



[TIPS & TRICKS]

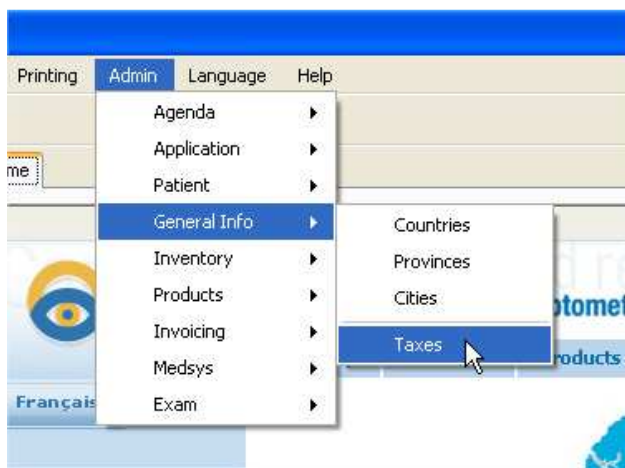
[CHANGING GST & PST TO HST IN OPTOSYS®2]

Effective **July 1st, 2010** **British Columbia** and **Ontario** will be implementing HST.

To change to HST in Optosys®2, we will need to create the HST tax, deactivate the GST and PST taxes, and then associate the HST with the province.

Step 1: Create the HST tax.

From the Admin menu select **Admin → General Info → Taxes**



This will take you to the Taxes tab in Optosys®2.

To create the new HST tax click on the **New** icon.



Fill in the **Description**, **Name FR**, **Name EN**, and **Rate** information as shown below, then save.

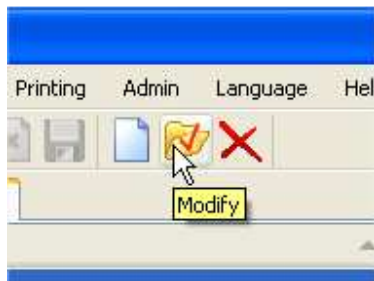
Description	<input type="text" value="Harmonized Sales Tax"/>
Name FR	<input type="text" value="HST"/>
Name EN	<input type="text" value="HST"/>
Rate	<input type="text" value="13.00"/> %

HST for Ontario is 13%

HST for British Columbia is 12%

Step 2: Deactivate the GST and PST taxes.

Select the GST or tax then click on the **Modify** icon.

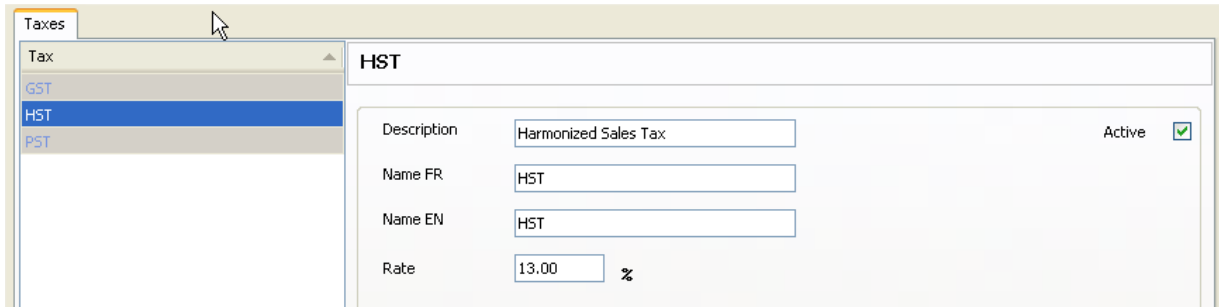


Uncheck the **Active** box, and save.

GST		
Description	<input type="text" value="Goods & Services Tax"/>	Active <input type="checkbox"/>
Name FR	<input type="text" value="GST"/>	
Name EN	<input type="text" value="GST"/>	
Rate	<input type="text" value="5.00"/> %	

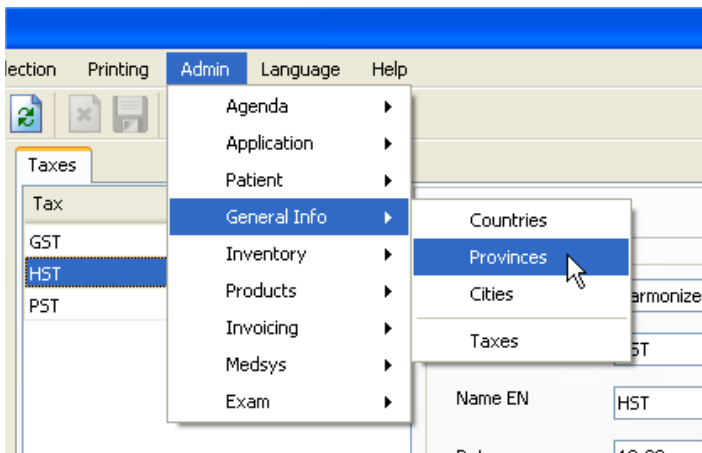
Repeat this process for the PST tax.

Your taxes should now look like image below. Both the GST and PST are grayed out to show that they are deactivated.

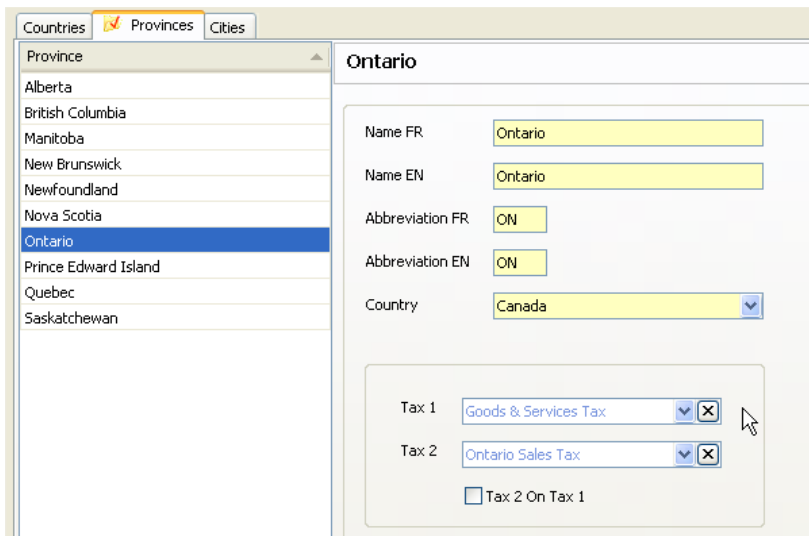


Step 3: Associating the HST to the Province.

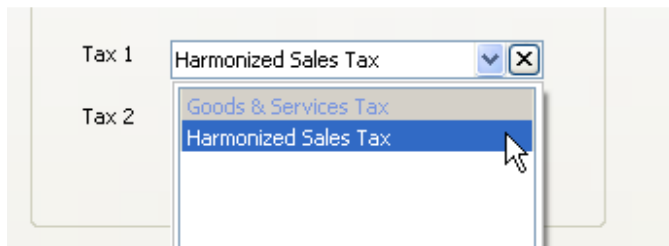
From the Admin menu select **Admin** → **General Info** → **Provinces**



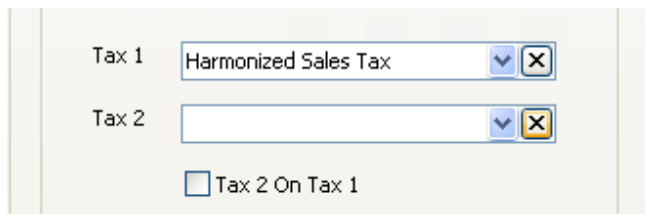
Select your province British Columbia or Ontario the click on the Modify icon.



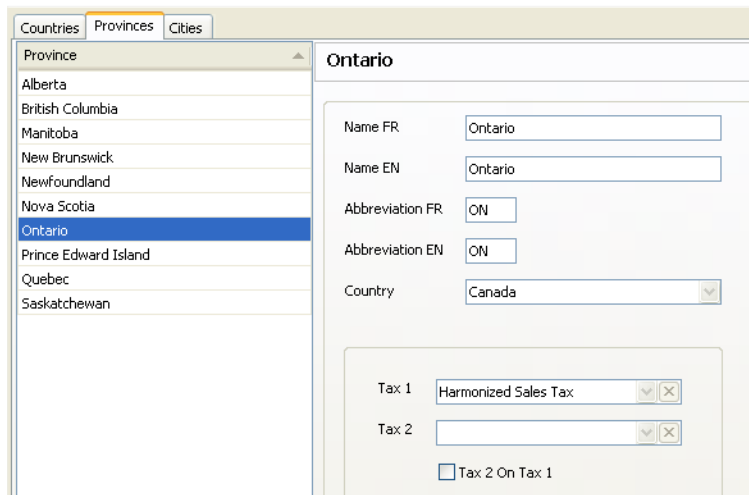
Under **Tax 1** select **Harmonized Sales Tax** from the drop down menu.



Under **Tax 2** click on the “X” to remove the PST, and save.



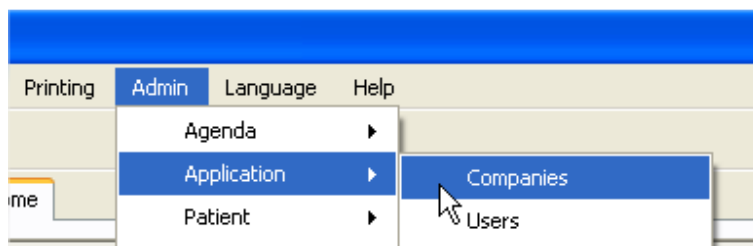
You have now successfully changed the GST & PST to HST.



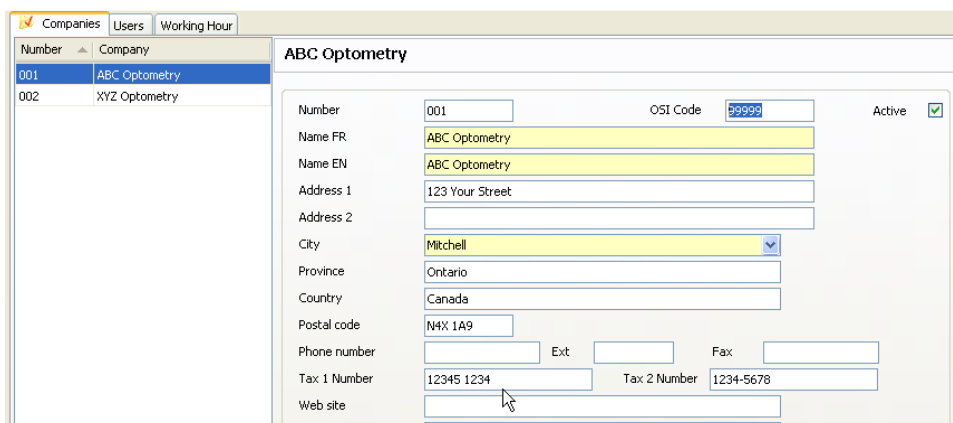
**** Clinics who would like to print their tax numbers on their invoices.**

For clinics that have their Tax numbers printed on their invoices you may also need to change that information on the Companies tab. This may include removing the PST number and changing the GST number to HST. Check your HST tax forms for this information.

To get to the Companies tab select **Admin**→**Application** → **Companies**.



Select the **Modify** icon then edit your **Tax1** and **Tax2** information.



***** For Multi-Companies you will need to do this for each clinic.**