

Sonoma County Office of Education

Escape Sales Tax Update

August 2022

Sales Tax Update

Sales tax may change each April. It is important to verify the District Sales Tax Rate on the California Department of Tax and Fee Administration website. <https://maps.cdtfa.ca.gov/>

- Enter Address
- Click the Search button
- Confirm Matched Address is accurate

Rate displayed is based on rate in effect as of the current date.

Sales tax is based on where the item(s) are received. If the district has sites in various city/town locations be sure to check those addresses.

The screenshot shows the 'Find a Sales and Use Tax Rate' interface. On the left, there is a form with the following fields: Street (5340 Skylane Blvd), City (Santa Rosa), and Zip (95403). A 'Search' button is located below the form. Below the search results, it indicates 'Search Results on 8/25/2022'. The results are displayed in a table:

Matched Address	Jurisdiction
5340 Skylane Blvd Santa Rosa, CA 95403	UNINCORPORATED AREA- SONOMA

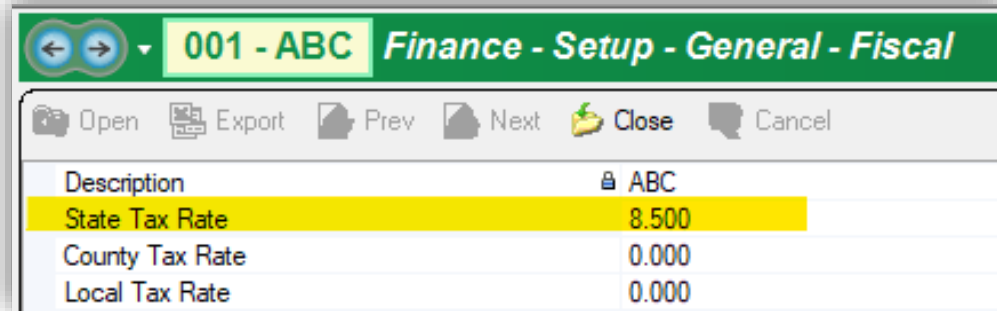
Below the table, the 'Sales and Use Tax Rate' is shown as 8.500%. To the right of the form is a map of the area around Santa Rosa, California, with a yellow callout box indicating the 8.500% tax rate for the location of the search. The map includes labels for various streets and landmarks such as Kaiser Park, Windsor Golf Course, and Charles M. Schulz Sonoma Co. Airport.

At the bottom of the screenshot, a yellow banner contains the following text: 'The tax rate displayed is for the point shown. Please review the results to ensure that the point shown is the intended location. Also, be aware that tax rates, as well as city and county boundary lines, are subject to change. The rate displayed is based upon the search results and is the rate in effect today.'

Enter Sales Tax Rate

Go to **Finance – Setup – General - Fiscal**

Rate cannot be post dated, instead, the rate needs to be **updated on April 1, 20XX**

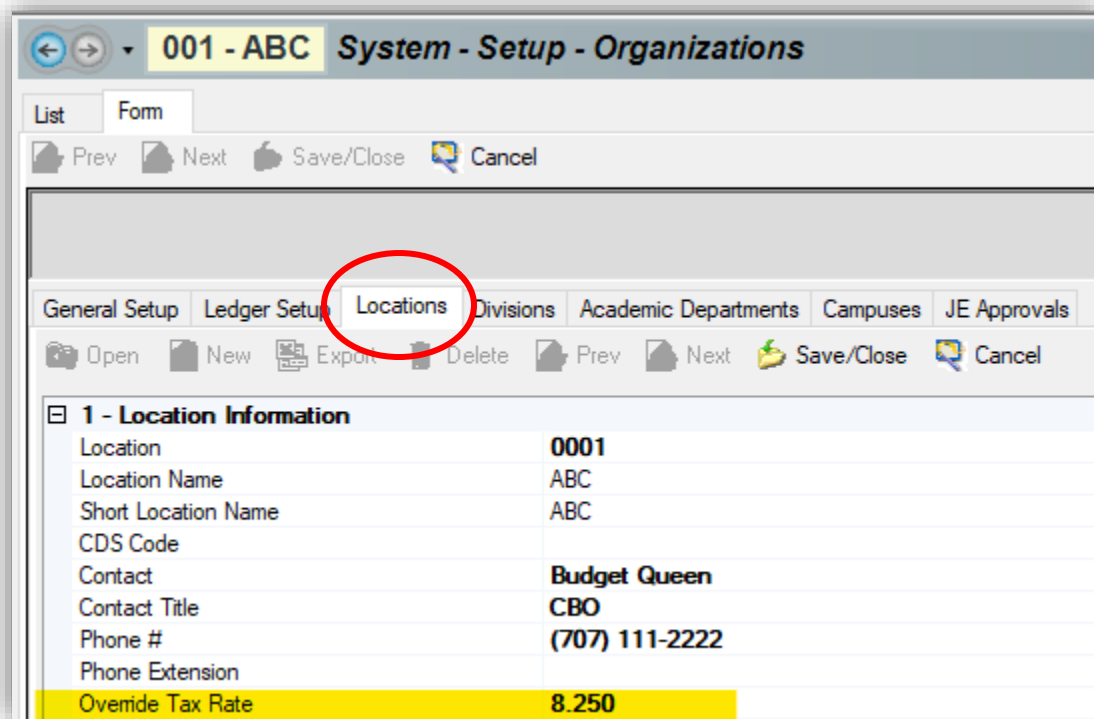


The screenshot shows a software interface for '001 - ABC Finance - Setup - General - Fiscal'. It features a toolbar with 'Open', 'Export', 'Prev', 'Next', 'Close', and 'Cancel' buttons. Below the toolbar is a table with the following data:

Description	ABC
State Tax Rate	8.500
County Tax Rate	0.000
Local Tax Rate	0.000

For Districts with multiple Sales Tax Rates, the override is in the Locations in the Organizations record. This is read only for most Districts, please send email to helpdesk@scoe.org to update.

Go to **System – Setup – Organizations**



The screenshot shows a software interface for '001 - ABC System - Setup - Organizations'. It has a 'List' and 'Form' tab, and a toolbar with 'Prev', 'Next', 'Save/Close', and 'Cancel' buttons. Below the toolbar are several tabs: 'General Setup', 'Ledger Setup', 'Locations', 'Divisions', 'Academic Departments', 'Campuses', and 'JE Approvals'. The 'Locations' tab is circled in red. Below the tabs is another toolbar with 'Open', 'New', 'Export', 'Delete', 'Prev', 'Next', 'Save/Close', and 'Cancel' buttons. The main area displays '1 - Location Information' with the following data:

Location	0001
Location Name	ABC
Short Location Name	ABC
CDS Code	
Contact	Budget Queen
Contact Title	CBO
Phone #	(707) 111-2222
Phone Extension	
Override Tax Rate	8.250