

## Enrolling in the Amazon Tax Exemption Program (ATEP)

Amazon Tax Exemption Program (ATEP) is the program that allows an eligible organization to use their tax exemption status toward future purchases on **Amazon Business**. By enrolling in the program, it will insure that all orders placed by faculty and staff are tax exempt.

Tax exemption applies to items sold by:

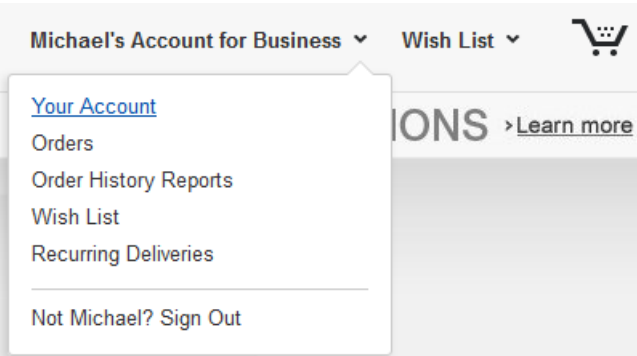
- Amazon.com LLC
- Amazon Digital Services, Inc.
- Warehouse Deals, Inc.
- Amazon Services LLC.
- 3rd Party Sellers (vendors) participating in ATEP

**Note:** enrolling in ATEP by uploading tax exemption certification excludes tax exemption on items sold by 3rd party sellers (vendors) participating in the Amazon Tax Exemption Program.

### **What if an account previously reflected tax exemption before registering for Amazon Business?**

- If a requisitioner migrated an existing Amazon account when registering for an Amazon Business account, then existing tax exemption status will carry over.
- If a requisitioner created a new account to register for an Amazon Business account, then tax exemption will remain on the personal account and the exemption process will need to be completed for the business account.

### **Wizard Enrollment for ATEP**

Step	Task
1.	Login to Amazon.com.
2.	Click <b>Your Account</b> to Sign In with your newly created Amazon Business account.
3.	Go to <b>Your Name Account for Business</b> (upper right hand corner) and click <b>Your Account</b> .  A screenshot of the Amazon Business account menu. At the top, it says "Michael's Account for Business" with a dropdown arrow, followed by "Wish List" with a dropdown arrow and a shopping cart icon. Below this, a dropdown menu is open, listing: "Your Account" (highlighted in blue), "Orders", "Order History Reports", "Wish List", "Recurring Deliveries", and "Not Michael? Sign Out". To the right of the dropdown, the word "PROMOTIONS" is partially visible with a right-pointing arrow and a link to "Learn more".
4.	Scroll down to the <b>Settings</b> section and click <b>Amazon Tax Exemption Program (ATEP)</b> .

<p><b>Settings</b></p> <p>Password, Prime &amp; E-mail</p>	<p><b>Account Settings</b></p> <p><a href="#">Change Account Settings</a></p> <p>E-mail, password, name and mobile phone</p> <p><a href="#">Forgot Your Password?</a></p> <p><a href="#">1-Click Settings</a></p> <p><a href="#">Manage Prime Membership</a></p> <p><a href="#">Amazon Student Membership</a></p> <p><a href="#">Manage 'Shipment Updates via Text'</a></p> <p><a href="#">Amazon Tax Exemption Program</a></p> <p><a href="#">Manage Login with Amazon</a></p>	<p><b>Address Book</b></p> <p><a href="#">Manage Address Book</a></p> <p><a href="#">Add New Address</a></p>
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**5. Click **Get Started!****

**Result: You will see a list of state jurisdictions.**

Select the appropriate state. Next, click **Save and Continue**.

**Please select one or more jurisdictions where you want to provide an exemption or resale certificate:**

[Select All](#)

<input type="checkbox"/> Alabama	<input type="checkbox"/> Indiana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Arizona	<input type="checkbox"/> Iowa	<input type="checkbox"/> Nevada	<input type="checkbox"/> Texas
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Kansas	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Utah
<input type="checkbox"/> California	<input type="checkbox"/> Kentucky	<input type="checkbox"/> New York	<input type="checkbox"/> Vermont
<input type="checkbox"/> Colorado	<input type="checkbox"/> Louisiana	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Virginia
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Maine	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Washington
<input type="checkbox"/> D.C.	<input type="checkbox"/> Maryland	<input type="checkbox"/> Ohio	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Florida	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Georgia	<input type="checkbox"/> Michigan	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Rhode Island	
<input type="checkbox"/> Idaho	<input type="checkbox"/> Mississippi	<input type="checkbox"/> South Carolina	
<input type="checkbox"/> Illinois	<input type="checkbox"/> Missouri	<input type="checkbox"/> South Dakota	

To upload your exemption forms directly, [exit this wizard](#).

**Save and Continue**

**6. Click the button next to **Education Institution**. Then select **Save and Continue**.**

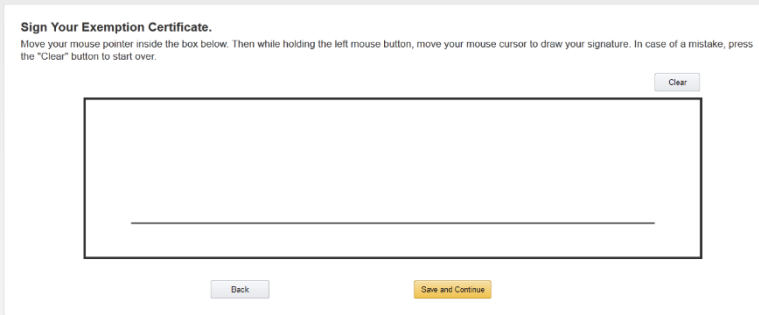
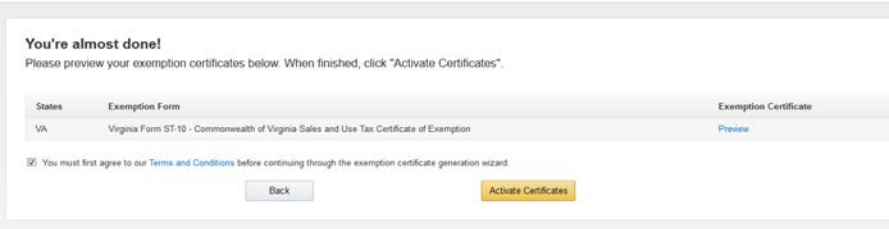
**What kind of tax exempt organization are you?**


<input type="radio"/> 501C	<input type="radio"/> Agriculture Production
<input type="radio"/> Direct Pay Permit	<input checked="" type="radio"/> Education Institution
<input type="radio"/> Federal Government	<input type="radio"/> Industrial Production/Manufacturing
<input type="radio"/> Library	<input type="radio"/> Nonprofit Religious Organization
<input type="radio"/> Resale	<input type="radio"/> State/Local Government
<input type="radio"/> United Nations/Diplomat	<input type="radio"/> Other

**7. You will see a confirmation message.**

**Result: You will be adding or modifying the following certificates.**

Click **Continue**.

<p><b>8.</b></p>	<p>Complete the organization form using the details as listed below:          Organization Name: <b>Southern Methodist University</b>          Organization Description: <b>Education Institution</b>          Address Line 1: <b>Box 750162, SMU Station</b>          Address Line 2:          City: <b>Dallas</b>          State: <b>Texas</b>          Zip/Postal Code: <b>75275</b>          Certificate Signer's Name: <b>Shannon Brown</b>          Certificate Signer's Title: <b>Director of Purchasing</b>  <b>Note:</b> Employees with P-cards are authorized to purchase on behalf of <b>SMU</b> and utilize its exemption for business purposes. These employees are allowed to be signers for Amazon Business purposes.</p>
<p><b>9.</b></p>	<p>The next page will differ depending on the previously elected exemption type and state(s). Answer the remaining questions. Then click <b>Save and Continue</b>.</p>
<p><b>10.</b></p>	<p>Review the tax exemption summary and edit if applicable. Otherwise, click <b>Continue</b>.</p>
<p><b>11.</b></p>	<p>Draw your signature on the line inside the box with your mouse. Use the <b>Clear</b> button if you need to start over. Click the <b>Save and Continue</b> button when complete.</p> <p><b>Note:</b> Employees with P-cards are authorized to purchase on behalf of <b>SMU</b> and utilize its exemption for business purposes. These employees are allowed to be signers for Amazon Business purposes.</p> 
<p><b>12.</b></p>	<p>You will see a message stating, <b>You're almost done</b>. Check the box next to the <b>Terms and Conditions</b> statement. Click the <b>Activate Certificates</b> button.</p> 
<p><b>13.</b></p>	<p>The status of your account will update from Pending to Active once your Tax Exemption Certificate has been activated and applied to your Amazon account.</p>

	<div style="border: 1px solid green; padding: 5px; margin-bottom: 10px;"> You have successfully submitted your tax exemption certificate(s)</div> <p>Please allow 15 minutes for new tax exemption certificates submitted via the Amazon Tax Exemption Tool to take effect. Certificates uploaded may take up to 24 hours. Click <a href="#">here</a> to view the current status of your tax exemption(s).</p>
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## Requesting Sales Tax Reimbursement for 3<sup>rd</sup> Party Sellers

3<sup>rd</sup> Party sellers (vendors) are not required to enroll in the Amazon Tax Exemption Program and are not able to see account information, such as tax exemption, on customer accounts.

In the event your order has been charged sales tax and your account reflects tax exemption, you can contact the seller (vendor) directly and request sales tax reimbursement.

Tax reimbursement will be credited to your account and can take to 24-48 hours to process. If you are unable to get in contact with a vendor or see that sales tax has not been reimbursed (after 3 business days), contact Amazon's dedicated business-customer service: **(866) 486-2360** or email the ATEP team ([auto-exempt@amazon.com](mailto:auto-exempt@amazon.com)).

## Request a Tax Refund from Amazon

If you qualify for tax exemption but did not enroll in the Amazon Tax Exemption Program, you can request a tax refund for products sold by Amazon.com LLC, Amazon Digital Services, Inc., Warehouse Deals, Inc., Amazon Services LLC or sold by other sellers and fulfilled by Amazon.

First, place your order and wait for your shipment confirmation. Submit your tax exemption documentation for the state to which your items shipped by fax or e-mail in order to receive a refund of any sales tax. Send scanned copies in PDF format to [tax-exempt@amazon.com](mailto:tax-exempt@amazon.com). You may also fax the documents to **(206) 266-2005**. For more information about tax exempt documentation, go to [Tax Exempt Documentation](#).

### **Important:** Please include the following:

- Your order number (17 digits in this format: XXX-XXXXXXX-XXXXXXX).
- E-mail address.
- Acceptable proof of your exempt status (as outlined above).
- The name of the seller who sold the item(s) completed on the exemption documentation.
- The name of the organization that purchased the item(s).
- If sending a fax, mark your fax "Attn: Amazon Tax Exempt".