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# REFUNDS ONLINE QUICK START GUIDE

## How do I claim a regional fuel tax rebate online?

Before you submit your first claim, there are three set-up tasks you need to do:

- › **Step 1:** Create your user profile
- › **Step 2:** Register as a customer
- › **Step 3:** Manage your assets (private customers can skip this step).

During your claim you'll add your claim details, upload documents, 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**<sup>®</sup> username and password.

Enter in your user profile details (your personal details) and click **Update profile**.

This will take you to the Refunds online welcome page.

### STEP 2: REGISTER A CUSTOMER

Select the option that applies to you:

- › **Option 1:** Register a **commercial** customer
- › **Option 2:** Register a **private** customer

When you register, you'll need to enter legal details about the customers you're registering, and give us the bank account number for rebates to be paid to. The details you put in the registration will be associated with all your future claims. To find out more about the information needed to register visit **How to get started** on our website.

### STEP 3: MANAGE YOUR ASSETS

Skip this step if you're a private customer.

Before submitting a claim, you need to set up your claimable assets. This includes vehicles, vessels and bulk tanks. These will be saved in our system for future use to save you time.

Always check the details of your claimable assets before you make a claim and update them if they've changed.

#### Machinery

Machines aren't saved as an asset. You need to enter them with each claim on the machinery page.

Machines are broadly defined to include anything used for commercial purposes, other than a vehicle, aircraft or vessel.

*Here are a few example: stump grinders, pumps, compressors, generators or light towers.*

## PLEASE SAVE YOUR WORK BEFORE PROGRESSING TO THE NEXT PAGE!

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

Ready to create your claim? Throughout the process you're able to save a draft claim and return to it later. *Please note: we don't receive your draft claims and you can't delete them from your welcome page claim history.*

› Now select **commercial** or **private** customer and the period you want to start a claim for.

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

- › retail purchases
- › home heating delivered (private only)
- › vehicle, vessel and machinery fuel use (commercial only)
- › bulk tank deliveries and balances (commercial only)

Always select **Save and continue** with each page, otherwise your details will be lost.

### STEP 5: UPLOAD YOUR SUPPORTING DOCUMENTS

Upload all receipts and invoices for purchases you've added in your claim. If you're entering your purchases into the system at a summary level, make sure you upload a breakdown that tells us the individual purchase.

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

### 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.