

REFUNDS ONLINE QUICK START GUIDE

How to claim your regional fuel tax rebate online



Welcome to refunds online. Before you submit your first claim there are three set-up tasks to complete:

- › **Step 1: Create user profile**
- › **Step 2: Register a customer**
- › **Step 3: Manage assets**

Once completed, you can enter your claim details, upload supporting documents, and declare and submit your claim.

STEP 1: CREATE YOUR USER PROFILE

The first time you make a claim you'll need to set up your user profile. To create your user profile you'll need to log in with a **RealMe®** username and password.

Enter in your user profile details and click **Update profile**.

This will take you to the Refunds online welcome page.

STEP 2: REGISTER A CUSTOMER

Before submitting a claim, your business needs to be registered in our system as a customer.

This is where you'll enter in legal details about your business and nominated bank account. These details will be associated with all future claims.

To find out more about the information needed to register your business please visit **How to get started** on our website.

Note: you can register more than one business against your user profile.

STEP 3: MANAGE YOUR ASSETS

Before submitting a claim you need to enter the details of your eligible assets. This includes vehicles, vessels and bulk tanks.

These will be saved in our system for future use, but please check the details of your eligible assets each time you make a claim and update them if they've changed.

Machines

Machines can't be saved with your eligible assets. You need to enter each machine type for each claim.

Machines are broadly defined to include anything used for a commercial purpose other than a vehicle, aircraft or vessel. For example chainsaws, stump grinders, pumps, compressors, generators or light towers.

MAKE SURE YOU SAVE YOUR WORK BEFORE PROGRESSING TO THE NEXT SCREEN!

Here's an example of the type of information you'll need:

Unregistered vehicles
Vehicles not currently registered for use on public roads. Please provide the vehicle identification number (VIN) or chassis number for each vehicle (if you have it).

Make	Model	Year	Fuel type	VIN/Chassis	Name/ID							
eg Honda	>	eg CRF250F	>	eg 2016	>	- Select -	>	eg 1AAAA00000A00	>	eg Farm bike	>	Add
New Holland	CK8070	2009	Diesel	AF71T-357690	Harvester 3							

Save

STEP 4: ENTER YOUR CLAIM DETAILS

Now that you've completed your set-up tasks, you're ready to create a claim!

Throughout this process you can always save a draft claim and return to it later. Please note, however, that we won't receive your draft claims and you can't delete them from your welcome page claim history.

Select the business you're claiming for and the claim period.

You'll have the opportunity to enter the fuel you've bought and used (as applicable) for:

- > retail purchases
- > bulk tank deliveries
- > bulk tank balances
- > vehicle fuel use
- > vessel fuel use
- > machine fuel use

Make sure you select **Save and continue** on each page, otherwise your details could be lost.

STEP 5: UPLOAD YOUR SUPPORTING DOCUMENTS

Upload your receipts and invoices for eligible fuel purchases so we can assess your claim.

Please note, you can only upload one document at a time and you won't be able to see the files you've uploaded.

We'll contact you if something is missing.

STEP 6: DECLARE AND SUBMIT

Review your claim summary to make sure all the details are correct. Make sure you carefully read and accept the declaration.

You have the option to **Save** or **Submit claim**. Your claim will only be submitted to the NZ Transport Agency when you select **Submit claim**.

Once you've submitted your claim successfully you'll return to the welcome page, where the status of your claim will change from **Draft** to **Submitted**.

Claim history

What do claim statuses mean?

Last modified	Customer number	Name	Claim number	Claim period	Claim status	Actions
01/10/2018		Example Customer	147476	Oct-Dec 2018	Draft	
01/10/2018		Example Customer	147472	Jul-Sep 2018	Submitted	

We'll assess your claim and contact you if we have any questions.