



APPLY FOR A REFUND

Department of Revenue User Guide



KENTUCKY DEPARTMENT OF
REVENUE

TEAM
KENTUCKY.
FINANCE AND
ADMINISTRATION CABINET

This guide provides step-by-step instructions for applying for a refund. The guide walks users through the full refund process, from navigating the dashboard to submitting a refund application, ensuring a smooth and accurate application. It applies to MyTaxes Users who have already created a MyTaxes username and signed in at MyTaxes.ky.gov.

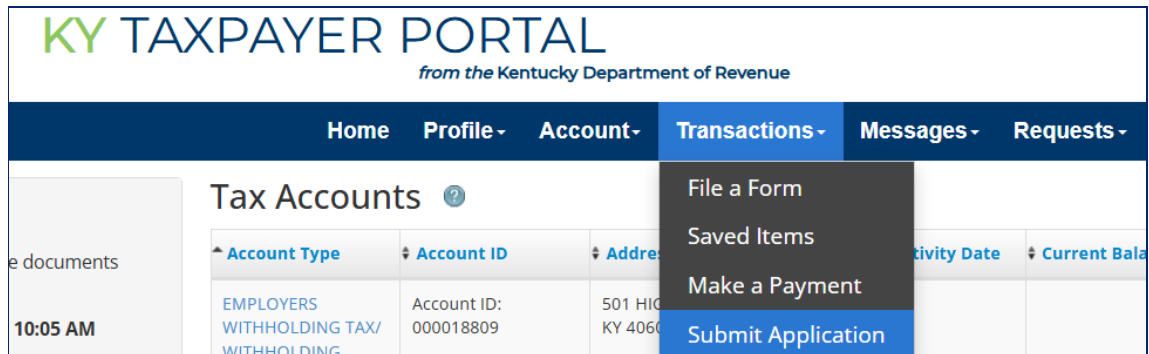
Disclaimer: The information in this presentation is for educational and informational purposes only and does not constitute legal advice. Information is presented as an overall review that is subject to law changes and may not apply to all statutes. Information in this presentation is believed to be accurate as of the date of publication. In the event that any information in this manual is later determined to be in error, this manual cannot be used by taxpayers in supporting a specific position or issue before the Department of Revenue, as it does not constitute statutory or regulatory authority.

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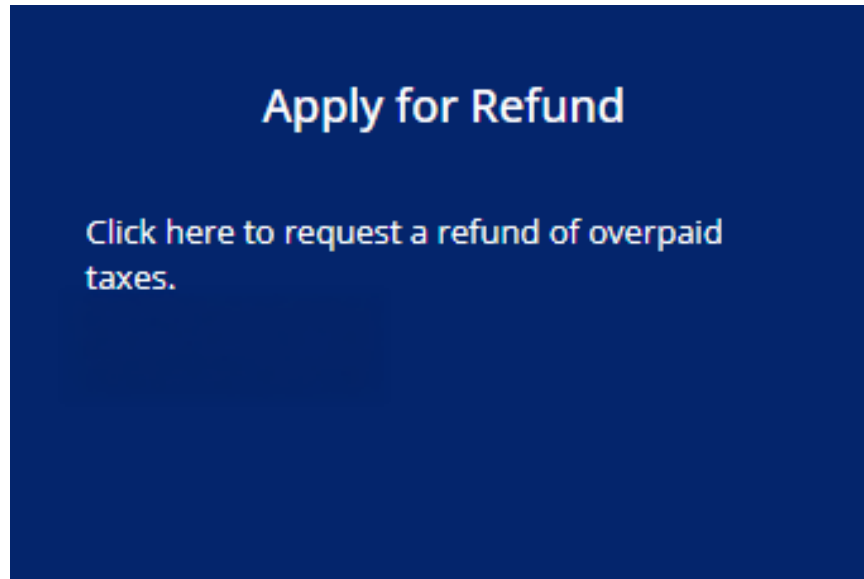
Applying for a Refund

Use the steps below to apply for a refund for a tax account(s) in the MyTaxes Portal.

1. From the **Account** homepage, select **Transactions**, then **Submit Application**.



2. Select the **Apply for Refund** tile.



3. Select the account requesting a refund, then select **Save and Continue**.

Refund Application

Progress 25%

* indicates required field

This application must be completed for a refund request to be considered.
Only the taxpayer or someone making a payment directly to the Kentucky State Treasurer on behalf of the taxpayer may apply for a refund.

* Account for which you are requesting a refund.

Delete Clear Save and Exit Save And Continue

4. On the **Refund Application** page, confirm the account from which you are requesting a refund, then enter the Filing Periods, type the reason for the refund, and enter the amount of the refund, then select **Save and Continue**.

Documents can be attached if applicable.

Account for which you are requesting a refund. SALES AND USE TAX / CONSUMERS USE - 000018808

Claims for a tax refund or credit must be filed within four years from the date the tax was paid to the Kentucky State Treasurer. After the statute of limitations has expired, no claims for refunds or credits will be considered.
Please list the end date(s) of the filing period(s) for which you are requesting a refund. Enter the date(s) in MM/DD/YYYY format. For example, for filing periods ending November 30, 2023 and December 31, 2023, enter "11/30/2023 12/31/2023." You may attach a detailed schedule if more than one period is involved.

* Filing period(s) for which you are requesting a refund.

* Please explain the reason(s) for your refund request. You may attach additional documentation if necessary.

* Enter the refund amount requested. \$

Previously Uploaded Attachments

No Attachments uploaded for this document.

Back Delete Clear Upload Save and Exit Save And Continue

5. From the **Refund Payment Method** dropdown, choose the preferred method then select **Save and Continue**.

Refund Method

Progress 75%

* Indicates required field

Select the payment method for the refund. If you select EFT ACH (electronic funds transfer), you must enter your bank account information when prompted at the end of this application.

* Refund Payment Method

< Back Delete Clear Save and Exit Save And Continue

6. If Check is chosen as the refund payment method, choose a Mailing Address already on file from the dropdown or enter a new address, then select **Save and Continue**.

Disregard if another payment method is chosen.

* Refund Payment Method CHECK

Click on the Mailing Address dropdown menu to select where you want us to send your refund check. If the correct mailing address isn't listed, select "Add a New Address" and enter the new address information below when prompted. Alternatively, you may exit this refund application and update your address on the Edit Taxpayer Information page or Account Summary page before proceeding with your refund application.

* Mailing Address Add a New Address

* Country UNITED STATES

Attn

* Address Line1

Address Line2

* City

* State KENTUCKY

* Zip Code

< Back Delete Clear Save and Exit Save And Continue

7. Review **Summary Information** ensuring accuracy, then select **Save and Continue**.

Submit Application - Summary Information

Progress 100%

Please review your refund application summary below. If everything is correct, click Save and Continue. If you would like to make any changes, click the Back button to return to your application. If you selected EFT ACH as your payment method, you will enter your bank account information in the next step.

Account Type	CORPORATE INCOME LLET
Account ID	000018810
Refund Amount Requested	\$1.00
Refund Payment Method	EFT ACH

Cancel Delete Back Save And Continue

8. If **EFT ACH** was chosen as the payment method, the **Direct Deposit Information** screen will appear. Complete all fields then select **Next**. If you would like to change your refund method, please select the **Back** button.

Direct Deposit Information

If you selected EFT ACH as your payment method, please enter your bank account information below. If you selected Check as your payment method, you may skip this section and click Next to continue.

Bank Account Type

Routing Number

Account Number

Confirm Account Number

Account Holder Name

Phone Number

Back Delete Clear Next

How to Find Your Routing Number and Account Number:

YOUR NAME
1234 Main Street
Anywhere, OH 00000

DATE 123

PAY TO THE ORDER OF \$

_____ DOLLARS

⑆044072324⑆ ⑆000123456789⑆ ⑆123

ROUTING NUMBER ACCOUNT NUMBER CHECK NUMBER

9. To acknowledge you are authorized to file this refund request online, select **Yes**.

Submit Application - Signature

Progress 100%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to file this document online.
Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

No

Yes

10. The **Confirmation** page will appear. Please write down the confirmation number or print this page for your records. Select **Return Home** to navigate to the Account Homepage.

Submit Application - Confirmation

Document was submitted successfully.
The confirmation number is: FR0000003390
Please print or save this number for future reference.

Return Home

Thank you for doing business in Kentucky. For questions on the process contained in this guide or other MyTaxes portal questions, please contact the Kentucky Department of Revenue Customer Contact Center at [502-764-5555](tel:502-764-5555). Representatives are available to assist Kentuckians Monday through Friday, excluding State Holidays.