

# Use Tax Correction Form Instructions

## How to Submit a Use Tax Correction

1. Click to go directly to the [Use Tax Report](#)
2. **Login** to the **Use Tax Correction Report** using your **UW NetID and Password**.

Windows Security

iexplore

Connecting to rpt1.fmdata.uw.edu.

User name

Password

Domain: netid.washington.edu

Remember my credentials

OK Cancel

Enter your **Login credentials** and click **OK**

3. The Use Tax Correction Report allows you to search for transactions by:
  - Entering a specific **Budget Number, DSI, Procard Tran ID** or **Invoice Number** into the fields to narrow down the report results.
  - Selecting your **Org Dean Level, Org Major Area Level, Org Dept Level** and **Org Sub Division** information from the drop-down menus to include multiple transactions.

Once you have entered the information, click **View Report**.

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★ Favorites Browse

Home > Procurement > Use Tax Correction

Budget Number

11 digit DSI

Procard Tran ID OR Invoice Number

Org Dean Level 205, UW FINANCE & ADMIN

Org Major Area Level 20502, VP OF FINANCE

Org Dept Level 2050202, ENTERPRISE SERVICES

Org Sub Division 2050202040, PROCUREMENT SRVCS

View Report

You have the option to enter a Budget number, DSI#, ProCard Tran ID or Invoice# to search for a transaction

You can also make selections from the drop-down menus

To run the report, click **View Report**

4. Locate the **transaction** from the report you wish to add/reverse use tax.

To access the **Use Tax Correction form** and initiate a correction for a transaction, you **must** click on the **Submit Correction** link from the column on the far left of the report.

Text highlighted in **blue and underlined** within the report means that it is a **clickable link**.

**Columns are sortable**

**Use Tax amounts listed here**

**List of transactions**

**Executive Summary**  
Report displays purchasing transactions potentially requiring use tax corrections submitted. To submit a correction for approval, click on the 'Submit Correction' link on the corresponding record.

Submit Correction	DSI / Procard Tran ID	Invoice Nbr	PO Number	Check Date	Net Amount	Use Tax	Organization Name	Budget Nbr	Account Code	Vendor Name	Payment Type
<a href="#">Submit Correction</a>	99700084114	<a href="#">UWBK201802-26</a>	AE0601140	3/5/2018	\$160.00	\$0.00	PROCUREMENT SRVCS	74-3460	05-99-00	TANGO CARD INC	ACH
<a href="#">Submit Correction</a>	99700084398	<a href="#">2017TIC-20</a>	AE0603980	3/5/2018	\$361.84	\$0.00	PROCUREMENT SRVCS	14-3735	03-34-00	UNIV OF FLORIDA (GAINESVILLE)	Paper Check
<a href="#">Submit Correction</a>	99700151307	XR234660	XR0234660	3/2/2018	\$162.35	\$0.00	PROCUREMENT SRVCS	14-3735	05-99-00	Robert J Lee	Direct Deposit
<a href="#">Submit Correction</a>	99700184125	<a href="#">UWBK20180301-2</a>	AE0611250	3/6/2018	\$650.00	\$0.00	PROCUREMENT SRVCS	74-3460	05-99-00	TANGO CARD INC	ACH
<a href="#">Submit Correction</a>	99700484090	<a href="#">UWBK201803-01</a>	AE0640900	3/7/2018	\$150.00	\$0.00	PROCUREMENT SRVCS	74-3460	05-99-00	TANGO CARD INC	ACH
<a href="#">Submit Correction</a>	99700484090			3/9/2018	\$1,040.00	\$105.04	PROCUREMENT SRVCS	01-3460	05-99-00	VARIDSK	ProCard

Click on the **Submit Correction link** to access the Use Tax Correction form

5. After clicking the Submit Correction link on the transaction, you may be prompted for additional logins using your **UW NetID and Password** before accessing the Use Tax Correction form.

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**Tax Office**

**Use Tax Correction**

You must **login** to view this form.

Click **login**

6. After logging in, the **Use Tax Correction form** appears (example screen shot below). This is where you will submit a request to add or reverse the use tax on that transaction.

Below and on the following pages are examples of how to:

- **Add** tax when tax was not originally applied (**this page**).
- **Reverse** tax when tax should not have been added to the transaction (**page 4**).
- Submit the form for **ProCard** transactions (**page 5**).

➤ To **ADD** tax when tax was not originally applied (**Ariba transactions**):

**Tax Office**

**Use Tax Correction form**

**Use Tax Correction**

DSI / Procard Tran ID \* **Asterisk = Required Field**

99700084398

Location (for Tax Rate) \* **System default location is Seattle**

Seattle **Click on the drop-down menu to select the Tax Rate Location for the transaction. The system defaults to Seattle. Other location options: Bothell, Tacoma, Forks, Eatonville and Friday Harbor**

Original Use Tax Amount \*

\$ 0.00

Corrected Use Tax Amount \* **The system automatically calculates the Use Tax Amount based on the Tax Rate for that location**

\$ 36.55

Reason for Correction \* **Provide a reason for the Correction here. If you believe the system-calculated Corrected Use Tax Amount is incorrect, please note that here as well.**

Contact E-mail \* **Your UW email appears by default, but can be changed**

yournetid@u.washington.edu

**Submit** **Click Submit after providing all the information above**

➤ To **REVERSE** tax when tax should not have been added to the transaction (**Ariba transactions**):



# Tax Office

## Use Tax Correction

DSI / Procard Tran ID \*

99699884741

Original Use Tax Amount \*

\$ 34.18

Corrected Use Tax Amount \*

\$ 0.00

**When reversing tax, the system automatically sets the Amount to \$0.00**

Reason for Correction \*

Contact E-mail \*

yournetid@u.washington.edu

Submit

- How to Submit the form for **ProCard** transactions:

## Use Tax Correction

DSI / Procard Tran ID \*

2550908441

Location (for Tax Rate) \*

Seattle

Original Use Tax Amount \*

\$ 0.00

Corrected Use Tax Amount \*

\$ 80.80

Reason for Correction \*

**REQUIRED: For ProCard transaction: Attach a copy of the invoice/receipt here**

Supporting Document \*

Browse...

Upload

[More information](#)

Contact E-mail \*

yournetid@u.washington.edu

Submit

7. After Submitting the form, the Tax Office reviews the request. If the request is **Denied**, you will receive an email from the Tax Office stating the reason why. Emails will be sent to the email address listed on the Use Tax Correction Form.
8. If you resubmit the request, make the necessary corrections and **repeat steps 1 through 6 in this guide**.

End of Guide