

# Utility Users Tax (UUT) Refund Request



Business Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Web Site: \_\_\_\_\_

**See next page for instructions before completing this form.**

1. Indicate amount of refund being requested (amount overpaid) in the appropriate column. See next page for more detailed instructions.

Utility	Amount of Refund Being Requested for UUT Year 9/1/18 – 8/31/2019
	**** Deadline to submit request is 8/31/2020 ****
Electricity	
Gas	
Telephone	
Cable TV	

2. Indicate preferred method of payment:

I want to prepay the maximum tax for the utilities indicated above.  
 I do not wish to prepay. (See instructions for more information)

3. Does your business have multiple locations within the City of Santa Rosa?

No  
 Yes. List addresses below (attach additional sheets if necessary)

Location #1: \_\_\_\_\_

Location #2: \_\_\_\_\_

Location #3: \_\_\_\_\_

4. Do you meter/measure the use of electricity or gas in order to bill someone else for the cost?

Yes  No

5. **Required:** Attach copies of all bills covering the period you are requesting a refund for. Copies must show amount of UUT, service location, account number and total bill amount. If you are missing copies, contact your service provider.

*I declare under penalty of perjury that I am authorized to request this refund for the accounts listed above and that no credit, adjustment or refund has been issued by the Utility provider for the UUT overpayment claimed on this refund request.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title/Position

# Utility Users Tax Refund Instructions

<b>Utility Users Tax</b> .....	5% of Utility charges
<b>Maximum UUT</b> .....	\$1,000 for each utility, for each service user, at each contiguous location, per UUT year
<b>UUT Year</b> .....	September 1 through August 31
<b>Utilities that are taxed</b> .....	Electricity Gas Telephone (exclude cell phone charges) Cable TV

**To find out if you qualify for a UUT refund:** Ask yourself, “Did I pay more than \$1,000 in UUT (or more than \$20,000 in utility charges) for any one of the utilities listed above?” If so, you may be entitled to a refund.

## **Line Item Information:**

1. Complete the chart:
  - a. Determine which utility account you believe will qualify for a refund. If you have more than one utility account (same type of utility) at the same location billed to the same account holder, you can combine them to calculate your potential refund. If you have multiple locations in Santa Rosa, please read #3 below.
  - b. To calculate your refund, add the UUT portion from bills dated September 1 through August 31 (UUT Year). Remember: Taxes paid for each of the utilities listed above should not be combined as the maximum tax is per utility.

Enter the amount of refund you are requesting for the UUT year in which excess tax was paid. Calculate the amount of your refund as follows:

***Total of what you paid in UUT (in a UUT year) - \$1,000 = Amount of refund being requested***

2. If you sign up to prepay your UUT, we will send you a bill each September for each utility you request to prepay. We will notify your utility provider to discontinue charging you the tax. If you do not sign up to prepay, you will have to file a refund request annually. Refunds will be issued to account holder. You can sign up to prepay at any time without waiting for the UUT Year to end.
3. The maximum tax of \$1,000 applies separately to each non-contiguous location within Santa Rosa City limits. If applicable, refund requests should be submitted separately.
4. If you are “re-selling” by billing others for the cost of the utility, you may not qualify for the refund.
5. We require copies of all bills during the UUT year in which you are requesting a refund in order to verify payments made. We do not have access to your utility accounts.

Upon completion, return this form with copies of your bills for the UUT year of your request. For additional information, visit our website at [www.srcity.org/uut](http://www.srcity.org/uut).

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