicle use: business, farm, commercial, u-drive, taxi or other. Please refer to our <u>Partner's site for Tax Responsibility examples.</u>
- 2. Talk to the customer prior to signing off on the authorization sheet.

 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:



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

