



INTIME User Guide for Individual Income Tax Customers

October 2021



Indiana Department of Revenue

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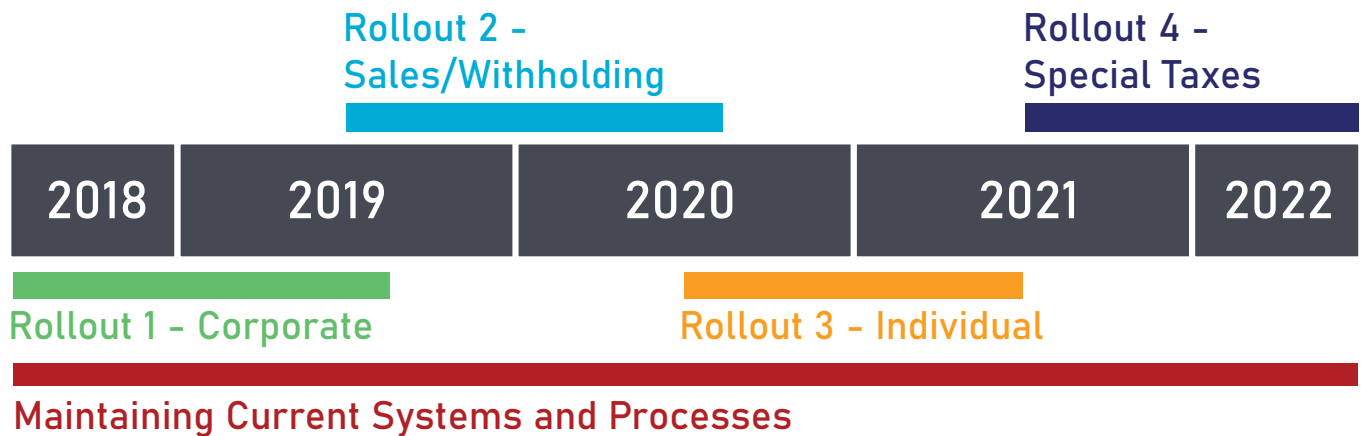
Project NextDOR Modernization Overview

What is Project NextDOR?

In September 2018, the Indiana Department of Revenue (DOR) officially launched Project NextDOR, a multi-year modernization project of its tax systems and business processes. This project implements an integrated tax system that provides Hoosier businesses and individual income tax customers increased access to data and the ability to view and pay their taxes online. For more information on Project NextDOR, visit ProjectNextDOR.dor.in.gov.



4 Major Rollouts over 4 Years



Welcome to INTIME for Individual Income Tax Customers

As of September 2021, DOR's online e-services portal, the Indiana Taxpayer Information Management Engine (INTIME), offers customers the ability to manage their individual income tax account(s) in one convenient location, 24/7. This includes viewing refund amounts, making payments, setting up payment plans, and secure messaging with DOR customer service.

This INTIME User Guide for Individual Income Tax Customers serves as a resource to help individual income tax customers create their INTIME account and explore the functionalities available with step-by-step instructions and images. Helpful tips are also provided to ensure a clear introduction to the new system.

What Can Individual Taxpayers Do Using INTIME?

Beginning September 2021, INTIME has a number of self-service functionalities available for individual income tax customers. While common transactions like making payments and refund status inquiries will be accessible without requiring a login, creating an INTIME logon offers additional access and functionality:



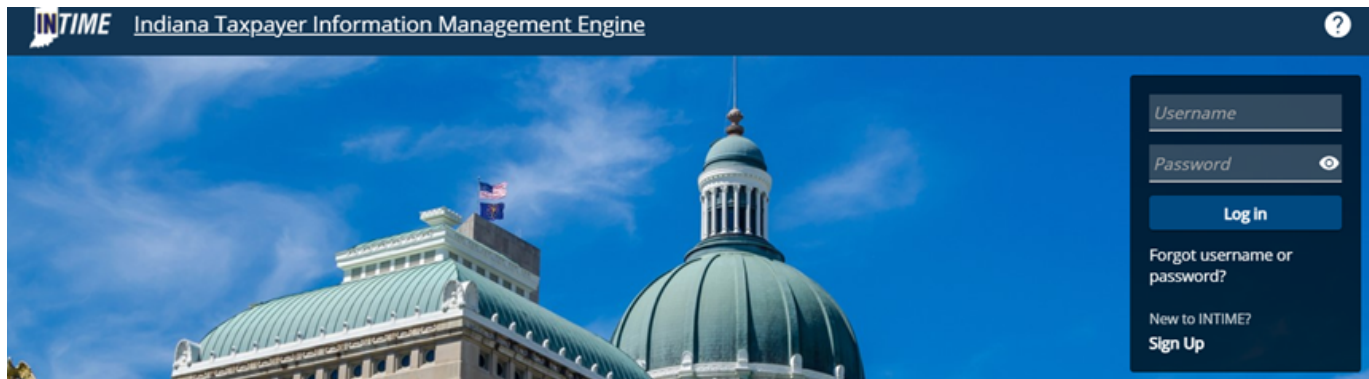
INTIME Functions for Individual Tax Customers

	Non-Logged-In	Logged-In
Check Refund Status	✓	✓
Electronic Delivery of DOR Correspondence		✓
View and Respond to Correspondence from DOR		✓
Make Payments Using a Bank Account or Credit/Debit Card	✓	✓
Request an Extension	✓	✓
View Payment History		✓
Establish Payment Plan		✓
Request and Print Transcripts of Tax Return Information		✓
Online Customer Service Support Through Secure Messaging		✓
Update Name and Address		✓

Creating an INTIME Account for Individual Income Tax Customers OVERVIEW

What individual income tax customers will need to create their INTIME account:

- Letter from DOR containing the unique Letter ID (printed in the upper-right hand corner of the letter)
- Name and ID: Social security Number (SSN) or Individual Tax Identification Number (ITIN)



Step 1: Navigate to INTIME using this web address: [INTIME.dor.in.gov](https://intime.dor.in.gov)

Step 2: Select “New to INTIME? Sign Up.” to create a logon username and password for access to INTIME.

Step 3: Follow the steps on the screen to create your logon

An individual income tax customer will enter their information and confirm their access using the amount of a prior year refund, return line item, or letter ID. If these items are not available, a letter can be requested and will be mailed to the customer to complete the registration. This is an essential step in protecting an individual customer’s sensitive information.

Step 4: Create username and password

This step requires the individual income tax customer to create a unique username (may be an email address) and password. Note that the password:

- Must be at least eight characters long;
- Must include at least one uppercase letter;
- Must include at least one special character; and
- Cannot be the username or email address.

Step 5: Once logon has been created, an email acknowledgment will be sent.

Step 6: Log in for the first time

Once the username and password have been created, the customer will be directed back to the INTIME homepage to log in for the first time with this new logon.

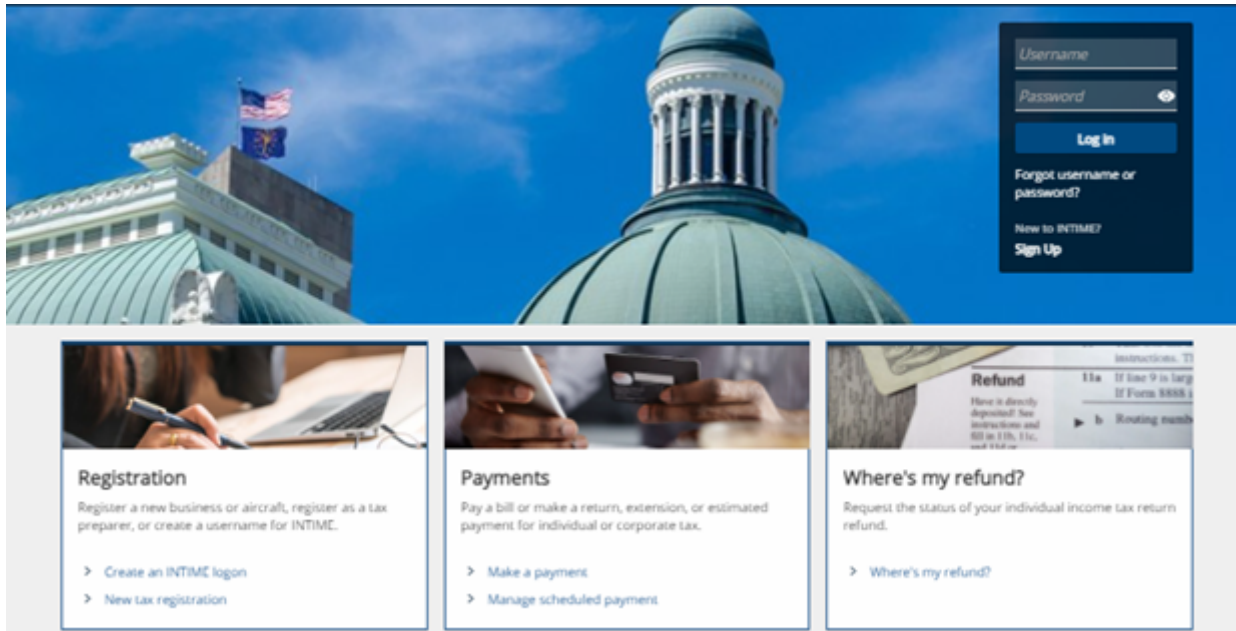
Step 7: Two-factor authentication

Access security for INTIME is enhanced with two-factor authentication. This means that a customer will be required to enter an access code upon logging in that can be received by email, text message (standard text message rates apply), or authenticator application. Information on each of these options is included on the registration screen.

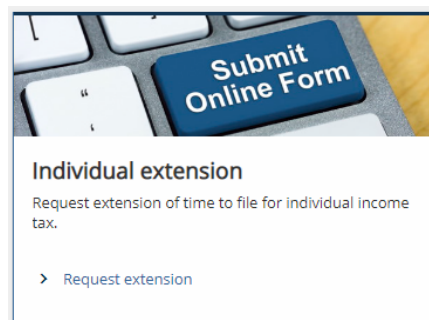
Non-Logged-In Options for Individual Income Tax Customers

There are functionalities available for an individual income tax customer without the need to log in to INTIME. Customers can find the following non-logged in options on the INTIME landing page:

- Make a payment
- Request the status of your individual income tax refund
- Request an extension of time for filing your individual income tax
(Only available from January 15 - April 15)

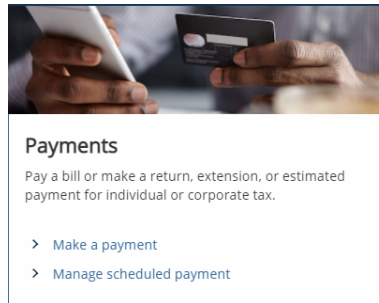


NOTE: The INTIME landing page will display the “Individual extension” option from January 1- April 15 only.

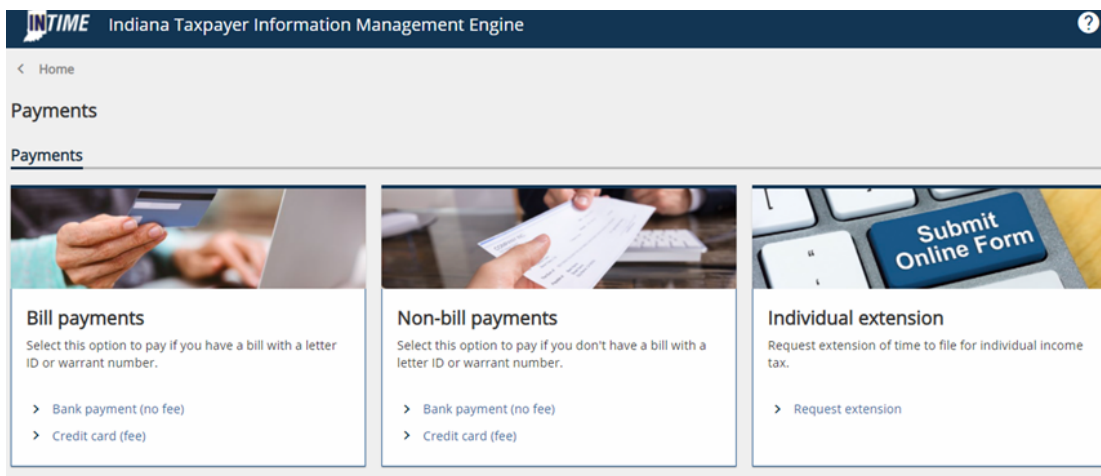


Make a Payment

Located on the INTIME landing page is the non-logged-in option to make a payment. Customers can make a payment or manage a scheduled payment.



When the customer selects “Make a payment,” they are presented with the option for “Bill payments,” “Non-bill payments” and “Individual extension.”



Bill Payments

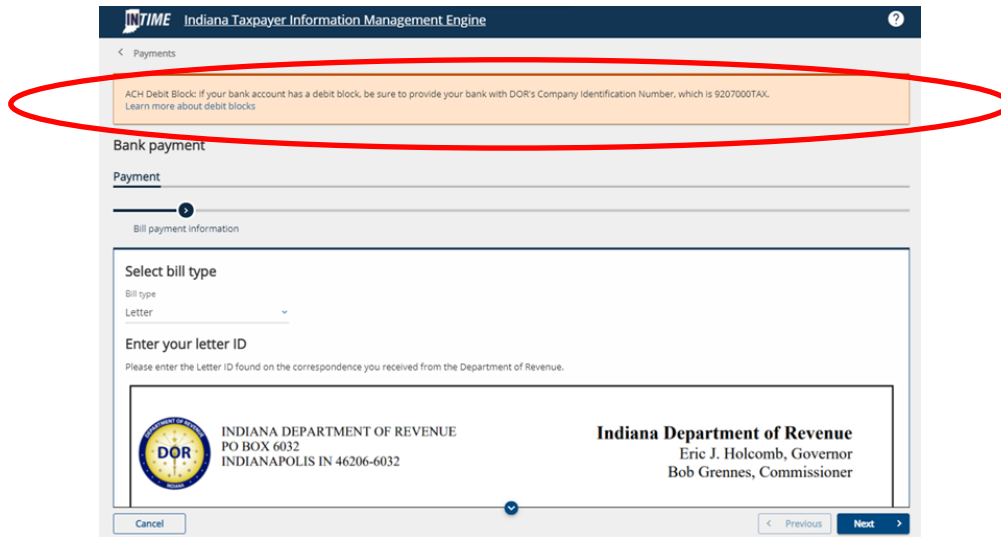
Customers can pay a bill using a bank payment or credit card.

NOTE: There will be a fee for making a payment by credit card. There is NO FEE for making a bank payment.

By Bank Account

Step 1: Bill Payment Information

When the bank payment option is chosen, a message regarding an ACH debit block may appear at the top of the screen. A debit block is optional. You can select the “Learn more about debit blocks” for more information.

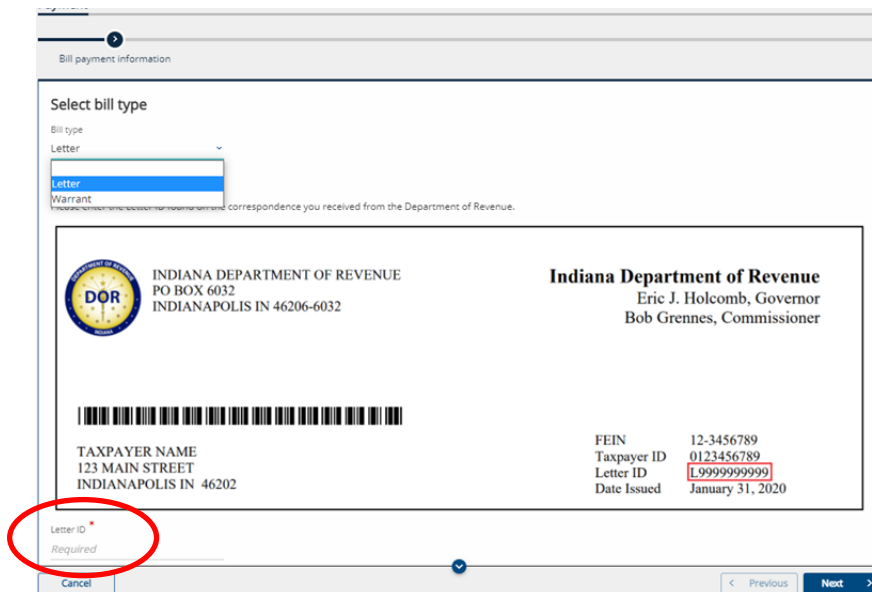


Two options are available for the bill type:

- “Letter” is the default
- “Warrant”

Enter the required information in either the “Letter ID” or “Warrant number” field and then click “Next.”

Letter ID:



TIP: If you do not have a Letter ID, the easiest and most efficient way to immediately view your balance and make a payment is to create a logon at [INTIME.dor.in.gov](https://intime.dor.in.gov) using information from a recent tax return.

Warrant:

The screenshot shows the 'Select bill type' step in the 'Bank payment' section. A red circle highlights the 'Warrant' option in the 'Bill type' dropdown menu. Below it, there is a 'Warrant number' field with a red asterisk and the word 'Required' below it. The progress bar shows the first step is active. Navigation buttons include 'Cancel', 'Previous', and 'Next'.

Step 2: Enter ID Information

Select an ID type and enter the required information, then click “Next.”

The screenshot shows the 'Enter ID Information' step. The progress bar now has two steps: 'Bill payment information' (checked) and 'ID information' (active). The 'ID type' dropdown is set to 'SSN'. Below it is a 'Last 4 of SSN' field with a red asterisk and 'Required' below it. Navigation buttons include 'Cancel', 'Previous', and 'Next'.

Step 3: Enter Payment Information

Enter the required payment information, then click “Next.” On the “confirm payment” page, review the payment information to be sure it is correct. An email address will be required to obtain payment confirmation.

The screenshot shows the 'Enter payment information' step. The progress bar has three steps: 'Bill payment information' (checked), 'ID information' (checked), and 'Payment' (active). A blue information box states: 'You currently owe \$5,349.49 for the 12/31/2020 period. This balance may or may not match the amount shown on the bill you received from the Department of Revenue due to penalty and/or interest assessed. Additionally, if you made a payment associated with the same bill immediately prior to making this payment, the balance may not yet be updated.' Below this are two columns of fields. The 'Bank account' column includes 'Bank account type' (radio buttons for 'Checking' and 'Savings'), 'Routing number', 'Account number', and 'Confirm account number', all with red asterisks and 'Required' labels. The 'Payment' column includes 'ACH debit for a bill', 'Payment Date' (20-Sep-2021), 'Amount' (5,349.49), and 'Confirm amount', with red asterisks and 'Required' labels. Navigation buttons include 'Cancel', 'Previous', and 'Next'.

NOTE: The box must be checked in order to confirm that you have read the warning stating that, by clicking the “Submit” button, you affirm having authorization to withdraw funds from the bank account provided from which the payment is being made.

Bank payment

Payment

Bill payment information ID information Payment Confirmation

Confirm payment

Amount : 5,349.49
Payment date : 20-Sep-2021
Payment type : Bill Payment
Filing period : 31-Dec-2020
Letter ID : L0001376443
Last name : DOE
First name : JANE
Last 4 of SSN : 12222

Email *
Required

By clicking Submit, you affirm that you have authorization to withdraw funds from this bank account. *

Cancel Previous Submit

Once the request has been submitted, the payment confirmation will be displayed and an email will be sent to the address previously provided. A “Printable View” option is available to save or print a copy for a customer’s records.

< Payments

Confirmation

Thank you for scheduling a payment with the Indiana Department of Revenue. You may wish to print or save a copy for your records.

If you need to make a change, it is not too late. While a payment is still pending, you can cancel the payment and make a new one.

To access or cancel this request in the future select the 'Retrieve a submission' link on the Submissions menu and use email: samplename@emailaddress.com and confirmation code: **rtvzmp**.

Customer: DOE, JANE
Filing period: 31-Dec-2020
Payment amount: 5,349.49
Payment date: 20-Sep-2021
Payment type: Bill Payment
Submitted date: 20-Sep-2021

If you have any questions or concerns please call (317) 232-2240, Monday – Friday, 8:00am – 4:30pm.

Printable View

OK

By Credit Card

Step 1: Bill Payment Information

The initial steps to make a credit card payment are similar to those for making a bank payment. Once “Credit Card (fee)” option is selected, there will be two options for the bill type: “Letter” (the default option) or “Warrant.” Enter the required information in either the “Letter ID” or “Warrant number” field and then click “Next.”

Credit card payment

Payment

Bill item payment information

Select bill type

Bill type

Letter

Letter

Warrant

correspondence you received from the Department of Revenue.

INDIANA DEPARTMENT OF REVENUE
PO BOX 6032
INDIANAPOLIS IN 46206-6032

Indiana Department of Revenue
Eric J. Holcomb, Governor
Bob Grennes, Commissioner

TAXPAYER NAME
123 MAIN STREET
INDIANAPOLIS IN 46202

FEIN 12-3456789
Taxpayer ID 0123456789
Letter ID 19999999999
Date Issued January 31, 2020

Letter ID *
Required

Cancel Previous Next

TIP: If you do not have a Letter ID, the easiest and most efficient way to immediately view your balance and make a payment is to create a logon at [INTIME.dor.in.gov](https://intime.dor.in.gov) using information from a recent tax return.

Continue to follow the on-screen instructions to enter ID Information and then payment information. An email address will be required to receive payment confirmation. Click “Next” to continue.

Credit card payment

Payment

Bill item payment information

ID information

Payment

Enter payment information

Verify your payment information. When you click Next, you will be redirected to our third party partner where you will be prompted to enter your credit card information.

Please note that a processing fee will be assessed on all credit card payments. The fees are structured as follows:

Credit Cards

Card Type	Percentage	Additional fee
Individual	1.99%	\$1.00
Corporate	2.63%	\$1.00

Debit Cards

Payment amount	Flat fee
Less than \$100.00	\$2.75
Greater than or equal to \$100.00	\$3.75

You currently owe \$176.16 for the 12/31/2016 period.
This balance may or may not match the amount shown on the bill you received from the Department of Revenue due to penalty and/or interest assessed.
Additionally, if you made a payment associated with the same bill immediately prior to making this payment, the balance may not yet be updated.

Balance due
176.16

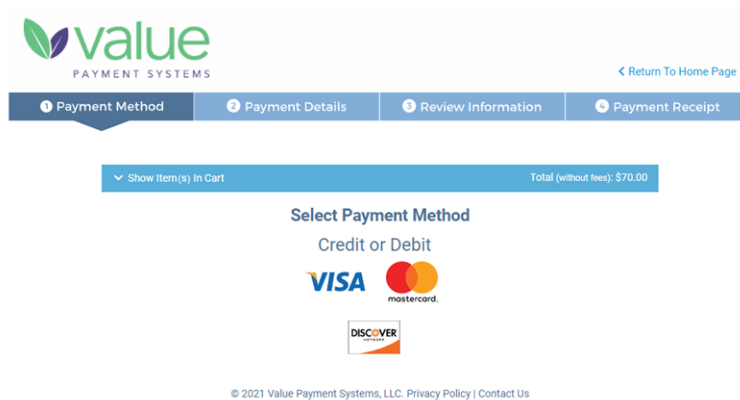
Amount you wish to pay
176.16

Email *
Required

Cancel Previous Next

Customers will be redirected to the following screen to complete the credit or debit card payment process. Only Discover, Mastercard or VISA are accepted.

NOTE: Processing fee(s) will be assessed for credit or debit card payments.



Non-Bill Payments

Customers can make a non-bill payment using a bank payment or credit card. Non-bill payments include:

- Audit pre-payment
- Estimated payment
- Return payment

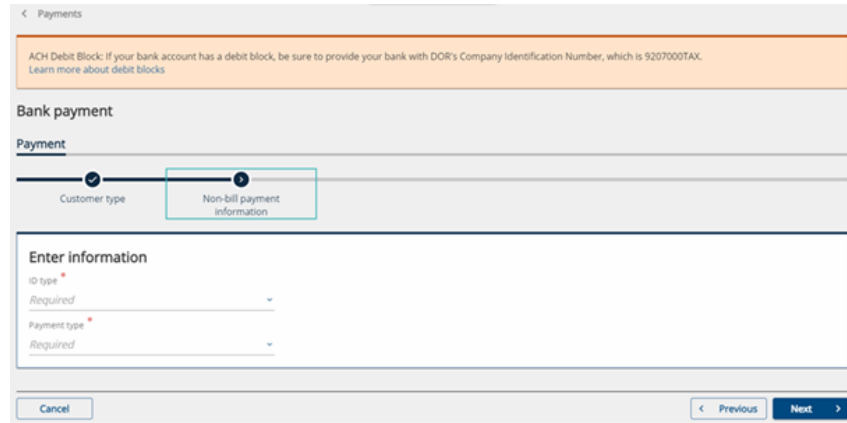
NOTE: There will be a fee for making a payment by credit card. There is NO FEE for making a bank payment.

Step 1: To make a payment for an individual income tax account, select that option and then click “Next.”

NOTE: When the bank payment option is chosen, a message regarding an ACH debit block may appear at the top of the screen. A debit block is optional. You can select the “Learn more about debit blocks” for more information.

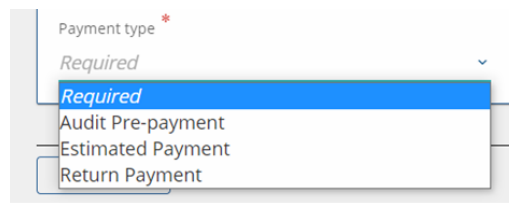
Step 2: Enter ID Information

Select an ID type (ITIN or SSN) and one of the three (non-bill) payment types available for the customer to make.



The screenshot shows a web form titled "Payments" with a sub-section "Bank payment". A progress bar indicates the current step is "Non-bill payment information". The "Enter information" section contains two dropdown menus: "ID type" and "Payment type". The "Payment type" dropdown is open, showing four options: "Required" (highlighted in blue), "Audit Pre-payment", "Estimated Payment", and "Return Payment". There are "Cancel", "Previous", and "Next" buttons at the bottom.

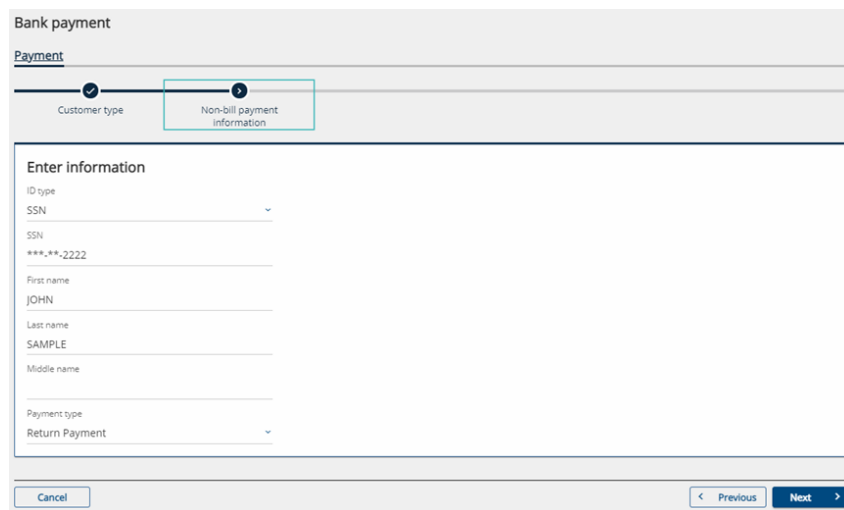
Select one of the three options from the drop-down menu for “Payment type” and then click “Next.”



A close-up of the "Payment type" dropdown menu. The "Required" option is selected and highlighted in blue. Other visible options include "Audit Pre-payment", "Estimated Payment", and "Return Payment".

Step 3: Enter Information

Enter the requested information and click “Next.”



The screenshot shows the "Enter information" section of the "Bank payment" form. The "Payment type" dropdown is now set to "Return Payment". The form includes fields for "ID type" (set to "SSN"), "SSN" (with a masked input "***-**-2222"), "First name" (set to "JOHN"), "Last name" (set to "SAMPLE"), and "Middle name". There are "Cancel", "Previous", and "Next" buttons at the bottom.

Step 4: Payment

Enter the payment information for either a bank account or credit/debit card.

By Bank Account

Select either checking or savings account and enter required routing and account information. On the right side under “Payment,” select the payment period (if applicable), payment date and amount.

Bank payment

Payment

Customer type Non-bill payment information **Payment**

Enter payment information

Bank account	Payment
Bank account type *	ACH debit payment type for returns
<input type="radio"/> Checking	Period *
<input type="radio"/> Savings	Required
Routing number *	Payment Date
Required	25-Jun-2021
Account number *	Amount *
Required	Required
Confirm account number *	Confirm amount *
Required	Required

Cancel < Previous **Next** >

When making an estimated payment, be sure to schedule your payment date on or before the due date for the intended quarter.

Customer type Non-bill payment information **Payment**

Enter payment information

ⓘ When making an estimated payment, be sure to schedule your payment date on or before the estimated payment due date for the intended quarter by following the schedule below.

Estimated Tax Installment	Payment Due Date
First Installment	15-Apr-2021
Second Installment	15-Jun-2021
Third Installment	15-Sep-2021
Fourth Installment	18-Jan-2022

Bank account	Payment
Bank account type *	ACH debit payment type for estimated payments
<input type="radio"/> Checking	Period
<input type="radio"/> Savings	31-Dec-2021
Routing number *	Payment Date
Required	20-Sep-2021
Account number *	Amount *
Required	Required
Confirm account number *	Confirm amount *
Required	Required

Cancel < Previous **Next** >

By Credit or Debit Card

Enter the required information. An email address is required to receive payment confirmation.

NOTE: Processing fee(s) will be assessed for credit or debit card payments.

Credit card payment

Payment

Customer type Non-bill payment information Payment

Enter payment information

Verify your payment information. When you click Next, you will be redirected to our third party partner where you will be prompted to enter your credit card information.

Please note that a processing fee will be assessed on all credit card payments. The fees are structured as follows:

Credit Cards		
Card Type	Percentage	Additional fee
Individual	1.99%	\$1.00
Corporate	2.63%	\$1.00

Debit Cards	
Payment amount	Flat fee
Less than \$100.00	\$2.75
Greater than or equal to \$100.00	\$3.75

Payment type
Return Payment

Filing period end date *

Amount you wish to pay *

Required


Email *

Required

Cancel < Previous Next >

After verifying the information is correct and clicking “Next,” customers will be redirected to the following screen to complete the credit or debit card payment process. Only Discover, Mastercard or VISA are accepted.

NOTE: Processing fee(s) will be assessed for credit or debit card payments.



 [Return To Home Page](#)


1 Payment Method 2 Payment Details 3 Review Information 4 Payment Receipt

▼ Show Item(s) In Cart Total (without fees): \$10.00

Select Payment Method

Credit or Debit

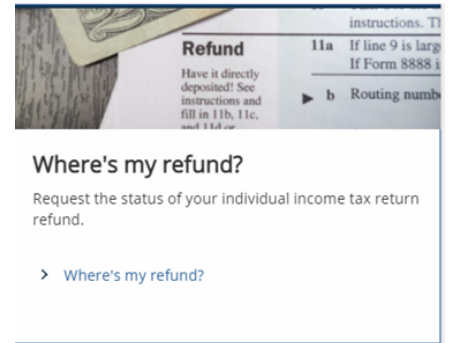


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Where is my Refund?

Customers can check on the status of their individual income tax refund from the INTIME landing page menu without logging in to an INTIME account. Locate the “Where’s my Refund?” panel and click on the hyperlink.

To check on the status of a refund, select an ID type (SSN or ITIN) and enter the corresponding ID number, the tax year for which you are requesting the refund status, and enter the expected refund amount from your individual income tax return. Click on “Search” to be provided with a refund status update.



< SAMPLE, JOHN

Where's my refund?

Check the status of your refund

SSN *

ITIN *

ID *

Required

Tax year *

Required

Refund amount *

Required

Additional information

This interactive tool will help you find out the status of your refund. Information is available from 2017 to the current tax year.

Some tax returns may take longer to process due to factors like return errors or incomplete information. Additionally, the Indiana Department of Revenue screens every return in order to protect taxpayer identities and refunds. We apologize for any delay but are processing your return and refund as quickly as possible while ensuring your information is accurate and safe.

To request your refund status:

- Select SSN or ITIN and enter your corresponding ID.
- Enter the tax year you are requesting the refund status for.
- Enter the refund amount from your individual tax return which can be found on either:
 - line 21 of your IT-40 Individual Income Tax Return Form.
 - line 21 of your IT-40PNR Part-Year or Full-Year Nonresident Individual Income Tax Return Form.
 - line 10 of your IT-40RNR Reciprocal Nonresident Individual Income Tax Return Form.

Search

NOTE: Allow a few weeks of processing time before checking the status of a refund.

TIP: If you requested a direct deposit of your refund from DOR to your bank account, review the account information you provided on your tax return. Contact your bank’s ACH representative if you have any issues.

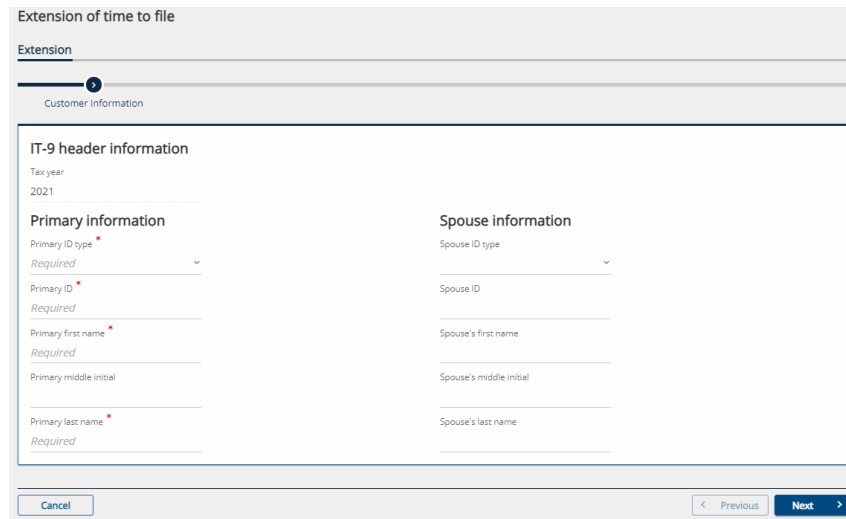
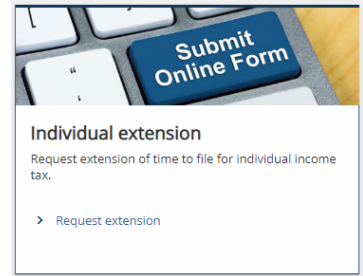
Individual Extension Request

Customers can request an extension of time to file an individual income tax return between January 1 and April 15.

NOTE: While a request for an extension cannot be filed outside of that period of time, a payment (estimated) can still be made.

Step 1: Customer Information

Provide the required information for the primary taxpayer and include spouse information (if applicable) then click “Next.”



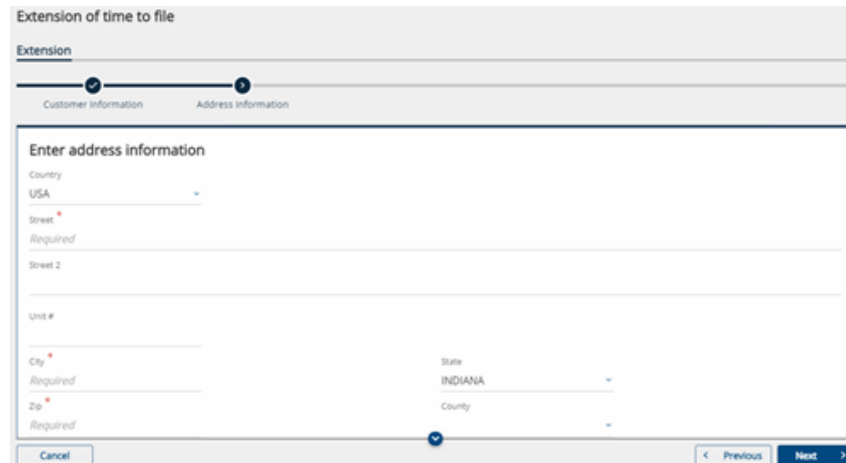
The screenshot shows the "Extension of time to file" form. At the top, it says "Extension" and "Customer information" with a progress indicator showing step 1 of 2. The form is titled "IT-9 header information" and contains the following fields:

- Tax year: 2021
- Primary information:
 - Primary ID type: Required (dropdown)
 - Primary ID: Required
 - Primary first name: Required
 - Primary middle initial
 - Primary last name: Required
- Spouse information:
 - Spouse ID type: (dropdown)
 - Spouse ID
 - Spouse's first name
 - Spouse's middle initial
 - Spouse's last name

At the bottom, there are "Cancel", "Previous", and "Next" buttons.

Step 2: Address Information

Provide the required address information for the primary taxpayer then click “Next.”



The screenshot shows the "Extension of time to file" form. At the top, it says "Extension" and "Address information" with a progress indicator showing step 2 of 2. The form is titled "Enter address information" and contains the following fields:

- Country: USA (dropdown)
- Street: Required
- Street 2
- Unit #
- City: Required
- State: INDIANA (dropdown)
- Zip: Required
- County: (dropdown)

At the bottom, there are "Cancel", "Previous", and "Next" buttons.

Step 3: Extension Payment

When a customer is ready to make an extension payment, they should select the “Yes” button and choose an option of how they will enter the payment.

The screenshot shows the 'Extension of time to file' form. At the top, there is a progress bar with three steps: 'Customer information', 'Address information', and 'Payment'. The 'Payment' step is currently active. Below the progress bar, there is a 'Payment' section with a blue background. It contains a warning message: 'Filing for an extension does not extend the deadline for paying any tax due. If you expect to owe when you file your tax return, you should pay at least 90% of the amount you expect to owe by the original return due date.' Below this, it states 'Interest is due on all amounts paid after the original return due date.' and 'Penalty will not be due if you: Pay at least 90% of your total tax due by 5/11/2021; file your return by the extended due date; Pay any remaining tax and interest due when you file your return.' There are two radio buttons for 'Do you want to make a payment now?': 'Yes' (selected) and 'No'. Below that, there are two radio buttons for 'How will you enter your 2020 extension payment?': 'I already know my desired extension payment amount' (selected) and 'I do not know my extension payment, I would like to use the IT-9 worksheet to help me calculate a extension payment amount'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

NOTE: Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at least 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.

If the amount of the extension payment is unknown, select that option and an extension payment worksheet will be provided.

The screenshot shows the 'Extension payment worksheet' form. At the top, there is a progress bar with four steps: 'Customer information', 'Address information', 'Payment', and 'Extension Payment Worksheet'. The 'Extension Payment Worksheet' step is currently active. Below the progress bar, there is a form with various fields for calculating the extension payment. The fields are: 'Total estimated income for 2020', 'Total exemption amount', 'Amount subject to tax', 'Amount of state income tax due', 'Primary county', 'Amount of county income tax due', 'Anticipated state and county tax due for 2020', 'Subtotal (90% of anticipated state and county tax due)', 'Total credits (including 2020 state and county income tax withheld, nonrefundable payments, etc.)', 'Minimum required extension payment', 'Portion of minimum required extension payment that represents your anticipated state tax due', 'Portion of minimum required extension payment that represents your (and spouse's if same county) anticipated county tax due', 'Spouse's county', and 'Portion of minimum required extension payment that represents your spouse's anticipated county tax due (if different from primary county)'. There is a red error message at the bottom: 'Total payment amount must be greater than 0'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

Provide the payment allocation information along with primary county and county tax (and spouse's county if applicable) and select a payment method; bank account or credit/debit card. Follow the prompts to enter payment information for either bank account or credit/debit card. Once that has been completed, a confirmation of payment will be displayed.

NOTE: There is no fee for making a payment from a bank account. Processing fee(s) will be assessed for credit card or debit card payments.

Customer Information Address Information Payment Extension Payment

Payment allocation

State tax
0

Primary county
▼

Primary county tax
0

Spouse's county
▼

Spouse's county tax
0

Total extension payment
0

Total payment amount must be greater than 0

Bank account Debit or credit card

Cancel < Previous Next >

Step 4: Confirmation

Review the information for accuracy and read the authorization request. Prior to submitting the payment, be certain to check the box authorizing DOR to debit the bank account or charge the credit/debit card provided for the payment and certifying that the customer is an authorized user for that payment method.

Confirm payment

Amount : 31.532
Payment date : 01-jan-2021
Tax year : 2020
Primary first name : JOHN
Primary last name : SMITH

I authorize the Indiana Department of Revenue to debit the bank account or charge the credit card identified above for the payment amount listed on today's date. I certify that I am an authorized user of this bank account or credit card. I understand that the Indiana Department of Revenue will require a separate authorization for any future transactions and that this authorization is only applicable for the specified one-time payment.

Cancel < Previous Submit

Once submitted, a confirmation message will be displayed and sent to the email that was previously provided. A "Printable View" option is available to save or print a copy for a customer's records.

Confirmation

Your request for extension of time to file has been submitted and your confirmation number is 0-000-004-822.

Please note that your submission may take several days to process.

If you have any questions or concerns you may submit a message by clicking "Send a message" under the "All Actions" menu or call us at (317) 232-2240, Monday - Friday, 8:00 a.m. to 4:30 p.m.

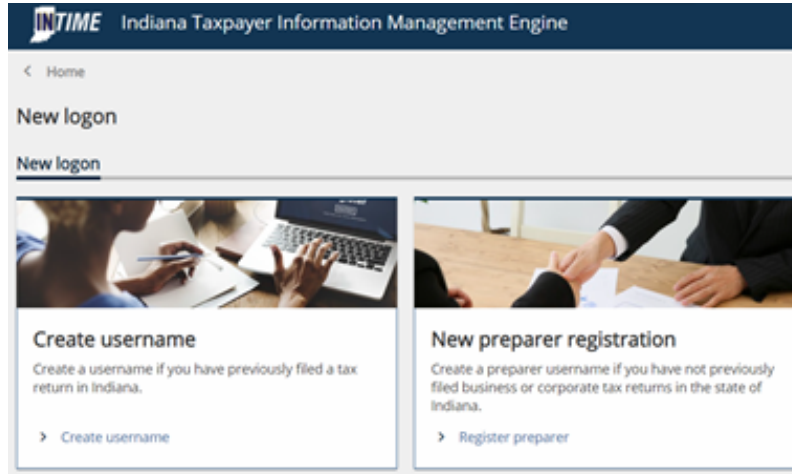
Printable View

OK

Log In to INTIME

Overview

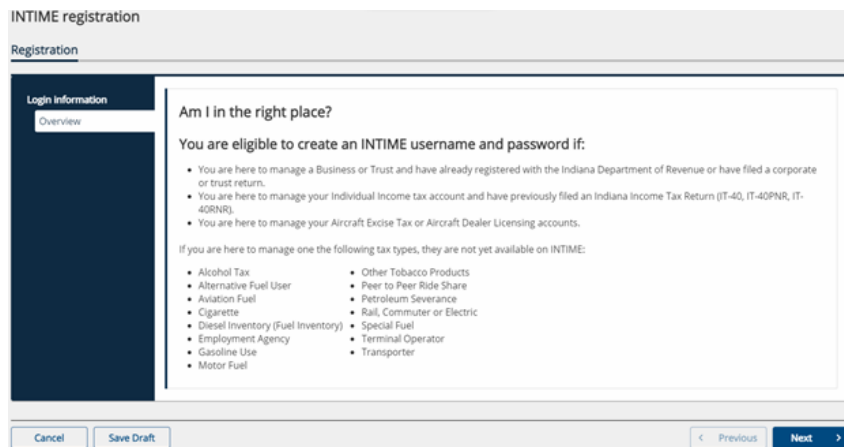
When creating your INTIME logon, there is an option to “Create username” or perform a “New preparer registration.” Individual income tax customers should select “Create a username.”



Creating a logon

Step 1: Am I in the right place?

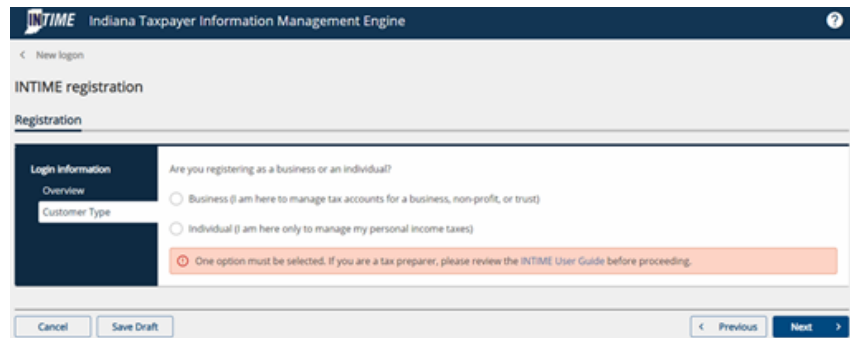
This registration overview page provides some context for creating a username and password for INTIME. If the customer is creating an INTIME account to manage their individual income tax and has previously filed an Indiana tax return (IT-40, IT-40PNR, IT-40RNR), they are in the right place and can click “Next” to continue to the next step.



Step 2: Customer Type

There are two customer type registration options:

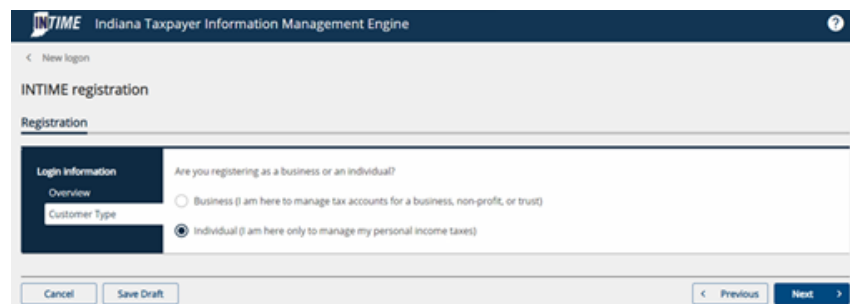
- Business
- Individual



The screenshot shows the INTIME registration page. The header is 'INTIME Indiana Taxpayer Information Management Engine'. Below the header, there is a navigation bar with '< New login'. The main content area is titled 'INTIME registration' and 'Registration'. On the left, there is a sidebar with 'Login Information' selected, and sub-items 'Overview' and 'Customer Type'. The main content area asks 'Are you registering as a business or an individual?' with two radio button options: 'Business (I am here to manage tax accounts for a business, non-profit, or trust)' and 'Individual (I am here only to manage my personal income taxes)'. A red error message states: 'One option must be selected. If you are a tax preparer, please review the INTIME User Guide before proceeding.' At the bottom, there are buttons for 'Cancel', 'Save Draft', '< Previous', and 'Next >'.

Step 2: Individual Customer

Individual income tax customers select “Individual” option to register for access to their account.

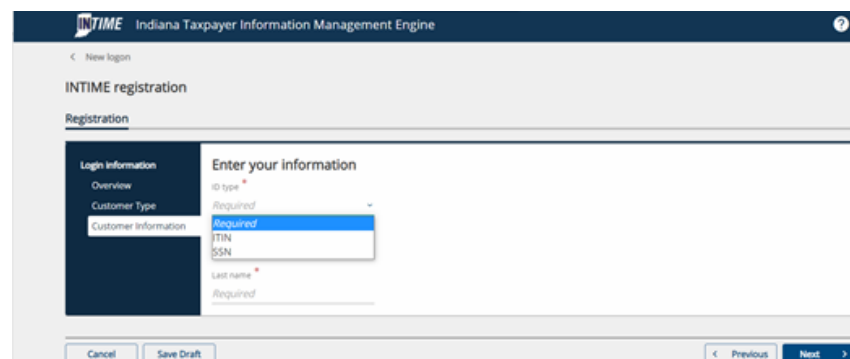


This screenshot is identical to the previous one, but the 'Individual (I am here only to manage my personal income taxes)' radio button is now selected, and the error message is no longer present.

Step 3: Customer information: Individual

Enter the required individual income tax customers information. Select from a choice of ID types and use the customer’s legal last name. The ID type options available for an individual income tax customer are:

- Social Security Number (SSN)
- Individual Taxpayer Identification Number (ITIN)



The screenshot shows the 'Enter your information' screen. The header is 'INTIME Indiana Taxpayer Information Management Engine'. Below the header, there is a navigation bar with '< New login'. The main content area is titled 'INTIME registration' and 'Registration'. On the left, there is a sidebar with 'Login Information' selected, and sub-items 'Overview', 'Customer Type', and 'Customer Information'. The main content area has a title 'Enter your information' and two required fields: 'ID type' with a dropdown menu showing 'ITIN' and 'SSN' options, and 'Last name'. At the bottom, there are buttons for 'Cancel', 'Save Draft', '< Previous', and 'Next >'.

Step 4: Add account access

The customer has a choice of three account validation methods:

- Letter ID
- Refund amount
- Previous tax return line item

If none of the validation methods are available to the customer, a request for a welcome letter to obtain a letter ID can be made on this screen by clicking the hyperlink text.

The screenshot shows the 'INTIME registration' page. On the left is a navigation menu with 'Add Accounts' selected. The main area is titled 'Account validation' and contains a blue box with the text: 'If you are unable to complete any of the account validation methods available below, you may request an INTIME welcome letter.' This text is circled in red. Below this is a dropdown menu for 'Select account validation method' with options: Letter ID, Refund Amount, and Return Line Item. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Letter ID:

When the Letter ID option is selected, it can be found on the welcome letter (or any correspondence with DOR) where indicated by the red box in the image below.

This screenshot shows the 'Account validation' screen with 'Letter ID' selected in the dropdown. Below the dropdown is a sample welcome letter from the Indiana Department of Revenue. The letter includes the DOR logo, address (PO BOX 6032, INDIANAPOLIS IN 46206-6032), and contact information for Governor Eric J. Holcomb and Commissioner Bob Grennes. It also contains a barcode and tax information: FEIN 12-3456789, Taxpayer ID 0121456789, Letter ID 1,9999999999 (highlighted with a red box), and Date Issued January 31, 2020. The 'Letter ID' field in the form below the letter is also highlighted with a red box. Navigation buttons are at the bottom.

Refund Amount:

When the “Refund Amount” option is selected, choose the type of tax return form that the customer most recently submitted to validate the account.

This screenshot shows the 'Account validation' screen with 'Refund Amount' selected in the dropdown. Below it is another dropdown menu for 'What form did you file on your most recent Indiana income tax filing?' with options: IT-40, IT-40PNR, and IT-40RNR. The 'IT-40' option is highlighted. Navigation buttons are at the bottom.

Return Line Item:

When the “Return Line Item” option is selected, choose the type of tax return form that was most recently submitted to validate the account.

The screenshot shows the 'Registration' page with a sidebar on the left containing 'Login Information', 'Overview', 'Customer Type', 'Customer Information', 'Add Accounts', 'Login', and 'Contact'. The main content area is titled 'Account validation' and includes a warning message: 'If you are unable to complete any of the account validation methods available below, you may request an INTIME welcome letter.' Below this is a 'Select account validation method' dropdown menu with 'Return Line Item' selected. A second dropdown menu asks 'What form did you file on your most recent Indiana income tax filing?' with a 'Required' dropdown menu open, showing options: 'Required', 'IT-40', 'IT-40PNR', and 'IT-40RNR'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 5: Login

Now that the account has been validated, the customer can create their INTIME login credentials.

The screenshot shows the 'Create your INTIME login' page. The sidebar on the left has 'Login' selected. The main content area has a warning message: 'The password: must be at least 8 characters long, must include at least one uppercase letter, must include at least one special character, cannot be the username or email address.' Below this are several required fields: 'Username (at least 6 characters)', 'Password', 'Confirm password', 'Secret question', 'Secret answer', and 'Confirm secret answer'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 6: Contact Information

Enter all the required contact information.

The screenshot shows the 'Enter your contact information' page. The sidebar on the left has 'Contact' selected. The main content area has several required fields: 'First name', 'Last name', 'Email', 'Confirm email', 'Phone type', 'Country', and 'Phone number'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 7: Review

On the review screen, verify that the INTIME logon summary is correct before submitting the request.

Review and submit

Last name : SAMPLE
SSN : ***-**-2222

INTIME logon summary

Name : JOHN SAMPLE
Username : test123
Secret question : What was the name of your first stuffed animal?

Click submit to complete this request.

Cancel Save Draft < Previous Submit

Step 8: Submitting the request

The customer will be asked to confirm if they are ready to submit the request.

Confirmation

Are you sure you want to submit?

Cancel OK

Step 9: Confirmation

Once the request has been submitted, a confirmation message will be displayed. A printable view option is available for the customer to save a copy to their computer or print a copy for their records.

Confirmation

Your request has been submitted.

You will receive an email from the Department of Revenue when your request has been processed.

To access this request in the future use email: sample@sample.com and confirmation code: jyp5r.

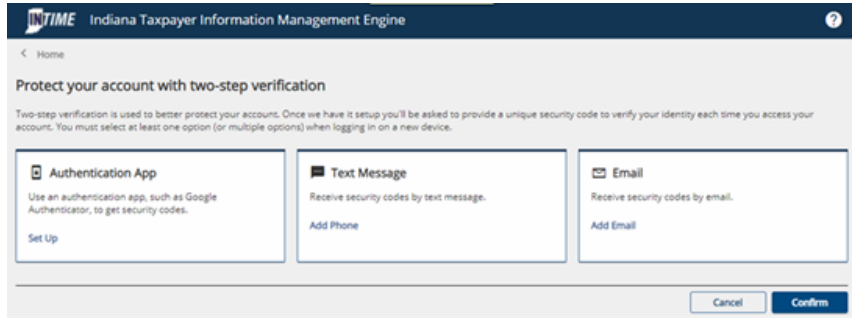
If you need further assistance, please call INTIME customer support at (317) 232-2240, Monday - Friday, 8:00am - 4:30pm.

Printable View

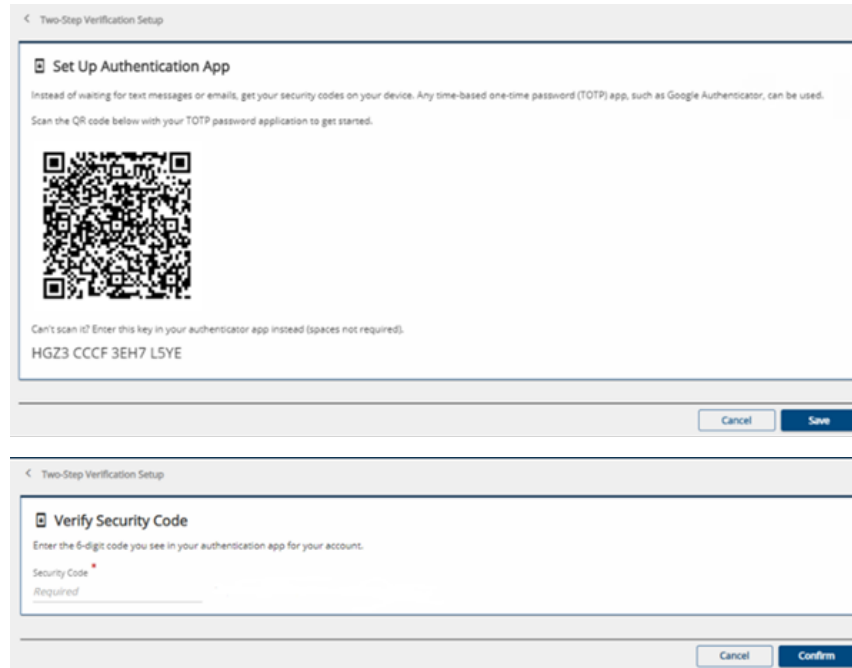
OK

Two-Step Verification

DOR knows the importance of customer account security and uses the two-step verification method for access to INTIME. Customers must choose their preferred two-step verification method before proceeding. The three options include the use of an authentication app, a text message receipt, or an email receipt to get a unique verification security code. This process of verifying the security code will be required for each INTIME login.



Authentication App



Text Message

The image shows two screenshots of a mobile application interface for two-step verification setup. The top screenshot is titled "Add Phone" and contains the following text: "A security code will be sent via text message when trying to access your account. Message and data rates may apply." Below this is the question "What phone number would you like to use?". There are three input fields: "Country" with "USA" selected, "Phone Number" with a red asterisk and "Required" below it, and "Carrier" with a red asterisk and "Required" below it. At the bottom right are "Cancel" and "Save" buttons. The bottom screenshot is titled "Verify Security Code" and contains the text: "A text message with your security code was sent to (555) 555-5555. Delivery time may vary, so please allow for a delay of up to two minutes to receive your security code." Below this is a "Security Code" input field with a red asterisk and "Required" below it. At the bottom left is the text "Didn't receive your security code? Resend". At the bottom right are "Cancel" and "Confirm" buttons.

Email

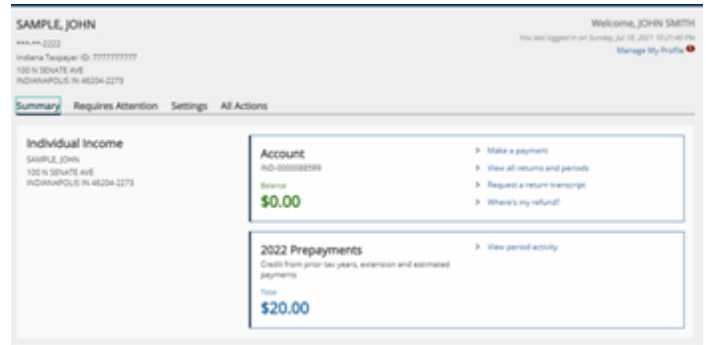
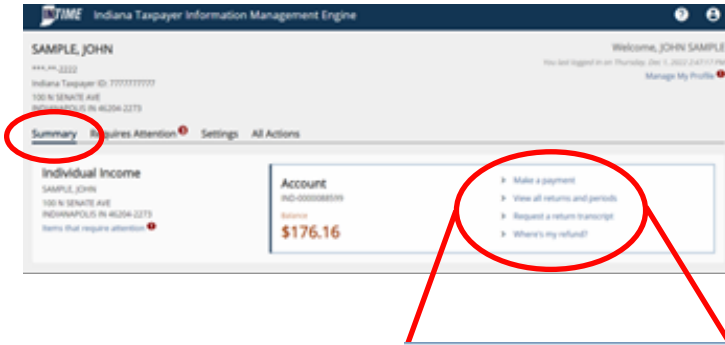
Once the security code has been verified, the customer will be logged in and immediately directed to their account's "Summary" tab.

The image shows two screenshots of a mobile application interface for two-step verification setup. The top screenshot is titled "Add Email" and contains the text: "A security code will be sent via email when trying to access your account. Add Do_Not_Reply@dor.in.gov to your email whitelist to prevent security codes going to your junk folder." Below this is the question "What email address would you like to use?". There is one input field labeled "Email" with a red asterisk and "Required" below it. At the bottom right are "Cancel" and "Save" buttons. The bottom screenshot is titled "Verify Security Code" and contains the text: "An email with your security code was sent to jane@sample.com. If you don't see the message, check your junk folder for an email from Do_Not_Reply@dor.in.gov." Below this is a "Security Code" input field with a red asterisk and "Required" below it, followed by the text "Populate in development environments only." At the bottom left is the text "Didn't receive your security code? Resend". At the bottom right are "Cancel" and "Confirm" buttons.

“Summary”

When logged in to INTIME, a customer will be able to view their account on the “Summary” tab.

It will look similar to the following examples:

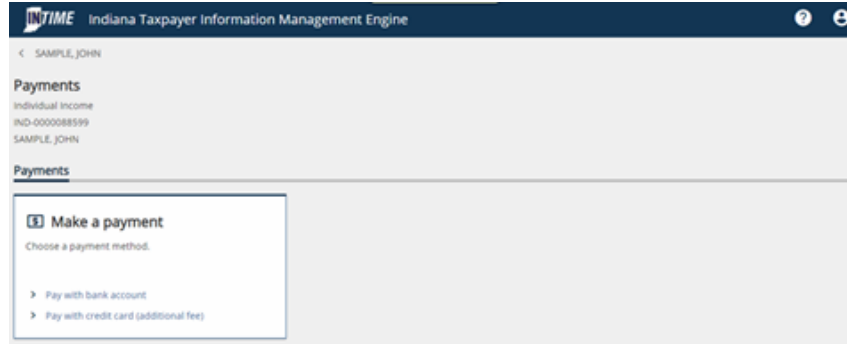


The “Account” panel provides the customer a list of options/actions to perform:

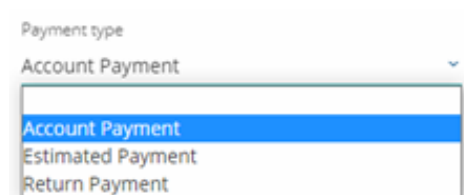
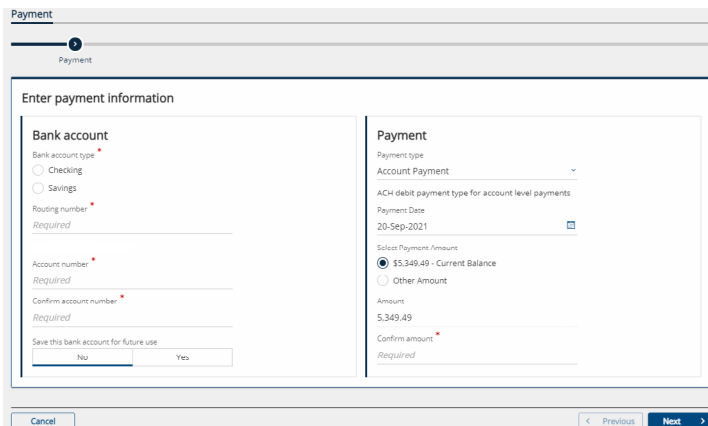
- > Make a payment
- > View all returns and periods
- > Request a return transcript
- > Where's my refund?

Make a Payment

Step 1: Select the “Make a payment” option and then determine the preferred payment method. The options available include paying with a bank account (no fee) or a credit/debit card (additional fee).



Step 2A: When making a payment from a **bank account**, the customer will be asked to enter payment information and select a payment type.



When making an estimated payment, be sure to schedule your payment date on or before the due date for the intended quarter.

Payment

Enter payment information

When making an estimated payment, be sure to schedule your payment date on or before the estimated payment due date for the intended quarter by following the schedule below.

Estimated Tax Installment	Payment Due Date
First Installment	15-Apr-2021
Second Installment	15-Jun-2021
Third Installment	15-Sep-2021
Fourth Installment	18-Jan-2022

Bank account

Bank account type *

Checking

Savings

Routing number *

Required

Account number *

Required

Confirm account number *

Required

Save this bank account for future use

No Yes

Payment

Payment type

Estimated Payment

ACH debit payment type for estimated payments

Period

31-Dec-2021

Payment Date

20-Sep-2021

Select Payment Amount

\$5,249.49 - Current Balance

Other Amount

Amount

5,249.49

Confirm amount *

Required

Cancel Previous Next

When making a return payment, be sure to select the period for which you are making a payment along with the payment date.

Payment

Enter payment information

Bank account

Bank account type *

Checking

Savings

Routing number *

Required

Account number *

Required

Confirm account number *

Required

Save this bank account for future use

No Yes

Payment

Payment type

Return Payment

ACH debit payment type for returns

Period

31-Dec-2021

Payment Date

20-Sep-2021

Select Payment Amount

\$5,149.49 - Current Balance

Other Amount

Amount

5,149.49

Confirm amount *

Required

Cancel Previous Next

Step 2B: When making a payment with a **credit or debit card**, the customer will be asked to select a payment type and enter the payment amount.

Payment

Payment

Enter payment information

Verify your payment information. When you click Next, you will be redirected to our third party partner where you will be prompted to enter your credit card information.

Please note that a **processing fee will be assessed** on all credit card payments. The fees are structured as follows:

Credit Cards		
Card Type	Percentage	Additional fee
Individual	1.99%	\$1.00
Corporate	2.63%	\$1.00

Debit Cards	
Payment amount	Flat fee
Less than \$100.00	\$2.75
Greater than or equal to \$100.00	\$3.75

Payment type ^{*}
Required

Amount you wish to pay
5,049.49

Cancel Previous Next

After verifying the information is correct and clicking “Next,” customers will be redirected to the following screen to complete the credit or debit card payment process. Only Discover, Mastercard or VISA are accepted.

NOTE: A fee will be charged by the credit card processor based on the amount of the payment. The online transaction fee is \$1 plus 1.99% of the total payment.

value
PAYMENT SYSTEMS

Return To Home Page

Payment Method Payment Details Review Information Payment Receipt

Show Receipts in Cart Total (withour fees) \$290.37

Select Payment Method
Credit or Debit

VISA Mastercard DISCOVER

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Step 3: A confirmation request will be displayed and the customer will be asked to check the box if they can affirm that they are authorized to withdraw funds from the bank account they entered. When making estimated payments you will be asked to enter your county of residence on January 1 or check the box that affirms you did not reside in Indiana.

Bank payment
Individual Income
IND-0006105458
DOE, JANE

Payment

Payment Confirmation

Confirm payment

Amount : 100.00
Payment date : 20-Sep-2021
Payment type : Account Payment
Last name : DOE
First name : JANE
SSN : ***-**-2222

By clicking Submit, you affirm that you have authorization to withdraw funds from this bank account. *

Cancel < Previous Submit

Bank payment
Individual Income
IND-0006105458
DOE, JANE

Payment

Payment County

Enter County Information

County of residence on January 1 *

Required

I did not reside in Indiana

Cancel < Previous Next >

Step 4: Once the request has been submitted, a confirmation message will be displayed. A “Printable view” option is available to save or print a copy for recordkeeping.

< DOE, JANE

Confirmation

Thank you for scheduling a payment with the Indiana Department of Revenue. You may wish to print or save a copy for your records.

If you need to make a change, it is not too late. While a payment is still pending, you can cancel the payment and make a new one. To cancel your payment, you must search for it by navigating to the All Actions tab and selecting the “Search submissions” link on the Submissions menu. Once you have found your submission, select the “delete” link.

Your confirmation number is **0-004-169-279**

Customer: DOE, JANE
Account ID: IND-0006105458
Payment amount: 100.00
Payment date: 20-Sep-2021
Payment type: Account Payment
Submitted date: 20-Sep-2021

If you have any questions or concerns please call (317) 232-2240, Monday – Friday, 8:00am – 4:30pm.

Printable View
OK

Confirmation

Thank you for scheduling a payment with the Indiana Department of Revenue. You may wish to print or save a copy for your records.

When making an estimated payment, be sure to schedule your payment date on or before the estimated payment due date for the intended quarter by following the schedule below.

Estimated Tax Installment	Payment Due Date
First installment	15-Apr-2021
Second installment	15-Jun-2021
Third installment	15-Sep-2021
Fourth installment	15-Jan-2022

If you need to make a change, it is not too late. While a payment is still pending, you can cancel the payment and make a new one. To cancel your payment, you must search for it by navigating to the All Actions tab and selecting the “Search submissions” link on the Submissions menu. Once you have found your submission, select the “delete” link.

Your confirmation number is **0-004-152-895**

Customer: DOE, JANE
Account ID: IND-0006105458
Payment amount: 100.00
Payment date: 20-Sep-2021
Payment type: Estimated Payment
Submitted date: 20-Sep-2021

If you have any questions or concerns please call (317) 232-2240, Monday – Friday, 8:00am – 4:30pm.

Printable View
OK

Payment History

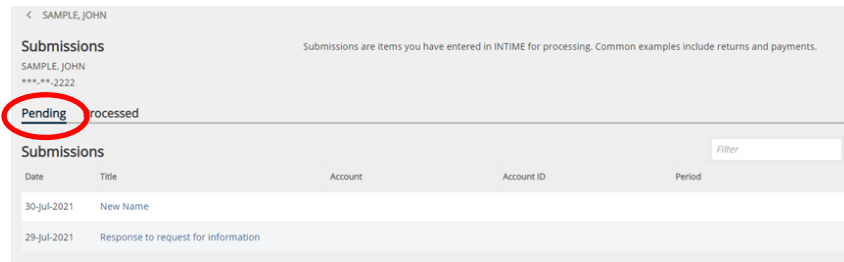
Step 1: To view payment history, go to the “All Actions” tab and locate the “Submissions” panel and click on the “Search submissions” link. Submissions are items that have been entered in INTIME for processing. This includes returns and payments.

Submissions

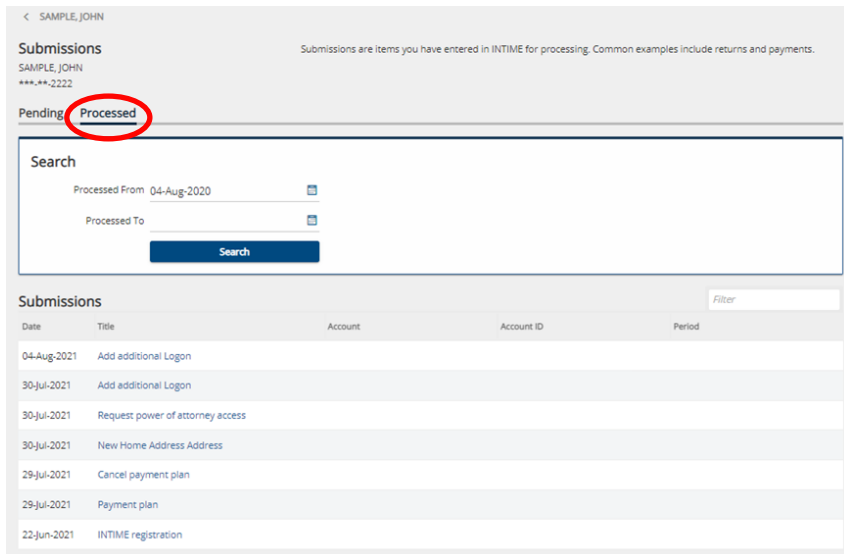
Check the status of a previous INTIME return, payment, or submission or view past submissions.

> Search submissions

Step 2: Payments or any items that have been submitted but that have not yet been processed can be viewed in the “Pending” tab.



Step 3: Past payments or any items that have been completed or processed will appear in the “Processed” tab and listed by date. The “Search” function can help locate past items by entering a date range.



View All Returns and Periods

When the option to view all submitted returns and periods is selected, a customer will have two tabs to choose from:

- Returns
- Periods

Returns Tab

Return	Period	Status	Due Date
IT-40	31-Dec-2016	Processed	18-Apr-2017

Periods Tab

Period	Balance	
31-Dec-2021	\$0.00	Make payment
31-Dec-2020	\$0.00	Make payment
31-Dec-2019	\$0.00	Make payment
31-Dec-2018	\$0.00	Make payment
31-Dec-2016	\$176.16	Make Payment

Request a Return Transcript

Step 1: To request a return transcript, go to the “Summary” tab where the “Account” panel is located and click on the “Request a return transcript” hyperlink.

INTIME Indiana Taxpayer Information Management Engine

SAMPLE, JOHN
***-**-2222
Indiana Taxpayer ID: 777777777
100 N SENATE AVE
INDIANAPOLIS IN 46204-2273

Welcome, JOHN SAMPLE
You last logged in on Thursday, Dec 1, 2022 2:47:17 PM
Manage My Profile

Summary Requires Attention 3 Settings All Actions

Individual Income
SAMPLE, JOHN
100 N SENATE AVE
INDIANAPOLIS IN 46204-2273
Items that require attention 1

Account
IND-0000088599
Balance
\$176.16

- > Make a payment
- > View all returns and periods
- > Request a return transcript
- > Where's my refund?

Step 2: On the “Select Filing Period” screen, use the drop-down menu to choose the filing period (required) for which you are requesting the return transcript then click “Next.”

The screenshot shows the 'Request return transcript' screen for 'SAMPLE, JOHN'. The 'Request' progress bar has two steps: 'Select Filing Period' (current) and 'Request Transcript'. A message box states: 'Select an available period to request a return transcript. If no periods are displayed, a return transcript cannot be requested at this time. Please allow several days for recently submitted returns to process before requesting a return transcript.' Below this is a dropdown menu labeled 'Select return filing period' with a red asterisk. A red circle highlights this dropdown, and a red arrow points to the expanded list of filing periods: 31-Dec-2020, 31-Dec-2019, 31-Dec-2018, and 31-Dec-2016. The 'Next' button is visible at the bottom right.

Step 3: The next screen will provide some information on generating a PDF of the requested transcript. Click on the “Submit” button to complete the request. A confirmation of submission will be displayed.

The screenshot shows the 'Request return transcript' screen for 'SAMPLE, JOHN'. The 'Request' progress bar has two steps: 'Select Filing Period' and 'Request Transcript' (current). A message box states: 'This transcript request will generate a line item PDF of the current version of the return. The figures shown in this document reflect the amounts as currently calculated. This may include amendments, adjustments, or other department changes to your return and may not reflect what was originally reported. Click the submit button below to request a transcript for the IT-40 Individual Income Tax Return.' Below this is a 'Submit' button highlighted in blue. The 'Previous' button is also visible.

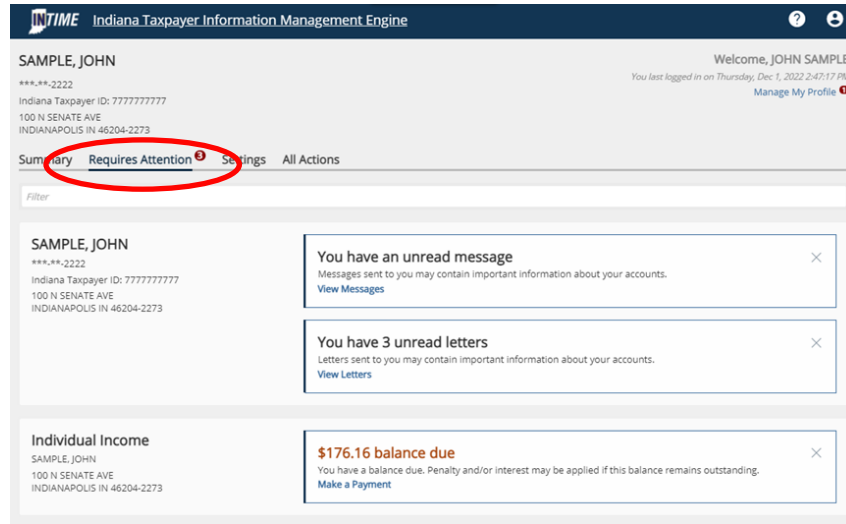
Where's my Refund?

To check on the status of a refund, select an ID type (SSN or ITIN) and enter the corresponding ID number, the tax year for which you are requesting the refund status, and enter the expected refund amount from your individual income tax return. Click on “Search” to obtain a refund status update.

The screenshot shows the 'Where's my refund?' screen for 'SAMPLE, JOHN'. The title is 'Where's my refund?'. There are two main sections: 'Check the status of your refund' and 'Additional information'. The 'Check the status of your refund' section has radio buttons for 'SSN' and 'ITIN', and input fields for 'ID', 'Tax year', and 'Refund amount', all marked as 'Required'. The 'Additional information' section contains a message: 'This interactive tool will help you find out the status of your refund. Information is available from 2017 to the current tax year. Some tax returns may take longer to process due to factors like return errors or incomplete information. Additionally, the Indiana Department of Revenue screens every return in order to protect taxpayer identities and refunds. We apologize for any delay but are processing your return and refund as quickly as possible while ensuring your information is accurate and safe.' Below this is a blue box with instructions: 'To request your refund status: Select SSN or ITIN and enter your corresponding ID. Enter the tax year you are requesting the refund status for. Enter the refund amount from your individual tax return which can be found on either: line 21 of your IT-40 Individual Income Tax Return Form. line 21 of your IT-40PNR Part-Year or Full-Year Nonresident Individual Income Tax Return Form. line 10 of your IT-40RNR Reciprocal Nonresident Individual Income Tax Return Form.' A 'Search' button is at the bottom right.

“Requires Attention”

When an item requires the attention of the customer, it will appear in the “Requires Attention” tab with a red circle and number indicating the quantity of notifications.

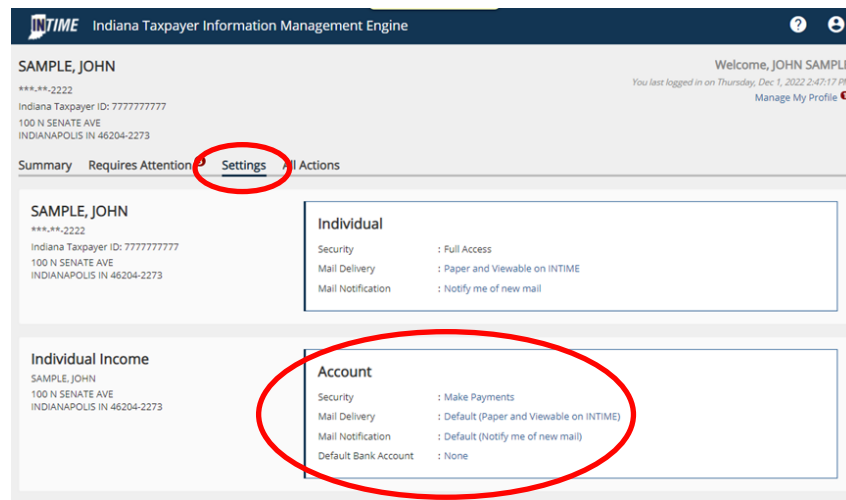


NOTE: The question mark icon in the top right corner links to the DOR Contact Us webpage. It also allows the customer to view a support ID. If the customer calls DOR with an INTIME question, a support person could use this ID to view the customer’s current INTIME session in real-time.

“Settings”

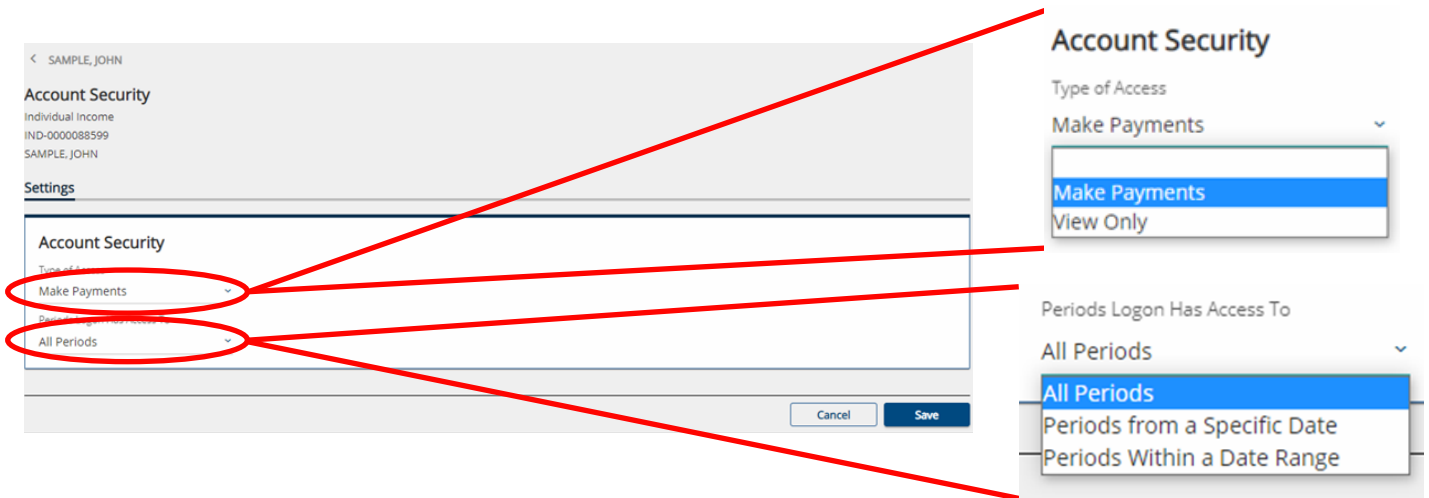
A number of actions are available via the “Settings” tab including the options for both individual and account settings:

- Security settings
- Mail delivery options
- Mail notifications
- Default bank account



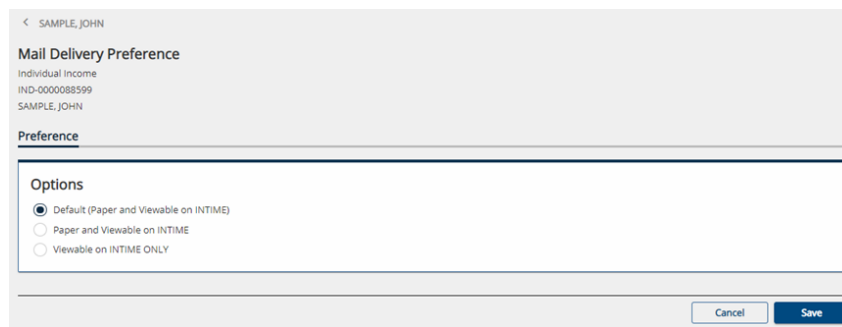
Managing Security

Account security settings provide the option to grant access to an authorized tax practitioner to make payments or view only, and or all periods, from a specific date or within a date range.



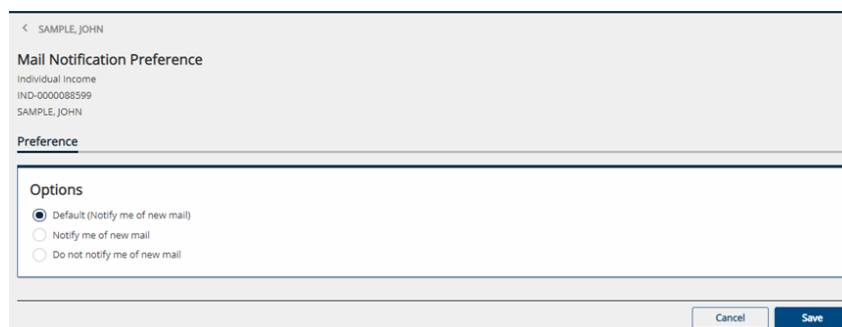
Mail Delivery Options

There are two options for the mail delivery; a customer can choose to go paperless (view only in INTIME) or continue to receive paper correspondence from DOR via postal service while remaining viewable on INTIME.



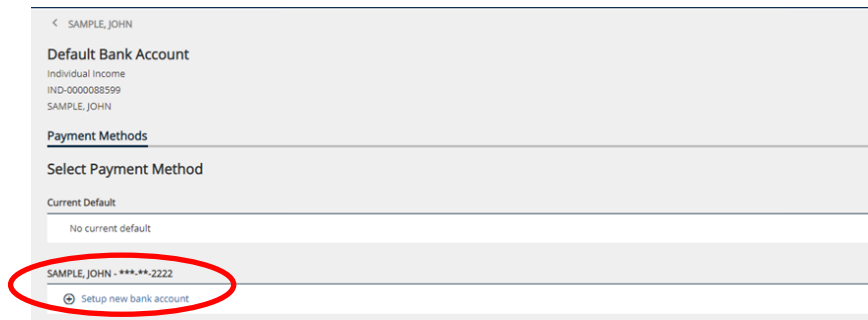
Mail Notifications

Customers can choose to turn their INTIME mail notifications on or off depending on their preference.

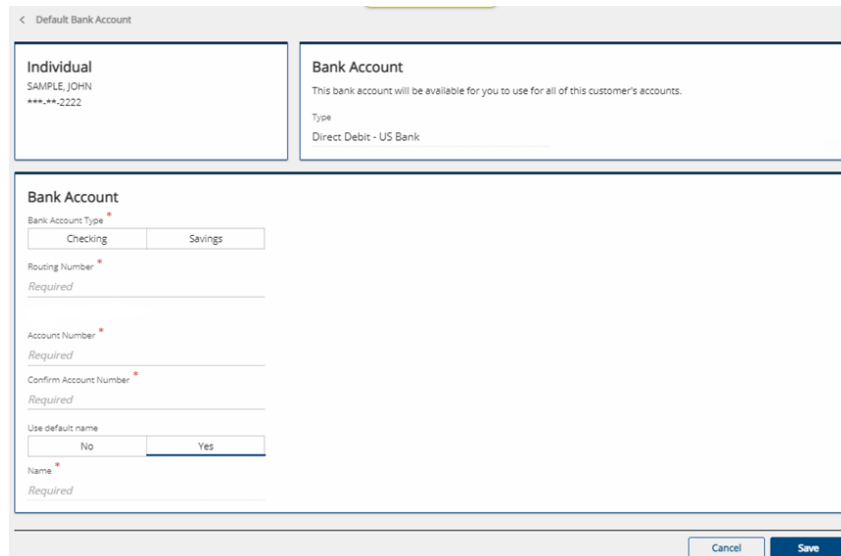


Default Bank Account

Step 1: Customers can add a default bank account to make payments (or for direct deposit of refunds) by clicking on “Setup new bank account.”



Step 2: Enter the required information and follow the prompts to add, remove, or rename a default bank account.



“All Actions”

The customer can perform a number of tasks using the “All Actions” tab.

INTIME Indiana Taxpayer Information Management Engine

SAMPLE, JOHN
****-**-2222
Indiana Taxpayer ID: 7777777777
100 N SENATE AVE
INDIANAPOLIS IN 46204-2273

Welcome, JOHN SAMPLE
You last logged in on Thursday, Dec 1, 2022 2:47:17 PM
Manage My Profile

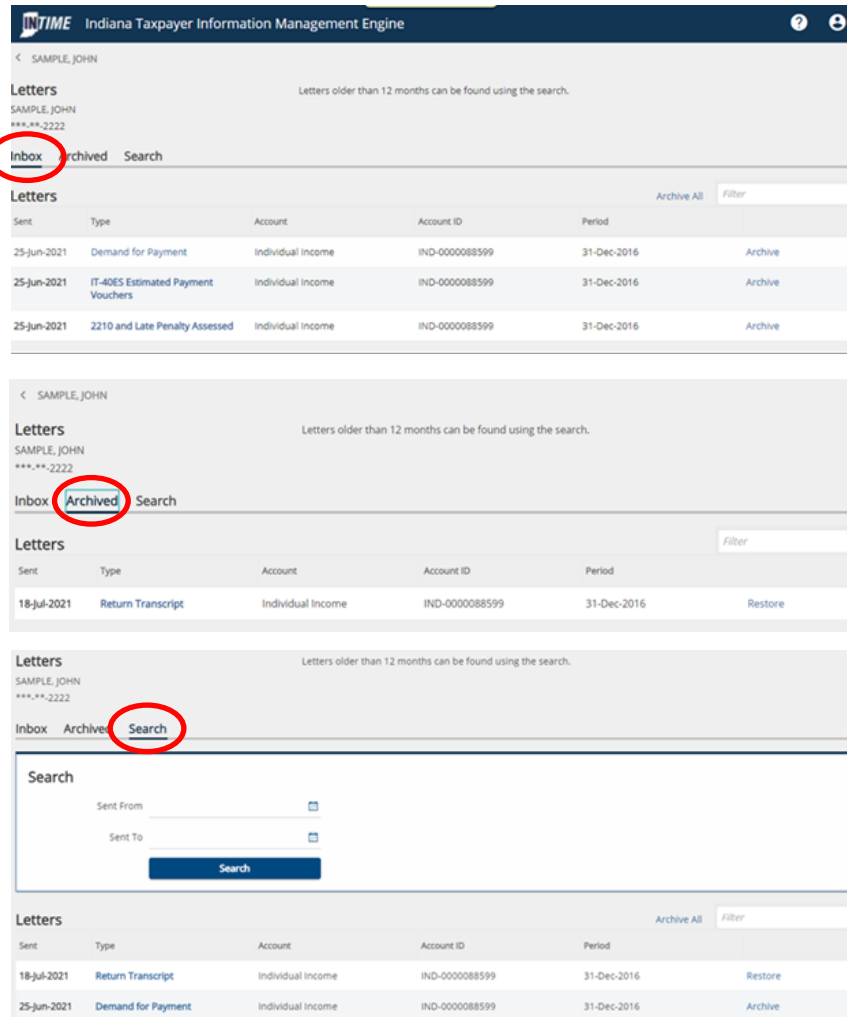
Summary Requires Attention **All Actions** Settings

Search our online services

Letters View all letters you've received from the agency. <ul style="list-style-type: none">> View letters> Respond to a letter, notice, or bill	Messages View all messages you've received from the agency. <ul style="list-style-type: none">> Send a message> View messages	Payment plan Manage payment plans for all accounts. <ul style="list-style-type: none">> Add a payment plan> Cancel a payment plan
Where's my refund? Request the status of your individual income tax return refund. <ul style="list-style-type: none">> Where's my refund?	Names & addresses View or update names and addresses associated to this customer. <ul style="list-style-type: none">> Manage names & addresses	Power of attorney Request power of attorney access. <ul style="list-style-type: none">> Request POA access
Manage account access Manage access for additional users or manage access that third party preparers have to your account. <ul style="list-style-type: none">> Manage access	Submissions Check the status of a previous INTIME return, payment, or submission or view past submissions. <ul style="list-style-type: none">> Search submissions	Tax account registration Register or close a location or tax account. <ul style="list-style-type: none">> Register a sole proprietor BT-1> Register an aircraft
Refund for tax on purchases Request a refund for Indiana tax that you have paid on purchases. <ul style="list-style-type: none">> Submit refund request	ST-200 application Apply for a sales tax exemption on your purchase of metered utilities or telecommunication services. <ul style="list-style-type: none">> Apply for an exemption	Individual extension Request extension of time to file for individual income tax. <ul style="list-style-type: none">> Request extension

Letters

Letters, notices, or bills sent to the customer from DOR can be viewed by going to the “All Actions” tab and selecting “View Letters.” Three tabs are available in “Letters:” Inbox, Archived, and letters older than 12 months can be found by using “Search.”



Respond to a Letter, Notice or Bill

To respond to a letter, notice or bill from DOR, go to the “All Actions” tab and locate the “Letters” panel, then click on the “View Letters” hyperlink.

Letters

View all letters you've received from the agency.

- > View letters
- > Respond to a letter, notice, or bill

Step 1: In the “Inbox” tab, click a hyperlinked item in the “type” column to open it.

Step 2: Enter the letter ID on the letter, notice, or bill to which the customer would like to respond.

Enter letter ID

Enter the letter ID of the letter, notice, or bill you are responding to in the box below. The letter ID can be found near the top right in the header of the letter you received. See the picture below for an example of a letter ID.

On the next page, include a detailed response to this correspondence and optionally attach any documentation that pertains to your response.

INDIANA DEPARTMENT OF REVENUE
PO BOX 6032
INDIANAPOLIS IN 46206-6032

Indiana Department of Revenue
Eric J. Holcomb, Governor
Bob Grennes, Commissioner

TAXPAYER NAME
123 MAIN STREET
INDIANAPOLIS IN 46202

FEIN 12-3456789
Taxpayer ID 0123456789
Letter ID **L9999999999**
Date Issued January 31, 2020

Letter ID
Required

Cancel Previous Next

Step 3: A customer can provide a detailed response on this page with the option of uploading supporting documentation. Follow the prompts to make a submission. A confirmation of submission will be displayed.

Response to request for information
SAMPLE JOHN
***-**-2222

Reply

Letter Response

Respond to letter
Enter your response to Demand for Payment
Required

Attachments are not required but can be added by clicking the add attachment button below.

Add attachment

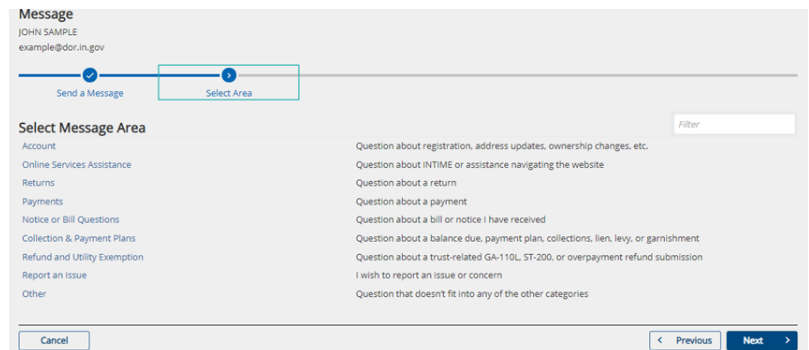
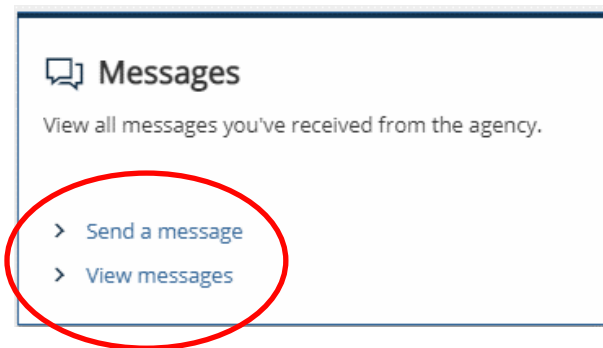
Cancel Previous Submit

Sending and Receiving INTIME Messages

INTIME includes the ability to securely communicate with DOR about individual income tax accounts.

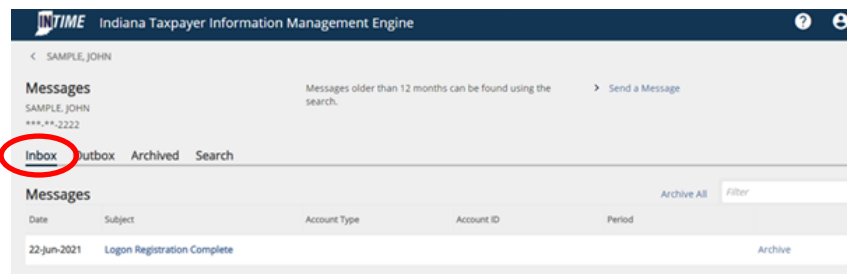
In the “All Actions” tab, a “Messages” panel will be displayed. From there, a customer can view and respond to messages, or create a new message.

When creating a new message, INTIME will ask for some specific information to get the message to the appropriate person.



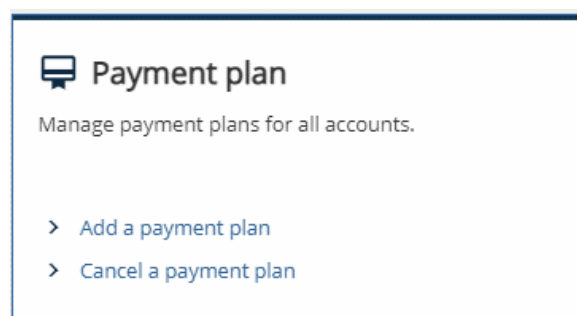
TIP: An email alert will be sent when DOR responds to your message.

Messages can be viewed in one of four tabs: Inbox, Outbox, Archived and via Search.



Payment Plans

INTIME offers individual income tax customers the option of setting up a payment plan from the “All Actions” tab menu.



Add a Payment Plan

Step 1: Once a customer has read the information provided and determined that a payment plan works for their needs, they should check the acknowledgement box and then click “Next” to select a payment plan.

< SAMPLE, JOHN

Payment plan
SAMPLE, JOHN
***-**-2222

Payment

Information

Is a payment plan right for me?

The Indiana Department of Revenue understands that making a full payment for outstanding tax liabilities may not be possible. We offer flexible terms to meet the needs of most customers, but also wish to make you aware of some important information regarding payment plans.

- Although we do not charge an additional fee for a payment plan, **interest will continue to accrue** throughout the course of the payment arrangement. Penalty and interest is included in your installment payment. Making a down payment and/or establishing a shorter payoff time will reduce the total amount you pay over time.
- **Payments will be withdrawn automatically** on the date you specify for the amount due.
- If you make payments after the due date of your arrangement, additional **interest will accumulate**, which will result in extra payments due.
- **The Department may be forced to cancel your payment arrangement** if you do not make payments by the established due dates.
- If a lien has been filed on personal or business property, **the lien will remain in place until the balance has been paid in full.**
- **There may be additional requirements** needed in order to avoid the protest of a professional license or to release a vehicle title.

I understand and wish to proceed with requesting a payment arrangement.

Cancel Previous Next >

NOTE: A checking or savings account will be required to set up ACH debit payments. Installment payments will be withdrawn automatically from the bank account provided on the dates requested by the customer.

Step 2: Select the payment plan details. Installment frequency can be made monthly or bi-weekly, and the installment type can be by number of payments or by amount for each payment.

INTIME Indiana Taxpayer Information Management Engine

< SAMPLE, JOHN

Payment plan
SAMPLE, JOHN
***-**-2222

Payment

Information Payment Plan

Select payment plan details

Your balance, plus any penalty and interest, can be paid in fixed monthly or bi-weekly installments. A checking or savings account will be required to set up ACH Debit payments. Payment dates after the first payment will vary depending on the payment frequency selected.

If you have any more questions regarding payment plan requirements, please call the DOR Payment Services Division at (317) 232-2240.

Please note that after you enter your payment plan information and click next, your payments plan will be forecasted. Depending on the age and number of your liabilities as well as the length of the plan, this may take a few moments.

Balance
396,189,678.48

Payment Frequency
Monthly Bi-Weekly

Install Type
Number Of By Amount

Total Number of Payments
Required

The down payment being added with this payment plan will be processed on the day it is submitted.
The first payment due field refers to the first installment date, not including the down payment.
If you elect to make a down payment and enter today's date in the first payment due field, both payments will be processed today.

I will make a down payment today

Down Payment Amount
79,237,935.70

First Payment Due Date
Required

Cancel Previous Next >

Step 3: A payment plan forecast will be provided.

< SAMPLE, JOHN

Payment plan

SAMPLE, JOHN
***-**-2222

Payment

Information Payment Plan Forecast Bank Information

View payment plan forecast

By creating a payment plan, you will be required to make every payment in full based on the payment schedule provided below. Defaulting on the payment plan will result in additional collection efforts to satisfy outstanding liabilities. A down payment is not required, but making one will decrease the monthly payment amount.

This payment plan agreement is not considered binding against you or the Department unless and until you submit your first payment which may include an optional down payment.

Installments

Installment	Due	Starting	Interest	Penalty	Payment	Ending
0	29-Jul-2021	396,015,280.03	0.00	0.00	79,237,935.70	316,777,344.33
1	30-Jul-2021	316,777,344.33	34,715.33	0.00	63,792,930.88	253,019,128.78
2	30-Aug-2021	253,019,128.78	859,571.83	0.00	63,792,930.88	190,085,769.73
3	30-Sep-2021	190,085,769.73	645,770.84	0.00	63,792,930.88	126,938,609.69
4	01-Nov-2021	126,938,609.69	445,154.57	0.00	63,792,930.88	63,590,833.38
5	30-Nov-2021	63,590,833.38	202,096.90	0.00	63,792,930.28	0.00

Cancel < Previous Next >

Step 4: Provide the required bank account information.

< SAMPLE, JOHN

Payment plan

SAMPLE, JOHN
***-**-2222

Payment

Information Payment Plan Forecast Bank Information

Enter bank information

Bank Account Type Required

Routing Number Required

Account Number Required

Confirm Account Number Required

Cancel < Previous Next >

Step 5: After reviewing the information provided is correct, the customer will need to check the box to affirm that they agree to the terms provided in the payment plan agreement. Once the request is submitted, a confirmation message will be displayed and a “Printable view” option will be available to save or print a copy for recordkeeping.

Cancel a Payment Plan

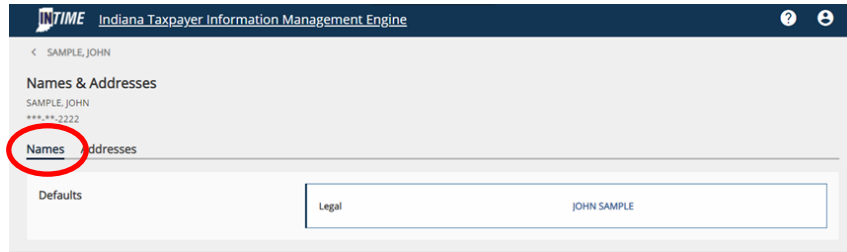
Step 1: Customers can cancel an existing payment plan by selecting the corresponding checkbox in the “Cancel Plan” column.

Payment Plan ID	Total Plan Amount	Installment Amount	Cancel Plan
47656	396,189,678.48	63,792,930.88	<input checked="" type="checkbox"/>

Step 2: Prior to clicking the “Submit” button to cancel the plan, customers should read the warning message. Once the cancellation has been submitted, a confirmation message will be displayed.

Update Names and Addresses

Customers can manage names and addresses associated to their account by selecting the “Update Name and Addresses” panel in the “All Actions” tab. To update a legal name, go to the “Names” tab and click the hyperlinked legal name, or to update an address, select the “Addresses” tab and click the hyperlinked address.



Update Name

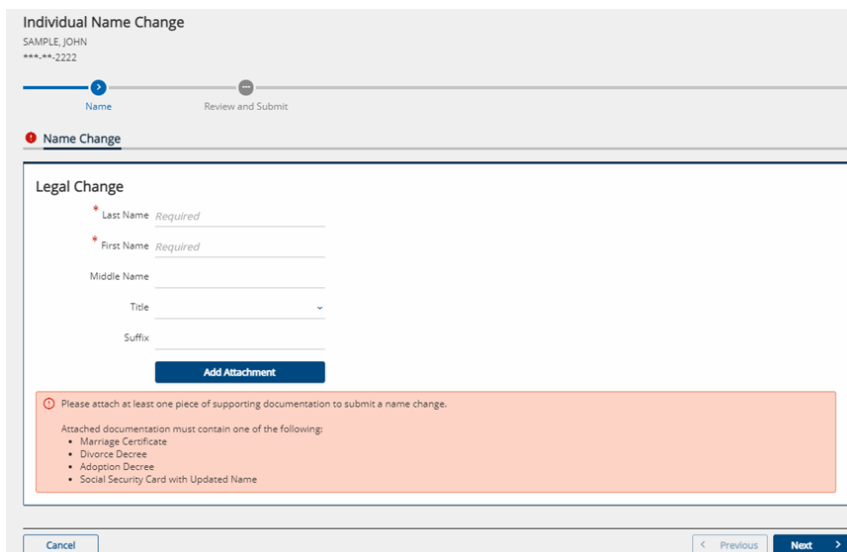
Step 1: Legal Name Change

A customer can select “Change this name.” A warning will appear at the top of the screen noting that this is only a name change with DOR.



Step 2: Add Supporting Documentation

This is where the customer can enter their new legal name and upload supporting documentation.



Step 3: Review and Submit

The screenshot shows a mobile application interface for 'Names & Addresses'. The title is 'Individual Name Change'. Below the title, the user's name 'SAMPLE, JOHN' and a masked phone number '***.**-2222' are displayed. A progress bar at the top has two steps: 'Name' (completed) and 'Review and Submit' (current step). A text box contains the message: 'Your name change request is ready to submit.' At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Submit'.

Step 4: Confirmation

An additional link to contact the Secretary of State is provided in case the customer missed the first warning about how this name change is only for DOR as it relates to their tax accounts.

The screenshot shows a 'Confirmation' screen within the 'Names & Addresses' section. The text reads: 'Your request to change your Name has been submitted and your confirmation number is 0-000-008-385. By submitting this, you are only changing your name with the Department of Revenue as it relates to your tax accounts. Please note that your submission may take several days to process. If you have any questions or concerns please send us a message or call us at (317) 232-2240, Monday - Friday, 8:00 a.m. to 4:30 p.m.' There are two buttons at the bottom: 'Printable View' and 'OK'.

Update Addresses

Step 1: The “Addresses” tab lists any addresses associated with the customer. After clicking on the hyperlinked address, select “Change this address” to make an update.

The screenshot shows the 'Names & Addresses' screen for 'SAMPLE, JOHN'. The 'Addresses' tab is selected and circled in red. Below the tabs, there is a 'Defaults' section with a 'Home Address' field containing the text: '100 N SENATE AVE INDIANAPOLIS IN 46204-2273'.

The screenshot shows the 'Address' screen for 'SAMPLE, JOHN'. The 'Address' tab is selected. Below the tab, there is a 'Home Address' section with the text: 'Current Home Address 100 N SENATE AVE INDIANAPOLIS IN 46204-2273 Change this address'.

Step 2: Enter the new address, then review and submit. Once the request has been submitted, a confirmation message will be displayed. A “Printable view” option is available to save or print a copy for recordkeeping.

The image shows two screenshots of a web application interface for changing a home address.

The top screenshot is titled "Home Address Address" and shows a progress bar with two steps: "Address" (active) and "Review and Submit". Below the progress bar is a form titled "Home Address Change" with the following fields:

- Country: USA
- Street: 100 N SENATE AVE
- Street: (empty)
- Unit Type: (dropdown)
- Unit #: (text)
- City: INDIANAPOLIS
- State: INDIANA
- Zip: 46204-2273
- County: MARION
- Attention: (text)

At the bottom of the form, there is a checked checkbox labeled "Address has been verified". Navigation buttons include "Cancel", "Previous", and "Next".

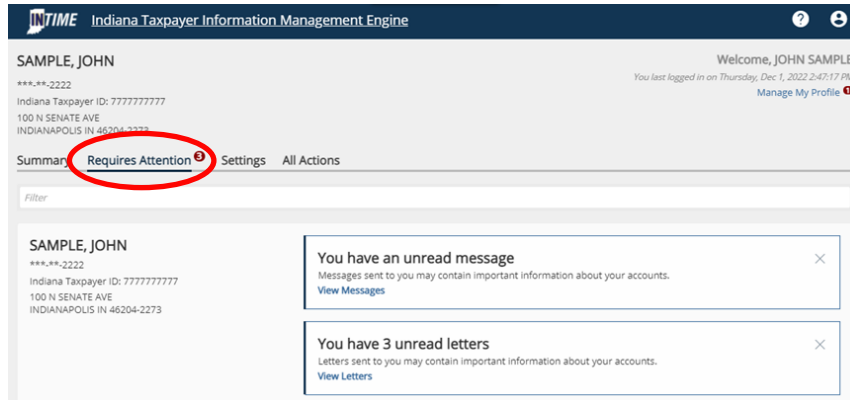
The bottom screenshot is titled "Confirmation" and contains the following text:

Your submission to change your Home Address Address has been submitted and your confirmation numbers is 0-000-041-153. By submitting this, you are only changing this address with the Department of Revenue as it relates to your tax accounts. Please note that your submission may take several days to process. If you have any questions or concerns please send us a message or call us at (317) 232-2240, Monday - Friday, 8:00 a.m. to 4:30 p.m.

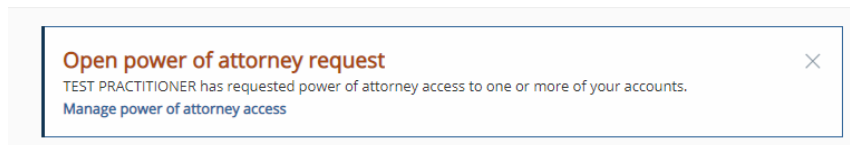
At the bottom of the confirmation screen, there are two buttons: "Printable View" and "OK".

Power of Attorney Access for Tax Practitioners

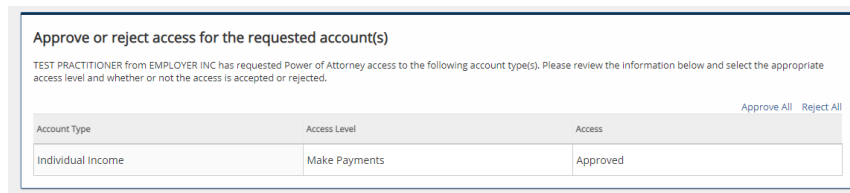
If a customer would like to provide access to their INTIME account to a tax practitioner, the process will begin with the tax practitioner requesting access from their own account. Once that occurs, the customer will be notified and can log in to their own INTIME account to review and approve the access they have requested.



The request will appear like the following:



NOTE: Access is granted on a user level basis, so if multiple tax preparers within a firm request access, the customer will need to approve the access for each requestor.



If at a later date the customer wishes to revoke the tax practitioner's access to their account, this can be done in the "All Actions" tab by selecting the "Manage POA access" hyperlink. Instructions can be found in the "Manage POA access" section of this guide.

Manage Account Access

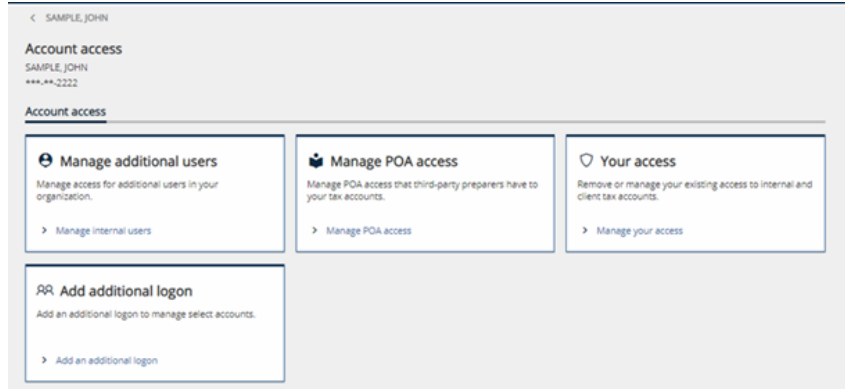
Customers can manage access to their INTIME account for additional user(s) by going to the “All Actions” tab, locating the “Manage account access” panel and then click on the “Manage access” hyperlink.

Step 1: Select from the following types of access that can be managed.

Manage account access

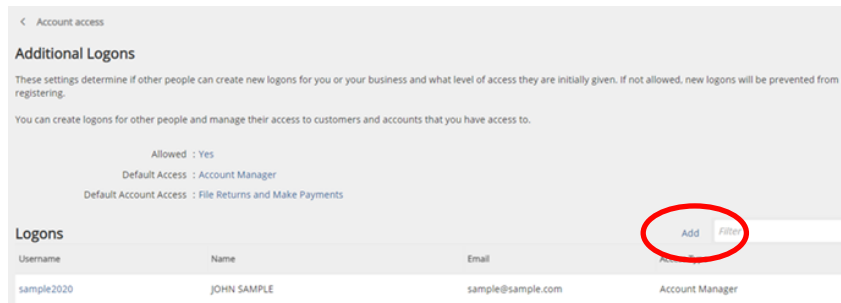
Manage access for additional users or manage access that third party preparers have to your account.

[Manage access](#)



Manage Additional Users

A customer can choose to permit or revoke access to their account, determine the level of access, and create a logon for an additional user(s). To change access, select the username hyperlink and follow the instructions. To add an additional user, click on the “Add” hyperlink and follow instructions, or go to the “Add additional logon” panel on the previous account access menu page (above).



Manage POA Access

A customer can change the settings to allow a tax preparer/practitioner to request access to their accounts along with the level of access they may want to grant them. Customers may select one of five types of account access from the drop-down menu.

< Account access

Power of Attorney Access

These settings determine if accountants or third parties can request access to your accounts and what level of access they are initially given. If not allowed, they will be prevented from requesting access to your accounts.

Allowed : Yes
Default Access : Account Manager
Default Account Access : File Returns and Make Payments

Logons

There are no logons.

>

< Account access

Default Access for Power of Attorney

Type of Access
Account Manager

Type of Account Access
File Returns and Make Payments

File Returns and Make Payments
File Returns Only
Make Payments
Make Payments Only
View Only

Cancel Save

Forms and Publications | Policies | Contact Us

Manage Your Access

Customers can manage their own access by selecting the hyperlinks to see the type and level of access they have for an account.

< Account access

Access Settings

Filter

SAMPLE, JOHN - ***-**-2222

General Access	Full Access
Individual Income (IND-000088599)	Make Payments
	All Periods

Add Additional Logon

A customer can add an additional logon for another user from the account access menu page by clicking “Add additional logon,” which then brings up this screen. Create a logon name, the person’s email address and the type of access the customer would like to grant to the additional user, then follow the prompts.

Add additional Logon

SAMPLE, JOHN
***-**-2222

Add additional Logon

1

Create a Logon for Someone Else

Create a logon for someone else

Logon *Required*

Email *Required*

Confirm email *Required*

Type of access: Account Manager

Additional Logons

- Perform work as themselves.
- May have access to customers and accounts that you do not have access to.
- Will not lose access to customers and accounts that you lose access to.
- Can have their access managed for only customers and accounts that you have access to.

Cancel Previous Next >

NOTE: Check the box that grants access to the account listed and select what the additional logon will be permitted to do – view only or make payments – then click “Next.” Once submitted, a confirmation message will be displayed and sent to the email that was previously provided. A “Printable View” option is available to save or print a copy for a customer’s records.

The screenshot shows a form titled "Add additional Logon" for a user named "SAMPLE, JOHN". The form is in the "Grant Access to Accounts" step. It includes a table for granting access to specific accounts. A red circle highlights the "Grant access?" checkbox and the "Make Payments" dropdown menu for the account "Individual Income" with ID "IND-000088599".

Account type	ID	Grant access?	Make Payments
Individual Income	IND-000088599	<input checked="" type="checkbox"/>	Make Payments

TIP: Revoking access to accounts can also be done from the “Settings” tab.

Revoking Access to a Client’s Account(s)

Tax practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA). To do so, practitioners should enter the client’s INTIME account, select the “Settings” tab and cancel access to the client or accounts they no longer wish to access.

Client Revocation

Individual income tax customers have the ability to modify their tax practitioner’s access by going to the “Settings” tab to revoke practitioner ePOA access.

Submissions

A customer wanting to check on the status of a submission to DOR can do so by going to the “All Actions” tab, locating the “Submissions” panel and clicking on the hyperlink. Submissions are items that have been entered in INTIME for processing such as a payment, a request for a return transcript, etc.

Submissions

Check the status of a previous INTIME return, payment, or submission or view past submissions.

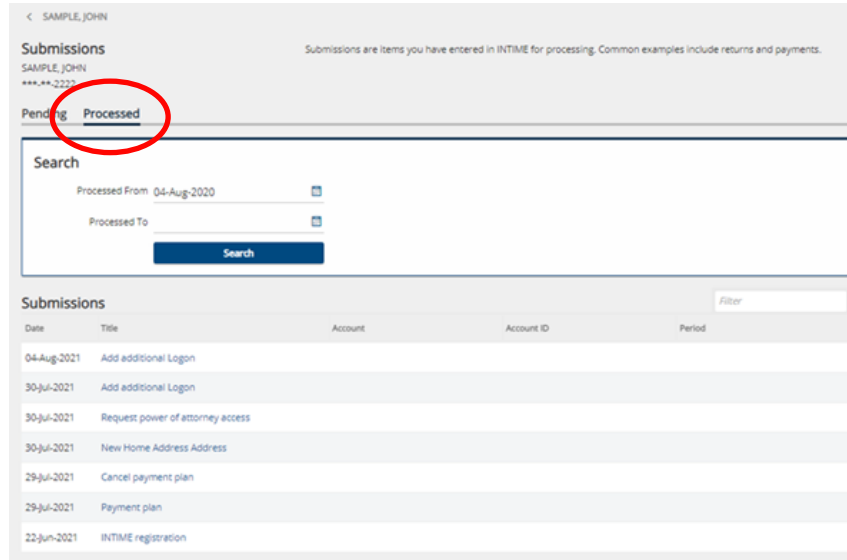
[> Search submissions](#)

Step 1: Any items that have been submitted but that have not yet been processed can be viewed in the “Pending” tab.

The screenshot shows the "Submissions" page for "SAMPLE, JOHN". The "Pending" tab is highlighted with a red circle. Below the tabs is a table of submissions.

Date	Title	Account	Account ID	Period
30-Jul-2021	New Name			
29-Jul-2021	Response to request for information			

Step 2: Past payments or any items that have been completed or processed will appear in the “Processed” tab and listed by date. The “Search” function can help locate past items by entering a date range.



Tax Account Registration

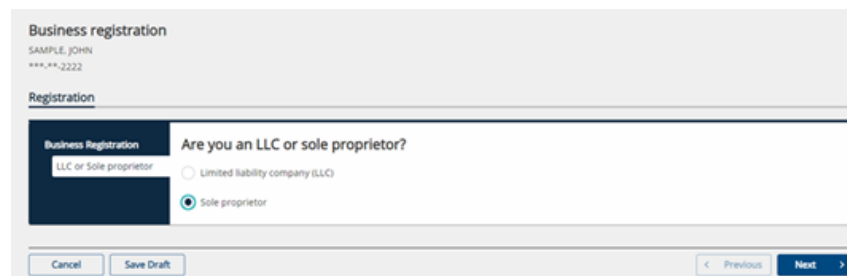
A customer can register another tax account in the “All Actions” tab and locate the “Tax account registration” panel.

Sole Proprietor Tax Account Registration

Step 1: Choose from the options provided and follow the prompts to select the registration type, the responsible officer(s), location name and contact information, as well as a location address.

+ Tax account registration
Register or close a location or tax account.

- > Register a sole proprietor BT-1
- > Register an aircraft



NOTE: If limited liability company (LLC) is selected, the customer will need to log off and register as a separate entity with INTIME.

Step 2: Enter the NAICS (North American Industry Classification System) code specific to the sole proprietor. Enter a key word in the “Search” to help locate a code.

The screenshot shows the 'Business registration' interface for 'SAMPLE, JOHN' (ID: ***-**-2222). The 'Registration' section is active, with a sidebar menu showing 'Business Registration', 'Location Registration', and 'Locations'. The 'Name and Address' section has 'NAICS' entered. The main content area is titled 'Choose primary NAICS code for activity specific to this location' and includes a search box with a 'Search' button. A warning message states: 'You must select a NAICS code to continue'. Navigation buttons at the bottom include 'Cancel', 'Save Draft', 'Previous', and 'Next'.

Step 3: Select the tax types to register. Clicking on the hyperlink next to each tax type provides information on each one. Click “Next” and continue to follow the prompts to enter information for each tax type selected.

This screenshot shows the 'Select the tax types to register at this business location (Check all that apply)' screen. The sidebar menu is the same as in the previous screenshot. The 'Location Details' section is active. A list of tax types is displayed with checkboxes: 'Withholding tax (More info)', 'Sales tax (More info)', 'County linkeepers tax (More info)', 'Food and Beverage tax (More info)', 'Heavy Equipment Rental Excise tax (More info)', 'Motor Vehicle Rental Excise tax (More info)', 'Tire Fee (More info)', and 'Wireless Prepaid Fee (More info)'. A red error icon and message 'Select at least one tax type to register at this location' are visible. Navigation buttons at the bottom include 'Cancel', 'Save Draft', 'Previous', and 'Next'.

This screenshot shows the 'Do you have another location to add?' screen. The sidebar menu is the same. The 'Locations' section shows 'TEST' and an 'Add Location' button. The main content area contains the question: 'You have finished entering information for this location. Do you have another location to add?' with 'Yes' and 'No' buttons. Navigation buttons at the bottom include 'Cancel', 'Save Draft', 'Previous', and 'Next'.

NOTE: If registering for retail sales tax, DOR will issue a Registered Retail Merchant Certificate (RRMC), which is valid for two years. The RRMC registration is fee is \$25 per sales location registered.

Register an Aircraft

Step 1: When registering an aircraft, a number of selections will be offered during the registration process including the owner type, if the aircraft is owned by multiple owners and the mailing address that should be used for the account. Aircraft information, location and usage should be entered on the following screen.

The screenshot shows the 'Register an aircraft' form at the 'Attributes' step. The user is 'SAMPLE, JOHN' with ID '***-**-2222'. The progress bar shows 'Attributes' as the current step. The form contains three sections: 'Select owner type' with radio buttons for 'Individual or business' (selected), 'Nonprofit museum', and 'State of Indiana'; 'Is the aircraft owned by multiple owners?' with 'Yes' and 'No' buttons; and 'Which mailing address should be used for this account?' with radio buttons for '100 N SENATE AVE INDIANAPOLIS IN 46204-2273' (selected) and 'Different mailing address'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 2: Enter aircraft purchase or transfer information. A tax calculation screen will appear next.

The screenshot shows the 'Register an aircraft' form at the 'Enter purchase or transfer information' step. The progress bar shows 'Attributes', 'Aircraft Information', and 'Purchase/Transfer' as completed steps. The form contains a 'Type of transaction' dropdown menu (required), and input fields for 'FAA N number of trade-in (if applicable)', 'Make and model of trade-in (if applicable)', 'Date of purchase', and 'Date based in Indiana'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

The screenshot shows the 'Register an aircraft' form at the 'Sales and use tax calculation' and 'Excise tax calculation' steps. The progress bar shows 'Attributes', 'Aircraft Information', 'Purchase/Transfer', and 'Tax Calculation' as completed steps. The 'Sales and use tax calculation' section includes fields for 'Purchase price' (required), 'Trade-in allowance' (0.00), 'Amount subject to sales tax' (0.00), 'Sales tax rate' (0.07), 'Sales tax due' (0.00), 'Use tax credit' (0.00), and 'Sales/use tax amount due' (0.00). The 'Excise tax calculation' section shows 'Gross excise tax' (13.00), 'Excise tax reduction' (3.90), 'Excise tax credit' (0), and 'Excise tax amount due' (9.10). At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 3: Any attachments, bill of sale, Form AE-5 or other written evidence to support the purchase price of the aircraft should be uploaded by clicking “Add attachment.”

The screenshot shows the 'Register an aircraft' process for 'SAMPLE, JOHN' with ID '***-**-2222'. The progress bar indicates that 'Attachments' is the current step. Below the progress bar, a red message states: 'A bill of sale, Form AE-5 or other written evidence must be attached to support the purchase price of the aircraft.' A blue 'Add attachment' button is visible. At the bottom, there are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 4: A fee summary will include the registration fee, excise, and sales tax due with the option to make a payment and the payment method. Continue to follow the prompts to complete the payment process.


The screenshot shows the 'Register an aircraft' process for 'SAMPLE, JOHN' with ID '***-**-2222'. The progress bar indicates that 'Fee Summary' is the current step. The 'Fee summary' section includes a blue information box with the following text: 'The aircraft registration fee is \$10 per aircraft. It must be paid to complete the initial registration and it is assessed annually each December thereafter. The aircraft excise tax is calculated based on the aircraft's age, class, and maximum landing weight. For a full table and description of the calculation, visit <https://www.in.gov/dor/business-tax/tax-rates-fees-and-penalties/miscellaneous-tax-rates>. The sales tax is calculated from the aircraft purchase price using the current sales tax rate of 7%. Only the base sales tax amount is shown. If you are reporting past the due date, penalty and interest may be applied.'

Aircraft registration fee	:	\$10.00
Aircraft excise tax due	:	\$9.10
Aircraft sales tax due	:	\$35,000.00
Total fees	:	\$35,019.10

The 'Payment' section asks 'Make a payment now?' with 'Yes' and 'No' buttons. Below, it asks to 'Select a payment method' with 'Bank account' and 'Debit or credit card' buttons. At the bottom, there are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Request a Refund for Tax on Purchases

A customer can request a refund for tax on purchases by selecting “Submit refund request” under the “Request for tax on purchases” group on the “All Actions” tab.

 **Refund for tax on purchases**

Request a refund for Indiana tax that you have paid on purchases.

> [Submit refund request](#)

Step 1: Instructions

The screenshot shows the 'Refund request' process for 'SAMPLE, JOHN' with ID '***-**-2222'. The progress bar indicates that 'Instructions' is the current step. The main content area asks 'Am I eligible to submit a refund request for tax on purchases?' and provides two paragraphs of instructions: 'If you are exempt from paying sales tax and you have documentation proving sales tax has been paid on exempt purchases, you may use this submission to request a refund.' and 'If you wish to request a refund based on a prior sales tax filing, you must log into your tax account and amend the prior return.' At the bottom, there are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Step 2: Claim information

The customer will need to explain why a refund is due and select the relevant tax type. The customer also must enter details about each period from which they wish to claim a refund.

The screenshot shows the 'Refund request' form at the 'Claim information' step. The progress bar indicates that 'Instructions' is complete and 'Claim information' is the current step. The form is divided into two main sections: 'Enter claim information' and 'Enter claim details'.

Enter claim information

Provide an explanation as to why a refund is due:

Tax type:

Location ID:

Enter claim details

Enter summary details for the refund request. Documentation for the requested refund amounts must be provided later.

Period End Date	Requested Refund Amount	Date of Tax Payment
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>

Buttons: Cancel, Save Draft, Previous, Next

Step 3: Attachments

Customers must attach supporting documentation for their refund request before proceeding. Each document they attach will appear as a list underneath this menu.

The screenshot shows the 'Refund request' form at the 'Attachments' step. The progress bar indicates that 'Instructions', 'Claim information', and 'Attachments' are complete, and 'Disclosure' is the next step. The form is titled 'Attachments' and includes instructions and a list of examples.

Attachments

Include evidence to support your claim. Failure to attach all documentation with your claim may result in your claim being rejected or denied.

Examples include:

- Invoices showing tax paid
- Copy of exemption certificate if it is an exempt customer
- Purchase agreement and contract for items such as software and warranties
- Proof of payment (credit invoice or canceled checks)
- Utility bills showing meter number
- Use tax journal and any additional documentation to support your claim

Type	Name	Size	Remove
Other	example.png	67	<input type="button" value="Remove"/>

Buttons: Cancel, Save Draft, Previous, Next

Step 4: Disclosure

The screenshot shows the 'Refund request' form at the 'Disclosure' step. The progress bar indicates that 'Instructions', 'Claim information', and 'Attachments' are complete, and 'Disclosure' is the current step. The form contains a certification statement and a disclaimer.

Refund request

SAMPLE, JOHN
***-**-2222

Refund request

Instructions, Claim information, Attachments, Disclosure

I hereby certify that the information entered is just and correct; that the amount claimed is legally due, after allowing all just credits; and that no part of the same has been paid. I further understand that this refund may be applied to any liability which I currently have outstanding. Under penalties of perjury, I declare that I have examined this form, including the accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete.

Do not attach a utility tax exemption (ST-200) application or any of its required documentation to this refund claim (GA-110L). These two items must be submitted separately. Go to the "All Actions" tab and select "Apply for Exemption" under the ST-200 application panel in INTIME to submit your utility tax exemption application. Select "Previous" to remove unnecessary attachments.

Buttons: Cancel, Save Draft, Previous, Submit

Step 5: Confirmation

Once the request has been submitted, a confirmation message will be displayed.

Confirmation

Your request has been submitted.

Your confirmation number is **0-000-052-974**

Please allow up to 60 days for processing before contacting the department regarding the status of your claim.

[Printable View](#)

[OK](#)

ST-200 Application

A customer can apply for a sales tax exemption on a purchase of metered utilities or telecommunications services, if applicable, by going to the “All Actions” tab and locating the “ST-200 application” panel. Click the hyperlink and read the eligibility information before continuing. Follow the prompts to fill in the required information for mailing information, meter location information, customer information and utility company information.

ST-200 application

Apply for a sales tax exemption on your purchase of metered utilities or telecommunication services.

[> Apply for an exemption](#)

Utility Sales tax exemption application

SAMPLE, JOHN
***-**-2222

Utility Sales tax exemption application

Instructions Mailing Information Meter Location Information Customer Information Utility Information Summary of C

Am I eligible for a sales tax exemption on my utility purchases?

Indiana sales tax statutes (IC 6-2.5-4-5, IC 6-2.5-4-6, IC 6-2.5-5-5.1) provide an exemption for purchases of utility services that are consumed in specific activities. Primarily, this applies to manufacturers that consume utilities to produce goods for sale. Other industrial users may qualify for a partial or full exemption depending on how or where utility services or commodities are used.

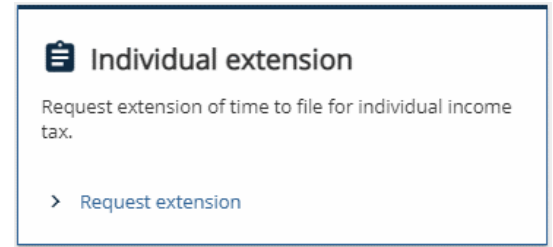
R&D companies must be in business for at least 12 months to be eligible for a utility sales tax exemption.

[Cancel](#) [Save Draft](#) [Previous](#) [Next](#)

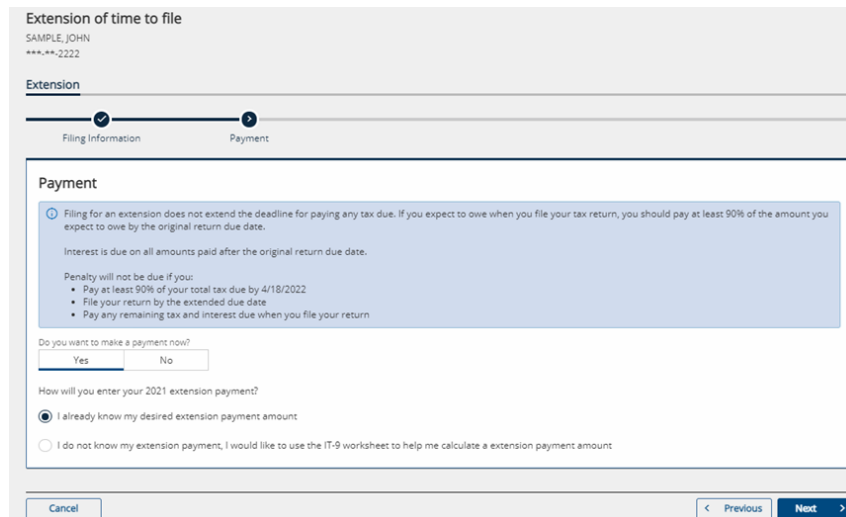
Individual Extension

Customers can request an extension of time to file an individual income tax from the “All Actions” tab and the “Individual extension” panel.

Step 1: When a customer is ready to make an extension payment, they should select the “Yes” button and choose an option of how they will enter the payment.

A screenshot of a web form titled "Extension of time to file" for a user named "SAMPLE, JOHN" with ID "***-**-2222". The form is in the "Extension" section, with a progress bar showing "Filing Information" as the current step. A question asks, "Will you be filing a joint tax return for the 2021 tax year?" with "Yes" and "No" radio buttons. At the bottom, there are "Cancel", "Previous", and "Next" buttons.

Step 2: If the amount of the extension payment is unknown, select that option and an extension payment worksheet will be provided.

A screenshot of the same web form, now in the "Payment" section. The progress bar shows "Payment" as the current step. A blue box contains information: "Filing for an extension does not extend the deadline for paying any tax due. If you expect to owe when you file your tax return, you should pay at least 90% of the amount you expect to owe by the original return due date. Interest is due on all amounts paid after the original return due date. Penalty will not be due if you: • Pay at least 90% of your total tax due by 4/18/2022 • File your return by the extended due date • Pay any remaining tax and interest due when you file your return". Below this, it asks "Do you want to make a payment now?" with "Yes" and "No" radio buttons. Then it asks "How will you enter your 2021 extension payment?" with two radio button options: "I already know my desired extension payment amount" (selected) and "I do not know my extension payment, I would like to use the IT-9 worksheet to help me calculate a extension payment amount". At the bottom, there are "Cancel", "Previous", and "Next" buttons.

NOTE: Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at last 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.

Step 3: Provide the payment allocation information along with primary county and county tax (and spouse's county if applicable) and select a payment method: bank account or credit/debit card. Follow the prompts to enter payment information for either bank account or credit/debit card. Once that has been completed, a confirmation of payment will be displayed.

NOTE: There is no fee for making a payment from a bank account. Processing fee(s) will be assessed for a credit card or debit card payment.

Step 4: Review the information for accuracy and read the authorization request. Prior to submitting the payment, check the box authorizing DOR to debit the bank account or charge the credit/debit card provided for the payment. This certifies that the customer is an authorized user for that payment method. Once submitted, a confirmation message will be displayed and sent to the email that was previously provided. A “Printable view” option is available to save or print a copy for recordkeeping.

Confirm payment

Amount : 31,532
Payment date : 01-jan-2021
Tax year : 2020
Primary first name : JOHN
Primary last name : SMITH

I authorize the Indiana Department of Revenue to debit the bank account or charge the credit card identified above for the payment amount listed on today's date. I certify that I am an authorized user of this bank account or credit card. I understand that the Indiana Department of Revenue will require a separate authorization for any future transactions and that this authorization is only applicable for the specified one-time payment.

[Cancel](#) [Previous](#) [Submit](#)

Confirmation

Your request for extension of time to file has been submitted and your confirmation number is 0-000-004-822.

Please note that your submission may take several days to process.

If you have any questions or concerns you may submit a message by clicking "Send a message" under the "All Actions" menu or call us at (317) 232-2240, Monday - Friday, 8:00 a.m. to 4:30 p.m.

[Printable View](#)
[OK](#)

Additional Information and Tips

Incorrect Contact Information

If you need to update your INTIME contact information, select the user icon in the top right corner and then edit the contact information available on the screen.

To update legal name and address, go to the “All Actions” tab and the “Updating Name and Addresses” panel.

Payment Due Date

If the individual income tax return due date of April 15 falls on a weekend or legal holiday, the payment (if tax is owed) is due on the next business day. Payment can be made via INTIME with or without logging in.

Making Estimated Payments

Customers have the option to make a logged-in or non-logged-in payment.

To make an estimated payment, without logging in to an INTIME account, follow the directions in the “Non-Logged-In” section of this guide under “Non-Bill Payments.”

To make an estimated payment while logged in to an INTIME account, go to the “Summary” tab and locate the “Make a payment” hyperlink in the “Account” panel. The option to make an estimated payment will appear in the “Payment type” drop-down.

Individual Income Tax Returns

DOR is unable to accept and process Indiana individual income tax returns through INTIME. Completed returns, including all schedules and wage statements should be sent to the address at the bottom of the return.

DOR Individual Income Tax Filing Requirement

Indiana individual income tax return must be filed if a customer has lived:

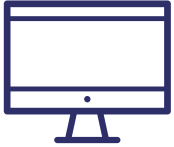
- in Indiana and had an income higher than eligible exemptions, or
- outside Indiana and received income from Indiana.

However, individual income tax customers may want to file a return to get a refund of any state and/or county tax withheld by an employer, or other refundable credits, such as an earned income credit or estimated tax payment.

Contact Us



If you have questions, contact DOR Customer Service via INTIME using secure messaging by logging in to your INTIME account.



Project NextDOR - ProjectNextDOR.dor.in.gov

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-



DOR Customer Service: 317-232-2240

Monday through Friday, 8 a.m. - 4:30 p.m. EST



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