

## **Forms Management Subcommittee**

The Forms Management Subcommittee promotes points 2, 3, 4, 5 and 9 of the 11 Point Plan.

### **2013 - 2014 Annual Report**

The Forms Management Subcommittee is responsible for reviewing forms, instructions, schedules, issuing product codes and schedule codes in addition to reporting on several other ongoing projects.

#### **Completed Projects**

1. Sub schedules were requested by the states of Oregon and Ohio. The full Uniformity Committee voted and approved the requests and the following codes were issued:
  - 1H Gallons received – Originating county and city tax paid
  - 7E Gallons sold for export – Originating city and/or county tax paid
  - 10AC Tax exempt sales in city jurisdiction
  - 10AD Tax exempt sales in county jurisdiction
  - 5AD Gallons sold to licensed retailers
  
2. Uniformity Guide – There was a discrepancy regarding the order in which the “~~Cost~~” and “~~Net~~” columns appeared on the Carrier Report Schedule, compared to all other schedules. The full Uniformity Committee agreed, for consistency, the two columns on the Carrier Report Schedule should be reversed.
  
3. The State of Georgia submitted form:
  - Motor Fuel Tax form MFD-04 along with receipt and disbursement schedules.
 The Forms Review Team led by Tracy Lenius provided feedback to Georgia. Georgia’s form was revised, voted on and approved as uniform by the full Uniformity Committee.
  
4. The State of Oregon submitted forms:
  - Motor Vehicle Fuel and Aircraft Fuel License Tax Return and Dealers Schedule of Receipts, Dealers Schedule of Disbursements and City and County Summary Schedule.
  - Carrier Report & Schedules
  - Terminal Report & Schedules
 The Forms Review Team led by Tracy Lenius provided feedback to Oregon during the review process. Oregon forms were revised, presented, voted on and approved as uniform by the full Uniformity Committee.
  
5. The Forms Subcommittee received a request for new product codes for mixed stream fuels. This request had been considered previously by the Uniformity Committee. Extensive discussion ensued and it was determined that the product code is not needed by any taxing jurisdiction for a taxing purposes, thus no action will be taken at this time.

#### **Currently Outstanding Projects**

1. **Cross Walk (FTA and STCC Codes)** – A team led by Michael Grammer has presented a document identifying FTA Codes and corresponding STCC codes. Concerns were raised regarding the possibility of differences in STCC codes from East Coast to West Coast railroads. The team is in the process of contacting a West Coast railroad representative.
  
2. **Ohio Forms Review** – The following Ohio forms and schedules were presented at the January 2014 meeting for review. Feedback was provided and Ohio will make needed changes and provide instructions for review.

- Ohio Terminal Operator Return
- Terminal Operator Inventory Schedule Detail
- Terminal Operator Schedule Detail – Receipt
- Terminal Operator Schedule Detail – Disbursement
- Transporter Return
- Transporter Schedule Detail
- Fuel Dealer's Tax Return
- Inventory Schedule Detail – 15C
- Dealer and Exporter Schedule Detail – Receipt
- Dealer and Exporter Schedule Detail – Disbursement
- Exporter Return

**3.Uniform Motor Fuel Sales Tax Form** – A team was created to design a Uniform Motor Fuel Sales Tax Form. The team members are Bob Donnellan, David Hernandez, Jessica McInerny, Tammy West and Amy Drewry. A draft form has been presented to the full committee for review and discussion. The team continues to make revisions on the return and will be creating instructions.

**4.Washington Forms Review** – The State of Washington has provided the following returns and schedules for review.

- Terminal Report and Schedules
- Supplier Tax Return and Schedules

Forms review team led by Tracy Lenius is in the process of reviewing the forms and will provide feedback.

If you need additional information regarding committee projects and activities, or need further assistance with the Uniform Report Forms, please contact the co-chairs of the committee:

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