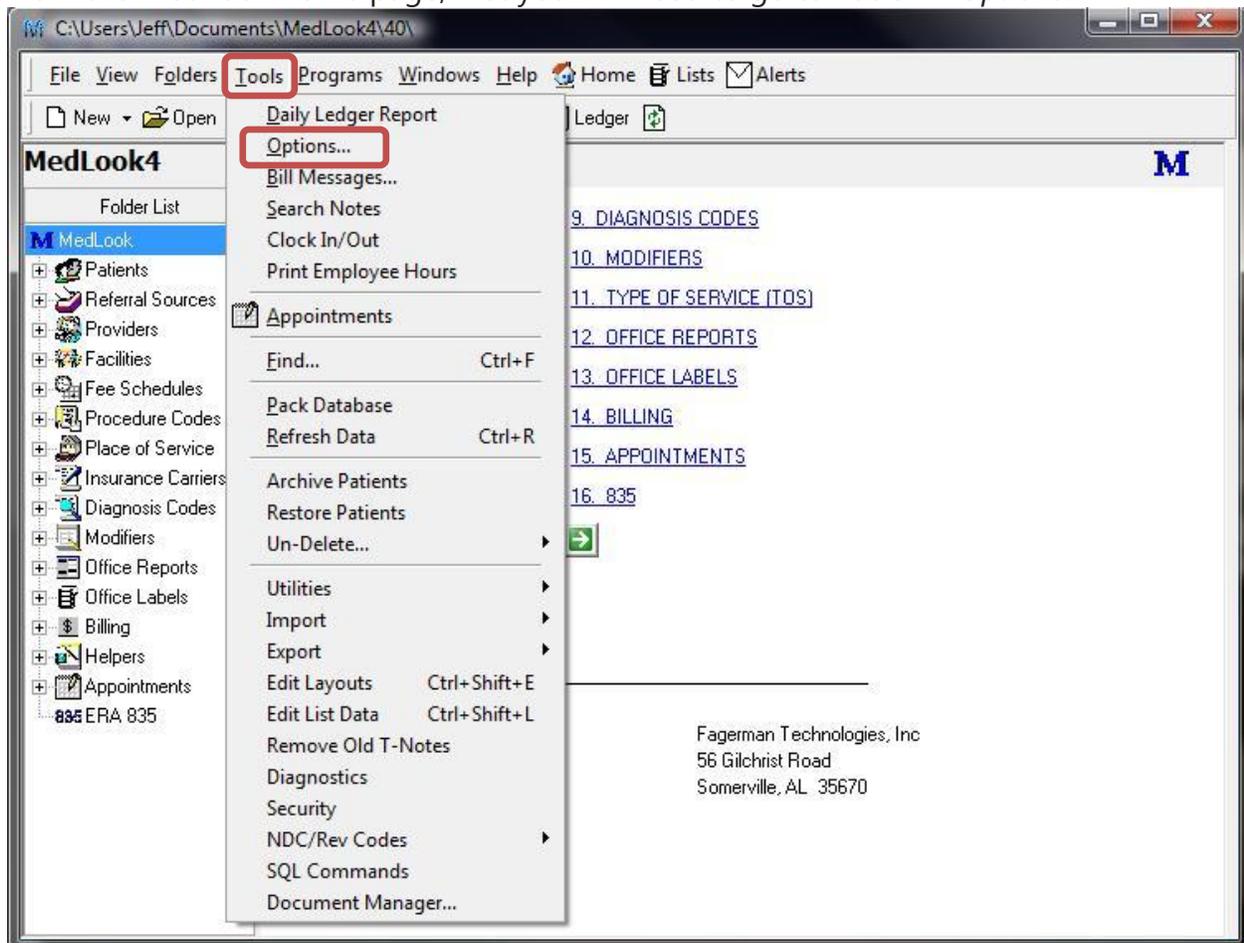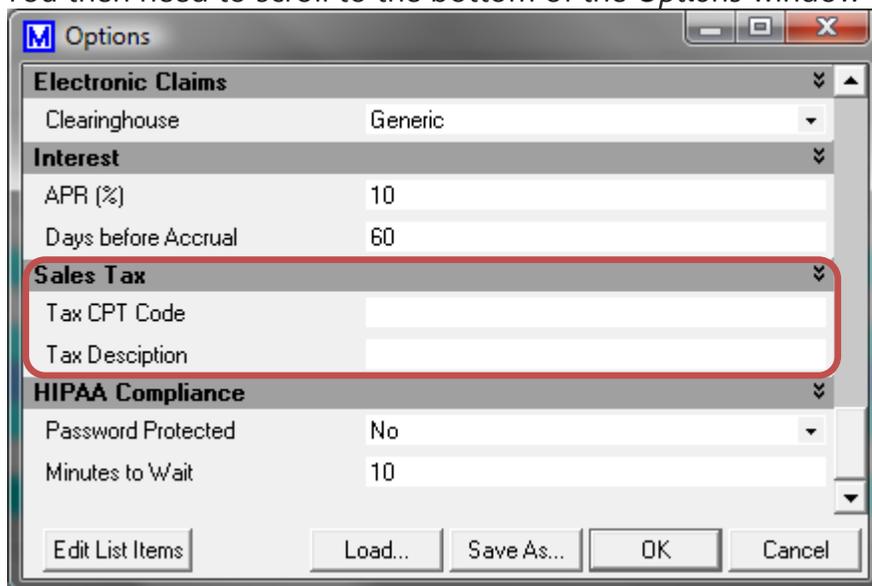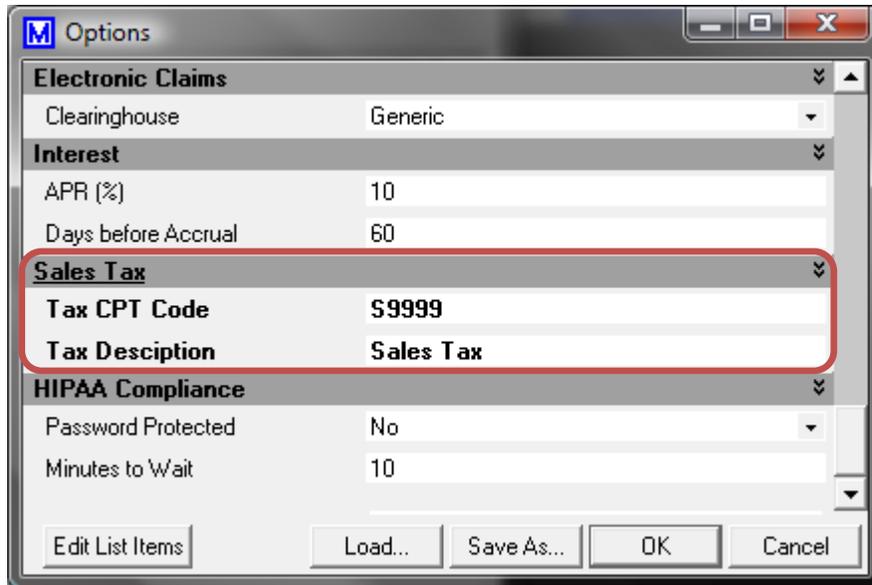## Adding Sales Tax to a Charge

From the MedLook home page, first you will need to go to *Tools -> Options*.

You then need to scroll to the bottom of the *Options* window to the *Sales Tax* section.

Looking at the *Sales Tax* section, the *Tax CPT Code* is the code that will show up as the sales tax. Since insurance companies will not take "sales tax" on the CMS1500 form, you have to give sales tax a CPT code, EX. S9999. *Tax Description* is just the title you want to give the sales tax. It could be "Sales Tax" or you can change it to say "AL State Tax". **You must to have both *Tax CPT Code* and *Tax Description* filled in for the sales tax to work correctly.**
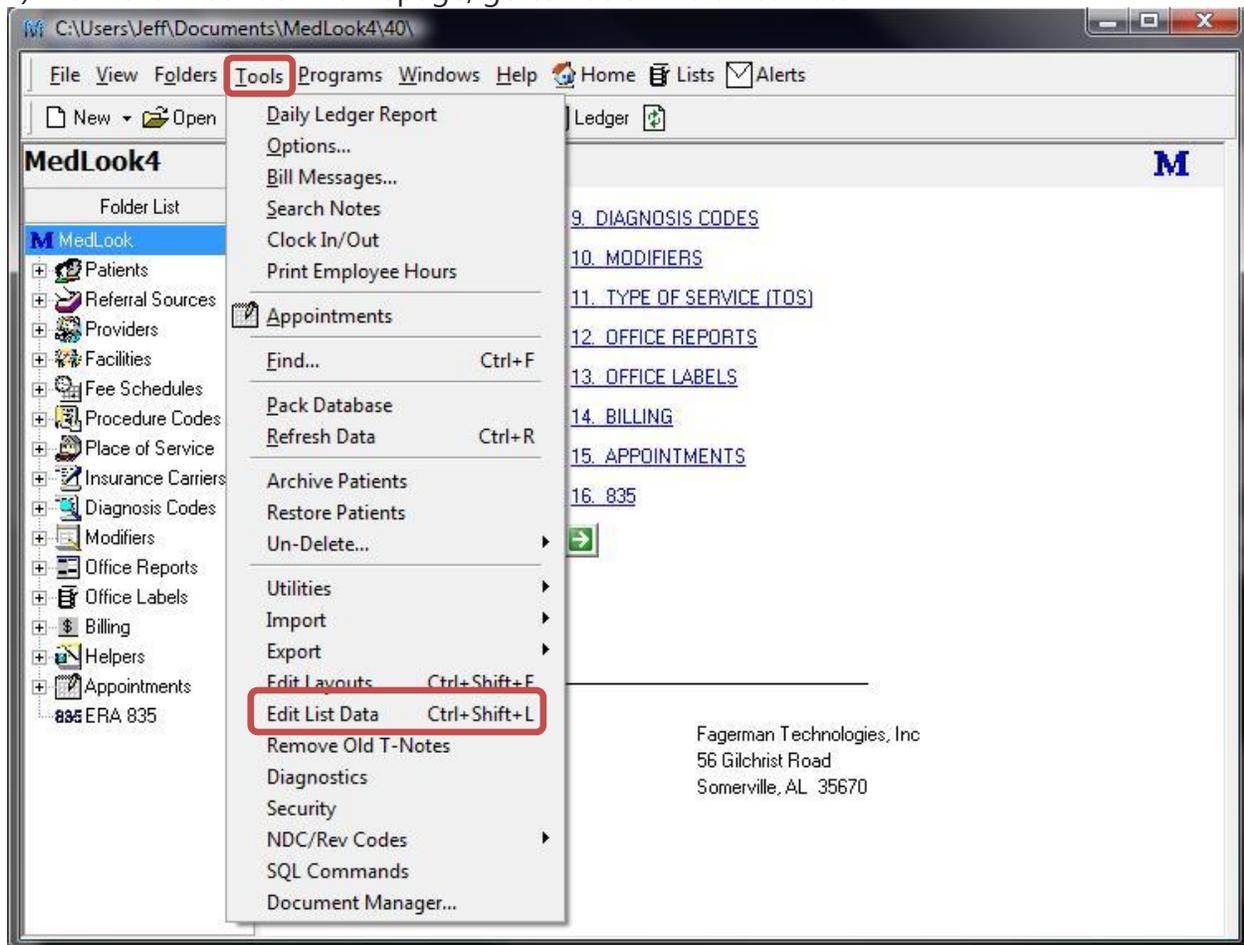
There are two ways to add a sales tax record to ML.

1) From the MedLook homepage, go to *Tools->Edit List Data.*

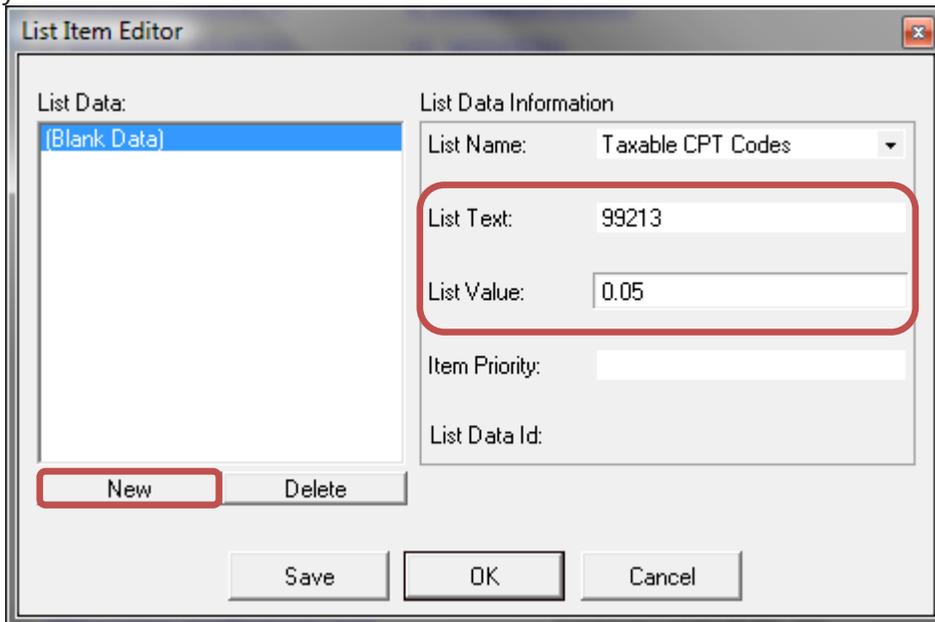On the *List Item Editor* window, select *Taxable CPT Codes* from the *List Name* dropdown.
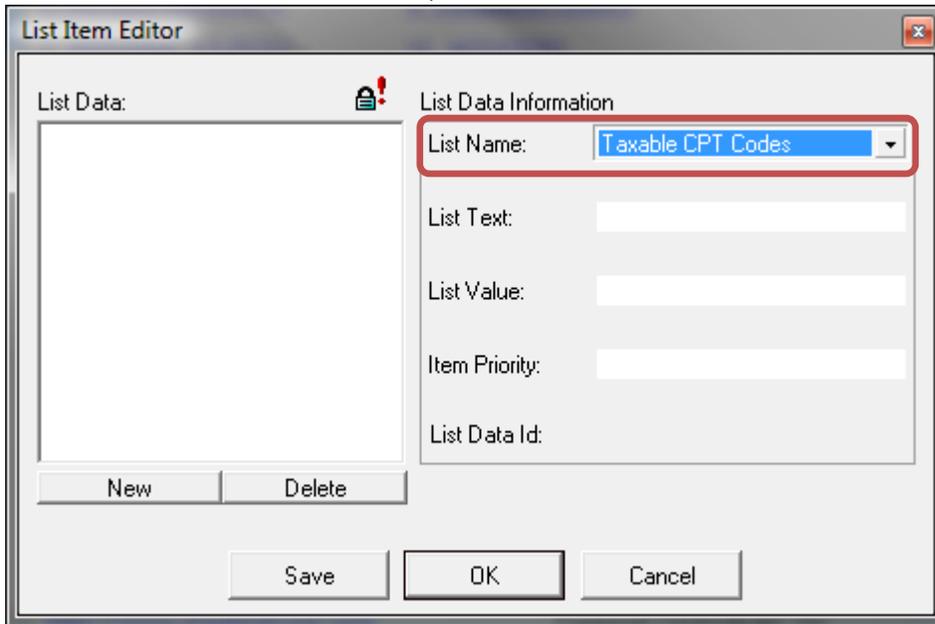

Once you have *Taxable CPT Codes* selected, you will need to create a new item by clicking the *New* button. Once the new item is in the list you need to add in the *List Data Information*. In the *List Text* box you will add the CPT code that needs to be taxed. So if you wanted to add sales tax to CPT code 99213 then you would type 99213 in the *List Text* box. In the *List Value* box you will enter the tax rate in decimal form, EX. 5% tax = 0.05. Once you have the information entered **click Save**.
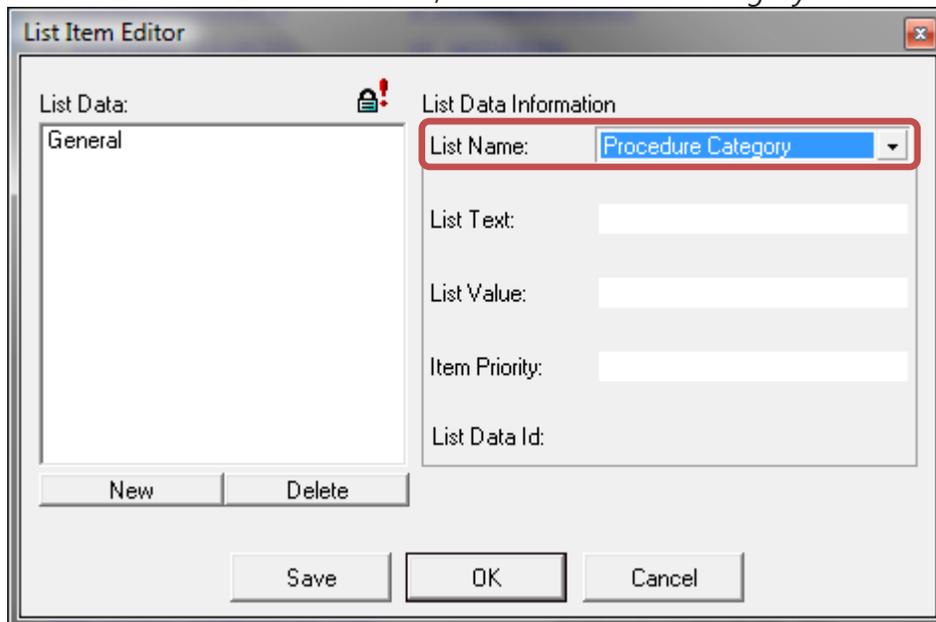
2) This way of adding sales tax allows you to add a tax rate to a group of CPT codes. From the MedLook homepage, go to *Tools->Edit List Data*.
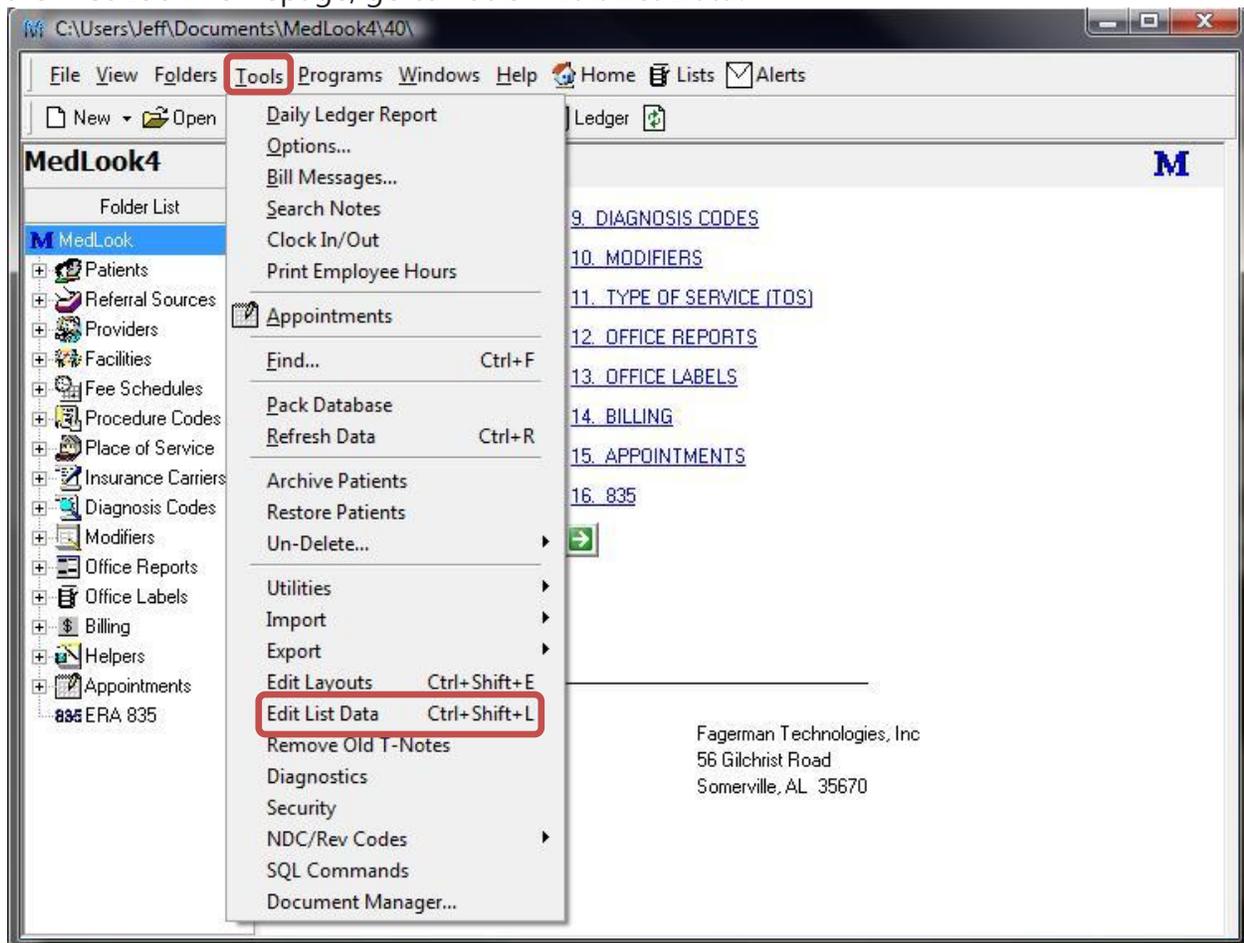
On the *List Item* Editor window, select *Procedure Category* from the *List Name* dropdown.

Then, click *New* and enter a category name in *List Text*, EX: Taxable Codes. In the *List Value* box you need to enter a category that is not already in the list. For example, if there are 5 categories and they have the list values of 1, 2, 3, 4, 5 then you will need to enter 6 for the *List Value*. Once this is done **click *Save***.

Back on the MedLook homepage, go to the *Procedure Codes* folder.

Double-click on the desired procedure code and set it to the new category you added and **click *Save*.** You can do this with multiple procedure codes.
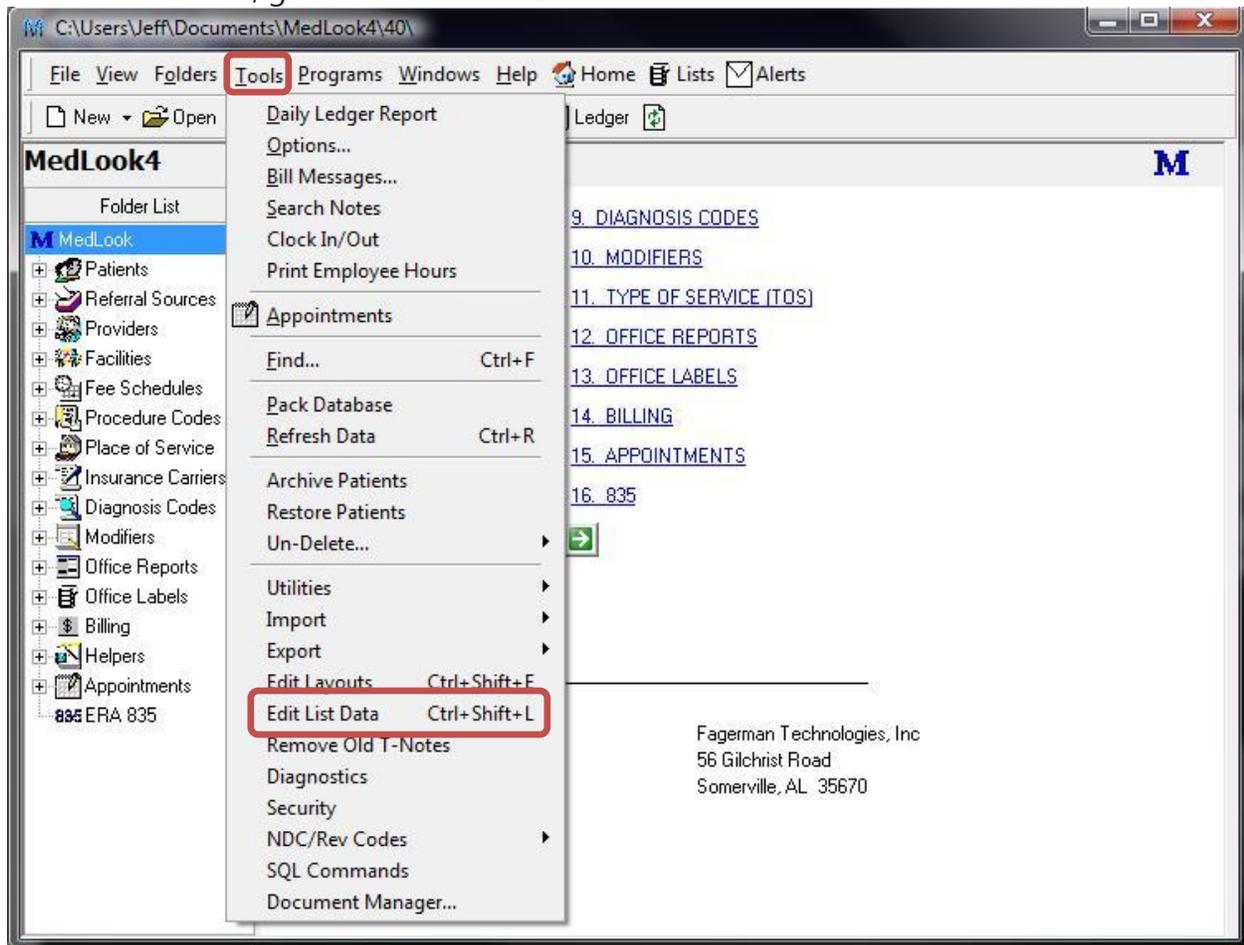
Once that is done, go back to *Tools->Edit List Data*.

On the *List Item Editor* window, select the *Taxable CPT Codes* from *List Name*.
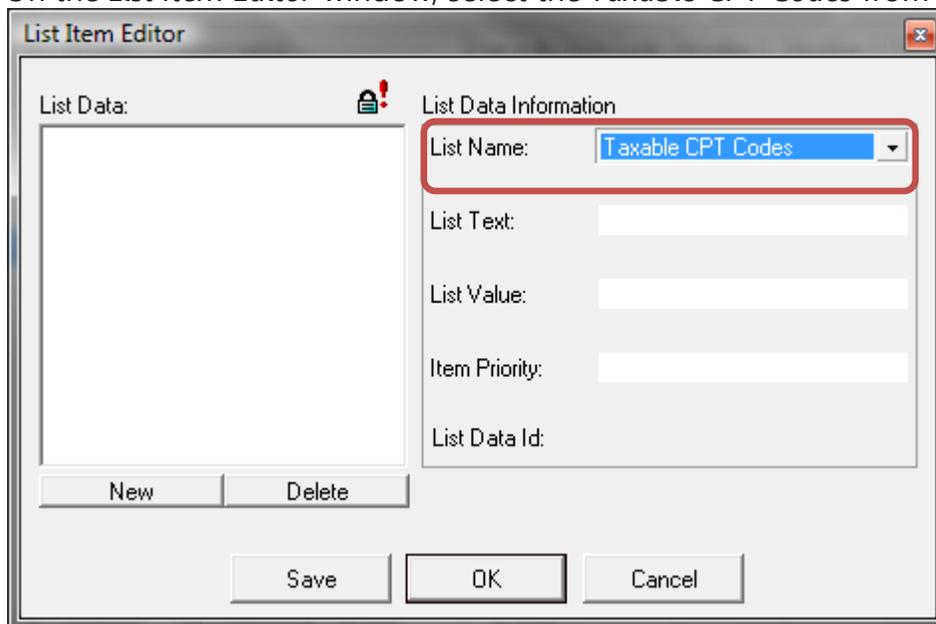
Now, create a new item by clicking the *New* button. To add a sales tax to a category you will need to type "cat-" then the category name in the *List Text* box, EX cat-Taxable Codes. **This box is case-sensitive.** Then enter the tax rate in decimal form to *List Value*, EX. 5% tax= 0.05. Then **click *Save.***

Now, whenever you add a charge that uses one of the procedure codes that is linked to sales tax, a sales tax charge will be added once you click the Save button on the charge screen. You can view this by going to the *Billing* tab, where it says *Explanation* it will have the *Tax CPT Code,* and under the column entitled *Comment* it will have the *Tax Description*.