



CCH[®] SureTax[®] for Communications Tax

Best-in-class
communications tax
calculation engine

CCH® SureTax® for Communications Tax

Thousands of leading companies rely on Wolters Kluwer to provide high-quality research and software products. CCH® SureTax® is the latest, most advanced solution for indirect tax calculation and utilizes award-winning taxability content for the communications market.

CCH® SureTax® was designed from the ground up by communications professionals with decades of experience. Handling the nuances and complex situations found in communications tax was considered and built into the logic of the system.

CCH® SureTax® for communications tax covers:

- CLEC/ILEC
- VoIP
- Fiber
- Wireless
- Machine to Machine (M2M)
- Media and digital goods
- MVNO/MVNE Data
- Colocation and cloud services
- UCaaS
- IoT

Benefit from the solution that ...

- Hosted on Microsoft Azure, the most secure, leading cloud computing service provider
- Supports multi-tenant structure
- Leverages high-performance environment
- Provides minimal response time due to in-memory database

Use CCH® SureTax® to:

- Automate your communications tax calculations for reporting, collection, and remittance
- Improve your compliance with statutes and tax law
- Have detailed reporting at your fingertips
- Eliminate the need to manage changes in tax rates, statutes or policies
- Utilize best-in-class reporting system and look up taxability information within CCH SureTax



Customization, overrides and exemptions

CCH® SureTax® allows for web-based, user-driven, instantaneous customization of tax overrides and exemptions, unlike alternative systems on the market today.

The solution offers a secure web portal where you can review all of your transaction tax data and also allows you to drive custom overrides and exemptions with the click of a mouse. No special customization module or development efforts are needed.

You can even add an effective date to your changes for better controls and management.

Have CCH® Smart Charts at your fingertips as a fully integrated component of CCH® SureTax® for exemptions in the communications industry.

When it comes to communications tax exemptions and tax data, not all exemptions are treated the same. Many vary from state to state, which can make exemption handling a time-consuming, tedious chore.

With CCH® Telecom Customer Exemption Smart Charts, you can work smarter, not harder. This powerful, easy-to-use application gives you thousands of lines of communications tax data and exemption certificate information at your fingertips, which can be easily integrated into your current workflow.

CCH® SureTax® has the logic and data to apply specialty exemptions based on qualification status. Find out which taxes are applicable and which are exempt simply by passing the industry code. You can go directly to the portal and select from a drop-down menu of all the major categories of tax-exempt industries, and the appropriate taxation methodology will occur.

CCH® SureTax® for communications tax saves all of the data. You can research the exemption decisions and also set effective dates that these exemptions should be applied based on the most current certificate.

Powerful features include:

- Twenty categories of tax-exempt industries are distributed over 28 different tax types for all 50 states.
- More than 17,000 possible exemption scenarios.
- Simple verification of certification requirements for any communications tax-exempt customer found in the chart for any location in the United States.
- Communications tax exemption data for state-level information and for certain local-level taxes, including Alaska local sales tax, Colorado home-rule sales tax, and the California Local Utility Users Tax (UUT).
- Tax type and tax category descriptions that help simplify communications tax exemption management.

CCH® SureQuotes™

Have you ever lost money because you misquoted the total cost of the service? Have you ever had to absorb the taxes because a sales agent didn't, or couldn't, accurately quote taxes?

CCH® SureQuotes™ is a module within CCH® SureTax® that allows you to pass the pending transaction data and receive all of the correct taxes and fees that would apply to that transaction based on the service type and location. The data utilized for quotes is driven by the same live data as CCH® SureTax®, the only difference is that the data is not saved and, therefore, will not affect your reporting or compliance calculations.

CCH® SureQuotes™ supports an e-commerce platform by allowing you to properly present the subtotal with all of the correct taxation applied. This enables your customer to make an informed decision before finalizing the purchase.



CCH® SureAddress™

This advanced address correction solution enables you to improve operations by easily identifying the correct situs down to the complete ZIP+4.

CCH® SureAddress™ is a powerful tool optimized for billing, taxation, direct marketing, and more. Most businesses only receive five-digit ZIP codes from their customers. With local taxes this can be an audit problem since many ZIP codes cross over jurisdictional boundaries. CCH® SureAddress™ takes incomplete, misspelled or otherwise incorrect addresses and “scrubs” them down using a robust algorithm to determine the correct address and geolocation with complete ZIP+4. This corrected information is then used for proper jurisdiction assignment and mapping.

SureAddress™ improves your e-commerce process.

Consumers often, in haste, misspell or leave off parts of their addresses, and almost no one actually knows their ZIP+4. SureAddress™ can integrate with your online shopping cart and correct these errors. This ensures that you are collecting and reporting the right tax to the right location.

CCH® SureAddress™ enables your direct marketing dollars to go farther.

Targeted mailing lists that you buy are often incomplete or include misspellings and seldom have an accurate ZIP+4. Processing the list through CCH® SureAddress™ before mailing improves deliverability, ensuring more of your promotional material actually reaches the intended recipient.

CCH® SureAddress™ is an independent module that can be used either separately or in conjunction with CCH® SureTax®. It is delivered as a real-time, cloud-based computing methodology. Utilizing an easy-to-use interface, CCH® SureAddress™ enables a streamlined workflow that is easily integrated into billing, shopping carts and/or other tax systems.



Revenue Allocation Manager in CCH® SureTax®

When selling bundled service packages, it's important to be able to unbundle packages for tax purposes in order to charge the lowest legal tax on the bundle. The issue is tax contamination laws, which often state that if a bundle is sold and the price for each line item is not clearly identified on the bill, then all the services are taxed as telephony. This is an issue when non-taxed services, like IP access, are bundled into packages.

CCH® SureTax® Revenue Allocation Manager (RAM) works as a bundling manager, acting accordingly with statute and jurisdiction. Revenue can be allocated and bundled, separating non-taxable charges from communications charges to drive the desired tax outcomes. CCH® SureTax® RAM allows you to assign values to services within the bundle by fixed dollar amount, by percentage, or both. For example, when selling a triple-play bundle, you can break out the voice service first as a fixed dollar amount, then allocate the remaining bundle by a percentage of the overall invoice. CCH® SureTax® RAM makes adjustments quick and easy. Changing a bundle allocation by state or performing "what-if" scenarios can be done instantaneously.

CCH® SureTax® Views — state-of-art reporting powered by Power BI®

Accurate reporting is vital to the success and organization of a company. CCH® SureTax® Views module, the most advanced reporting tool in class, not only gives you functional and streamlined reporting but also allows you to customize reports to match whatever your needs may be. For instance, with CCH® SureTax®, you can analyze exempt sales by reason or your revenue by product.

Equipped with the best-in-class business intelligence tools, users can digest accumulating data quickly and use it to make informative decisions. With our Power BI® analytics reporting tool, you can also analyze your transaction data more granularly, spot trends, or learn more about your customer base.

All reports generated in CCH® SureTax® are easily exported to Microsoft® Excel® at the click of your mouse. Reports can be generated by effective date or date range.

Customized reports are easily generated and virtually limitless.

The Wolters Kluwer database that drives CCH® SureTax® is recognized throughout the industry as the most complete and accurate tax data available. With more than 375 separate communications tax categories, you can be sure that you have the ability to apply the most efficient tax policy to all of your products and services.

If you are ever subject to an audit, all of your transactions and the logic behind the calculations are at your fingertips through the portal. Even tax-on-tax transactions are detailed and demonstrated down to the fourth decimal point for accuracy.

CCH® SureTax® Professional Services®

Keeping up with the constant changes in the tax and accounting profession can be a full-time job. But if you're like most professionals, you can't spend all day hunting down the latest information. That's where Wolters Kluwer comes in. Whether your business is small, medium or large, you'll benefit from our team of specialized tax accountants and tax attorneys who constantly stay up to date on all of the changes in tax rates, rules and policies throughout our service area. If you are new to the communications market or adding new products, Wolters Kluwer Professional Services is available to assist you in identifying the most efficient way to stay compliant with taxes and fees at all levels.

Our team is available for taxability and nexus studies that provide you the answers you need, right when you need them. Improve your indirect tax workflow and ensure you are achieving the highest possible levels of compliance with CCH® SureTax® Professional Services.



CCH® SureTax®

On-cloud sales and use tax automation platform

CCH® SureTax® is a sales and use tax software platform designed to take the complexity out of taxability determination, calculations, and compliance by offering a simple, intuitive interface to manage sales and use taxes, all within one platform. Here are just a few of the reasons it has become a go-to resource for communications providers:



- 1** Our tax research process is SOC (System and Organization Controls) 1 and SOC 2-compliant. Wolters Kluwer’s experienced tax research team constantly monitors legislation changes and ensures the tax rates and rules in CCH SureTax are always up to date.
- 2** All implementations are done with the involvement of experienced tax experts that make sure all unique requirements are met.
- 3** Easily monitor sales tax nexus thresholds, manage sales tax exempt certificates, analyze your sales data with advanced reports, and partner with a CCH® SureTax® preferred vendor for sales and use tax compliance.
- 4** Do not underpay or overpay use tax with our [Use Tax Optimization Managed Services](#).



Automate sales tax

Lets you skip error-prone, time-consuming manual entry with end-to-end tools for sales tax management.



Automatically apply proper taxability to products

Enables you to properly categorize what you sell, including tax-exempt items, and more.



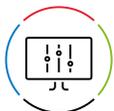
Manage compliance

Keeps your team current with critical information about state rates and sales tax holidays, just for starters.



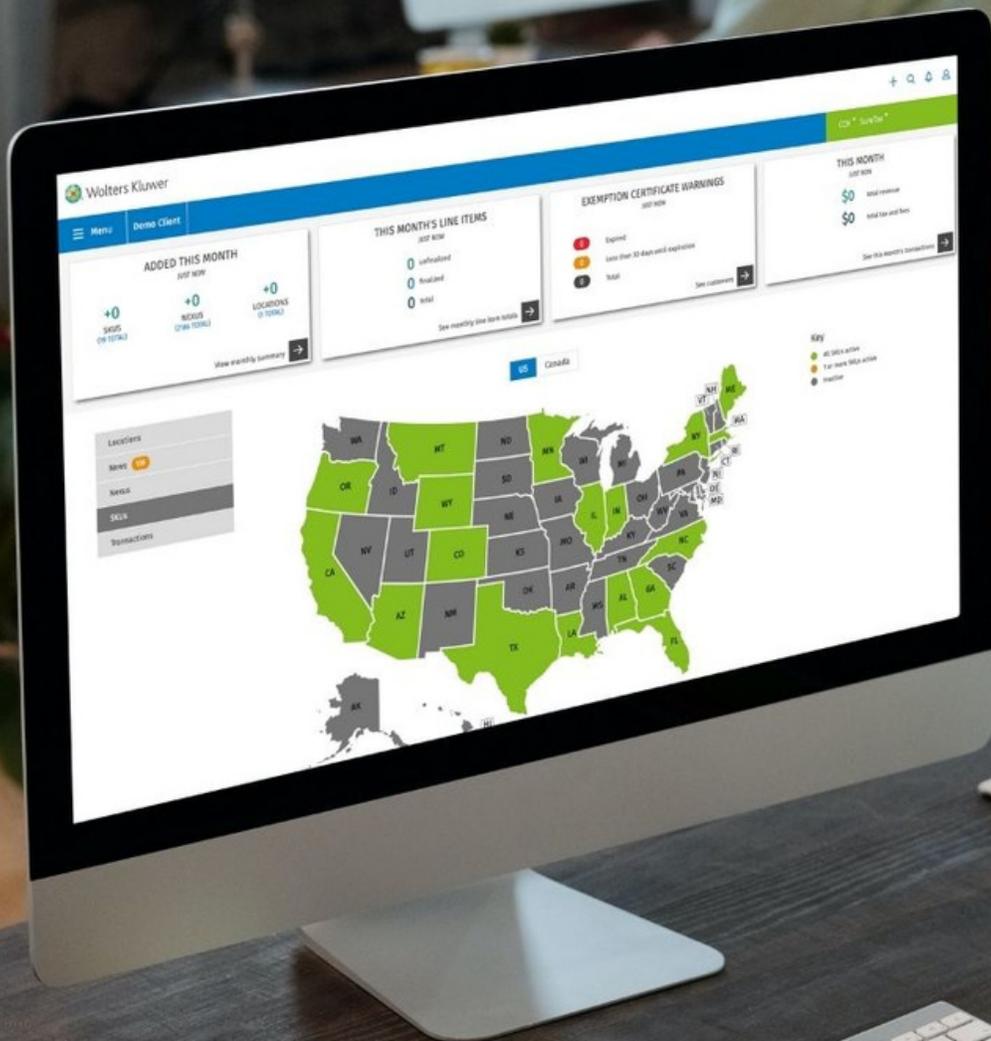
Effortlessly track exemption sales

Makes it easy to document non-taxed transactions and track proof of exemption certificates.



Capitalize on tax rebates

Helps you leverage opportunities for rebates for sales taxes paid on-time in full in states that offer this opportunity.



Book a consultation today to learn more about how automating sales and use tax can help you increase accuracy and minimize audit risk.

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; corporate performance and ESG; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2022 annual revenues of \$5.6 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,800 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).



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