



# How to File a Claim for Refund Using Revenue Online

Refund claims for the following tax types can now be submitted online:

Cigarette, Consumer Use, County Lodging, Fuel, IFTA, Local Marketing, Marijuana, Nicotine Products, Passenger Mile, Retailer's Use, Sales, Tobacco Products, and Wage Withholding

## Who's Eligible for Online Filing?

- Established Colorado Taxpayers
- Taxpayers with Revenue Online Access
- Taxpayers with supporting documentation to attach to the claim

## Why File Online?

- Save postage and time mailing
- Reduce errors and incomplete submissions
- Sales Tax filers can include multiple jurisdictions (state, RTD/CD, city, and county) on one submission
- Receive confirmation that your claim has been received within 24 hours of successful transmission

**IMPORTANT:** Different tax types such as Sales vs. Consumer Use must be submitted separately

Sales Tax  
TRAINING EXAMPLE  
1881 PIERCE ST  
LAKEWOOD CO 80214-3503  
Action Center Items 12

12/31/2021 Return  
Monthly  
Due  
01/20/2022

Upload a Spreadsheet or XML File  
File Return

Account  
12345678-003-SLS  
Balance  
\$0.00

Make a Payment  
File/Amend and View Returns/Payments  
Add or Close Sales Tax Locations  
Additional Actions

### Helpful Hint:

If you are submitting a claim for both Sales and County Lodging tax, you need to submit a separate claim for each account

**Step 1:** Log into Revenue Online. Locate the account for which you are filing a refund. From the account field, select "Additional Actions"

Additional Actions

Perform the following actions here in your Revenue Online account.

- > Cease Account
- > File a Protest
- > Upload a Spreadsheet or XML File
- > Submit A Claim for Refund (DR 0137)

**Step 2:** Select "Submit a Claim for Refund (DR 0137)"

Purpose

Do Not Use for Income Tax, Buyer's Rural Broadband, or Exempt Fuel Claims

- Use this form to submit electronic claims for refund for Sellers/Retailers, Consumer Use, Local Marketing, County Lodging, Withholding (prior years), IFTA, Cigarette, Tobacco, Nicotine, Marijuana, Liquor taxes, Fuel Distributor, and Aviation Fuel.
- This claim form is for monies remitted directly to the Department of Revenue. Do not use this form for Home-Rule Self Collected cities.
- For Buyer's/Purchaser's claims, use Form DR 0137B. For Rural Broadband, use Form DR 0137C.

Eligibility

- This request is only available for established Colorado taxpayers.

Information related to the refund claim  
Supporting documentation

Cancel Next >

**Helpful Hint:** This screen will tell you which types of accounts you **cannot** submit

**Step 3:** Read through the Purpose, Eligibility & Information Needed to Continue. Click "Next"

**\*\*Attention\*\***

Failure to accurately complete the application and submit all supporting documentation may cause the amount of the refund to be reduced or denied.

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Documentation Requirements and Processing Delay

Many of the submissions received by the Department are incomplete or insufficient. These submissions cause delays in processing.

Explanations such as "overpayment", "Filing error", or "Credit on my account" are not sufficient. If an amended return was submitted, documentation to support the changes made to the return should be supplied.

Examples of documentation may include but is not limited to; amended returns, invoices, proof that money was refunded to your customer and sales reports. General documentation requirements are outlined in the instructions of the Claim for Refund Form DR 0137 (a link is below). Additional documentation or information may be requested depending on the reason for overpayment.

[https://tax.colorado.gov/sites/tax/files/documents/DR0137\\_2021.pdf](https://tax.colorado.gov/sites/tax/files/documents/DR0137_2021.pdf)

**Helpful Hint:** If you need to access the paper form DR 0137, click on this hyperlink.

Cancel

Next >

**Step 4:** Read through the information. When finished, click "Next"

Mailing Address

Colorado Staging

5a

Country: USA  
Street: 1881 PIERCE ST  
Street 2:  
Unit Type: Unit #:  
City: LAKEWOOD State: COLORADO  
Zip Code: 802143503 County: JEFFERSON  
Attention:  
Foreign Province (if not U.S.): Foreign Postal Code (if not U.S.):

Address Verified

**Step 5:**

Enter the Mailing Address where you would like to receive all correspondence for the refund claim. Then click "Verify Address"

**Step 5b:**

If the system returns multiple addresses, select the most correct address from the list provided and click "Select this address"

**Helpful Hint:** You do have the option of choosing "As Entered"; however, in most situations, a Verified address is highly encouraged to prevent undeliverable refund issues

Address Search

5b

Verified	1881 PIERCE ST LAKEWOOD CO 80214-3503	Select this address
Verified	1881 PIERCE ST RM [Required] LAKEWOOD CO 80214	Select this address
Verified	1881 S PIERCE ST LAKEWOOD CO 80232-7125	Select this address
As Entered	1881 PIERCE ST DENVER CO 80214-3503	Select this address

**Step 6:** Enter your Contact Information

**Helpful Hint:** If this is a third party, submit your Power of Attorney along with your claim for refund. You will have an opportunity to do this later on in this process

Contact Information

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Taxpayer Contact: TRAINING EXAMPLE  
Name:  
Taxpayer Title:  
Phone Type: Business Phone  
Taxpayer Phone: (970) 123-4567 Extension:  
Taxpayer Email: dor\_taxtraining@state.co.us  
Best times to reach you:

Cancel

Next >

Refund Details

Tax Type: Sales Tax

Colorado Account Number: 13345678

Period Begin: 10/31/2021

Period End: 10/31/2021

Original Amount Paid: 11,227.11

Correct Amount: 5,476.28

Refund Requested: 5,476.28

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Jurisdiction Detail for Refund

Total State	3,600.80
Total RTD	0.00
Total CD	0.00
Total RTA	0.00
Total City	0.00
Total County	1,875.48
Total	5,476.28

RTA Name: \_\_\_\_\_

City Name: \_\_\_\_\_

County Name: EAGLE

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**Step 7:**

- Enter the details about the claim for refund. The account type and account number will auto-populate based on the tax type where you initially selected Additional Actions
- The Period Begin and Period End Dates are **the last day of the first filing period and last filing period included in the claim respectively** (e.g. 03/31/21 - 09/31/21 would cover Q1, Q2 & Q3 for a quarterly filer)
- The Original Amount Paid is the sum of all of the amounts paid on the periods *included* in the claim amount
- The Correct Amount is the sum of the corrected amounts that were paid for all filing periods included in the claim minus the amount of the refund claimed.

**Step 8:**

You must provide specific details regarding the amount of tax being refunded from specific Jurisdictions. If the issue spans multiple sites you may need to submit multiple claims. Then click "Next"

**HELPFUL HINT:**

Take into consideration any vendor's fee allowed when calculating these amounts. You will be required to enter the name of the jurisdiction that you are requesting any amounts from

Refund Request Reason

Important: List the reason for the over-payment. Explanations such as credit on account, over-payment, see attached, or filing error are not sufficient explanations. A short explanation should be provided even if a letter is included.

Refund Reason \*

- Required
- Biotechnology
- Blood, Urine, Testing Kits
- Combined My Sales
- Contractor's Exemption
- Data Entry Error
- Direct Pay Permit
- EFT Data Entry Error
- Food
- Home-Rule Self Collected City
- Machinery
- Other
- Paid an Estimated return and later filed my actual return
- Property Management or Third Party Collected on my Behalf
- Returned Goods/Cancelled Invoice

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**Step 9:** The explanation is for detailing how & why there was a credit created on your account. Explanations such as credit on account, over-payment, see attached, or filing error are not sufficient. A short explanation should be provided even if a letter is included. Then click "Next"

Power of Attorney(POA)/Third Party Representative

Is this claim being submitted by a POA or Third Party Representative? (attach a copy of the form DR 0145 Power of Attorney) \*

No  Yes

Supporting Documentation

Does your refund require supporting documentation? (Examples of refund reasons not requiring documentation are data entry error and duplicate payments) \*

No  Yes

I understand failure to provide all required documentation may result in a denial. \*

[https://tax.colorado.gov/sites/tax/files/documents/DR0137\\_2021.pdf](https://tax.colorado.gov/sites/tax/files/documents/DR0137_2021.pdf)

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**Step 10:** On this screen is where you can attach the supporting documentation, and the Power of Attorney (if applicable). You can attach as many files as necessary. Then click "Next"

## Refund Claim

Sales Tax

### Refund Claim



- I declare under penalty of perjury in the second degree that this claim including all attachments is to the best of my knowledge true and correct. I further understand that the claim and documentation may be subject to the same verification process used by the Department of Revenue in auditing other taxes for three years from the date of payment of the claim. C.R.S. 13-80-101
- I understand that I must keep all information and documentation related to this claim for a minimum of three years or until my claim is resolved whichever is greater.
- I understand that incomplete, inaccurate or missing information can result in an adjustment to or a denial of my claim.

Cancel

< Previous

Submit >

**Step 11:** Read and put a check in the box next to the three disclaimers before submitting the claim. Then click "Submit"

### Helpful Hint:

After submitting the claim, you can select 'printable view' to get (and save) your confirmation number



**Thank You from the Colorado Department of Revenue**

**Additional Resources:**

[Tax.Colorado.gov/sellers-refund-claim](https://tax.colorado.gov/sellers-refund-claim)

[Tax.Colorado.gov](https://tax.colorado.gov)