

Sales Tax Reporting for OrthoPacks Customers

As a practitioner using OrthoPacks for patients, you are responsible for retrieving and downloading sales tax information from your patients' OrthoPacks orders via the Avalara website. Troubleshooting or questions about downloading sales tax data can be directed to salestax@ompimail.com.

You will receive an email from Avalara <u>no-reply@avalara.com</u> once your application is approved with a subject line "Welcome, it's time to set up your Avalara password".



Click "Sign into your Avalara account" and you will be directed to the Avalara website to create a unique password of your choosing.

kvalara	
	Welcome!
	Create your password
	NEW PASSWORD*
1	The strongest passwords are long and contain numbers, symbols, and a mix of upper and lower case letters
	Show
	Strength

Once logged in, click on Reports in the top ribbon.



From this tab, you can view your reports under "Liability & tax return reports" to help complete your sales tax returns.

Avalara								
Home	Transact	ons 🔻	Exemptions	Returns	Reports	Settings 🔻		
REPORT	TS DR	WHO S	Switch company					
Report data includes transactions up to 03:43 PM today (CDT)								
Favori	tes T	ansact	ion reports	Liability	& tax retu	n reports	Exemption reports	Downloads
Select	a report							
Report c	ategory							
Sales &	sellers use	tax retur	n filing reports					-
Report n	iame							
Sales ar	nd sellers u	se tax jur	isdiction detail					×
Shows transactions summarized by individual tax jurisdictions within a state								

Select further report details as you scroll down, including the date range of the report, additional display options, preview or export options, and favoriting a report. Then click "Create and Download Report".

Your report with sales tax jurisdiction details is ready for you!

Sample Report:



Sales and Sellers Use Tax Jurisdiction Detail (Standard View)

Use this report to fill out tax returns by state and local jurisdiction

Companies:	Dr Who				
Period:	09/01/2023-09/30/2023				
	e range based on Document Date which is the date used during posting				
Country:	US				
State/Province:	All				
Тах Туре:					
Tax Code:	All				
Location Code:	All				
Report Date:	09/21/2023 2:01:17 PM				

STANDARD VIEW									
STATE	JURISDICTION TYPE	JURISDICTION	TOTAL SALES LESS DISCOUNT	EXEMPT SALES	NON TAXABLE SALES	TOTAL EXEMPT/ NON TAXABLE SALES	TOTAL TAXABLE SALES	TAX RATE	TAX AMOUNT
<u>CA</u>									
	State	CALIFORNIA	\$28.28	\$0.00	\$28.28	\$28.28	\$0.00	0.0000 %	\$0.00
<u>IL</u>									
	State	ILLINOIS	\$15.12	\$0.00	\$0.00	\$0.00	\$15.12	1.0000 %	\$0.15
	State	ILLINOIS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	6.2500 %	\$0.00
	County	LAKE	\$15.12	\$0.00	\$0.00	\$0.00	\$15.12	0.0000 %	\$0.00
	City	BARRINGTON	\$15.12	\$0.00	\$0.00	\$0.00	\$15.12	0.0000 %	\$0.00
	Special Tax Jurisdiction	<u>Regional</u> <u>Transport.</u> <u>Authority</u> (<u>RTA</u>)	\$15.12	\$0.00	\$0.00	\$0.00	\$15.12	0.0000 %	\$0.00