

Sugary Drinks Tax Return filing instructions

Entering the Online Filing System

You must have the following to enter the online filing website:

- Your twelve (12) digit Location Identification Number;
- The last four (4) digits of your Tax Identification Number; and
- Your eight (8) character Online PIN previously mailed to you by the Office of the Treasurer & Tax Collector.

If you do not have your Online PIN, go to www.sftreasurer.org/pinreset to learn how to reset your Online PIN. Please note that Online PINs are only sent via USPS Mail to your mailing address on record with our office. You will be unable to file any taxes or fees without your new Online PIN. If you do not file and pay by the deadline, you will be subject to penalties, interest, and fees. You cannot reset your Online PIN over the phone or in person.

Filing Tabs

There are three tabs at the top of the page that help identify your filing progress. The tabs are Sugary Drinks Tax, Tax Summary, and Certification.

Navigation Icons

Do not use browser buttons to navigate once you are in the return or data may be lost. Use the tabs to navigate the return.

Once you have completed entering amounts and answers on a page select "Continue" on the bottom right side of the page to go on to the next page of the return. If you wish to go back one screen, you may select the tabs on the top of the page.

Submission

Once you have entered all information for the return, you will have the option to review your return information on the Tax Summary page. On the Certification page you must input the required information and select "Submit." Note that submission may take several minutes. Refreshing or using your browser back button will cause your submission to fail and your filing will not be received.

Once your return has been received, a "Received Return" window will display. Selecting "Continue" will take you to a page to print, email, or continue to the next page to select payment options.

Sugary Drinks Tax

Line 1. Gross Number of Taxable Ounces

Report all distributed fluid ounces of bottled sugar-sweetened beverages and fluid ounces of sugar-sweetened beverages that could be produced from syrup or powder. To report fluid ounces from syrup or powder, calculate

using the largest volume of a sugar-sweetened beverage that would typically be produced by the amount of syrup or powder based on the manufacturer's instructions. For example, if ten ounces of syrup produces 80 ounces of sugar-sweetened beverage, you would report 80 ounces. If you use the syrup or powder to produce a sugar-sweetened beverage, use your regular practice. For definitions of "distribute," "sugar-sweetened beverage," "syrup," and "powder," please refer to Section 552 of the Business and Tax Regulations Code available at www.sftreasurer.org/btrcode

Line 2. Credits in Ounces

Enter the amount in fluid ounces of bottled sugar-sweetened beverage, syrup, or powder (with the fluid ounces for syrup and powder calculated as described in the instructions to Line 1): (a) that is shipped to a point outside the City for distribution outside the City; or (b) on which the Tax has already been paid by another person; or (c) that has been returned to the person who Distributed it and for which the entire purchase price has been refunded in cash or credit. This amount cannot exceed the amount in line 1. If your credits exceed the amount in line 1, you may amend your return for the period on which they were reported. All overpayments will be reviewed to determine if you are eligible for a refund.

Line 3. Net Number of Taxable Ounces

This is the total taxable ounces after credits. The amount on this line cannot be less than zero.

Line 4. Sugary Drinks Tax

The Sugary Drinks Tax is \$0.01 per ounce. The amount displayed on this line is the Sugary Drinks Tax.

Line 5 – 8. Penalties, Interest, and Fees

These lines display penalties, interest, and fees for late filing and payment, if applicable.

Line 9. Total Payment Due

The system will calculate the total obligation due, with penalties, interest, and fees (if applicable). Visit the online payment portal at <https://etaxstatement.sfgov.org/onlinepayment/> to submit payment.

Tax Summary

This page summarizes your Sugary Drinks Tax obligation on a single page.

Certification

Enter the information requested on the Certification page and, after agreeing with the terms of the Taxpayer Statement, click "Submit." Clicking "Submit" will transmit your Return to the Office of Treasurer and Tax Collector.