



Department of
Taxation

Filing an Ohio Application for Refund of
Other Tobacco Products Tax OTP12
Using the Ohio Business
Gateway

October 2018

Version: 1.1

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Chapter 1 - Introduction

General

Beginning February 5, 2018, the Application for Refund of Other Tobacco Products Tax can be filed using the Ohio Business Gateway (OBG). Attached are instructions of how to navigate the OBG.

Ohio Department of Taxation (ODT) Contact

If you have any questions or concerns about this document, please contact the Excise and Energy Tax Division:

Phone: 855.466.3921 (option 3)

E-mail: excisecigarette@tax.state.oh.us

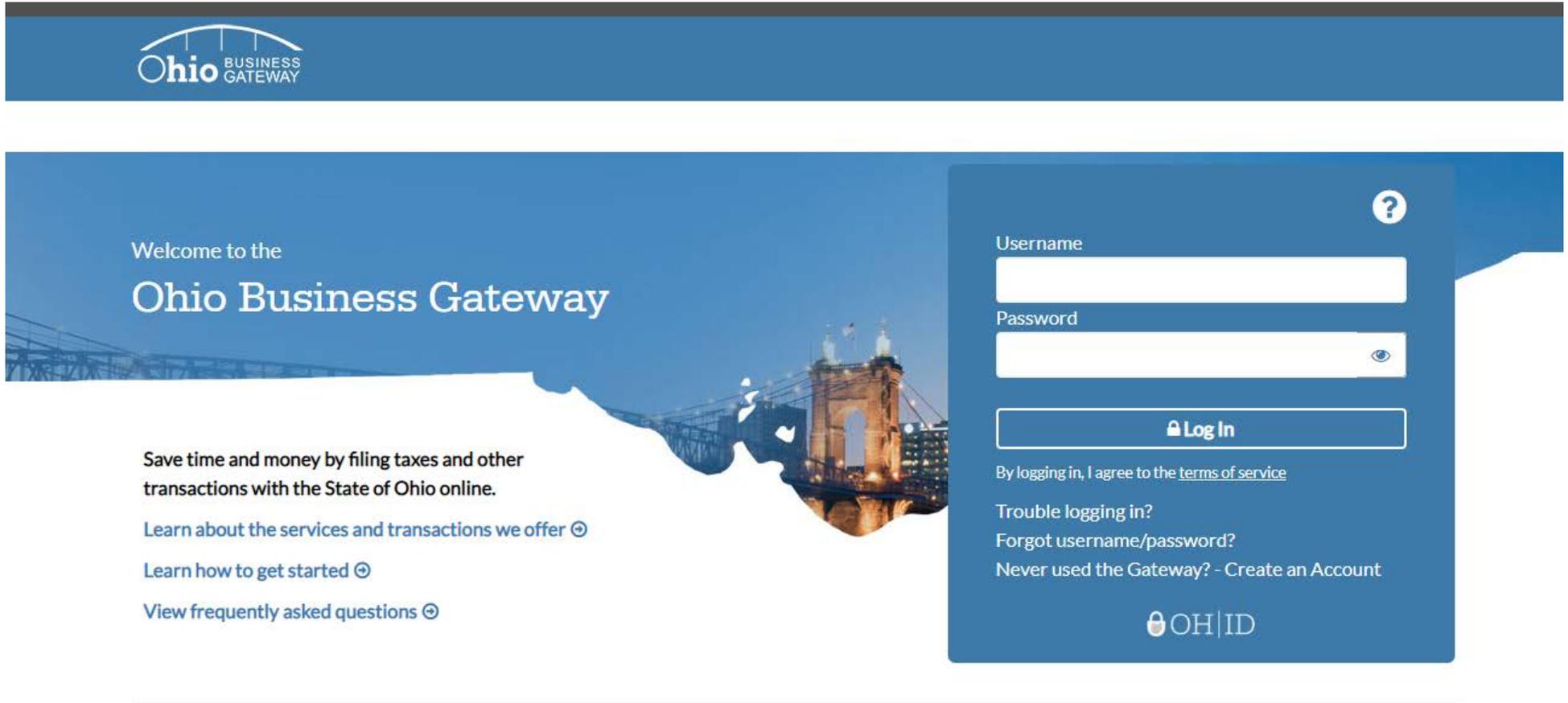
You may write to us at the following address:

Ohio Department of Taxation
Excise and Energy Division
P.O. Box 530
Columbus, OH 43216-0530

NOTE: Information Release, XT 207-03 Other Tobacco Products Tax – Premium Cigars – Issued July, 2017, http://www.tax.ohio.gov/excise/information_releases/index_excise/XT2017-03.aspx, requires that premium cigars be reported separately from other tobacco products and little cigars. Purchases or sales of any premium cigars during the filing period require that you continue to report via paper returns. Updated forms are available at <http://www.tax.ohio.gov/forms.aspx>.

Chapter 2 – Logging In To Ohio Business Gateway

Navigate to the Ohio Business Gateway web page at [Ohio Business Gateway](http://gateway.ohio.gov/) (http://gateway.ohio.gov/).



Ohio BUSINESS GATEWAY

Welcome to the
Ohio Business Gateway

Save time and money by filing taxes and other transactions with the State of Ohio online.

[Learn about the services and transactions we offer](#)

[Learn how to get started](#)

[View frequently asked questions](#)

Username

Password

Log In

By logging in, I agree to the [terms of service](#)

[Trouble logging in?](#)
[Forgot username/password?](#)
[Never used the Gateway? - Create an Account](#)

OH|ID

- Sign in to OBG using your existing Username and Password
- If your company has never filed using OBG, click the Create a Gateway Account. Additional instructions for registering a new account on OBG can be found on our website at tax.ohio.gov

My Business | Dashboard



[▶ New Transaction](#) [▶ Pending](#) [▶ In Progress](#) [✓ Ready for Checkout](#) [▶ Recent](#) [▶ History](#) [▶ Payments](#) [▶ Reminders](#) [▶ Announcements](#) 1

Quick Links

Has Something Changed?

Request Business Access

Favorites

Show Favorites

Service Area

Other Tobacco Products Tax

Cigarette Tax

Other Tobacco Products Tax

Other Tobacco Products Tax ▶

Cigarette Tax

Cigarette Tax ▶

Start a Transaction

- From the Home Page, use the “Start a Transaction” tab and select “Ohio Taxation – Other Tobacco Products Tax”.



[Home](#) [History](#)

Start a Transaction

In Progress (0)

Ready for Checkout (0)

- Ohio Taxation - Municipal Net Profit Tax - **New**
- Municipal Taxation – Net Profit Tax
- Ohio Taxation - Cigarette Tax
- Ohio Taxation - Motor Fuel Tax

- Ohio Taxation - Other Tobacco Products Tax
- Ohio Taxation - Master Settlement Agreement
- Ohio Taxation - Replacement Tire Fee



- Next, click the “Other Tobacco Products Tax – Refund Request (OTP12)” option.



Home History

Start a Transaction	In Progress (0)	Ready for Checkout (0)
<ul style="list-style-type: none">⊕ Ohio Taxation - Municipal Net Profit Tax - New⊕ Municipal Taxation – Net Profit Tax⊕ Ohio Taxation - Cigarette Tax⊕ Ohio Taxation - Motor Fuel Tax		<ul style="list-style-type: none">⊕ Ohio Taxation - Other Tobacco Products Tax<ul style="list-style-type: none">➔ Other Tobacco Products Tax - In-State Distributor (OTP2)➔ Other Tobacco Products Tax - Out-of-State Distributor (OTP6)➔ Other Tobacco Products Tax - Manufacturer (OTP98)➔ Other Tobacco Products Tax - Payment➔ Other Tobacco Products - Request for Consent to Transport(OTP99)➔ Other Tobacco Product Tax - Refund Request (OTP12)⊕ Ohio Taxation - Master Settlement Agreement⊕ Ohio Taxation - Replacement Tire Fee



Ohio Other Tobacco Products Tax – Refund Request (OTP12)

This is the Ohio Other Tobacco Products Tax - Refund Request (OTP12) page where you will begin all your filing transactions and can view your filing history. On the left-hand side, you will see there are several filing options available:

- Submit a Refund Claim
- eFiling History

Ohio.gov WELCOME TO THE STATE OF OHIO

Home Wednesday, July 5, 2017 Help

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

Submit a Refund Claim

eFiling History

Incomplete Transactions

If you left the site before you filed your claim, your saved draft will be listed below. Click Resume to finish it, and Delete if you don't want to keep it. The draft claims are ordered by the most recent at the top.

No Incomplete Transactions

Tips

- Do not use the back button in your browser to navigate.
- Submit a Refund Claim**
 - Per R.C. 5743.53, an application for refund must be received or postmarked within three years from the date of the overpayment of the tax.
- What you will need:**
 - 8 digit account number
 - Filing period
 - Product Type
 - Reason for Refund
 - Amount of refund requested
- eFiling History**
 - View and print online filings through eFiling History.
- Session Time Out**
 - Sessions have a time out limit of 20 minutes. If the session time exceeds this limit, you will need to log back into OBG.
- Browser and Resolution Compatibility**
 - For optimal browser/resolution compatibility, please see "Help".

Contact Us

- As well as these options, note the “Tips” box to the right, and the “Help” link in the upper-right corner.

- The “Tips” box will be updated for each page that you navigate to while processing your transaction and will provide useful information that may assist your filing.
- The “Help” link will take you to more specific information regarding the tax and the filing of your transactions as seen below.

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

5743.59 Refunds - credits.

(A) The treasurer of state shall refund to a taxpayer any of the following:

(1) Any tobacco products tax paid erroneously;

(2) Any tobacco products tax paid on an illegal or erroneous assessment;

(3) Any tax paid on tobacco products that have been sold or shipped to retail or wholesale dealers outside this state, returned to the manufacturer, or destroyed by the taxpayer with the prior approval of the tax commissioner.

Any application for refund shall be filed with the tax commissioner on a form prescribed by the commissioner for that purpose. The commissioner may not pay any refund on an application for refund filed with the commissioner more than three years from the date of payment of the tax.

Information Needed to Complete Your Request

- 8 digit account number
- Filing period
- Product Type
- Product for Refund
- Amount of refund requested

Browser Compatibility

This user interface was designed and tested using the browsers and version listed below. For the optimal browsing experience, please use a browser and version from this list. Full compatibility cannot be guaranteed using browsers and/or versions outside of those listed.

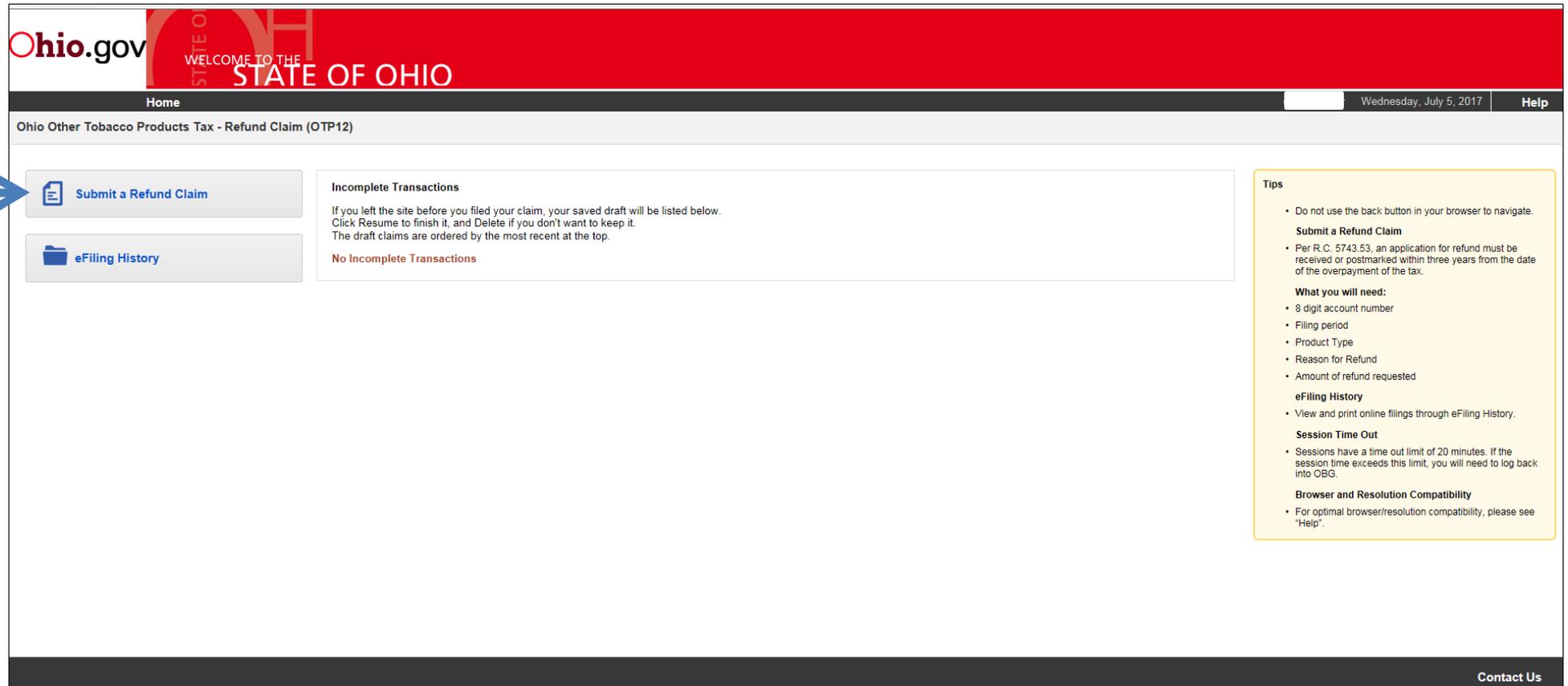
- 1) Internet Explorer 11 - Update version 11.0.35
- 2) Google Chrome - Version 55.0.2883.87

Help

The Ohio Department of Taxation is ready to help you and offers several resources where you can get answers to your tax questions. Our website, tax.ohio.gov, contains information on all taxes administered by the Department or you may call 1-855-466-3921.

Chapter 3 – Submit a Refund Claim

To file a new request, click the “Submit a Refund Claim” button.



The screenshot displays the Ohio.gov website interface for filing a refund claim. At the top, the Ohio.gov logo and 'WELCOME TO THE STATE OF OHIO' banner are visible. Below the banner, a navigation bar includes 'Home', a search box, the date 'Wednesday, July 5, 2017', and a 'Help' link. The main content area is titled 'Ohio Other Tobacco Products Tax - Refund Claim (OTP12)'. On the left, there are two buttons: 'Submit a Refund Claim' (highlighted with a blue arrow) and 'eFiling History'. The central area shows 'Incomplete Transactions' with instructions on how to resume or delete a draft claim, and a message stating 'No Incomplete Transactions'. On the right, a 'Tips' section provides guidance on navigation, filing requirements, and session management. The footer contains a 'Contact Us' link.

Ohio.gov WELCOME TO THE STATE OF OHIO

Home Wednesday, July 5, 2017 Help

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

 [Submit a Refund Claim](#)

 [eFiling History](#)

Incomplete Transactions

If you left the site before you filed your claim, your saved draft will be listed below. Click Resume to finish it, and Delete if you don't want to keep it. The draft claims are ordered by the most recent at the top.

No Incomplete Transactions

Tips

- Do not use the back button in your browser to navigate.
- **Submit a Refund Claim**
 - Per R.C. 5743.53, an application for refund must be received or postmarked within three years from the date of the overpayment of the tax.
- **What you will need:**
 - 8 digit account number
 - Filing period
 - Product Type
 - Reason for Refund
 - Amount of refund requested
- **eFiling History**
 - View and print online filings through eFiling History.
- **Session Time Out**
 - Sessions have a time out limit of 20 minutes. If the session time exceeds this limit, you will need to log back into OBG.
- **Browser and Resolution Compatibility**
 - For optimal browser/resolution compatibility, please see "Help".

Contact Us

Select Claim Period

Please select a reason for the refund claim

- Account Number
- Claim Year (yyyy)
- Claim Month (select month)
- Click Next

The screenshot shows the Ohio.gov website interface for the 'Ohio Other Tobacco Products Tax - Refund Claim (OTP12)'. The page features a red header with the Ohio.gov logo and 'WELCOME TO THE STATE OF OHIO'. Below the header is a navigation bar with 'Home', 'Wednesday, July 5, 2017', and 'Help'. The main content area is titled 'Ohio Other Tobacco Products Tax - Refund Claim (OTP12)'. On the left, a progress indicator shows four steps: 1. Select Claim Period (highlighted with a blue arrow), 2. Enter Information, 3. Review and Submit, and 4. Confirmation. The main form area contains the following fields and controls:

- * All fields are required**
- Account Number:
- Claim Year: yyyy
- Claim Month:
- Buttons:

On the right side, there is a 'Tips' box with the following content:

Tips

- Account Number**
 - Account numbers are 8 digits in length.
- Claim Date**
 - The refund claim may only be filed for a previously filed return period.
- Navigation:**
 - Do not use the back button in your browser to navigate.
 - The Cancel button will return you to the previous page and data entered will not be saved.
 - Use the Next button to proceed to the next page.

At the bottom right of the page, there is a 'Contact Us' link.

- Use the Cancel button to return you to the previous page and no data entered will be saved
- Use the Next button to proceed to the next page

Enter Information

- Refund Amount Requested
- Product Type (select all that apply)
- Reason for Refund (select all that apply)
- State full and complete reason for above claim
- Click Review

Ohio.gov WELCOME TO THE STATE OF OHIO

Home Tuesday, January 30, 2018 Help

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

1 Select Claim Period
2 **Enter Information**
3 Review and Submit
4 Confirmation

* All fields are required

Account Number [redacted]
Claim Period 12/01/2017 to 12/31/2017

Refund Amount Requested \$ [redacted] 0.00

Product Type (select all that apply):

- Other Tobacco Products
- Little Cigars
- Premium Cigars

Reason for Refund (select all that apply):

- Illegal or erroneous payment
- Product sold outside of Ohio
- Product returned to manufacturer
- Product destroyed with prior approval

State full and complete reason for above claim:

[Text Area]

400 characters remaining

Back Review Save & Exit

Tips

- Refund Amount Requested**
 - Enter the total amount of refund requested for the claim period selected.
- Product Type**
 - Select the Product Type(s) that the refund claim relates to.
- Reason for Refund**
 - Select one or all of the Reasons for Refund that apply to the claim.
 - State the full and complete reason for the refund claim.
 - You will be able to upload supporting documentation for the claim on the next page.
- Navigation:**
 - The Back button will return you to the previous page and the data entered will not be saved.
 - The Review button will allow you to proceed to the next page.
 - The Save & Exit button will save the data entered and return you to the OBG home page.

Contact Us

- Use the Back button to return to the previous page and the data entered will not be saved
- Use the Review button to proceed to the next page
- Use the Save & Exit button to save the data entered and return you to the OBG home page

Document Submission

Please complete one of the following options (required):

- Option 1: No Documentation Required
 - I have no documentation to add
- Option 2: Upload Documentation
 - To upload supporting documentation, click Browse to search for the file(s)
 - Maximum number of files permitted to be uploaded is 6 *.pdf files and must be uploaded individually
 - Maximum, combined, uploaded size cannot exceed 5,120KB (5MB)
 - Click Submit when all files have been uploaded
- Option 3: Send Documentation by Mail
 - Documentation will be mailed
 - Please print and provide a copy of your Transaction Confirmation page with any documentation
 - Please send all documentation to Excise and Energy Tax Division, P.O. Box 530, Columbus, OH 43216-0530
- Confirm the accuracy of the refund claim
- Click Submit

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

- 1 Select Claim Period
- 2 Enter Information
- 3 **Review and Submit**
- 4 Confirmation

Account Number

Claim Period 01/01/2017 to 01/31/2017

Refund Amount Requested: \$1,000.00

Product Type(s) selected: Other Tobacco Products; Little Cigars

Reason(s) for Refund selected: Illegal or erroneous payment; Product sold outside of Ohio; Product returned to manufacturer; Product destroyed with prior approval

State Reason for Claim:

State full and complete reason for aboveclaim

Please complete one of the following options (required):

Option 1: No Documentation Required

 I have no documentation to add.

Option 2: Upload Documentation

To upload supporting documentation, click Browse to search for the file(s). Maximum upload is 6 *.pdf files with a maximum of 5,120 KB (5 MB) each. Click Submit when all files are loaded.

Browse

File Name	Size	Action
No Files Selected		

If you click "Back" or close the window before clicking "Submit," the uploaded files will not be saved.

Option 3: Send Documentation by Mail

Check the box below if you wish to mail your documentation.

 Documentation will be mailed.

Please print and provide a copy of your Transaction Confirmation page with any documentation.

Please send all documentation to:

Excise and Energy Tax Division, P.O. Box 530, Columbus, OH 43216-0530

 I declare under penalties of perjury that this refund claim (including supporting documents and statements) has been examined by me and to the best of my knowledge and belief is true, correct, and complete.

Back

Submit

Exit

Tips

Supporting Documentation

- Supporting documentation may be submitted electronically or by mail.
- Supporting documentation is not required, but may be requested prior to the refund claim being approved.
- Only *.pdf file formats will be accepted for upload.
- Each file uploaded cannot exceed 5120KB (5MB) in size. Files larger than this must be split into two to reduce file size.

Navigation:

- The Back button will return you to the previous page and the data entered will not be saved.
- The Submit button will process the refund claim.
- The Exit button will not save any files uploaded and will return you to the OBG home page.

- Use the Back button to return to the previous page and the data entered will not be saved
- Use the Submit button to submit the refund claim
- Use the Exit button to return to the OBG home page, no data will be saved

Chapter 7 - Confirmation

- You will see a confirmation acknowledging that your Application for Refund of Other Tobacco Products (OTP12) has been filed with the Ohio Department of Taxation
- A Filing Confirmation Number will also be provided. Use this number when contacting the Excise and Energy Tax Division

ohio.gov WELCOME TO THE STATE OF OHIO

Home Wednesday, January 18, 2017 Help

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

1 Select Claim Period

2 Enter Information

3 Review and Submit

4 Confirmation

 **Your refund request has been received.**

This confirmation acknowledges that the Ohio Other Tobacco Product Tax refund request has been filed with the Ohio Department of Taxation. Please refer to the Filing Confirmation Number listed below when contacting the Excise and Energy Tax Division.

Date and Time of Claim Submission	01/18/2017 02:16 PM
Confirmation Number	373804285440
Account Number	
Claim Period	06/01/2016 - 06/30/2016
Refund Amount Requested	\$340.00
Documentation Submission	To Be Mailed

If you are mailing in documentation, please print and include a copy of this page.
Please send all documentation to:
Excise and Energy Tax Division, P.O. Box 530, Columbus, OH 43216-0530.

[Return to Main Menu](#) [Print View](#) [Exit](#)



Contact Us

- Use the Return to Main Menu button to return to the landing page
- Use the Print View button to get a print of the claim filed
- Use the Exit button to be redirected to the OBG Home Page

Print View

Ohio Cigarette Tax - Request for Consent to Transport (CIG99) - Internet Explorer



State of Ohio Other Tobacco Products Tax Refund Claim (OTP12)

Company Name: Testing OTP 2

Please print this page for your records.

Account Number:	
Date Filed:	01/18/2017
Filed By:	
Confirmation Number:	373804285440
Claim Period:	06/01/2016 to 06/30/2016
Product Type:	Other Tobacco Products
Reason Type:	Product sold outside of Ohio
Refund Amount Requested:	340.00
Documentation Submission:	To Be Mailed

Please print and provide a copy of this page with your receipts. Please send all documentation to:
Excise and Energy Tax Division, P.O. Box 530, Columbus, OH 43216-0530.

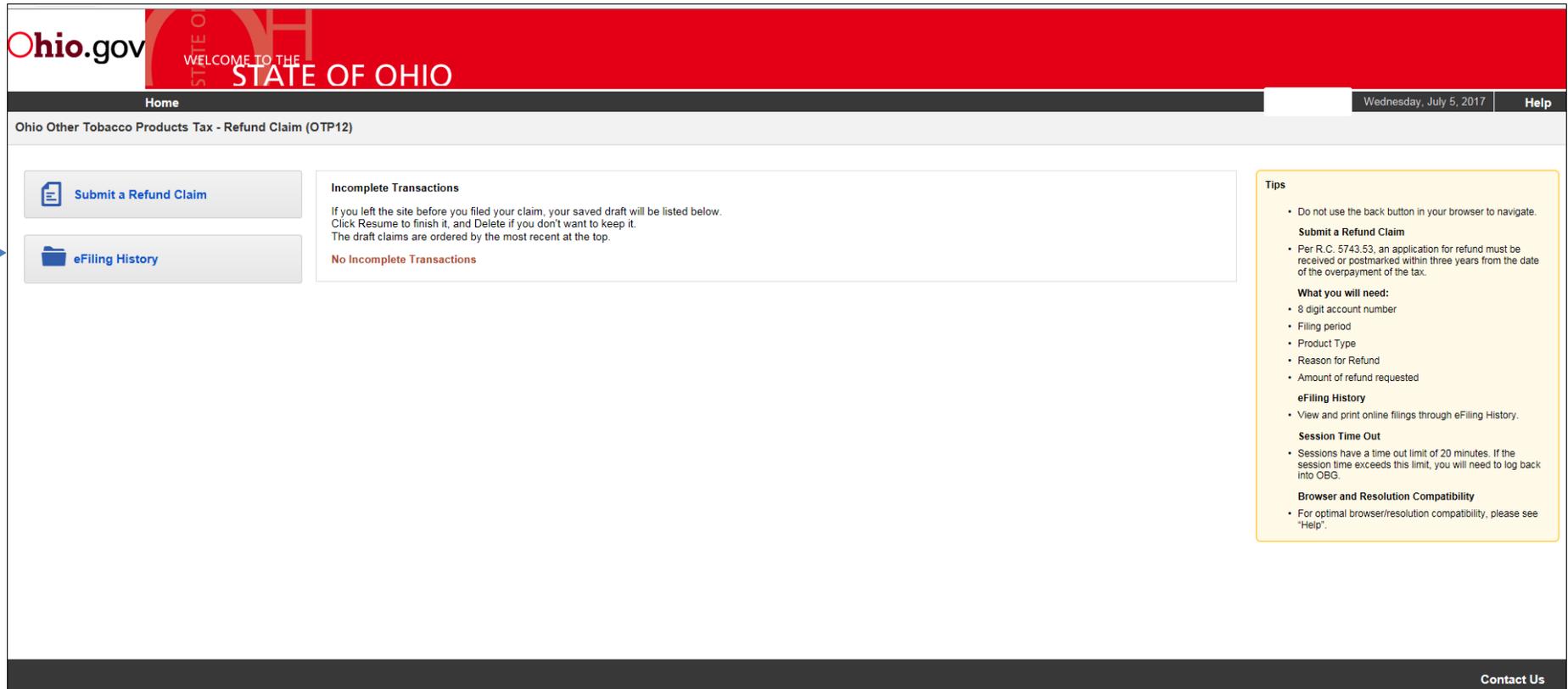
Stated reason for claim:

test

- Click on the picture of the printer in order to print a copy of your refund claim

Chapter 8 – eFiling History

- To view eFiling History, click the “eFiling History” button.



The screenshot shows the Ohio.gov website interface for the "Ohio Other Tobacco Products Tax - Refund Claim (OTP12)". The page features a red header with the Ohio.gov logo and "WELCOME TO THE STATE OF OHIO". Below the header is a navigation bar with "Home", "Wednesday, July 5, 2017", and "Help". The main content area includes two buttons on the left: "Submit a Refund Claim" and "eFiling History", with a blue arrow pointing to the latter. To the right of these buttons is a section titled "Incomplete Transactions" which states: "If you left the site before you filed your claim, your saved draft will be listed below. Click Resume to finish it, and Delete if you don't want to keep it. The draft claims are ordered by the most recent at the top." Below this text, it says "No Incomplete Transactions". On the far right, there is a "Tips" section with several bullet points: "Do not use the back button in your browser to navigate.", "Submit a Refund Claim" (with a sub-bullet: "Per R.C. 5743.53, an application for refund must be received or postmarked within three years from the date of the overpayment of the tax."), "What you will need:" (with sub-bullets: "8 digit account number", "Filing period", "Product Type", "Reason for Refund", "Amount of refund requested"), "eFiling History" (with a sub-bullet: "View and print online filings through eFiling History."), "Session Time Out" (with a sub-bullet: "Sessions have a time out limit of 20 minutes. If the session time exceeds this limit, you will need to log back into OBG."), and "Browser and Resolution Compatibility" (with a sub-bullet: "For optimal browser/resolution compatibility, please see 'Help'"). A "Contact Us" link is located in the bottom right corner.

eFiling History

Available Information

- Date Time Filed
- Account
- Type
- Filing Period Start
- Filing Period End
- Filing Conf#
- View

Ohio Other Tobacco Products Tax - Refund Claim (OTP12)

eFiling History

Date Time Filed	Account	Type	Filing Period Start	Filing Period End	Filing Conf #	
01/17/2017 05:06 PM		Refund	02/01/2016	02/29/2016	509463336440	View

Showing 1 to 1 of 1 entries

Previous **1** Next

[Return to Main Menu](#)

- This page lists only the returns filed through OBG. It has a limit of 200 transactions
- Use Ctrl+F to search for a confirmation number