

Department: All Stores

Original Date: 10/21/2013

Subject: Tax Exempt Sales

HID #: 011

Purpose:

To cover our butts & provide proper documentation for tax exempt sales.

Responsibility

Ultimately this is the responsibility of the General Manager; however, all management is required to receive training & execute proper tax exempt procedure.

TAX EXEMPT [dining guest]

1. Guest must provide credit card or check with organization name and tax ID number OR official IRS or state form indicating tax exemption status.
2. MOD enters tax exempt number into POS [FYI Colorado 501c3 tax exemption numbers are 11digits [00-00000-0000]
3. POS chit is retained by management and submitted with sales bundles [on top of sales reports]. Please write "tax exempt" on the sales receipt.
4. Verify that total tax exempt sales on the sales report match the sales receipt

TAX EXEMPT [private event/ catering]

1. Guest must complete the DR 0563 "sales Tax Exemption Certificate Multi-Jurisdiction" form at time of contract submission.
2. When event sales are entered in POS, MOD enters tax exempt number into POS [FYI Colorado 501c3 tax exemption numbers have 11digits [00-00000-0000]
3. One copy of the completed DR 0563 form must be sent to the accounting department; please indicate restaurant name at the top of the form
4. One copy of the completed DR 0563 form MUST be held on file with the contract at the restaurant.
5. Verify that total tax exempt sales on the sales report match the sales receipt

*note: If you have a completed DR 0563 form on file an organization they do not have to resubmit the form for subsequent events. The Tax exempt number MUST be recorded on Aloha for ALL events.