



Changing Sales and Use Tax Rates

Version 1.0 | December 9, 2016

This job aid explains how to update the Sales and Use Tax rates for Purchasing and Accounts Payable using the **Sales - Use Tax Authority** page. You will need to add a new effective-dated row for each Tax Authority. If you cannot access this page, please submit a HEAT ticket to request access to make changes to the tax authority table. Please allow for enough lead time to get your access so you can have the new rates in place before January 1, 2017.

NOTE FOR PRELIMINARY DISTRICTS: When your districts were converted to PeopleSoft your tax authority table consisted of the entire state of California. Please update only those Authorities that you do business with.

Navigation: Main Menu > Set Up Financials/Supply Chain > Common Definitions > Sales and Use Tax > Authorities

1. Navigate to **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Sales and Use Tax > Authorities**.
2. Enter your **SetID** (district #) and click **Search**. The search results will show a list of Tax Authorities.

Search Criteria

SetID: = 09900

Tax Authority: begins with

Include History Correct History

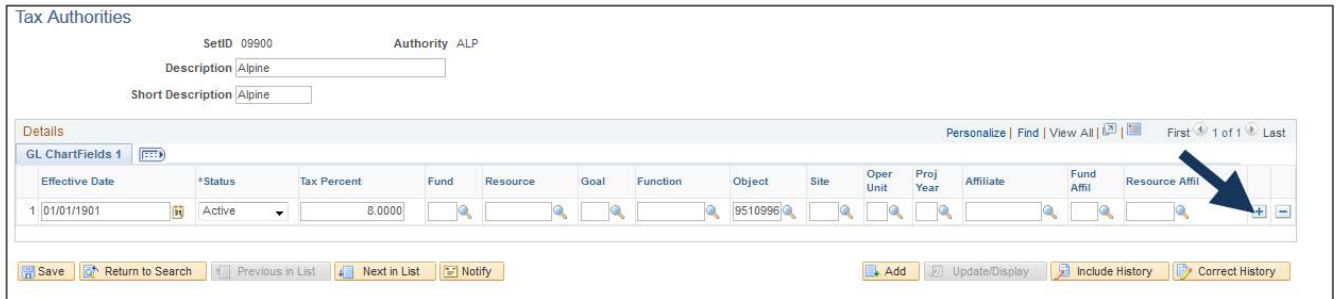
Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-22 of 22 Last

SetID	Tax Authority	Description
09900	ALP	Alpine
09900	CAM	Campbell
09900	CMP	Campo
09900	CUL	Culver City
09900	CV	Chula Vista

- Select the first **Tax Authority**. Click the **+ sign** to create a new effective dated row. In this example, we have selected the Alpine Tax Authority.



Tax Authorities

SetID 09900 Authority ALP

Description Alpine

Short Description Alpine

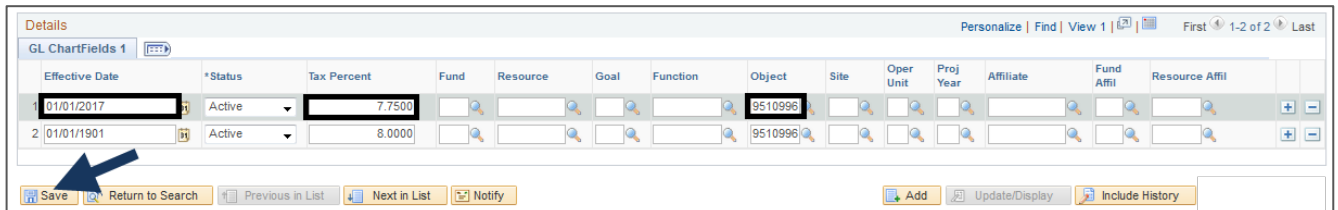
Details Personalize | Find | View All | First 1 of 1 Last

Effective Date	*Status	Tax Percent	Fund	Resource	Goal	Function	Object	Site	Oper Unit	Proj Year	Affiliate	Fund Affil	Resource Affil
1 01/01/1901	Active	8.0000					9510996						

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

- For the new row, enter the details, then click **Save**.

TIP: You can click the **View All** link at the top right to see the new record and the old record(s).



Details Personalize | Find | View 1 | First 1-2 of 2 Last

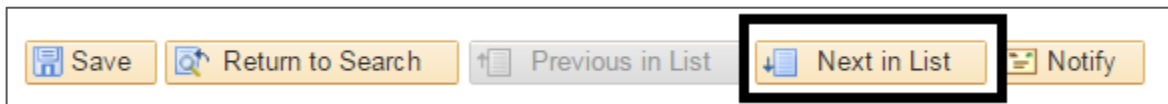
Effective Date	*Status	Tax Percent	Fund	Resource	Goal	Function	Object	Site	Oper Unit	Proj Year	Affiliate	Fund Affil	Resource Affil
1 01/01/2017	Active	7.7500					9510996						
2 01/01/1901	Active	8.0000					9510996						

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

- Effective Date:** Enter the new effective date. *Example: 1/1/17*
- Tax Percent:** Enter the tax percent. *Example: 7.75*
- Object:** 9510996

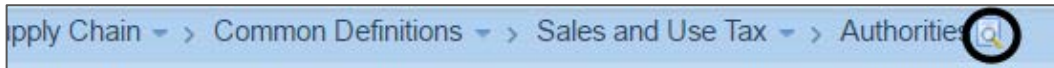
NOTE: You have to check with every Tax Authority in your table to make sure what their rates will be on the new effective date.

- Repeat this for all Tax Authorities. Click **Next in List (Alt+3)** to change the next Tax Authority.



Save Return to Search Previous in List Next in List Notify

Other options: Click **Return to Search** or the use the icon at the end of the breadcrumb to view your search results.



Apply Chain > Common Definitions > Sales and Use Tax > Authorities