

USE FUEL USER REPORTING

This procedure details the manual process of entering data for Use Fuel User reporting. To begin entering data, a Tax Session must be created. A Tax Session represents a tax report for a specific period.

To create a Tax Session, select the “Tax Filing” tab at the top left of the Oregon Fuels Tax System screen. From the drop-down list, select “Tax Sessions”. The following screen is displayed:

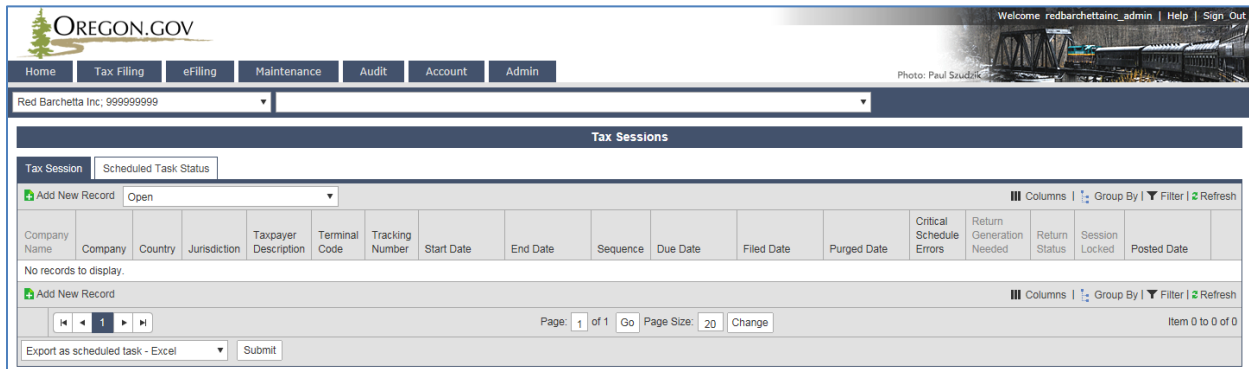


Figure 1. Tax session screen

Click “Add New Record” to create a new tax session. The following box appears:

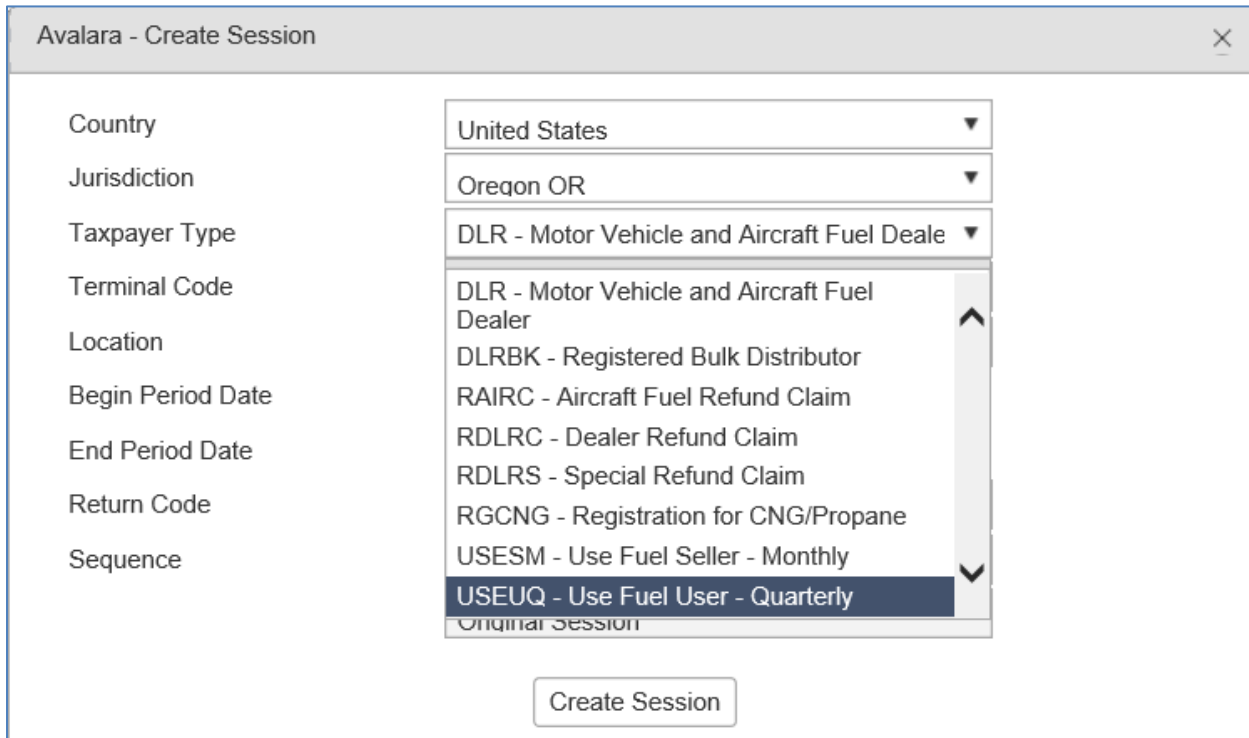


Figure 2. Creating a Tax Session

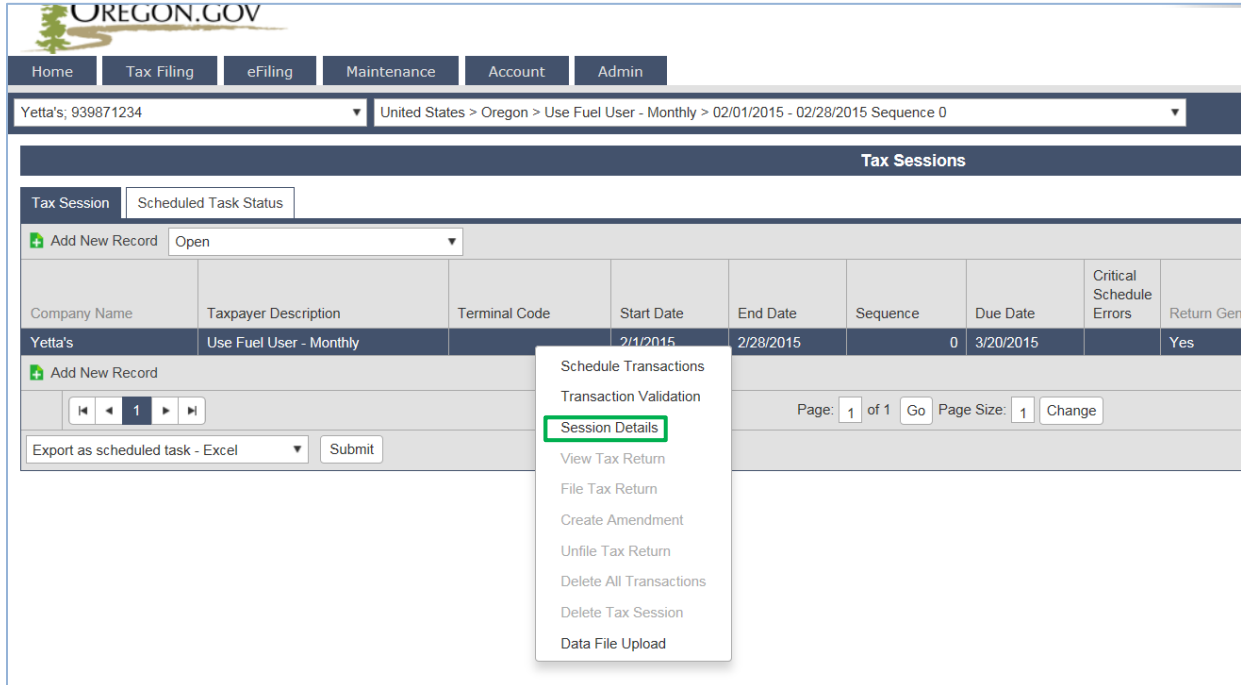
Select “USEUM – Use Fuel User - Quarterly” from the drop down box.

Enter the beginning period date, click the “Create Session” button and close the box.

The appropriate ending date should prefill based on the beginning period date. Each report will start with the first day of the reporting period, regardless of when operations began during that period.

The tax report will now appear on the Tax Sessions screen.

Click on the tax session and select “Session Details” from the pop-up menu.



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Home Tax Filing eFiling Maintenance Account Admin

Yetta's, 939871234 United States > Oregon > Use Fuel User - Monthly > 02/01/2015 - 02/28/2015 Sequence 0

Tax Sessions

Tax Session Scheduled Task Status

Add New Record Open

Company Name	Taxpayer Description	Terminal Code	Start Date	End Date	Sequence	Due Date	Critical Schedule Errors	Return Gen
Yetta's	Use Fuel User - Monthly		2/1/2015	2/28/2015	0	3/20/2015		Yes

Add New Record

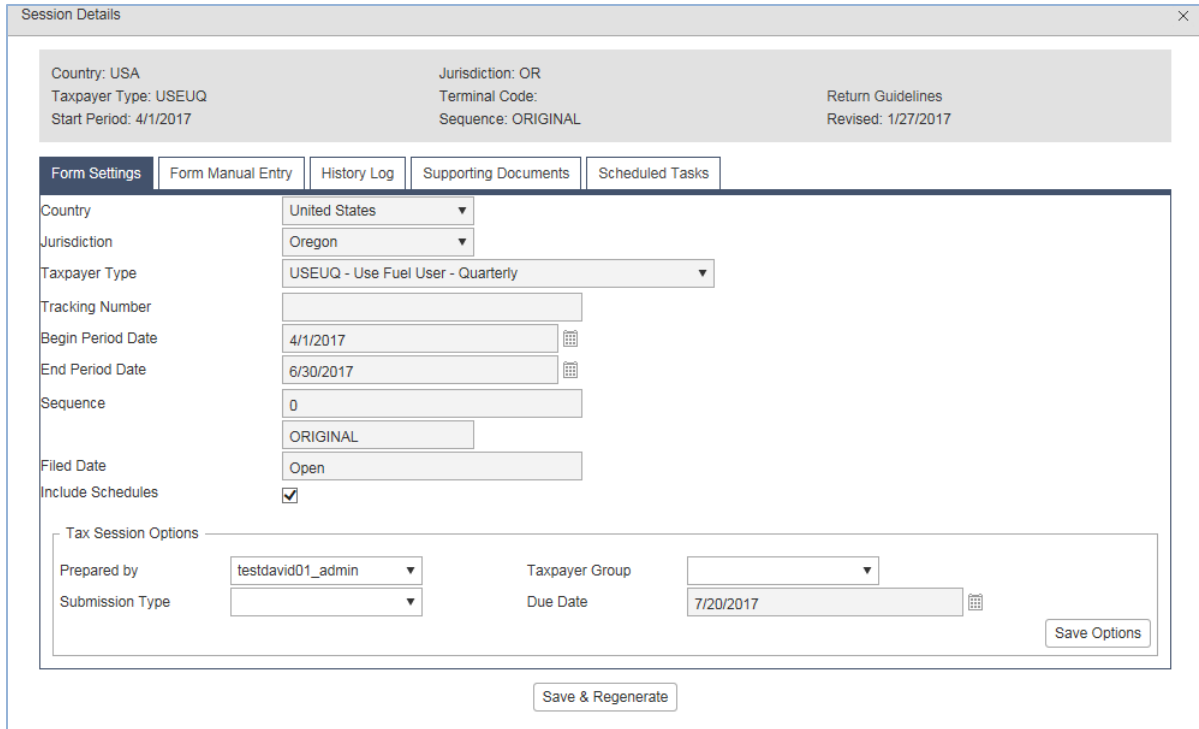
Page: 1 of 1 Go Page Size: 1 Change

Export as scheduled task - Excel Submit

- Schedule Transactions
- Transaction Validation
- Session Details
- View Tax Return
- File Tax Return
- Create Amendment
- Unfile Tax Return
- Delete All Transactions
- Delete Tax Session
- Data File Upload

Figure 3. Select a line to bring up the menu

The following screen is displayed:



Session Details

Country: USA Jurisdiction: OR
 Taxpayer Type: USEUQ Terminal Code:
 Start Period: 4/1/2017 Sequence: ORIGINAL Return Guidelines Revised: 1/27/2017

Form Settings | Form Manual Entry | History Log | Supporting Documents | Scheduled Tasks

Country: United States
 Jurisdiction: Oregon
 Taxpayer Type: USEUQ - Use Fuel User - Quarterly
 Tracking Number:
 Begin Period Date: 4/1/2017
 End Period Date: 6/30/2017
 Sequence: 0
 ORIGINAL
 Filed Date: Open
 Include Schedules:

Tax Session Options

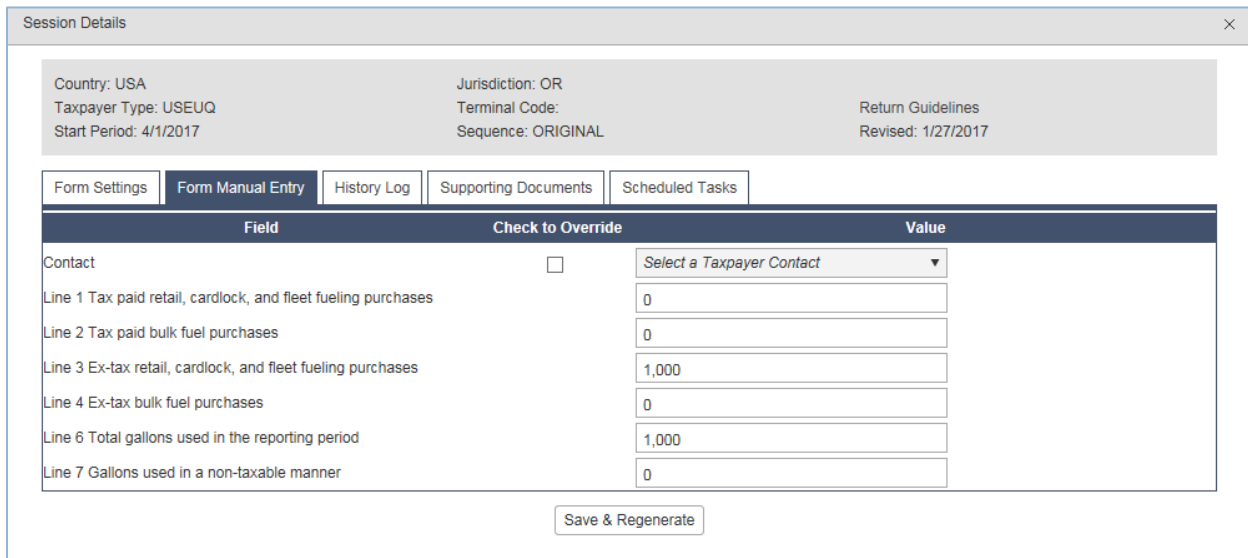
Prepared by: testdavid01_admin Taxpayer Group:
 Submission Type: Due Date: 7/20/2017

Save Options

Save & Regenerate

Figure 4. Session Details screen

Select the “Form Manual Entry” tab. The following screen is displayed:



Session Details

Country: USA Jurisdiction: OR
 Taxpayer Type: USEUQ Terminal Code:
 Start Period: 4/1/2017 Sequence: ORIGINAL Return Guidelines Revised: 1/27/2017

Form Settings | Form Manual Entry | History Log | Supporting Documents | Scheduled Tasks

Field	Check to Override	Value
Contact	<input type="checkbox"/>	Select a Taxpayer Contact
Line 1 Tax paid retail, cardlock, and fleet fueling purchases		0
Line 2 Tax paid bulk fuel purchases		0
Line 3 Ex-tax retail, cardlock, and fleet fueling purchases		1,000
Line 4 Ex-tax bulk fuel purchases		0
Line 6 Total gallons used in the reporting period		1,000
Line 7 Gallons used in a non-taxable manner		0

Save & Regenerate

Figure 5. Form manual entry screen

Check the “Check to Override” box in the Contact line and select the appropriate contact from the drop down menu.

For each line, enter total gallons for the period. The totals will be retrieved from consumption and vehicle mileage records.

Click the “Save and Regenerate” button at the bottom of the screen when your entries are complete and close the window.

From the “Tax Sessions” screen, click on the line for the report and select “View Tax Return” from the pop-up menu to view the tax report prior to submitting.

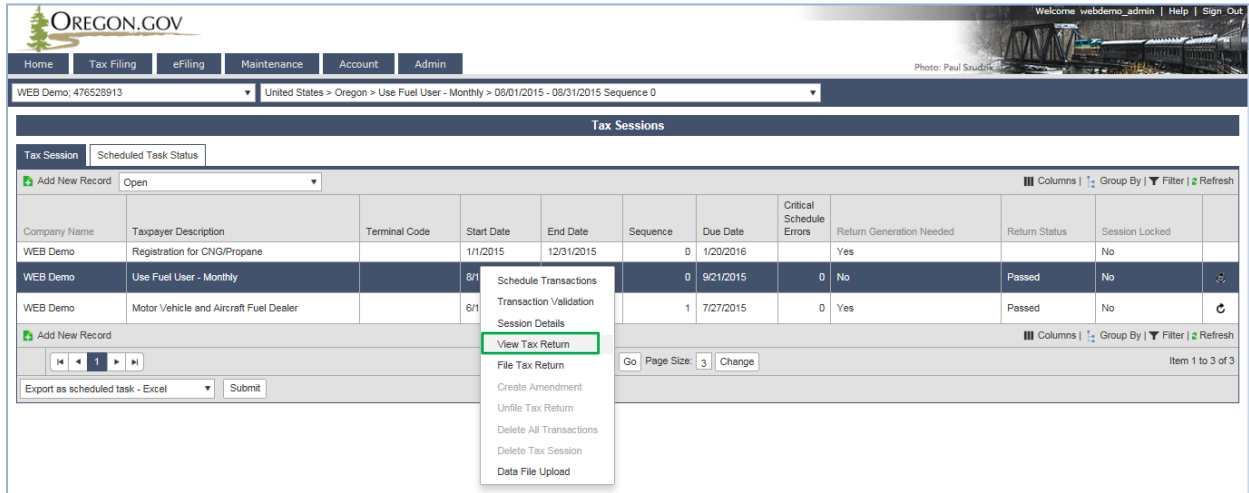


Figure 6. Viewing the tax return

Once you have reviewed the tax report for accuracy, click “Return to Tax Sessions” in the upper right corner. Click on the line for the report and select “File Tax Return” from the pop-up menu to file the tax report

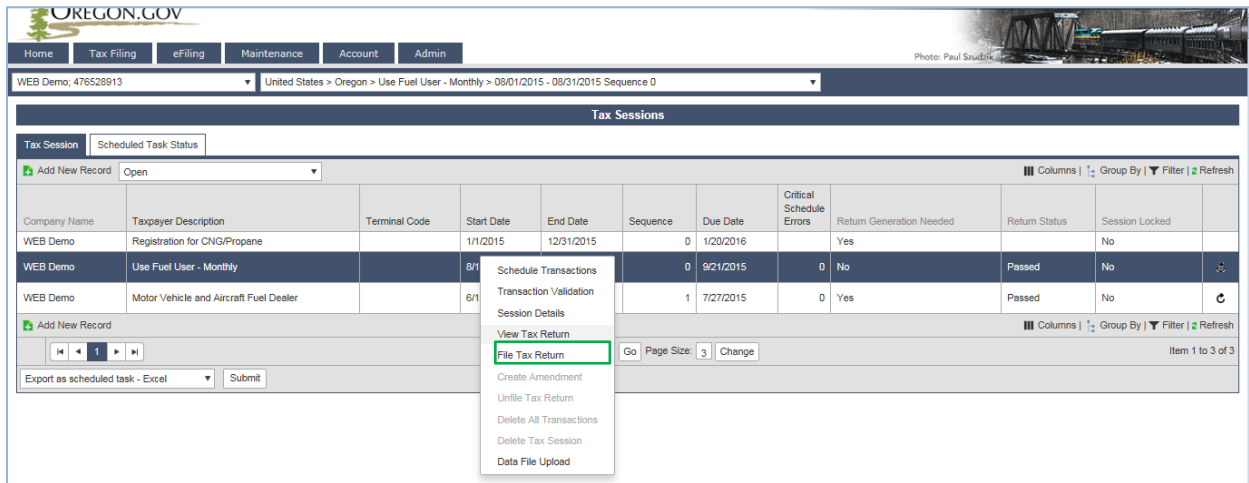


Figure7. File Tax Return

The following screen is displayed:



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Home Tax Filing eFiling Maintenance Account Admin

File Tax Return

Filing Status: Open

Tax Return: Use Fuel User - Monthly

Terminal:

Tax Session Date: 8/1/2015 - 8/31/2015

Filing Due Date: 9/21/2015

Return Status: Passed

Electronic Acknowledgement

By checking the agreement and pressing 'Submit', I acknowledge this submittal is treated as an official submittal to the State of Oregon. Submitting this tax report shall constitute the signature of the submitter as if the tax return were actually signed.

I agree to the conditions of this submittal.

Submit

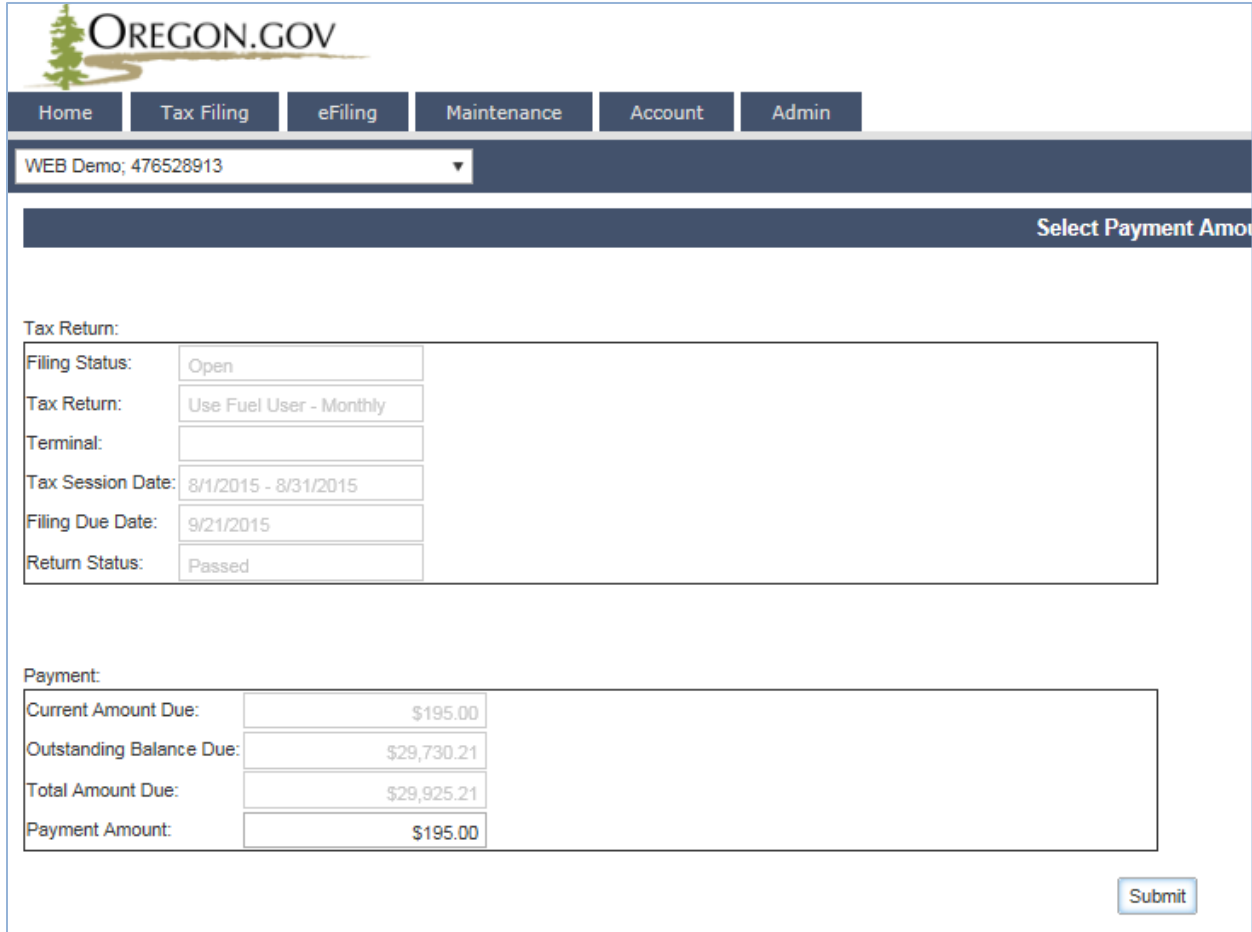
Figure 8. Submittal screen

Check the box at the bottom of the statement agreeing with the conditions.

Once you accept the conditions of the electronic filing, the “Submit” box will become available to click and the process will continue with paying the amount due, if applicable.

When a return is submitted where no amount is due, an acknowledgement screen is displayed.

When a report is submitted with an amount due, the following screen is displayed:



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Home Tax Filing eFiling Maintenance Account Admin

WEB Demo; 476528913

Select Payment Amount

Tax Return:

Filing Status:	Open
Tax Return:	Use Fuel User - Monthly
Terminal:	
Tax Session Date:	8/1/2015 - 8/31/2015
Filing Due Date:	9/21/2015
Return Status:	Passed

Payment:

Current Amount Due:	\$195.00
Outstanding Balance Due:	\$29,730.21
Total Amount Due:	\$29,925.21
Payment Amount:	\$195.00

Submit

Figure 9. Select payment amount screen

The Payment Amount displayed is the amount due from the tax report being submitted. This is the minimum amount that can be paid.

If you have amounts due from previous tax report errors or adjustments, they will show in the “Outstanding Balance Due:” field.

When also paying on an outstanding balance, enter the new amount being paid in the “Payment Amount” field and click the “Submit” button. The “Select Payment Date” screen is displayed.

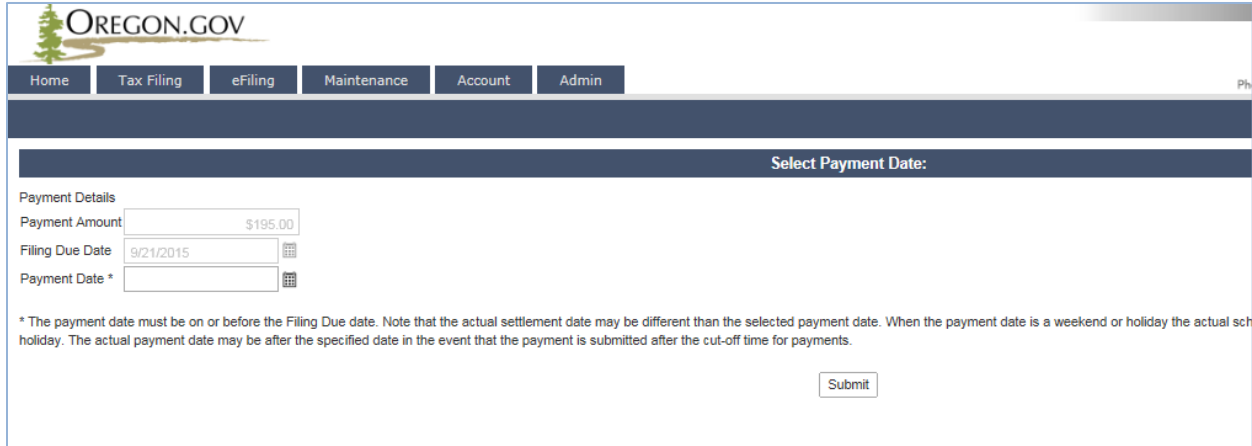


Figure 7. Select payment date screen

The payment may be made as soon as the report is finished or can be delayed until the due date. Enter the date you want the payment to process in the “Payment Date” field and click the “Submit” button.

If this is the first time a payment is being made in the system, One Time Payment is the only option available.

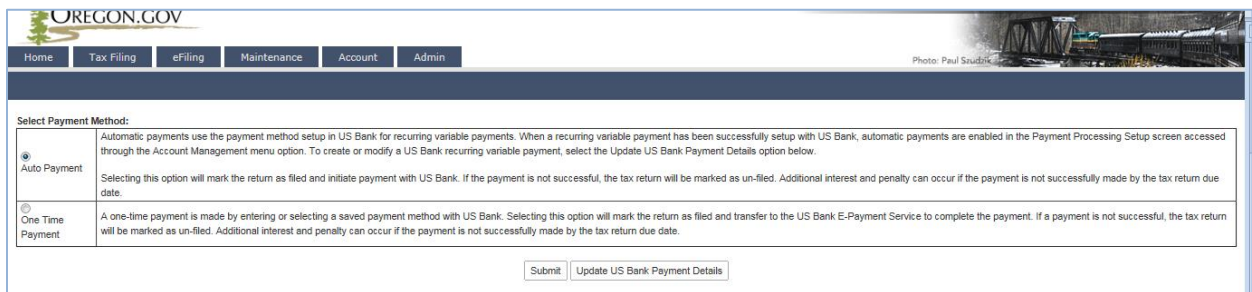


Figure 8. Payment type screen

Click the “Submit” button to proceed to the US Bank site and enter the account information for the initial setup.

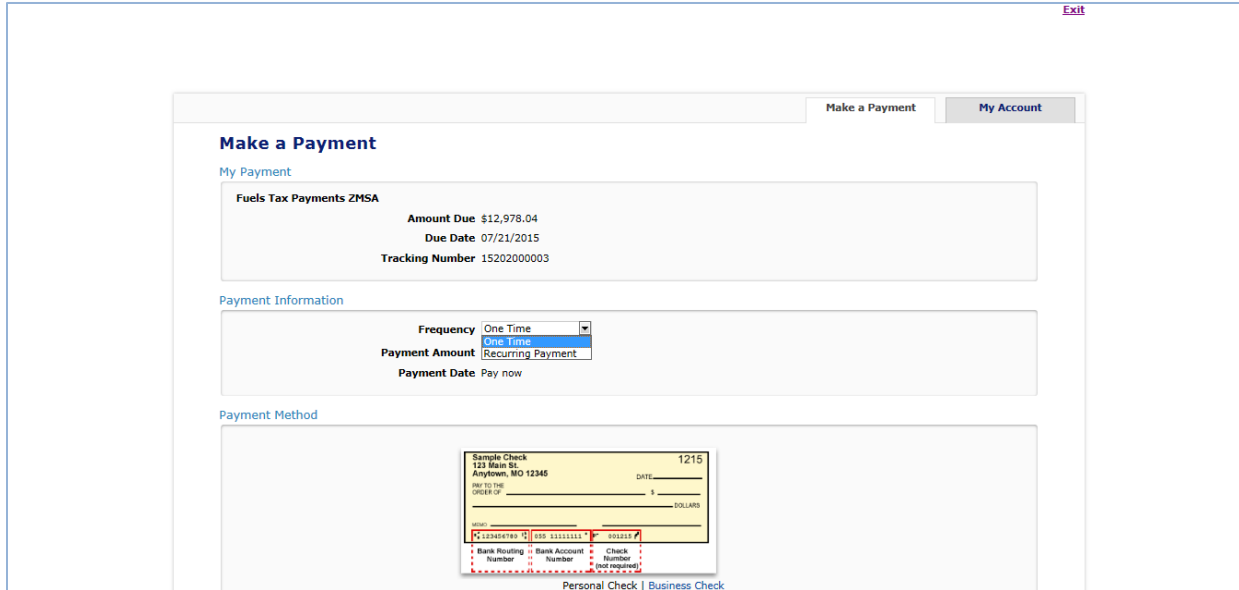


Figure 12. US Bank payment screen

The “Payment Information” area allows you to enter the frequency as one time or recurring payment. Selecting “Recurring Payment” will allow you to schedule automatic payments.

In the lower part of the window, enter your checking account or savings account information for the payment.

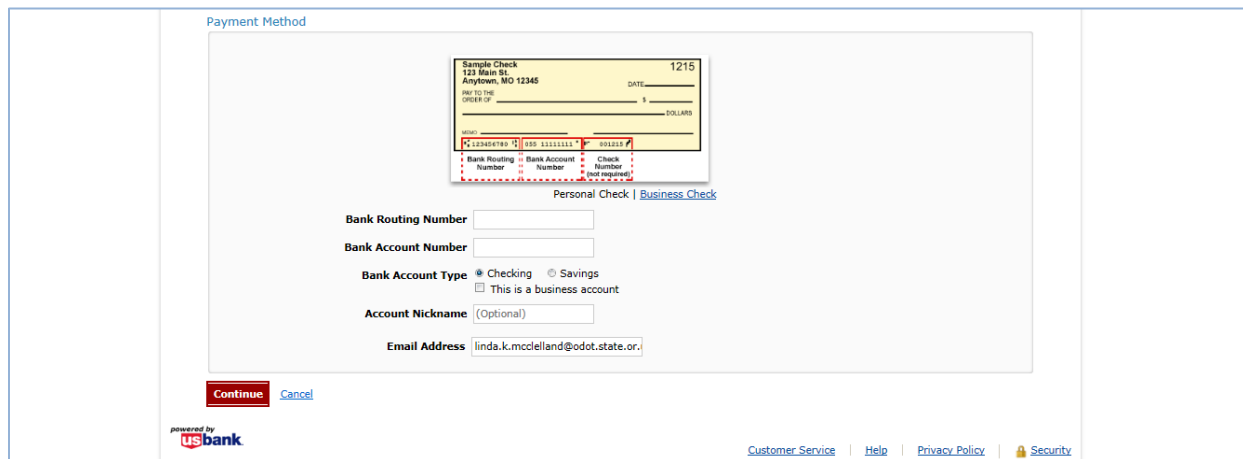


Figure 13. Bank account information

Once you have entered your bank account information, click “Continue” at the bottom of the screen to go on to confirm the payment information.

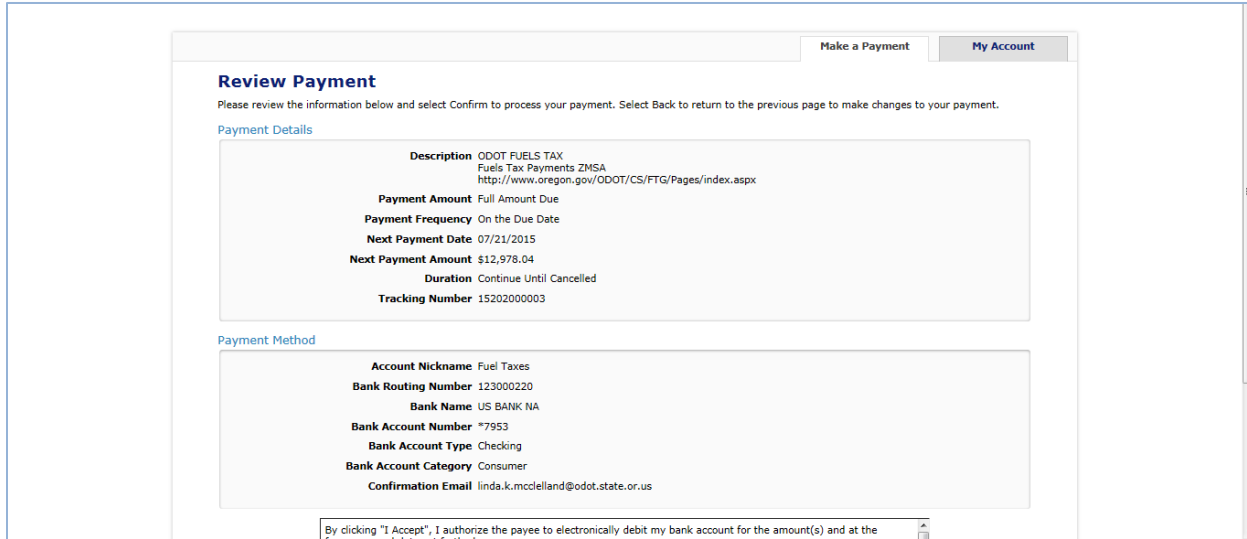


Figure 14. Review payment screen

Check the box at the bottom of the electronic statement to accept the Terms and Conditions and then click “Confirm” to continue to the payment review.

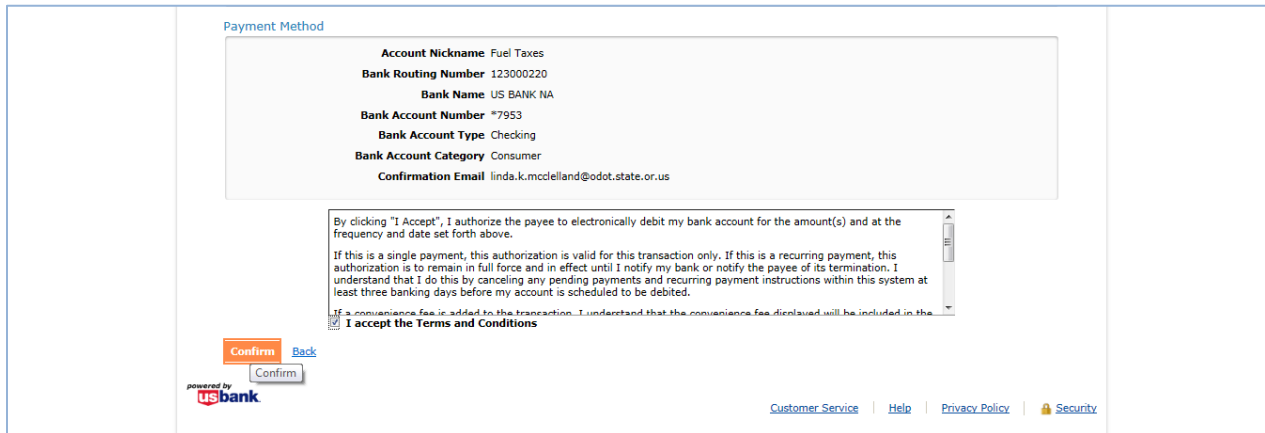


Figure 15. Verifying the payment information

When your payment has been completed, the confirmation screen showing the reference number and payment details will be displayed.

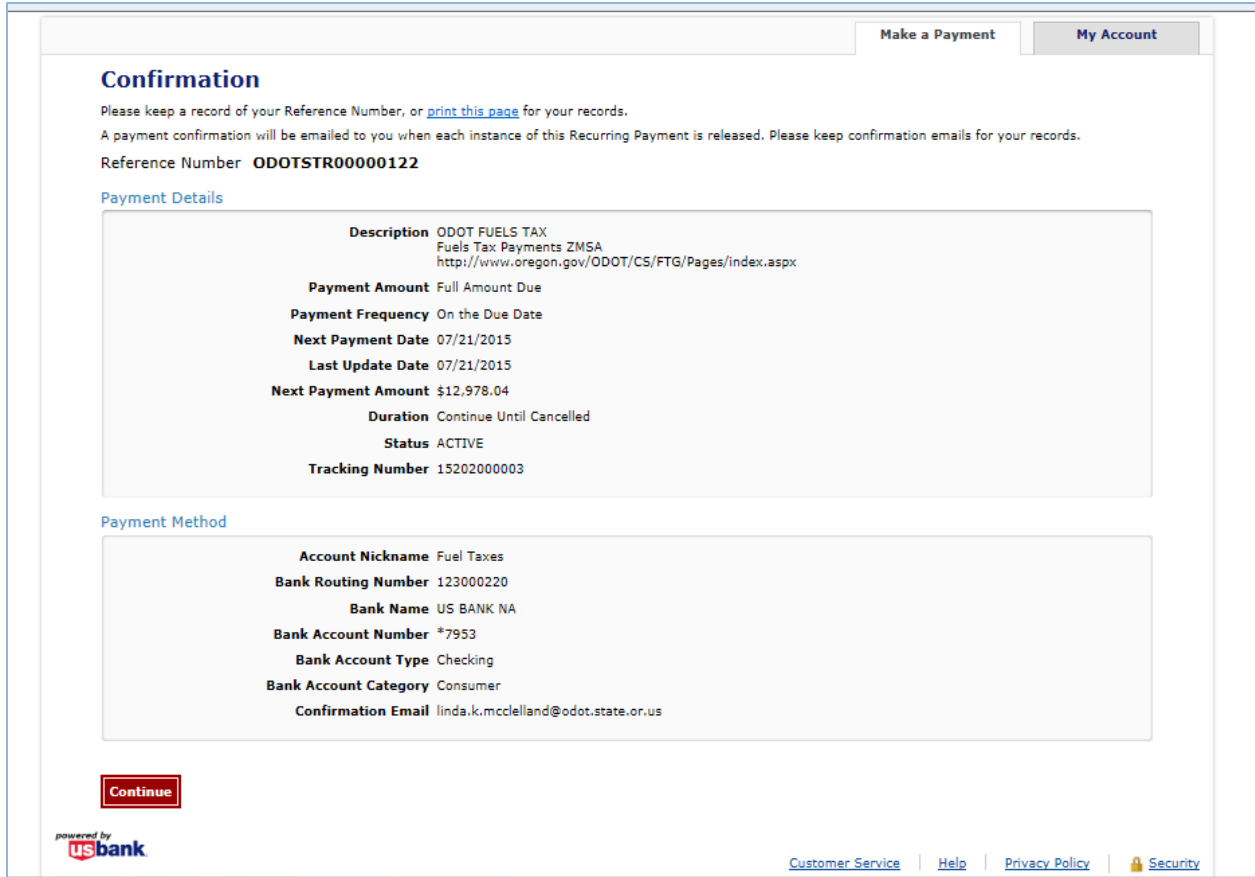


Figure 16. Payment confirmation page

Click the “Continue” button to leave the US Bank site. The Fuels Tax System “Payment History” confirmation screen will be displayed. This screen shows the date the payment was created, tracking number, the status and amount.

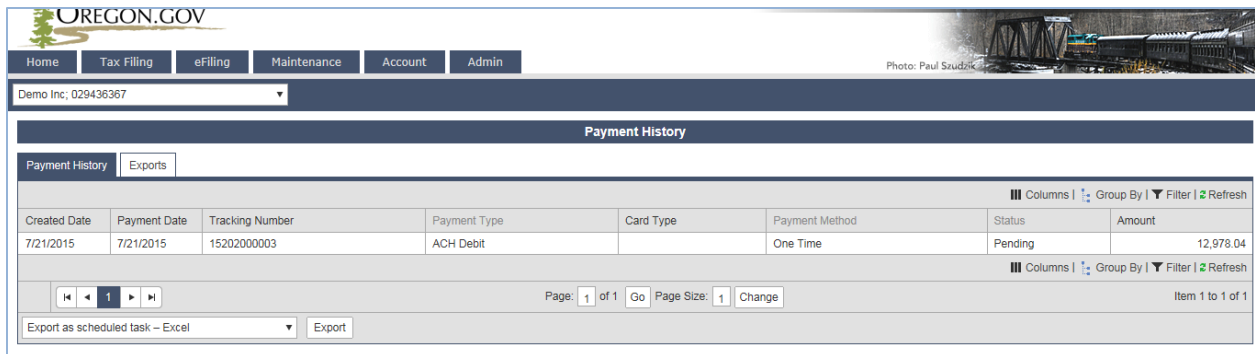


Figure 17. Payment history screen

The Status will show as Pending until the payment processes through the bank.

Return to the “Tax Sessions” screen. The tax session will now display a date in the “Filed Date” column and the Fuels tax System confirmation number in the “Tracking Number” field.