



# TAXATION & REVENUE

City of Monroe, Louisiana  
MAYOR – COUNCIL GOVERNMENT

## Claim for Refund of Taxes Paid

Name of taxpayer \_\_\_\_\_

**Mailing Address:**

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Local Sales Tax Account Number \_\_\_\_\_

Period(s) of overpayment \_\_\_\_\_

**Contact Person:**

Name \_\_\_\_\_

Email Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Total remitted for the period \$ \_\_\_\_\_

Amount claimed to be due as amended \$ \_\_\_\_\_

Difference (refund requested) \$ \_\_\_\_\_

*This refund is claimed for the following reasons:*

\_\_\_\_\_  
\_\_\_\_\_

**All documentation evidencing your refund claim must accompany the request or the claim will be denied.** For example: original invoice, credit invoice, original tax return, and proof of payment. See attached Refund Policy for additional information.

For bad debt write-offs, please supply the state's approval letter.

Signature of Taxpayer: \_\_\_\_\_ Date Prepared: \_\_\_\_\_

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**FOR OFFICE USE ONLY:**

Total Approved for Payment \$ \_\_\_\_\_

Date \_\_\_\_\_

Approved By \_\_\_\_\_



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### Refund Policy

The City of Monroe Taxation & Revenue Division has established the following policy on processing any refund claims received by this office.

All claims for refund can either be on the *Claim for Refund of Taxes Paid* form or by an official letter. If submitting a refund claim by an official letter, all information on the *Claim for Refund of Taxes Paid* must be included on your letter.

**1) Transactions in which the dealer collected taxes from a customer when no tax was due:**

Before local sales tax can be refunded to the dealer, the dealer must provide documentation that the tax has been refunded to the customer(s) that paid the tax ***with the refund claim.***

***All documentation that supports the refund request must accompany the claim for refund,*** including but not limited to copies of customers invoices. The dealer should also provide a detailed schedule of customers showing the amount of local sales taxes refunded directly to each customer.

**2) All other refund requests – Clerical or mathematical errors on returns, taxes remitted to an incorrect parish, etc.:**

The dealer must provide ***all documentation evidencing their claim for refund with the claim for refund.***

Depending on the size of the refund claim and the documentation required to evidence the claim, the dealer may submit the claim electronically to the City of Monroe Taxation & Revenue Division. However, it must be submitted timely to be considered filed prior to prescription running on the claim.

Any claim for refund submitted to the City of Monroe Taxation & Revenue Division without supporting evidence of the amount due will be **DENIED**.