



Job Aid

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

Version 7.3

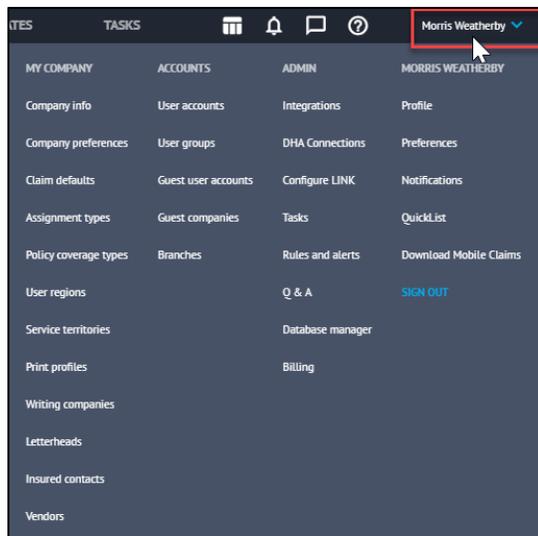
Issue 1
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Option to Apply Overhead and Profit to Taxes

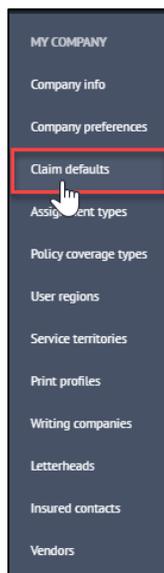
This job aid will guide an 'administrator' user of a company through the steps to configure default claim settings for the application of overhead and profit to taxes. This only applies to taxes that are not set to be applied to overhead and profit.

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.

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



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



3. 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 'Overhead' and 'Profit' input fields, 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.

4. 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.

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

5. 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 on it. The 'Cancel' button is also visible to the right.



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