



**CCH® SureTax®**

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# Sales Tax Audit Readiness Checklist

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Sales and use tax audits are becoming more frequent, more data-driven, and less forgiving. Use this checklist to assess your audit readiness posture, identify risks, and close gaps before they turn into audit findings.

## Risk awareness

- We understand the most common sales and use tax audit triggers
- We regularly assess exposure and proactively identify risks
- We monitor rate and rule changes that impact our business

## Nexus, registration and filing

- We know where we have physical and economic nexus
- Sales tax registrations align with our business footprint
- Returns are filed accurately and on time in all required jurisdictions
- We can support filings across changing rates and rules

## Transaction accuracy and exemptions

- Sales tax calculations are accurate and consistent
- Exempt sales are supported by valid exemption certificates
- Certificates are centrally stored and easy to retrieve
- We can defend tax decisions at the transaction level

## Documentation and audit defense

- We can recreate detailed reports for audited transactions
- All required documentation is stored in one place
- Tax decisions can be traced back to source rules

## Process control

- Processes are standardized and repeatable
- Manual workarounds and spreadsheets are minimized
- We have an automated tax compliance solution in place

## Final assessment

All boxes checked? You're well positioned for a sales tax audit. Some gaps? Address them now — before an auditor finds them.

**Take the next step toward audit confidence.**

**Explore CCH® SureTax® or contact us to learn more.**

