

Instructions For Submitting Sales Tax Refund Request Forms

Unit Instructions

1. Unit requests for sales tax refunds can be submitted twice a year (in August for January 1 through June 30 and in February for July 31 through December 31). Alternately, requests for the entire year (for January 1 through December 31) can be made in February. No item outside the period covered should be included on the form. *Submission deadlines must be strictly observed!*
2. Completely fill out the **YELLOW** Sales Tax Refund Request Form. A computer-generated report of the required data may be attached to the form.
3. To receive a refund from the State of Utah, a PTA making a refund request must be a PTA in good standing. This means that it must have an EIN, current bylaws, and remitted all membership dues to Utah PTA and National PTA. Check your Local bylaws to be sure that they are current and to find your PTA's EIN, if you do not know it. If additional sheets are needed for making your request, copy the back side only on yellow paper. Staple all sheets together.
4. There is no minimum amount for which a refund request may be made. Remember that \$2.00 is subtracted from each refund for processing costs if the refund is over \$20.00. Under \$20.00, there is no fee.
5. Make a copy of all pages for your records. Give or send the original completed form to your Council President or Treasurer. If you do not have a Council, send the form to your Region Director. You will find the name and address of your Council President and/or Region Director in the Utah PTA directory.
6. Once the forms are submitted, it takes approximately three months for checks to be received back from the Utah Tax Commission via Utah PTA. Checks, less a \$2.00 handling fee, will be mailed directly to your school. Please deposit refunds promptly.
7. Making a sales tax refund request should not be viewed as an optional activity. These funds can and should be requested according to the established procedure so that they can be used to further the work of PTA!

Most Common Errors

- Use of something other than **YELLOW** paper.
- Wrong Period Covered. (Please check to make sure that the appropriate period is covered by the specified deadline. Also, do not include any items outside of the period to be covered.)
- Omission of EIN and/or Date Bylaws Approved. (Date Bylaws Approved is NOT a Yes or No question.)
- Incorrect EIN. (Sometimes the PTA Unit ID Number or the Utah PTA Tax Exempt Number is improperly used instead.)
- Ten-key or spreadsheet with correct math not attached.

