

# Changing Sales and Use Tax Rates

Version 1.1 | November 9, 2018

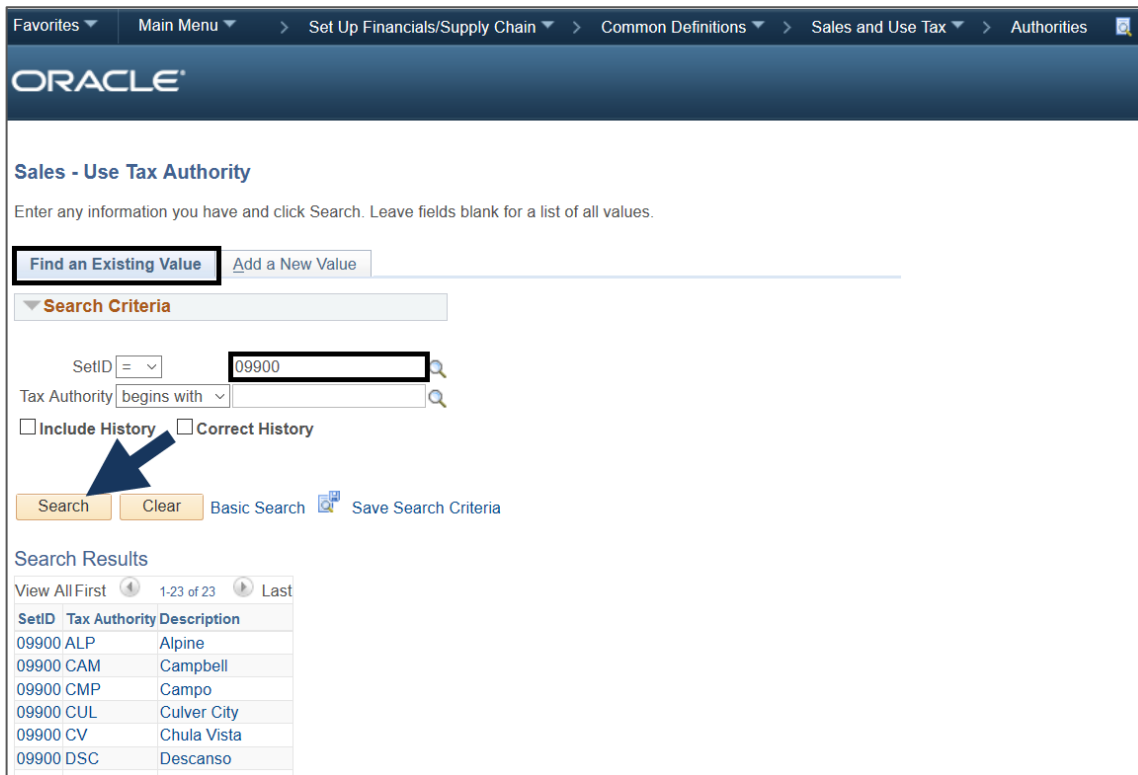
These procedures update the Sales and Use Tax rates for Purchasing and Accounts Payable

**Note:**

- 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 Jan 1, 2017.
- For **Prelim GROUP Only** – 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

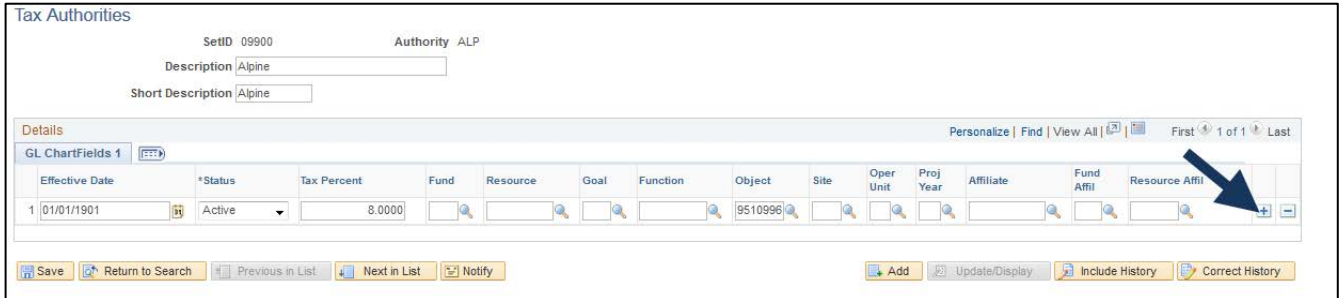
1. **Navigate to:** Main Menu > Set Up Financials/Supply Chain > Common Definitions > Sales and Use Tax > Authorities
  - a. Enter **SetID**
  - b. Click **Search**



Search Results

SetID	Tax Authority	Description
09900 ALP		Alpine
09900 CAM		Campbell
09900 CMP		Campo
09900 CUL		Culver City
09900 CV		Chula Vista
09900 DSC		Descanso
09900 ELS		El Cajon

2. Open each **Tax Authority** to create a new effective dated line,
  - a. *Example:* Open Alpine Tax Authority. Click the + icon on the far right side of the Details table to create a new line.



Tax Authorities

SetID 09900 Authority ALP

Description Alpine

Short Description Alpine

Details

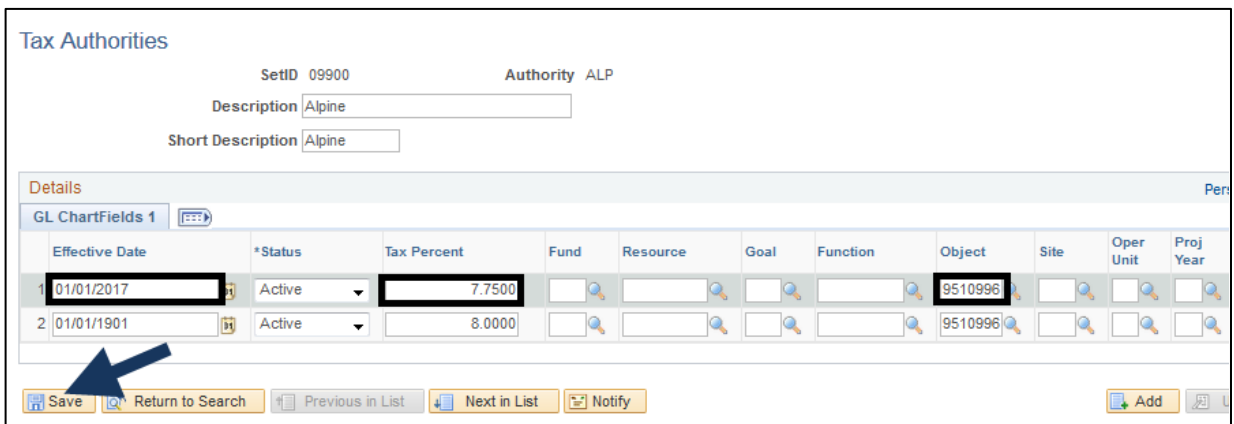
GL ChartFields 1

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

3. Enter Details:
  - a. **New Effective date.** *Example 01/01/2017*
  - b. **Tax Percent:** *Example: 7.7500*
  - c. **Object:** 9510996
  - d. Click **Save**

**\*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.



Tax Authorities

SetID 09900 Authority ALP

Description Alpine

Short Description Alpine

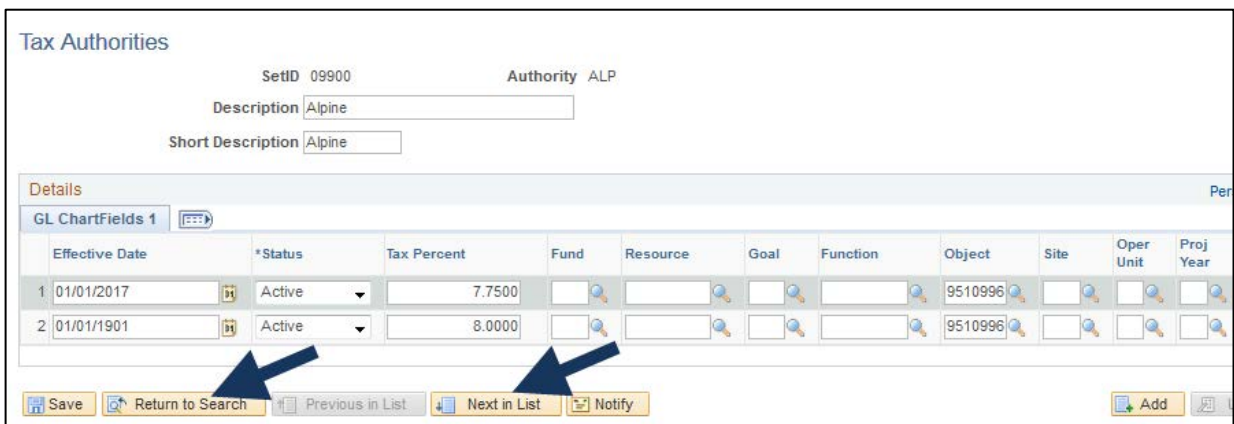
Details

GL ChartFields 1

Effective Date	*Status	Tax Percent	Fund	Resource	Goal	Function	Object	Site	Oper Unit	Proj Year
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

4. Click **Next in List** to change the next Tax Authority or **Return to Search**.



Tax Authorities

SetID 09900 Authority ALP

Description Alpine

Short Description Alpine

Details

GL ChartFields 1

Effective Date	*Status	Tax Percent	Fund	Resource	Goal	Function	Object	Site	Oper Unit	Proj Year
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