

### FUELS TAX BOND & DEPOSIT IN LIEU OF BOND

Fuels Tax Licensees must obtain a surety bond from an insurance company as part of the licensing process. Deposits in Lieu of Bond are covered at the end of this tutorial.

Print the Fuel Tax Bond form from the Fuels Tax website at the following address:

https://www.oregon.gov/ODOT/Forms/FT/13220R.pdf

Complete the form using the bond document information (once obtained) and sign the form as required.

To submit the form and bond documents, sign in to the Oregon Fuels Tax System, and select the "Account" tab. Then select "Registration" and then "Registration Status".

| Oregon   | .GOV   |                  |       |              |     |                     |     |                   |        |  |
|--|--|------------------|-------|--------------|-----|---------------------|-----|-------------------|--------|--|
| Home Tax Filing  | eFiling  | Maintenance      | Audit | Account      | Adr | min                 |     |                   |        |  |
| Vandelay Industries: 999999                                | 9999   | •                |       | Registration | ► R | legistration Status |     |                   |        |  |
| 📕 System Default Dashboa                                   | rd 🔻 🌣 Tools 🔻   | + Add Widgets    |       | Management   | , – |                     |     |                   |        |  |
| Widgets have been hidden due to access level restrictions. |  |                  |       |              |     |                     |     |                   |        |  |
| Widgets have been hidden                                   | n due to access leve   | el restrictions. |       |              |     |                     |     |                   |        |  |
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| Message Center   |  |                  |       |              |     |                     | Тах | Session Status Pe | Period |  |
| Add New Record   | Expand Grid  |                  |       |              |     |                     |     |                   |        |  |
| From <b>T</b>  | Subject  |                  |       |              | T   | Date                | -   |                   |        |  |
| *system*   | Your Avalara Excise Platform User Account                          |                  |       |              |     | 4/1/2019 4:13 PM    |     |                   |        |  |
| *system*   | Your Oregon Fuels Tax System secure user account 3/28/2019 5:17 PM |                  |       |              |     |                     |     |                   |        |  |
| 1 - 2 of 2 items   |  |                  |       |              |     |                     |     |                   |        |  |

Figure 1. Account Registration screen

If you currently have other licenses, you will find a list of them here. If you selected "Fuel Tax Bond" when you selected the license application, it will show in the list of available registrations.



| Home Tax Filing               | GOV<br>efiling Maintenance Audit Accou | nt Admin          |                            |                | Phot          | Welcome vandela | vindustries_admin | Help   2   Sign Ou |
|-------------------------------|--|-------------------|----------------------------|----------------|---------------|-----------------|-------------------|--------------------|
| Vandelav Industries; 99999999 | 19                                     |                   |                            |                |               |                 |                   |                    |
|                               |  | Acc               | ount Registrations         |                |               |                 |                   |                    |
| Account Registrations Sc      | heduled Tasks                          |                   |                            |                |               |                 |                   |                    |
| Add New Record All Red        | aistration Forms                       |                   |                            |                |               | Columns         | Group By   🝸      | Filter   PRefresh  |
| Company Name                  | Description                            | Registration Type | Registration Status        | Effective Date | Obsolete Date | Form Status     | Approved Date     | Approved By        |
| Vandelay Industries           | Application for Use Fuel User License  | Initial           | Application Available      | 4/30/2019      |               |                 |                   |                    |
| Vandelay Industries           | Fuel Tax Bond                          | Initial           | Application Available      | 4/30/2019      |               |                 |                   |                    |
| Vandelay Industries           | Application for Use Fuel User Emblems  | Initial           | Application Available      | 4/30/2019      |               |                 |                   |                    |
| Add New Record                |  |                   |                            |                |               | Columns         | Group By   Y      | Filter   PRefresh  |
| HATFH                         |  | Page: 1           | of 1 Go Page Size: 3 Chang | je             |               |                 |                   | Items 1 to 3 of 3  |
| Export as Scheduled Task - E  | Excel   Export                         |                   |                            |                |               |                 |                   |                    |

Figure 2. List of existing applications

If it does not appear, Click "Add New Record" located directly under the "Account Registrations" tab. From the "Create Account Registration" pop-up window, select "BND – Fuel Tax Bond" from the "Account Type" drop-down box.

| Home Tax Filing eFiling<br>WEB Demo; 476528913 | Maintenance                         | Account Admin  |   |                 |      |       |                | Photo: Paul   | Szudzik                                   | ome webDemo_ad    | min   Help   Sign Out |
|--|-------------------------------------|--|---|-----------------|------|-------|----------------|---------------|---|-------------------|-----------------------|
| Account Registrations                          |                                     |  |   |                 |      |       |                |               |   |                   |                       |
| Account Registrations Exports                  |                                     |  |   |                 |      |       |                |               |   |                   |                       |
| Add New Record All Registration For            | rms 🔻                               |  |   |                 |      |       |                |               | III Col                                   | umns   🏣 Group By | 🝸 Filter   🛿 Refresh  |
| Company Name Description                       |                                     |  | Registration Type   | Registration St | atus |       | Effective Date | Obsolete Date | Form Status                               | Approved Date     | Approved By           |
| WEB Demo Application for                       | Create Account Registration         |  |   |                 | ×    |       | 6/30/2015      |               |   |                   |                       |
| Add New Record                                 | Company Name:                       |  |   |                 | _    |       |                |               | lumns   🎦 Group By   🍸 Filter   2 Refresh |                   |                       |
|  | Account Type:                       |  | 0   |                 |      | hange |                |               |   |                   | Items 1 to 1 of 1     |
| Export as scheduled task - Excel               | Account rype:<br>Registration Type: | APCAR - Application for<br>APPCR - Application for<br>APPLR - Application for<br>APPCR - Application for<br>APPCR - Application for<br>APTOR - Application for<br>APUE - Application for<br>APUE - Application for<br>CNUE - Dealer License<br>BNDS - Deposit / Secur<br>BND - Fuel Tax Bond<br>CNUFS - Seller License C | Carrier License<br>Etranomisiousen mouocerr C<br>Motor Vehicle Fuel Dealer Lic<br>Registere Buik (Disthutor<br>Road Usage Charge<br>Terminal Operator<br>Use Fuel User License<br>Use Fuel User License<br>Use Fuel User License<br>Cancellation Request<br>Cancellation Request<br>anneclation Request | icense          | × 4  |       |                |               |   |                   |                       |

Figure 3. Create Account Registration screen

Then click "Insert" at the bottom of the window.

When you select the line for the Fuel Tax Bond, you will have a pop-up menu with the choice to:

Generate Registration Form

View Registration Form (not available until information is entered)

View/Submit Registration

View Certificate (not available until information is entered)



| Home Tax Filing                  | I.GOV<br>g eFiling Maintenance Account            | Admin                    |                   |      |                        |                | Photo: Paul   | Szudze      | ome webDemo_ad    | min   Help   Sign Out |  |
|----------------------------------|---|--------------------------|-------------------|------|------------------------|----------------|---------------|-------------|-------------------|-----------------------|--|
| Account Registrations            |   |                          |                   |      |                        |                |               |             |                   |                       |  |
| Account Registrations            | Account Registrations Exports                     |                          |                   |      |                        |                |               |             |                   |                       |  |
| Add New Record Al                | Registration Forms                                |                          |                   |      |                        |                |               | III Coli    | umns   🔓 Group By | Filter   2 Refresh    |  |
| Company Name                     | Description                                       |                          | Registration Type |      | Registration Status    | Effective Date | Obsolete Date | Form Status | Approved Date     | Approved By           |  |
| WEB Demo                         | Application for Motor Vehicle Fuel Dealer License |                          | Initial           |      | Application Available  | 6/30/2015      |               |             |                   |                       |  |
| WEB Demo                         | Fuel Tax Bond                                     | General                  | Begistration Form |      | Application Available  | 7/7/2015       |               |             |                   |                       |  |
| Add New Record                   |   | View Re                  | distration Form   |      |                        |                |               | III Coli    | umns   🛓 Group By | Tilter   2 Refresh    |  |
|                                  |   | View/Submit Registration |                   | of 1 | Go Page Size: 2 Change |                |               |             |                   | Items 1 to 2 of 2     |  |
| Export as scheduled task - Excel |   |                          | rtificate         |      |                        |                |               |             |                   |                       |  |
|                                  |   |                          |                   |      |                        |                |               |             |                   |                       |  |

Figure 4. Registration details screen

Select "Generate Registration Form" to enter the information for the application.

The screen will change to the Registration Details screen (shown below).

| egistration Details   |  | × |
|---|--|---|
| Country: USA<br>Taxpayer Type: BND<br>Start Period: 4/30/2019 | Jurisdiction: OR<br>Terminal Code:<br>Sequence: ORIGINAL   |   |
| Form Settings Form Mar  | ual Entry History Log Supporting Documents Scheduled Tasks |   |
| Country   | United States  |   |
| Jurisdiction  | Oregon OR  |   |
| Taxpayer Type   | BND - Fuel Tax Bond  |   |
| Tracking Number   |  |   |
| Begin Period Date   | 4/30/2019  |   |
| End Period Date   | 4/30/2019  |   |
| Sequence  | 0  |   |
|   | ORIGINAL   |   |
| Filed Date  | Open   |   |
| ⊤ Tax Session Options   |  |   |
| Prenared by   |  |   |
| Submission Type   |  |   |
|   | Save Ontions   |   |
|   | Save Options   |   |
|   | Save & Regenerate  |   |
|   |  |   |

Figure 5. Registration Details screen

Select the "Form Manual Entry" tab and complete the bond information.



### 1 – Ownership and Bond Information

| istration Details   |  |                       |          |                  |   |
|---|--|-----------------------|----------|------------------|---|
| Country: USA<br>Taxpayer Type: BND<br>Start Period: 4/30/2019 | Jurisdiction: OR<br>Terminal Code:<br>Sequence: ORIGINAL |                       |          |                  |   |
| Form Settings Form Manual Entry                               | History Log Supporting Documen                           | s Scheduled Tasks     |          |                  |   |
|   | 1-   | 2                     |          |                  |   |
| Type of Ownership   |  |                       |          |                  |   |
| Corporation   |  |                       |          |                  | • |
| Bond Number   | Bond Effective Date                                      |                       | Bond Amo | ount             |   |
|   |  | ***<br>               |          |                  |   |
| Name Address Line   |  |                       |          | Country          |   |
|   |  |                       |          | Select a Country | • |
| City  |  | State/Province        |          | Postal Code      |   |
|   |  | Select a Jurisdiction | •        |                  |   |
|   | < Save   | >                     |          |                  |   |
|   | Save & Reg   | enerate               |          |                  |   |

#### Figure 6. Form Manual Entry screen

Type of Ownership Bond Number Bond Effective Date Bond Amount Should default to correct type but can be changed if necessary Bond document number Effective date of bond Amount of the bond

Surety information is the company issuing the bond.

You can advance to the next screen by clicking the number in the bubble at the top of the window, or by using the arrow keys at the bottom of the window. Click "Save" at any time to save your work in process.



### 2 - Witness Information

| Registration Details   | × |
|--|---|
| Country: USAJurisdiction: ORTaxpayer Type: BNDTerminal Code:Start Period: 7/7/2015Sequence: ORIGINAL |   |
| Form Settings Form Manual Entry History Log Supporting Documents                                     | _ |
| 1 - 2  |   |
| Principal Witness Name (1) Principal Witness Name (2)  |   |
|  |   |
|  |   |
|  |   |
|  |   |
|  |   |
|  |   |
|  |   |
| < Save >   |   |
| Save & Regenerate  | _ |
|  |   |

Figure 7. Manual Entry screen 2

Enter the names of the bond document witnesses.

Click "Save" at the bottom of the window. If you have any errors or omissions, you will receive an error notice. Correct the errors and regenerate the application by clicking the "Save" at the bottom of the window.

Select the "Supporting Documents" tab. The following screen is displayed:



 $\sim$ 

Registration Details

| 0  |                 |                   |   |                  |               |               |                |                |  |  |
|--|-----------------|-------------------|---|------------------|---------------|---------------|----------------|----------------|--|--|
| Country: USA<br>Taxpayer Type: B<br>Start Period: 4/30 | ND<br>/2019     | Jur<br>Tei<br>Sei | urisdiction: OR<br>erminal Code:<br>equence: ORIGINAL |                  |               |               |                |                |  |  |
| Form Settings  | Form Manual Ent | ry History Log    | Supporting  | Documents Sch    | heduled Tasks |               |                |                |  |  |
| Add New Reco   | Add New Record  |                   |   |                  |               |               |                |                |  |  |
| Description  | File Name       | Document Type     | Order   | Format Type      | Uploaded By   | Uploaded Date | File Up        | Move<br>Down   |  |  |
| No records to disp                                     | olay.           |                   |   |                  | ·             |               |                |                |  |  |
| Add New Reco   | rd              |                   |   |                  | Columns       | 占 Group By    | 🕇 Filter   🖉 F | Refresh        |  |  |
| H 4 1  |                 |                   | Page: 1   | of 1 Go Page Si  | ze: 10 Change | ]             | Ite            | em 0 to 0 of 0 |  |  |
| Export as Scheduled Tat  Export Export                 |                 |                   |   |                  |               |               |                |                |  |  |
|  |                 |                   | Sa  | ave & Regenerate |               |               |                |                |  |  |

Figure 8. Supporting Documents screen

Select "Add New Record" just under the "Form Settings" tab. The screen will change to allow adding documents.

| egistration Details  |  |                      |  |                |                 |                  |                |            |               |  |  |
|--|--|----------------------|--|----------------|-----------------|------------------|----------------|------------|---------------|--|--|
| Country: USA<br>Taxpayer Type: I<br>Start Period: 4/30               | BND<br>0/2019  | Ju<br>Te<br>Se       | Jurisdiction: OR<br>Terminal Code:<br>Sequence: ORIGINAL |                |                 |                  |                |            |               |  |  |
| Form Settings  | Form Manual Entry  | y History Log        | Supporting   | Documents      | Scheduled Tasks |                  |                |            |               |  |  |
| Add New Reco   | Add New Record       Columns   L Group By   Y Filter   P Refresh |                      |  |                |                 |                  |                |            |               |  |  |
| Description  | File Name  | Document Type        | Order  | Format Type    | Uploaded By     | Uploaded Date    | File           | Move<br>Up | Move<br>Down  |  |  |
| Persist Document<br>Document Type<br>Description<br>Supporting Docum | for Future Filings Ar  | oplication / Account | Registration I   | Documents      |                 | ▼<br>Select      |                |            |               |  |  |
| Save Cancel  |  |                      |  |                |                 |                  |                |            |               |  |  |
| No records to dis  | play.  |                      |  |                |                 |                  |                |            |               |  |  |
| Add New Reco   | ord  |                      |  |                | Colur           | nns   占 Group By | <b>T</b> Filte | r   🗬 R    | efresh        |  |  |
| H I  | 1 🕨 📕  |                      | Page: 1  | of 1 Go Pag    | e Size: 10 Cha  | nge              |                | Iter       | m 0 to 0 of 0 |  |  |
| Export as Sched  | uled Ta: • Expo  | ort                  |  |                |                 |                  |                |            |               |  |  |
|  |  |                      | Sa   | ave & Regenera | ite             |                  |                |            |               |  |  |

**Figure 9. Adding documents** 

Click the "Select" button and navigate to where the bond documents were scanned and saved on your computer. Select a document and the document name will appear in the field.

Add a description to indicate the type of document - such as "Fuel Tax Bond form". Click the "Save"



button under the Supporting Document title. Both the bond form and bond document must be attached.

Once all documents are attached, click the "Save & Regenerate" button at the bottom of the screen and close the window.

After closing the window, the "Account Registrations" screen returns.

| Home Tax Filing   | eFiling Maintenance Audit Account     | Admin             |                       | -              | Phote         | Welcome vandelay | industries_admin | Help   🖬 4   Sign Out |  |  |
|---|---------------------------------------|-------------------|-----------------------|----------------|---------------|------------------|------------------|-----------------------|--|--|
| Account Registrations   |                                       |                   |                       |                |               |                  |                  |                       |  |  |
| Account Registrations Sche  | Account Registrations Scheduled Tasks |                   |                       |                |               |                  |                  |                       |  |  |
| Add New Record All Regis  | tration Forms                         |                   |                       |                |               | Columns          | 🗄 Group By   🝸   | Filter   P Refresh    |  |  |
| Company Name  | Description                           | Registration Type | Registration Status   | Effective Date | Obsolete Date | Form Status      | Approved Date    | Approved By           |  |  |
| Vandelay Industries   | Application for Use Fuel User License | Initial           | Application Available | 4/30/2019      |               | Warnings         |                  |                       |  |  |
| Vandelay Industries   | Fuel Tax Bond                         | Initial           | Application Available | 4/30/2019      |               | Passed           |                  |                       |  |  |
| Vandelay Industries   | Application for Use Fuel User Emblems | Initial           | Application Available | 4/30/2019      |               |                  |                  |                       |  |  |
| Add New Record  | 🕱 Add New Record                      |                   |                       |                |               |                  |                  |                       |  |  |
| H         4         9         1         of 1         Go (Page Size: 3)         Change         Items 1 to 3 of 3 |                                       |                   |                       |                |               |                  |                  |                       |  |  |
| Export as Scheduled Task - Ex   | Export as Scheduled Task - Excel      |                   |                       |                |               |                  |                  |                       |  |  |

Figure 10. Account Registrations screen

Update the screen by clicking "Refresh" in the upper right corner of the screen. The "Form Status" column will change to "Passed" if all entries have been made correctly.

Select "Fuel Tax Bond" and then select "View/Submit Registration" from the pop-up box. The following screen appears:

| ccount Registration Details  |                       |    |  |  |  |  |
|--|-----------------------|----|--|--|--|--|
| - Registration Details   |                       |    |  |  |  |  |
| Registration Status:   | Application Available |    |  |  |  |  |
| Account Type:  | APUFU                 |    |  |  |  |  |
| Company Name: Yetta's  |                       |    |  |  |  |  |
| Registration Type: Initial   |                       |    |  |  |  |  |
| Effective Date   | 2/23/2015             |    |  |  |  |  |
| Obsolete Date  | N/A                   |    |  |  |  |  |
| Electronic Acknowledgemen<br>By checking the agreement a<br>official submittal to the State<br>signature of the submitter as | It                    | an |  |  |  |  |
|  | Submit                |    |  |  |  |  |

Figure 11. Conditions of Submittal screen

Click the check box to agree to the conditions of the submittal, and click "Submit". This will send your license application request to the Fuels Tax Group for review.



### You will receive an acknowledgement of your submission with our contact information.

| Account Registration Details  | ×                     |
|---|-----------------------|
| The administrator for the Orgeon Automated Fuel Tax System (AFTS) has received your registr<br>will review your request. A message will be sent to the company contact to indicate if the form h<br>approved or rejected. | ation and<br>las been |
| If you have any questions about your registration status, please contact the Oregon Departmen<br>Transportation.  | t of                  |
| Fuels Tax Group, MS 21<br>355 Capitol St NE<br>Salem, OR 97301-3871   |                       |
| Telephone: 503-378-8150<br>eMail: ODOTFuelsTax@odot.state.or.us   |                       |
|   |                       |
|   |                       |

Figure 12. Confirmation of submittal

When your license is approved, you will receive an email which details the effective date of your license, the license number, and a link to the reporting system.

When you close the electronic notification window, you will see the status of your license application has changed to "Requested".



# FUELS TAX DEPOSIT/SECURITY IN LIEU OF BOND

You may also choose to post a deposit or security in lieu of a bond. If you selected "Deposit/Security in Lieu of Bond" when you selected the license application, it will show in the list of available registrations.

Print the Deposit in Lieu of Bond form from the Fuels Tax website at the following address:

https://www.oregon.gov/ODOT/Forms/FT/1327a.pdf

Complete the form using the deposit information (once obtained) and sign the form as required. This form is required to be notarized.

| Home Tax Filing                       | OV<br>eFiling Maintenance Audit       | Account | Admin             |                               |                | Phote         | Welcome vandelayi |  |  |  |
|---------------------------------------|---------------------------------------|---------|-------------------|-------------------------------|----------------|---------------|-------------------|--|--|--|
| Vandelay Industries: 999999999        | 9 🔻                                   |         |                   |                               |                |               |                   |  |  |  |
|                                       |                                       |         | Ac                | count Registrations           |                |               |                   |  |  |  |
| Account Registrations Scheduled Tasks |                                       |         |                   |                               |                |               |                   |  |  |  |
| Add New Record All Regi               | stration Forms                        |         |                   |                               |                |               | Columns           |  |  |  |
| Company Name                          | Description                           |         | Registration Type | Registration Status           | Effective Date | Obsolete Date | Form Status       |  |  |  |
| Vandelay Industries                   | Application for Use Fuel User License |         | Initial           | Application Available         | 4/30/2019      |               | Warnings          |  |  |  |
| Vandelay Industries                   | Fuel Tax Bond                         |         | Initial           | Application Available         | 4/30/2019      |               | Passed            |  |  |  |
| Vandelay Industries                   | Application for Use Fuel User Emblems |         | Initial           | Application Available         | 4/30/2019      |               |                   |  |  |  |
| Vandelay Industries                   | Deposit / Security in Lieu of Bond    |         | Initial           | Application Available         | 6/10/2019      |               |                   |  |  |  |
| Add New Record                        |                                       |         |                   |                               |                |               | Columns           |  |  |  |
|                                       |                                       |         | Page:             | 1 of 1 Go Page Size: 4 Change |                |               |                   |  |  |  |
| Export as Scheduled Task - E          | xcel T Export                         |         |                   |                               |                |               |                   |  |  |  |
|                                       |                                       |         |                   |                               |                |               |                   |  |  |  |

Figure 13. Account Registrations screen

If it does not appear, Click "Add New Record" located directly under the "Account Registrations" tab. From the "Create Account Registration" pop-up window, select "BNDSD – Deposit/Security in Lieu of Bond" from the "Account Type" drop-down box.



| Account Registrations         Exports         III Columns 1 * Group Byl Y Filter 12 Re         Made New Record       Ald Registration Forms       III Columns 1 * Group Byl Y Filter 12 Re         Mage Stration Forms       III Columns 1 * Group Byl Y Filter 12 Re         Mage Stration Forms       III Columns 1 * Group Byl Y Filter 12 Re         Annication for Motor Vehicle Fuel Dealer License       Annication for Motor Vehicle Fuel Dealer License       Annication for Motor Vehicle Fuel Dealer License       III Columns 1 * Group Byl Y Filter 12 Re         Mage Stration Type:       APCAR - Application for Carrier License       III Columns 1 * Group Byl Y Filter 12 Re         Add New Record       APCAR - Application for Carrier License       III Columns 1 * Group Byl Y Filter 12 Re         Add New Record       APCAR - Application for Carrier License       III Columns 1 * Group Byl Y Filter 12 Re         Account Type:       APCAR - Application for Carrier License       III Columns 1 * Group Byl Y Filter 12 Re         Application for Carrier License       III Columns 1 * Group Byl Y Filter 12 Re         Application for Carrier License       APCAR - Application for Carrier Licens   |                     | •  |   |   |             |                                  |                       |               |              |                     |                                       |
|--|---------------------|--|---|---|-------------|----------------------------------|-----------------------|---------------|--------------|---------------------|---------------------------------------|
| Exports       III Columns 1 :: Group Byl Y Filter 12 Re         Add New Record       All Registration Forms       III Columns 1 :: Group Byl Y Filter 12 Re         Hommanny Name       Description       Annication for Matrix Vehicle Fuel Date Likense       Initial       Annication Available       673/2015       Image: Status       Approved Date       Appr   |                     |  |   | Accou   | nt Registi  | ations                           |                       |               |              |                     |                                       |
| Add New Record       All Registration Forms       Ill Columns 1 :: Group By I T Filter 12 Registration Forms         cmpany Name       Description       Acolication for Motor Vehicle Fuel Deale License       Initial       Annication Available       6/30/2015       Image: Status       Approved Date       Approved Date <td< th=""><th>count Registrations</th><th>Exports</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></td<>  | count Registrations | Exports  |   |   |             |                                  |                       |               |              |                     |                                       |
| Add New Record     AppCond Date     Registration Type     Registration Status     Effective Date     Obsolete Date     Form Status     Approved Date     Approved By       EB Demo     Anolication for Motor Vehicle Fuel Dealer Livense     Initial     Anolication Available     6/30/2015     Imite     Imite     Approved By       Corteate Account Registration     V     Amountain Available     6/30/2015     Imite     Imite     Anolication Available     6/30/2015     Imite     Im  | Add New Record All  | Registration Forms   | ¥   |   |             |                                  |                       |               | <b>III</b> C | olumns   🎦 Group By | /   🝸 Filter   2 Refre                |
| EB Demo     Anolication for. Watch Value Lie Lue Loade Li Leose     Initial     Anolication Available     97302015     Image: Constant Consterior Constant Constant Constant Co | mpany Name          | Description  |   | Registration Type   | Regis       | tration Status                   | Effective Date        | Obsolete Date | Form Status  | Approved Date       | Approved By                           |
| EB Demo       Company Name:       WEB Demo       Image: Company Name:       WEB Demo       Image: Company Name:       Image:  | EB Demo<br>EB Demo  | Application for Motor Vehicle F<br>Create Account Registration | uel Dealer License  | Initial   | Annlin<br>× | ation Available<br>ion Available | 6/30/2015<br>7/7/2015 |               | Warnings     |                     |                                       |
|  | Add New Record      | Company Name:<br>Account Type:<br>Registration Type:           | WEB Demo<br>APCAR - Application for Carrier<br>APCAR - Application for Carrier<br>APRO - Application for Carrier<br>APROC - Application for Motor V<br>APROC - Application for Registe<br>APROC - Application for Registe<br>APTOR - Application for Use Fu<br>APTOR - Application for Use Fu<br>APEMB - Application for Use Fu<br>APLFU - Application for Use Fu | License<br>Uicense<br>VBiodiesel Producer License<br>ehcile Fuel Dealer License<br>red Buik Distributor<br>isage Charge<br>al Operator<br>al Seller Uicense<br>el User Emblems<br>el User License | V<br>X      | ion Available                    | 7/7/2015              |               |              | otumns I 🔚 Group By | r   ▼ Filter   2 Refr<br>Items 1 to 3 |

Then click "Insert" at the bottom of the window.

When you select the line for the Deposit application, you will have a pop-up menu with the choice to: Generate Registration Form View Registration Form (not available until information is entered) View/Submit Registration View Certificate (not available until information is entered)

Select "Generate Registration Form" to complete the information for the application.



# **OREGON FUELS TAX SYSTEM – USER GUIDE**

|                     |   |  | Acco              | unt Registrations          |                |               |             |                      |                      |
|---------------------|---|--|-------------------|----------------------------|----------------|---------------|-------------|----------------------|----------------------|
| count Registrations | Exports                                       |  |                   |                            |                |               |             |                      |                      |
| Add New Record A    | All Registration Forms                        |  |                   |                            |                |               | III c       | olumns   🔓 Group Bj  | 🝸 Filter   2 Refre   |
| mpany Name          | Description                                   |  | Registration Type | Registration Status        | Effective Date | Obsolete Date | Form Status | Approved Date        | Approved By          |
| EB Demo             | Application for Motor Vehicle Fuel Dealer Lic | ense   | Initial           | Application Available      | 6/30/2015      |               |             |                      |                      |
| EB Demo             | Fuel Tax Bond                                 |  | Initial           | Application Available      | 7/7/2015       |               | Warnings    |                      |                      |
| Add New Record      | H Excel                                       | View Registration Form<br>View/Submit Registration<br>View Certificate | Page: 1           | of 1 Go Page Size: 3 Chang | 20             |               |             | laumns ( ); Group B) | I T Fitter   2 Refit |

Figure 15. Generate Registration Form

The screen will change to the Registration Details screen (shown below).

| Registration Details  |  | $\times$ |
|---|--|----------|
| Country: USA<br>Taxpayer Type: BNDSD<br>Start Period: 6/10/2019 | Jurisdiction: OR<br>Terminal Code:<br>Sequence: ORIGINAL |          |
| Form Settings Form Manua  | I Entry History Log Supporting Documents Scheduled Tasks | _        |
| Country   | United States  | ]        |
| Jurisdiction  | Oregon OR  |          |
| Taxpayer Type   | BNDSD - Deposit / Security in Lieu of Bond               |          |
| Tracking Number   |  |          |
| Begin Period Date   | 6/10/2019  |          |
| End Period Date   | 6/10/2019  |          |
| Sequence  | 0  |          |
|   | ORIGINAL   |          |
| Filed Date  | Open   |          |
| ┌ Tax Session Options   |  |          |
| Prepared by   | alavindustries admi V Taxpaver Group                     |          |
| Submission Type   | Due Date     7/11/2019                                   |          |
|   | Save Options   |          |
|   |  |          |
|   | Save & Regenerate  |          |
|   |  |          |

Figure 16. Registration Details screen

Select the "Form Manual Entry" section, and complete the deposit information.



### 1 – Deposit or Security Information

| Registration Details   |  |
|--|--|
| Country: USA<br>Taxpayer Type: BNDSD<br>Start Period: 7/7/2015 | Jurisdiction: OR<br>Terminal Code:<br>Sequence: ORIGINAL |
| Form Settings Form Manual Entry History Lo                     | g Supporting Documents                                   |
|  |  |
| Bond Amount  |  |
| Cash Deposit Amount  |  |
| \$0.00   |  |
| Description of Security  |  |
| Document - Account Number                                      | · · · · · · · · · · · · · · · · · · ·                    |
| Maturity Date  | Purchase Date  |
|  |  |
| Interest Rate  |  |
| 0%   |  |
|  |  |
|  |  |
|  |  |
|  | Save   |
|  | Save & Regenerate  |
|  |  |
|  |  |

Figure 17. Form Manual Entry screen 1

| Bond Amount<br>Cash Deposit Amount   | The amount of security required<br>Amount of check or security (These two figures should be the same,<br>but the deposit amount may be higher if the security is worth more<br>than the required bond. |
|--|--|
| Description of Security  | Type of instrument provided. Select the type of security from the drop<br>down menu (certificate of deposit, certified check, letter of<br>assignment)   |
| Document – Account Number<br>Maturity Date<br>Purchase Date<br>Interest Rate | Security Instrument number or check number<br>Security maturity date (leave blank when submitting a check)<br>Security purchase date (leave blank when submitting a check)<br>Security interest rate   |



### 2 – Depositor Information

| egistration Details                        |                              |               | > |
|--|------------------------------|---------------|---|
| Country: USA                               | Jurisdiction: OR             |               |   |
| Taxpayer Type: BNDSD                       | Terminal Code:               |               |   |
| Start Period: 7/7/2015                     | Sequence: ORIGINAL           |               |   |
| Form Settings Form Manual Entry History Lo | og Supporting Documents      |               |   |
|  | 1-2-3                        |               |   |
| Depositor / Assignor Information           |                              |               |   |
| Company Name                               | Legal Representative         |               | _ |
|  |                              |               |   |
| Title                                      | Date of Deposit / Assignment |               | - |
| L  |                              |               |   |
| Address                                    |                              | Country       |   |
|  |                              | United States | • |
| City                                       | State                        | Postal Code   |   |
|  | Select a Jurisdiction        |               |   |
|  |                              |               |   |
|  |                              |               |   |
|  |                              |               |   |
|  |                              |               |   |
|  |                              |               |   |
|  | Save >                       |               |   |
|  | Save & Regenerate            |               |   |
|  |                              |               |   |

Figure 18. Form Manual Entry screen 2

Company Name Legal representative Title Date of deposit/assignment Company applying for the license Primary contact for licensee Title of representative Date submitted

Include the licensee address information.



#### **3** – Security Holder Information

| Registration Details                                       |                         |               | > |  |  |  |  |  |  |
|--|-------------------------|---------------|---|--|--|--|--|--|--|
| Country USA  | Jurisdiction: OR        |               |   |  |  |  |  |  |  |
| Taxpaver Type: BNDSD                                       | Terminal Code:          |               |   |  |  |  |  |  |  |
| Start Period: 7/7/2015                                     | Sequence: ORIGINAL      |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
| Form Settings Form Manual Entry History Log Supporting Doc | cuments                 |               |   |  |  |  |  |  |  |
| <b>1</b> -   | 2 - 3                   |               |   |  |  |  |  |  |  |
| Security Holder Information                                |                         |               |   |  |  |  |  |  |  |
| Name   | Representative          |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
| Title Security Date  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
| Address  |                         | Country       |   |  |  |  |  |  |  |
|  |                         | United States | • |  |  |  |  |  |  |
| Ctu.   | State                   | Bastel Cada   |   |  |  |  |  |  |  |
| City   | State                   | Postal Code   |   |  |  |  |  |  |  |
|  | Select a Jurisdiction 🔻 |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |
| S  | ave >                   |               |   |  |  |  |  |  |  |
| Save & f   | Regenerate              |               |   |  |  |  |  |  |  |
|  |                         |               |   |  |  |  |  |  |  |

Figure 19. Form Manual Entry page 3

Name Name of bank or other institution (For cash deposits, enter the Department of Treasury, Salem OR) Representative Security holder representative Title of representative Security Date Date of security

Include the Security Holder address information.

Click "Save" at the bottom of the window. If you have any errors or omissions, you will receive an error notice. Correct the errors and regenerate the application by clicking the "Save" at the bottom of the window.

Select the "Supporting Documents" tab. The following screen is displayed:

Title



Registration Details

| Country: USA<br>Taxpayer Type: B<br>Start Period: 4/30  | ND<br>/2019                    | Jur<br>Tei<br>Sei | isdiction: OF<br>minal Code:<br>quence: ORI | R<br>:<br>IGINAL |             |               |                 |            |              |
|---|--------------------------------|-------------------|---|------------------|-------------|---------------|-----------------|------------|--------------|
| Form Settings         Form Manual Entry         History Log         Supporting Documents         Scheduled Tasks                  |                                |                   |   |                  |             |               |                 |            |              |
| Add New Record III Columns   🔓 Group By   🍸 Filter   🗬 Refresh  |                                |                   |   |                  |             |               |                 |            |              |
| Description   | File Name                      | Document Type     | Order                                       | Format Type      | Uploaded By | Uploaded Date | File            | Move<br>Up | Move<br>Down |
| No records to disp  | olay.                          |                   |   |                  | ,           | 1             |                 |            |              |
| Add New Reco  | rd                             |                   |   |                  | Columns     | 占 Group By    | <b>T</b> Filter | 🔁 R        | efresh       |
| H         I         Page:         1         of 1         Go         Page Size:         10         Change         Item 0 to 0 of 0 |                                |                   |   |                  |             |               |                 |            |              |
| Export as Schedu  | Export as Scheduled Ta: Export |                   |   |                  |             |               |                 |            |              |
|   |                                |                   | Sa  | ave & Regenerate |             |               |                 |            |              |

Figure 20. Supporting Documents screen

Select "Add New Record" just under the "Form Settings" tab.

The screen will change to allow adding documents.

| gistration Details                                     |                      |                         |   |                |                   |               |                |            |               |
|--|----------------------|-------------------------|---|----------------|-------------------|---------------|----------------|------------|---------------|
| Country: USA<br>Taxpayer Type: F<br>Start Period: 4/30 | 3ND<br>0/2019        | Jur<br>Tei<br>Se        | risdiction: OF<br>rminal Code:<br>quence: ORI | GINAL          |                   |               |                |            |               |
| Form Settings  | Form Manual En       | try History Log         | Supporting                                    | Documents      | Scheduled Tasks   |               |                |            |               |
| Add New Reco   | ord                  |                         |   |                | Columns           | 占 Group By    | <b>T</b> Filte | r   🗬 R    | efresh        |
| Description  | File Name            | Document Type           | Order   | Format Type    | Uploaded By       | Uploaded Date | File           | Move<br>Up | Move<br>Down  |
| Persist Document                                       | for Future Filings 🛽 |                         |   |                |                   |               |                |            |               |
| Document Type  |                      | Application / Account F | Registration I                                | Documents      |                   | •             |                |            |               |
| Description  |                      |                         |   |                |                   |               |                |            |               |
| Supporting Docum                                       | ent                  |                         |   |                | Se                | lect          |                |            |               |
| Save   |                      |                         |   |                |                   |               |                |            |               |
| No records to dis                                      | play.                |                         |   |                |                   |               |                |            |               |
| Add New Reco   | ord                  |                         |   |                | Columns           | 占 Group By    | <b>T</b> Filte | er   🗗 R   | efresh        |
|  | 1 🕨 📕                |                         | Page: 1                                       | of 1 Go Page   | e Size: 10 Change |               |                | Iter       | m 0 to 0 of 0 |
| Export as Sched  | uled Ta: • Ex        | port                    |   |                |                   |               |                |            |               |
|  |                      |                         | Sa  | ave & Regenera | te                |               |                |            |               |

Figure 21. Adding documents screen

Click the "Select" button and navigate to where the bond documents were scanned and saved on your computer. Select a document and the document name will appear in the field.



Add a description to indicate the type of document – such as "Deposit form". Click the "Save" button under the Supporting Document title.

Once all documents are attached, click the "Save & Regenerate" button at the bottom of the screen and close the window.

After closing the window, the "Account Registrations" screen returns.

| Home Tax Filing                       | Home Tax Filing eFiling Maintenance Audit Account Admin |                   |                        |                |               |                          |  |  |  |  |  |
|---------------------------------------|---|-------------------|------------------------|----------------|---------------|--------------------------|--|--|--|--|--|
| Vandelay Industries: 9999999999       | ••••••••••••••••••••••••••••••••••••••                  |                   |                        |                | Photo         | Paul Szudzik zeszt jeszt |  |  |  |  |  |
|                                       | Account Registrations                                   |                   |                        |                |               |                          |  |  |  |  |  |
| Account Registrations Scheduled Tasks |   |                   |                        |                |               |                          |  |  |  |  |  |
| Add New Record All Registration Forms |   |                   |                        |                |               |                          |  |  |  |  |  |
| Company Name                          | Description   | Registration Type | Registration Status    | Effective Date | Obsolete Date | Form Status              |  |  |  |  |  |
| Vandelay Industries                   | Application for Use Fuel User License                   | Initial           | Application Available  | 4/30/2019      |               | Warnings                 |  |  |  |  |  |
| Vandelay Industries                   | Fuel Tax Bond   | Initial           | Application Available  | 4/30/2019      |               | Passed                   |  |  |  |  |  |
| Vandelay Industries                   | Application for Use Fuel User Emblems                   | Initial           | Application Available  | 4/30/2019      |               |                          |  |  |  |  |  |
| Vandelay Industries                   | Deposit / Security in Lieu of Bond                      | Initial           | Application Available  | 6/10/2019      |               | Warnings                 |  |  |  |  |  |
| Add New Record                        |   |                   |                        |                |               | Columns                  |  |  |  |  |  |
|                                       |   | Page: 1 of 1      | Go Page Size: 4 Change |                |               |                          |  |  |  |  |  |
| Export as Scheduled Task - Excel      | Export  |                   |                        |                |               |                          |  |  |  |  |  |

Figure 22. Account Registrations screen

Update the screen by clicking "Refresh" in the upper right corner of the screen. The "Form Status" column will change to "Passed" if all entries have been made correctly.

Select "Deposit/Security in Lieu of Bond" and then select "View/Submit Registration" from the popup box.

| Home Tax Filing                 | DV<br>eFiling Maintenance Account Admin           |                            |                       |                |               | Photo: Paul Szudzi | Welcome webden    | io_sdmin   Help   Sign Out   |  |
|---------------------------------|---|----------------------------|-----------------------|----------------|---------------|--------------------|-------------------|------------------------------|--|
| WEB Demo; 476528913             | ▼   |                            |                       |                |               |                    |                   |                              |  |
|                                 |   | Account Reg                | istrations            |                |               |                    |                   |                              |  |
| Account Registrations Export    | Accourt Registrations Exports                     |                            |                       |                |               |                    |                   |                              |  |
| Add New Record All Regis        | tration Forms                                     |                            |                       |                |               | I                  | 🛿 Columns   🏣 Gro | up By   🝸 Filter   🛢 Refresh |  |
| Company Name                    | Description                                       | Registration Type          | Registration Status   | Effective Date | Obsolete Date | Form Status        | Approved Date     | Approved By                  |  |
| WEB Demo                        | Application for Motor Vehicle Fuel Dealer License | Initial                    | Approved              | 6/30/2015      |               | Warnings           | 7/8/2015          | bock_ate                     |  |
| WEB Demo                        | Fuel Tax Bond                                     | Initial                    | Application Available | 7/7/2015       |               | Warnings           |                   |                              |  |
| WEB Demo                        | Deposit / Security in Lieu of Bond                |                            | Application Available | 7/7/2015       |               | Warnings           |                   |                              |  |
| Add New Record                  |   | Generate Registration Form |                       |                |               | 1                  | 🛚 Columns   🏣 Gro | up By   🍸 Filter   🕯 Refresh |  |
| H 4 1 F H                       |   | View/Submit Registration   | Page Size: 3 Change   |                |               |                    |                   | Items 1 to 3 of 3            |  |
| Export as scheduled task - Exor | Export  | View Certificate           |                       |                |               |                    |                   |                              |  |
|                                 |   |                            |                       |                |               |                    |                   |                              |  |

Figure 23. View Registration Form screen

The following screen appears:



| Registration Details  |                       |   |
|---|-----------------------|---|
| Registration Status:  | Application Available |   |
| Account Type:   | APUFU                 |   |
| Company Name:   | Yetta's               |   |
| Registration Type:  | Initial               |   |
| Effective Date  | 2/23/2015             |   |
| Obsolete Date   | N/A                   |   |
| Electronic Acknowledgeme<br>by checking the agreement<br>fficial submittal to the State | nt                    | n |
| ignature of the submitter as  |                       |   |

Figure 24. Conditions of submittal screen

Click the check box to agree to the conditions of the submittal, and click the "Submit" button. This will send your license application request to the Fuels Tax Group for review.

You will receive an acknowledgement of your submission with our contact information.

| ccount Registration Details   |                        |
|---|------------------------|
| The administrator for the Orgeon Automated Fuel Tax System (AFTS) has received your registr<br>will review your request. A message will be sent to the company contact to indicate if the form h<br>approved or rejected. | ration and<br>has been |
| f you have any questions about your registration status, please contact the Oregon Departmen<br>Fransportation.   | t of                   |
| Fuels Tax Group, MS 21  |                        |
| 355 Capitol St NE   |                        |
| Salem, OR 97301-3871  |                        |
| Felephone: 503-378-8150   |                        |
| eMail: ODOTFuelsTax@odot.state.or.us  |                        |
|   |                        |
|   |                        |
|   |                        |
|   |                        |
|   |                        |

Figure 25. Confirmation of submittal

When your license is approved, you will receive an email which details the effective date of your license, the license number, and a link to the reporting system.

When you close the electronic notification window, you will see the status of your license application has changed to "Requested".