

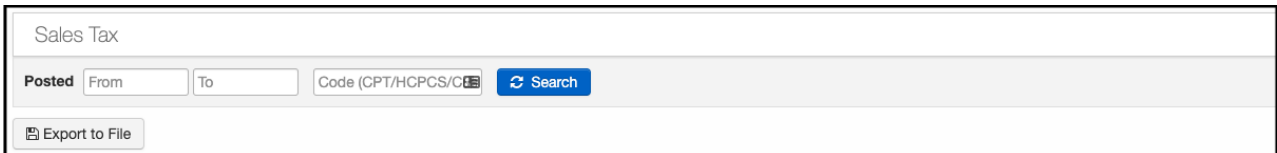
# Sales Tax Feature

08/29/2024 9:07 am EDT

## Using the Sales Tax Feature

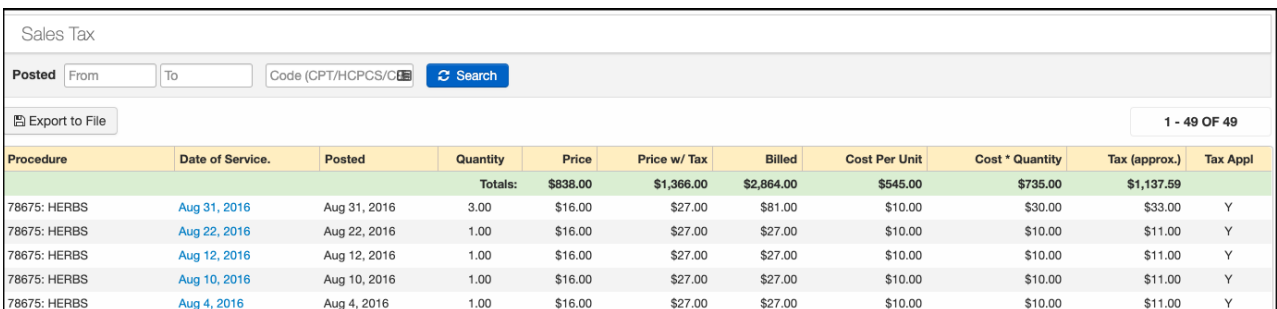
The Sales Tax screen will help you track amounts collected on applicable products and services from your account.

1. To navigate to the screen, hover over **Billing** and then select **Sales Tax** from the menu on the left.
2. You have the option to sort by date or date range, or by code. Once you make your selections, click the blue **Search** button. Once populated, you also have the option of exporting to a file. The file will populate and be available in your message center.



The screenshot shows the 'Sales Tax' search interface. It includes a title 'Sales Tax', a 'Posted' filter with 'From' and 'To' date pickers, a 'Code (CPT/HCPCS/CE)' dropdown, and a blue 'Search' button. Below these is an 'Export to File' button.

This is how the information will populate on your screen. For additional information on any of the lines, click on the blue date of service. It will take you to the Live Claims Feed and the appointment where the particular item/service was originally charged.



The screenshot shows the 'Sales Tax' results table. It includes a title 'Sales Tax', a 'Posted' filter with 'From' and 'To' date pickers, a 'Code (CPT/HCPCS/CE)' dropdown, and a blue 'Search' button. Below these is an 'Export to File' button and a page indicator '1 - 49 OF 49'. The table has the following columns: Procedure, Date of Service., Posted, Quantity, Price, Price w/ Tax, Billed, Cost Per Unit, Cost \* Quantity, Tax (approx.), and Tax Appl. The table contains 5 rows of data, including a 'Totals' row.

Procedure	Date of Service.	Posted	Quantity	Price	Price w/ Tax	Billed	Cost Per Unit	Cost * Quantity	Tax (approx.)	Tax Appl
Totals:				\$838.00	\$1,366.00	\$2,964.00	\$545.00	\$735.00	\$1,137.59	
78675: HERBS	<a href="#">Aug 31, 2016</a>	Aug 31, 2016	3.00	\$16.00	\$27.00	\$81.00	\$10.00	\$30.00	\$33.00	Y
78675: HERBS	<a href="#">Aug 22, 2016</a>	Aug 22, 2016	1.00	\$16.00	\$27.00	\$27.00	\$10.00	\$10.00	\$11.00	Y
78675: HERBS	<a href="#">Aug 12, 2016</a>	Aug 12, 2016	1.00	\$16.00	\$27.00	\$27.00	\$10.00	\$10.00	\$11.00	Y
78675: HERBS	<a href="#">Aug 10, 2016</a>	Aug 10, 2016	1.00	\$16.00	\$27.00	\$27.00	\$10.00	\$10.00	\$11.00	Y
78675: HERBS	<a href="#">Aug 4, 2016</a>	Aug 4, 2016	1.00	\$16.00	\$27.00	\$27.00	\$10.00	\$10.00	\$11.00	Y

Here is a [video](#) that will walk you through using the Sales Tax feature in DrChrono.