

b. ■

TEXAS CLAIM FOR REFUND OF GASOLINE OR DIESEL FUEL TAXES

d. Fuel type (Check appropriate type(s)) GASOLINE (06) DIESEL FUEL (07) e. Is this your first claim? YES NO

c. Claimant social security or FEI number
■

f. Period of claim m m d d y y m m d d y y
Begin date ■ End date ■

g. Claimant name and mailing address

Blacken this box if your address has changed. FM 1
For Comptroller's use only INV 2 SD 3

Refund claims must be supported by fuel receipts that contain the following information: • Name and location of seller • Name of purchaser • Type of fuel purchased • Date of purchase • Number of gallons purchased • Price per gallon • Amount of tax paid on fuel	Documentation is required to be furnished on first time claims -- you will be contacted regarding mailing instructions. (If documentation is needed on subsequent claims, you will be contacted.)
	If undyed diesel fuel is disbursed directly into equipment at a retail pump, a hand written note on receipt must identify equipment (example: boat, tractor, or reefer unit).
	If disbursed from bulk storage or container, distribution log showing usage must be maintained as follows: (Date of fuel use) (Fuel type) (Number of gallons) (Equipment or vehicle type)

a. T Code ■ 58600 GASOLINE PLEASE REFER TO THE APPLICABLE TAX RULES FOR CHAPTER 162 MOTOR FUELS TAX LAW FOR METHODS USED TO DETERMINE AMOUNT OF REFUND CLAIMED FOR EACH METHOD, ENTER ACTUAL WHOLE GALLONS USED FOR EACH REFUND CLAIMED a. T Code ■ 58700 DIESEL FUEL

1. ■ XXXXXXXXXXXXXXXXXXXX		1. ■ XXXXXXXXXXXXXXXXXXXX
2. ■	Fuel exported from Texas	2. ■
3. ■ XXXXXXXXXXXXXXXXXXXX	Fuel used by qualified passenger commercial motor vehicle on fixed routed miles traveled in Texas	3. ■
4. ■	Fuel used by U.S. Government	4. ■
5. ■	Fuel lost by fire, theft, or accident (must attach accident, police, and fire reports)	5. ■
6. ■	Fuel used in off-highway equipment (Claim for diesel fuel must be postmarked by 12/31/04)	6. ■ XXXXXXXXXXXXXXXXXXXX
CALCULATION IS REQUIRED FOR ITEM 7 -- SEE INSTRUCTIONS ON BACK		
7. ■	Incidental highway travel (4MPG)	7. ■ XXXXXXXXXXXXXXXXXXXX
CALCULATION IS REQUIRED FOR ITEM 8 -- SEE INSTRUCTIONS ON BACK		
8. ■	Fuel used in power take-off/auxiliary power units (Indicate type of unit: cement, solid waste truck, etc.)	8. ■ XXXXXXXXXXXXXXXXXXXX
9. ■	Fuel used by a Texas public school district or commercial transportation company providing Texas public school transportation services	9. ■
10. ■	Other claims not covered by above methods (EXPLANATION REQUIRED)	10. ■
11. ■	Fuel used by MTA (Metropolitan Transit Authority)	11. ■
12. ■	Fuel used by Texas nonprofit electric or telephone cooperative (Organized under the Utilities Code)	12. ■
13. ■	TOTAL REFUND GALLONS CLAIMED (Total Items 1-12)	13. ■

h. PM date ■ **You have certain rights under Ch. 559, Government Code, to review, request, and correct information we have on file about you. Contact us at the address or toll-free number listed on this form.** h. PM date ■

14. Texas location (if different from the address in Item g) where records can be examined or where fuel is stored. Street or detailed directions, city and state (Do not use P.O. Box) ZIP Code

Complete this claim and mail to: Comptroller of Public Accounts 111 E. 17th Street Austin, Texas 78774-0100	ENFORCEMENT OFFICE NO.	I declare that the information in this document and any attachments is true and correct to the best of my knowledge and belief. Claimant or Duty Authorized Agent sign here Daytime phone (Area code and number) Date
	DATE	
	E.O. Name	

INSTRUCTIONS FOR COMPLETING TEXAS CLAIM FOR REFUND OF GASOLINE OR DIESEL FUEL TAXES

NOTE: If you are filing a claim for both gasoline and diesel fuel tax refund for the same period, you may file both claims on one form.

- The amount of your gasoline and/or diesel fuel claims will be paid less deductions of 2% of the gallonage claimed. Qualified passenger commercial motor vehicle refunds will be paid less the 25% School Fund Benefit Fee. MTA refunds will be paid 1 cent per gallon of gasoline and 1/2 cent per gallon on diesel fuel, less the 2% deduction.
- You are not required to file any documentation with this claim, but you must keep complete records to support all items on the claim. If supporting documentation is needed to verify your claim, you will be contacted.

WHO MAY FILE:

A person who meets the qualifications specified in the Motor Fuel Tax Rules for Chapter 162 Motor Fuels Tax Law may file a claim for refund of the state tax paid on gasoline or diesel fuel. (www.window.state.tx.us/taxinfo/fuels)

WHEN TO FILE:

Claim for refund of fuels tax paid must be filed and postmarked ON OR BEFORE ONE YEAR from the FIRST DAY OF THE CALENDAR MONTH following:

- the purchase,
- the tax exempt sale, and/or
- the use if withdrawn from storage for own use.

EXCEPTION: Diesel off-road use gallons used 12-1-03 thru 12-31-04 must be postmarked by 12-31-04

NOTE: - Climate control gallons used 9-1-03 or later are not eligible for refund.
 - Diesel PTO gallons used 1-1-04 or later are not eligible for refund.
 - Diesel off-road use gallons used 1-1-05 or later are not eligible for refund.

FOR ASSISTANCE:

For assistance with any Texas Fuels Tax question please contact the Texas State Comptroller's Office at 1-800-252-1383 toll free nationwide, or call 512/463-4600. (From a Telecommunication Device for the Deaf (TDD) ONLY call 1-800-248-4099 toll free, or call 512/463-4621.)

GENERAL INSTRUCTIONS:

- Do not write in shaded areas.
- TYPE or PRINT.
- Complete all applicable items that are not preprinted.
- If any preprinted information is incorrect, mark through it and write in the correct information.
- ROUND ALL GALLONAGE FIGURES TO WHOLE GALLONS.

SPECIFIC INSTRUCTIONS:

Item c - Sole owner or individual - Enter your Social Security Number.
Corporation or other business - Enter your Federal Employer's Identification (FEI) Number. Send a copy of your IRS 141C.

Item f - Begin date - Enter the date of the earliest invoice or the date that the beginning inventory was taken.
End date - Enter the date of the most recent invoice or the date that the ending inventory was taken.

Items 4, 9, 11, & 12 - Gas and diesel must be purchased by and used by the exempt entity in order to use these line items.

Items 7 - If you are claiming refund on vehicles operated exclusively off-highway except for incidental highway travel (4 MPG), you must attach a separate sheet for each fuel type claimed, with the following information:
 A. Total Miles Driven
 B. (On-Road Miles) / (4 mpg) = (On-road Gallons)
 C. (Total gallons) - (On-road Gallons) = (Refundable Gallons)

Items 8 - If you are claiming fuel used in power take-off/auxiliary power units (See Note under "When to File"), you must attach a separate sheet for each fuel type claimed, with the following information:
 A. Indicate PTO type of unit (pump, cement haul truck, dump, etc.) and calculation
 (Total Gallons Delivered into Vehicle) x (5% qualified PTO rate) = (Refundable PTO Gallons)
 B. Indicate PTO type of unit (Ready mix cement truck, solid waste compacting unit, etc.) and calculation
 (Total Gallons Delivered into Vehicle) x (30% qualified PTO rate) = (Refundable PTO Gallons)
 C. Indicate PTO type of unit (cement truck, solid waste, etc.) and calculation
 (On-Road Miles) / (4 mpg) = (On-road Gallons). (Total gallons) - (On-road Gallons) = (Refundable PTO Gallons)
 D. Alternative methods used - please show calculation and attach a copy of your Comptroller Tax Policy approval letter.
 E. Total PTO Gallons Claimed: add Net PTO Gals A, B, C, and D and forward to gasoline block 8 or Diesel block 8, as applicable.

Please refer to the applicable tax rules for Chapter 162 Motor Fuels Tax Law for the correct method of determining the amount of your refund claim and the documentation that you must have to support your claim. (Do not file any of the documentation with this claim.) Links to the appropriate statute are located at www.window.state.tx.us/taxinfo/fuels .