

Sales and Use Tax Professional Services

Advance Your Sales and Use (Indirect) Tax Process to
New Heights — Increasing Efficiency While Reducing Risk

CCH® Celebrates 100 Years in Tax & Accounting

Partner with CCH Sales and Use Tax Professional Services from Wolters Kluwer to streamline your indirect tax workflow and ensure you are achieving the highest possible levels of compliance. Look to us as your “one-stop shop” to help you reduce risk and manage complex sales and use tax operations and issues. Working hand in hand with you, our team of experienced consultants and certified partners will develop the best game plan for increasing your efficiency.

CCH Sales and Use Tax Professional Services include:

- System implementation and configuration.
- User training and sales tax education.
- Sales tax education.
- Process reviews and best practice recommendations.
- SKU mapping.
- Custom taxability research.
- Nexus determination.
- **The most trusted source in the industry backing up your business** — CCH brings 100 years of tax and accounting expertise providing world class content and innovative solutions that will drive greater levels of accuracy, accountability and efficiency into your workday.
- **Deep staff knowledge and expertise** — Our team has decades of experience as well as expertise in sales and use tax issues, compliance, tax statutes and interpretation, audit defense, software installation, and integrating with a wide array of ERP systems. This combination ensures that your CCH solution is configured and installed correctly — the first time.
- **An established methodology for approaching all service engagements** — We apply our best of process techniques to businesses of all sizes, establishing a clear goal for the engagement, and optimizing workflow for a strong return on investment. An experienced project manager guides each service engagement and ensures that the right resources are brought in. From the beginning of the engagement and continuing through the migration to the production system, our consultants will focus on transferring knowledge to your staff.
- **Continued expansion of our partner program** — Esteemed certified implementation providers will join forces with CCH to bring best-of-class services and solutions to help advance your business.

Sales and Use Tax Diagnostic Review

As your business grows and requirements change, let the Sales and Use Tax Professional Services and Certified Partner team help identify risks or weaknesses within your current sales and use tax operations and tax system configurations. A **Sales and Use Tax Diagnostic** provides a complete review of:

- Current taxability of products and services against state and local statutes to verify exempt sales support documentation.
- Exemption certificate for exemptions claimed and reported for all relevant states.
- Statutory exemptions during specified time period.
- Miscellaneous credits and adjustments during specified time period.
- Untaxed purchases including A/P transactions, transactions outside A/P process, bulk distribution transactions, interstate/intercompany transfers, internal consumption, sample giveaways and product giveaways.
- Your production environment for Sales Tax Office and ERP integration to optimize the best performance capabilities.
- Your Sales Tax Office configuration for business rules, nexus and situs rules.

In addition, our team will generate the estimated tax exposure for applicable states and separately reported localities and create tax reserve projections relative to estimated tax deficiencies and penalties and interest. They will provide information on weaknesses and make recommendations for system and process improvements.

If you require, the **Sales and Use Tax Diagnostic Review** can also be expanded to include any sales and use tax liabilities associated with acquisitions or mergers.

Nexus Evaluation

The **Nexus Evaluation** service plan will allow our consultants to review your operations in states where you are not registered to determine if you have nexus in those jurisdictions. Specifically, we will review and evaluate the following activities:

- Property ownership.
- Sales and services activities.
- Trade shows.
- E-commerce.
- Contract labor arrangements.
- Affiliations and agency relations.

Our consultants will then determine if your business presence is substantial enough to establish the requirement to collect tax (nexus). We can also provide services related to utilizing Voluntary Disclosure Agreement ("VDA") rules in the jurisdiction to report your activity in the jurisdiction.

Custom Sales and Use Tax Research

With our **Sales and Use Tax Research** service plan, our consultants will complete a thorough analysis of your sales and use taxability in relation to the products and services you offer. We will then review state and local statutes, regulations and case law to create a taxability matrix for you. We will prepare private letter ruling or legal opinion request documentation to ensure that you have the support you need in case of audit.

Stock Keeping Unit (SKU) Mapping, Rules and Configuration

The **SKU Mapping, Rules and Configuration** service allows our consultants to perform an in-depth analysis of the individual products or services you provide, compiling all SKUs and GL account numbers. They will then review a mapping guide and recommend and select the best Group-Item mappings. Services also include:

- Identifying potential mapping weaknesses due to differences in description of SKUs or GL numbers.
- Create custom Group-Items when necessary and customize taxability.
- Document all Group-Item mappings, customization and potential exposure areas.
- Perform taxability testing and verify expected results.

- Review the entire configuration with you.
- Recommend revised SKU codes to optimize your tax determination.
- Ensure that you are confident making any revisions and additions to the system moving forward.

Address Validation and Data Cleansing Services

As part of a data migration and conversion effort, consider a data cleansing of your customer and vendor addresses to ensure accuracy of the right tax jurisdiction assignment. Our team will normalize your data to U.S. Post Office standards including:

- Correct spelling and formatting of the street, city and state.
- Correct city, state, county and zip code assignment.
- Return county.
- Return accurate ZIP+4.
- Determine the correct CCH tax jurisdiction for the appended address.

Address data you provide will not be modified. Instead, new fields will be appended at the end of each record in the file. These new fields will include verification flag, verification message, correction flag, corrected address and more. As part of this service, our team will provide an additional address scrubbing for the addresses that could not be verified during the first run due to incorrect data.

Business Process Review

Organizations change every day through mergers and acquisition, divestiture, expansion of product lines and markets. Each of these can have significant ramifications when it comes to sales and use tax compliance. By engaging in a **Business Process Review**, CCH consultants will work with your staff to analyze your existing processes and software. You will receive a written report on ways to increase your efficiency and reduce your risk.

Sales and Use Tax Training

Our Sales and Use Tax Training covers everything you need know to automate the entire sales and use tax compliance process, allowing Tax Department resources to focus on higher value activities. You'll learn about key issues involved with sales tax, understand key areas of exposure and risk that exist for your organization, and define your team's sales and use tax compliance responsibilities within your organization.