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# INSTRUCTIONS FOR SUBMITTING SALES TAX REFUND REQUEST FORMS

1. Unit requests for state 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. 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 lines are needed for making your request, copy back side only on **yellow** paper. Staple all sheets together.
3. There is no minimum amount for which a refund request may be made. Remember that \$2 is subtracted from each refund for processing costs. If the resulting check is less than \$3, Utah PTA will likely hold the refund and add it to a subsequent refund.
4. 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 region director in the Utah PTA directory.
5. 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 handling fee, will be mailed directly to your school. Please deposit refunds promptly.
6. 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 National PTA ID# or the Utah PTA Tax Exempt # is improperly used instead.)