INTIME User Guide for Individual Income Tax Customers

October 2021

Indiana Department of Revenue

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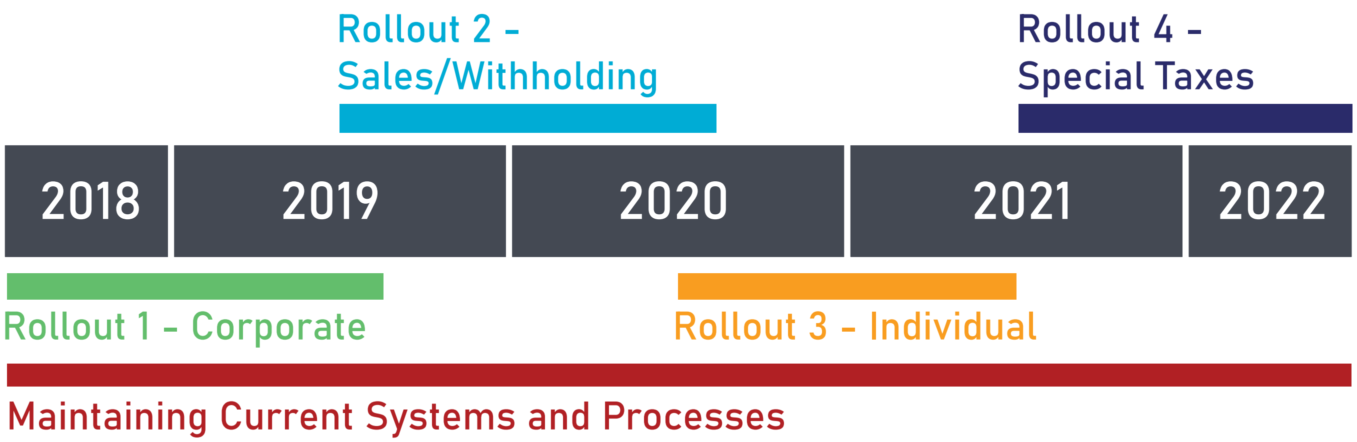
Project NextDOR Modernization Overview

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:

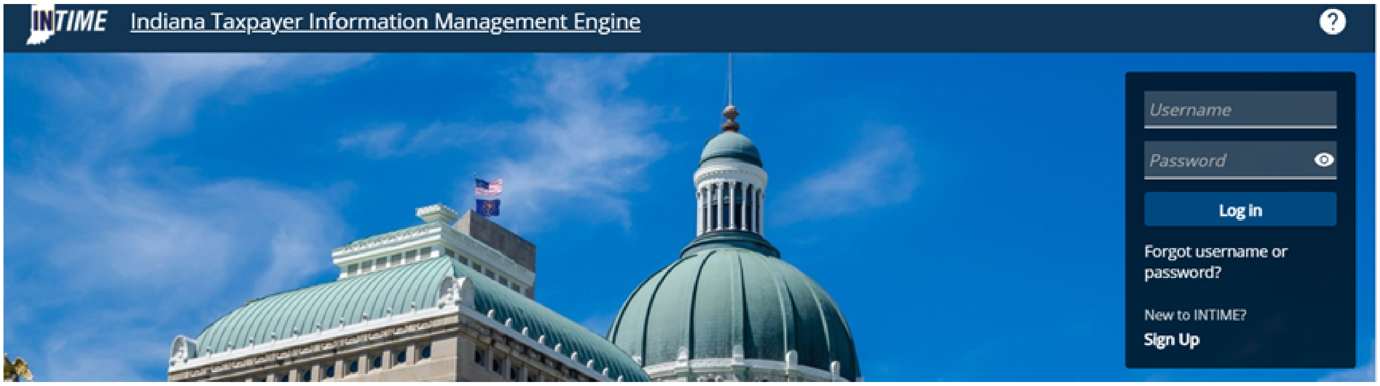
INTIME Functions for Individual Tax Customers

	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

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.

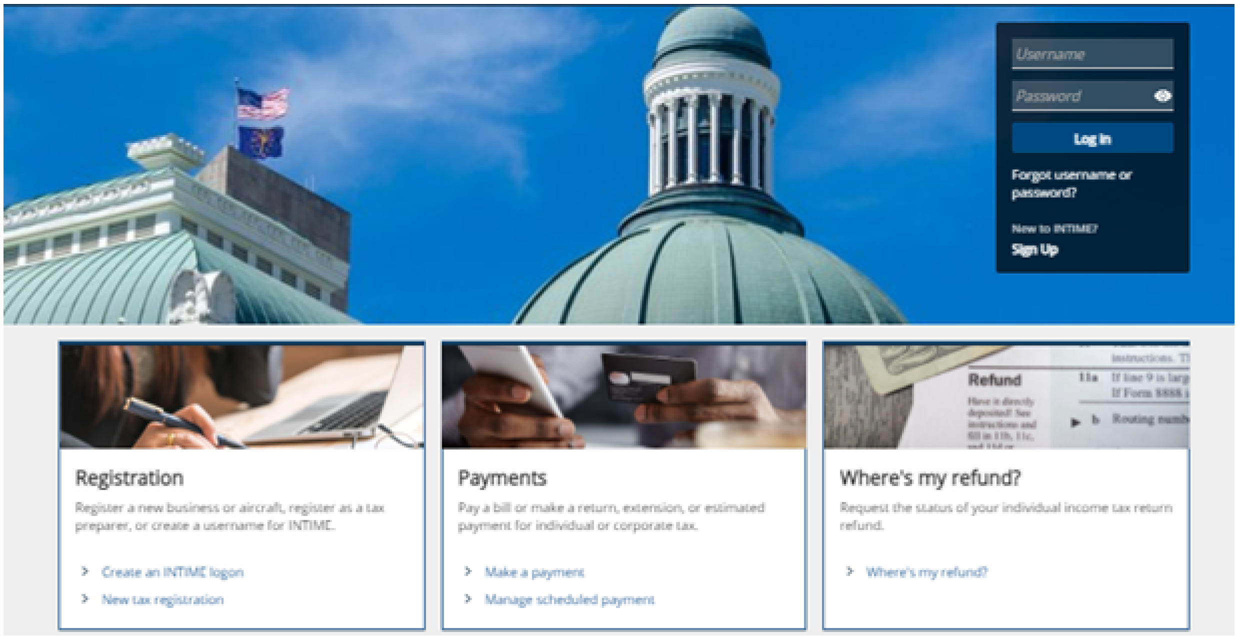
Step 6: Log in for the first time
Once the username and password have been created, the customer will be directed back to the INTIME homepage to log in for the first time with this new logon.

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.

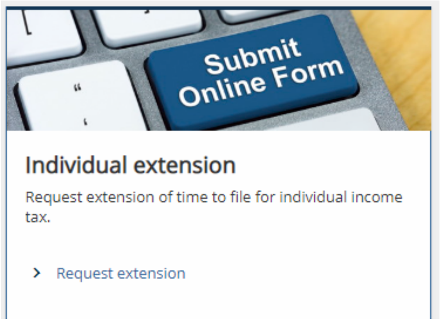
Non-Logged-In Options for Individual Income Tax Customers

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)

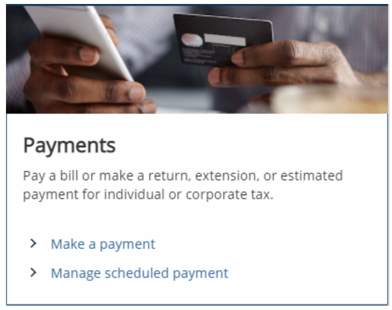


NOTE: The INTIME landing page will display the “Individual extension” option from January 1- April 15 only.

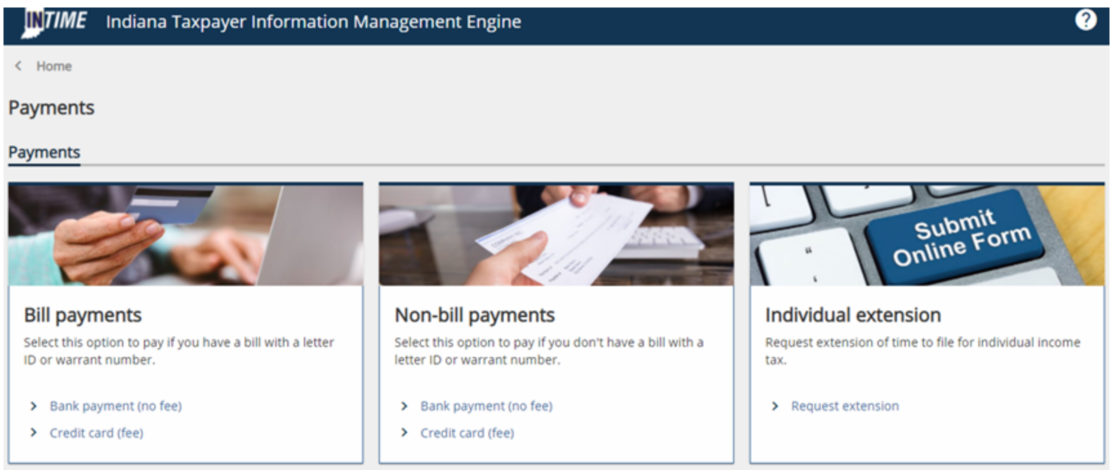


Make a Payment

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."



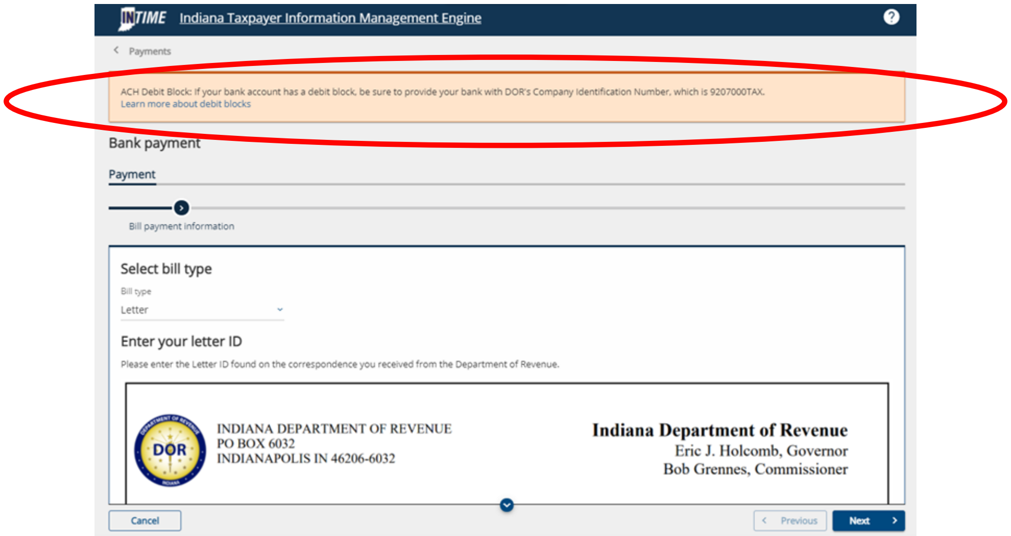
Bill Payments

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.

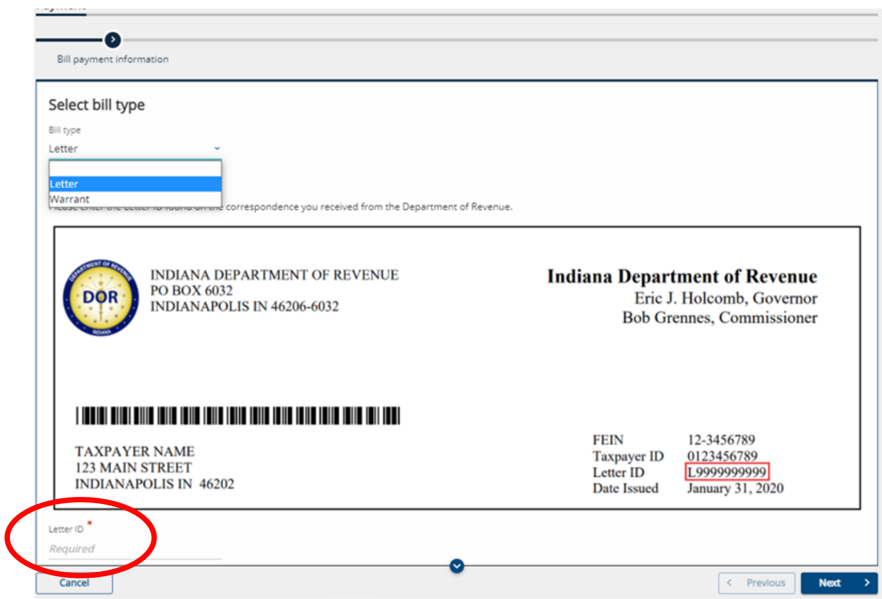


Two options are available for the bill type:

- "Letter" is the default
- "Warrant"

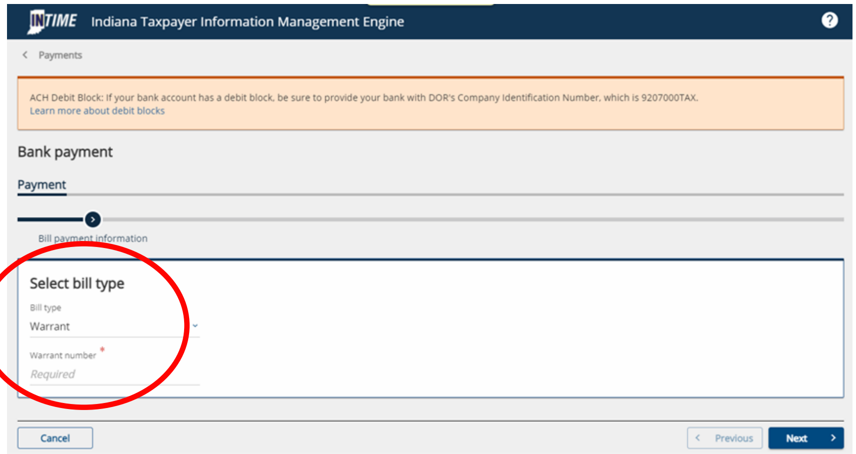
Enter the required information in either the "Letter ID" or "Warrant number" field and then click "Next."

Letter ID:



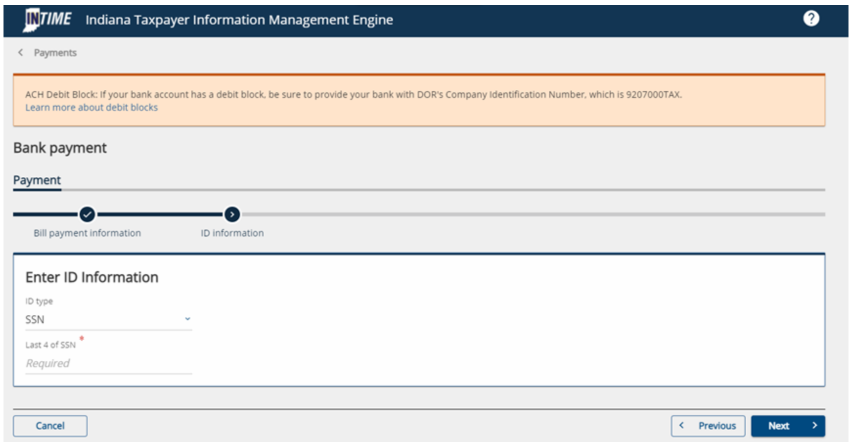
TIP: *If you do not have a Letter ID, the easiest and most efficient way to immediately view your balance and make a payment is to create a logon at INTIME.dor.in.gov using information from a recent tax return.*

Warrant:



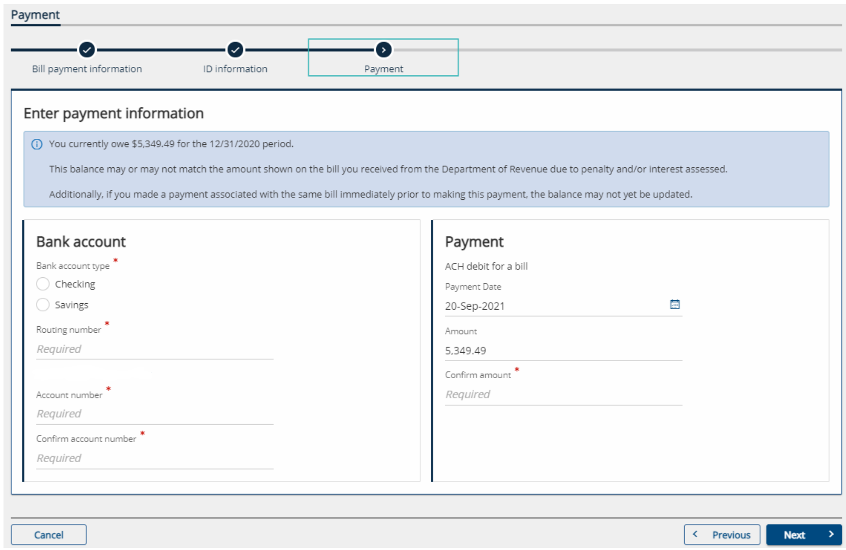
Step 2: Enter ID Information

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

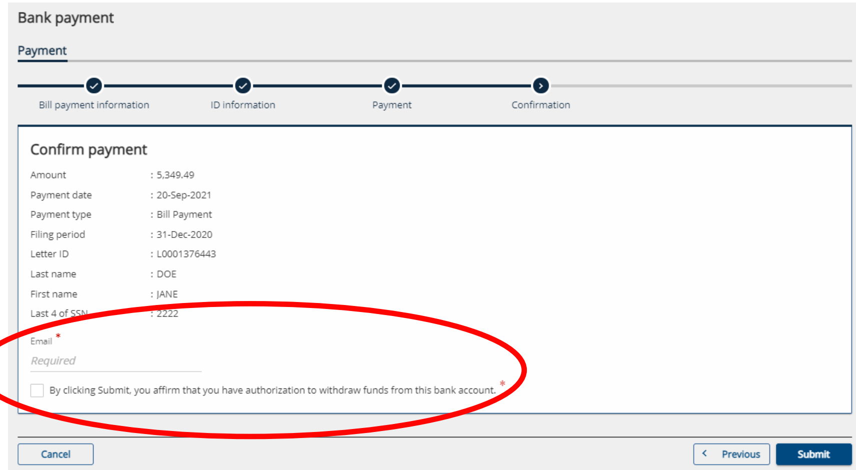


Step 3: Enter Payment Information

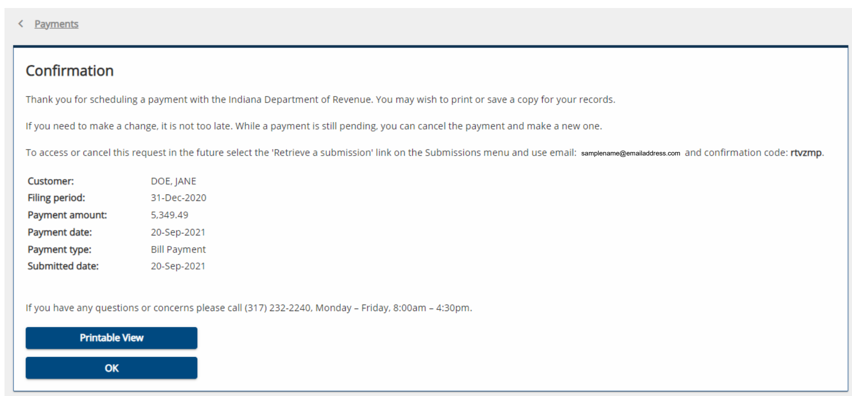
Enter the required payment information, then click "Next." On the "confirm payment" page, review the payment information to be sure it is correct. An email address will be required to obtain payment confirmation.



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.



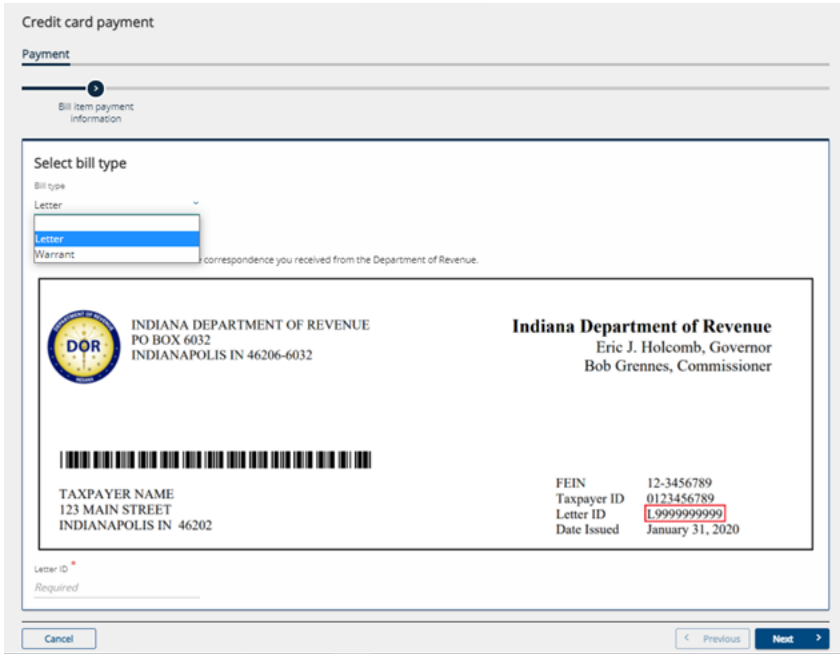
Once the request has been submitted, the payment confirmation will be displayed and an email will be sent to the address previously provided. A “Printable View” option is available to save or print a copy for a customer’s records.



By Credit Card

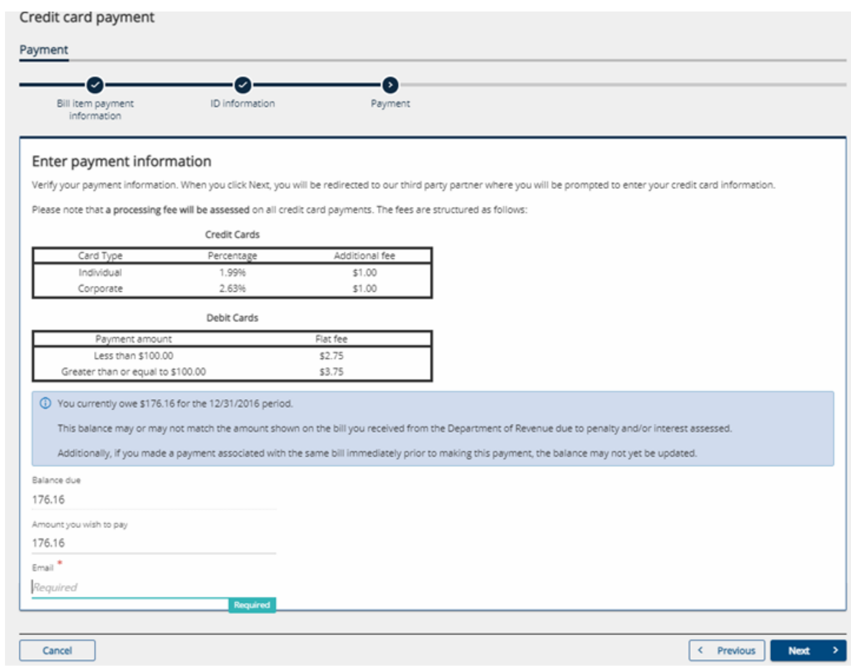
Step 1: Bill Payment Information

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."



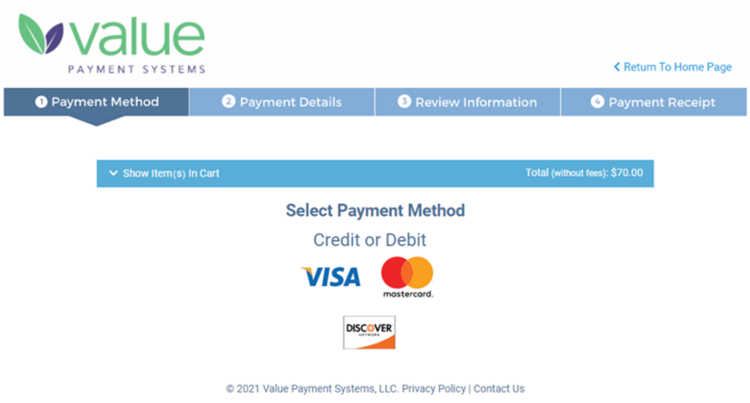
TIP: *If you do not have a Letter ID, the easiest and most efficient way to immediately view your balance and make a payment is to create a logon at* [*INTIME.dor.in.gov*] *using information from a recent tax return.*

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.



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.



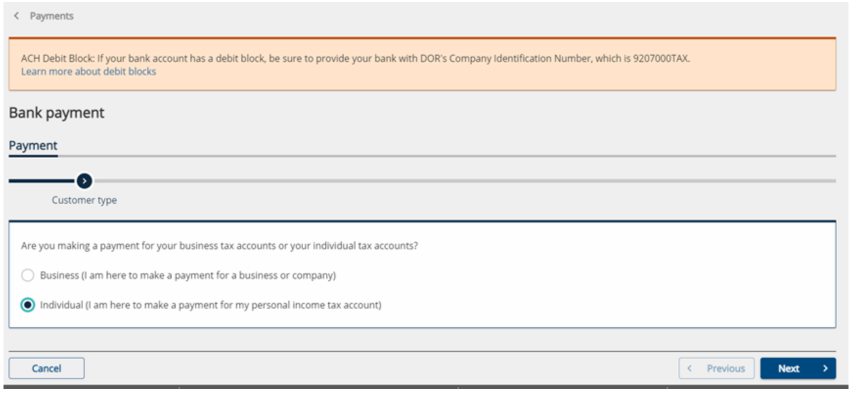
Non-Bill Payments

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.

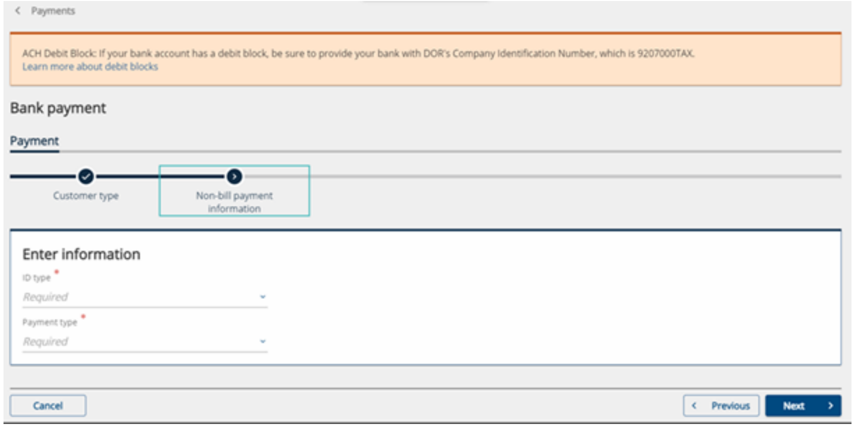
Step 1: To make a payment for an individual income tax account, select that option and then click “Next.”



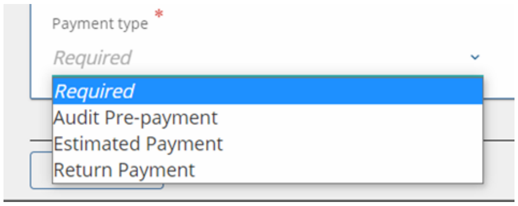
NOTE: When the bank payment option is chosen, a message regarding an ACH debit block may appear at the top of the screen. A debit block is optional. You can select the “Learn more about debit blocks” for more information.

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.

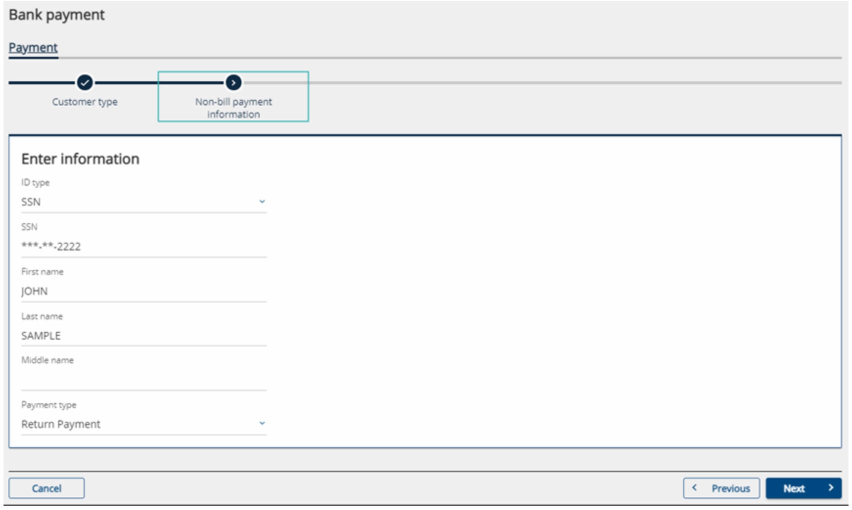


Select one of the three options from the drop-down menu for “Payment type” and then click “Next.”



Step 3: Enter Information

Enter the requested information and click “Next.”

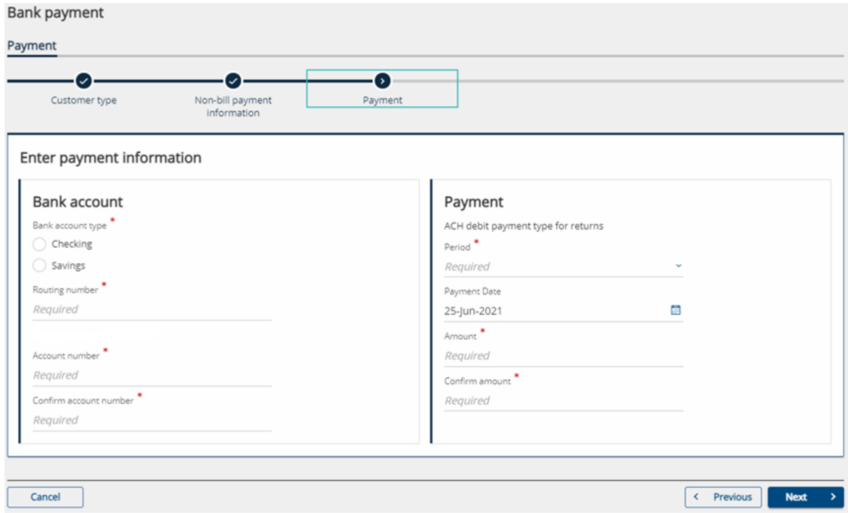


Step 4: Payment

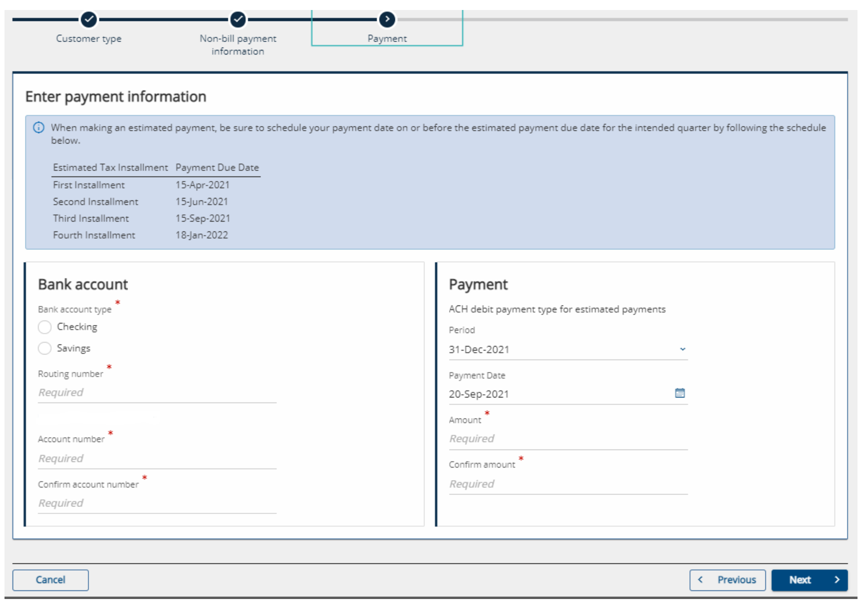
Enter the payment information for either a bank account or credit/debit card.

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.



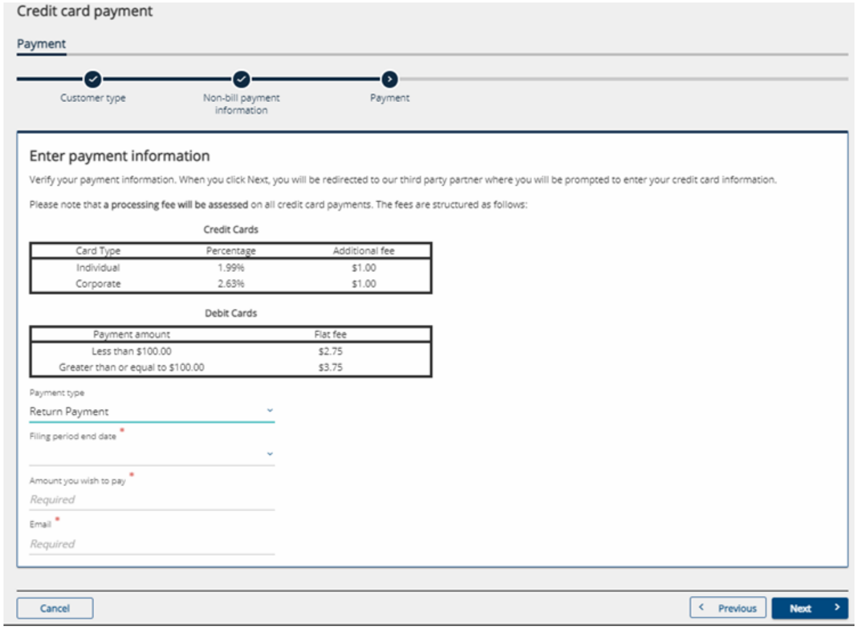
When making an estimated payment, be sure to schedule your payment date on or before the due date for the intended quarter.



By Credit or Debit Card

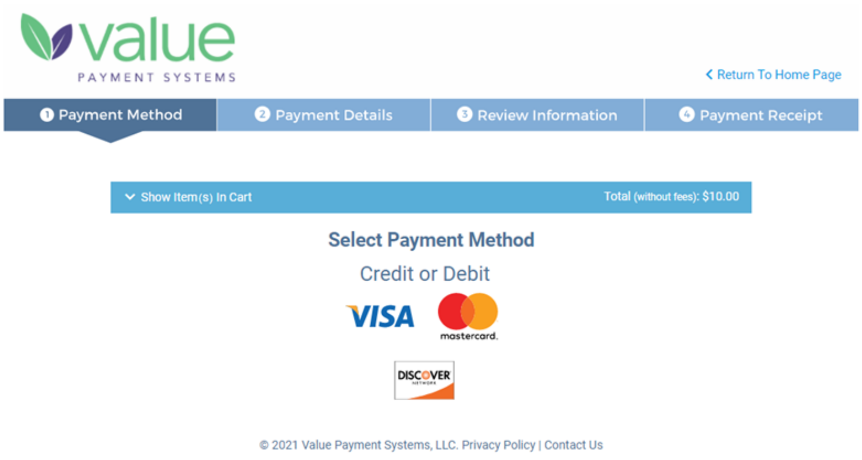
Enter the required information. An email address is required to receive payment confirmation.

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



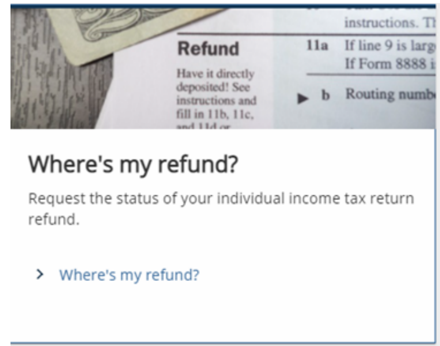
After verifying the information is correct and clicking “Next,” customers will be redirected to the following screen to complete the credit or debit card payment process. Only Discover, Mastercard or VISA are accepted.

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

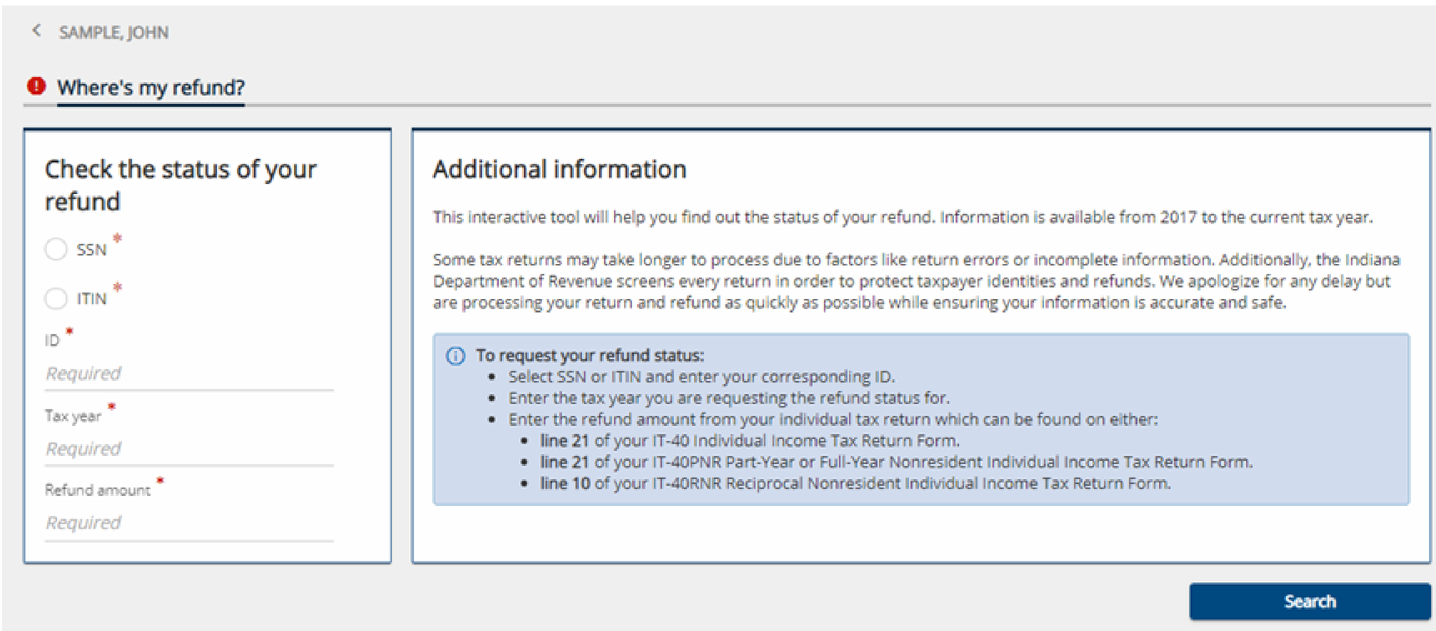


Where is my Refund?

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.



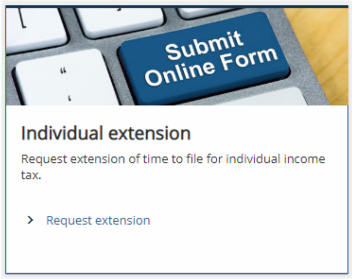
NOTE: Allow a few weeks of processing time before checking the status of a refund.

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

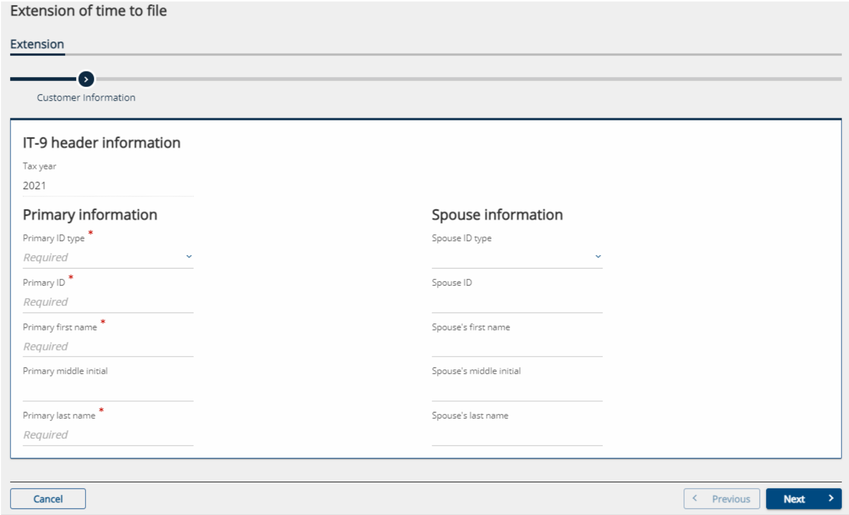
Customers can request an extension of time to file an individual income tax return between January 1 and April 15.

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



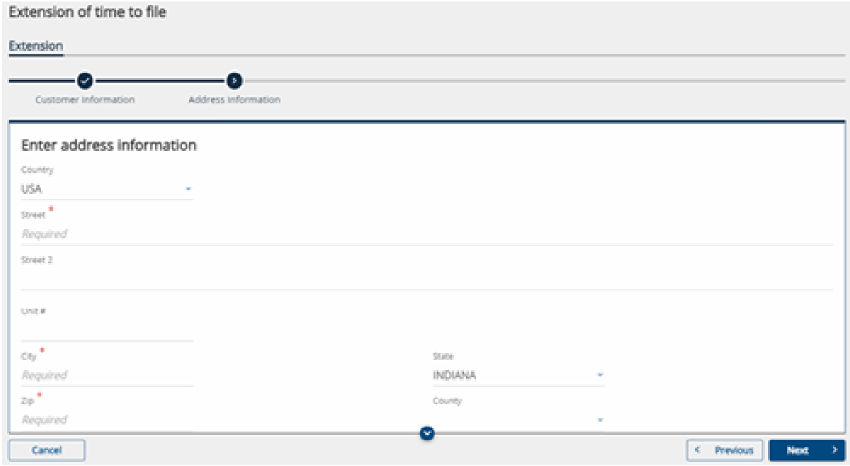
Step 1: Customer Information

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



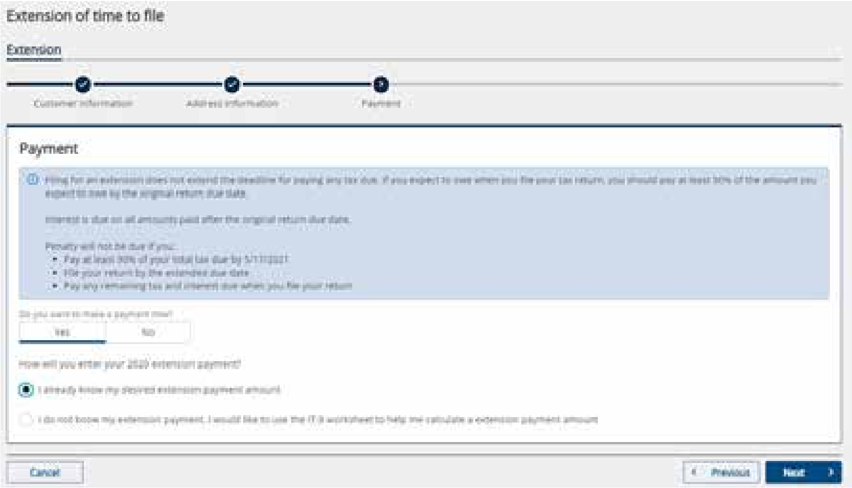
Step 2: Address Information

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



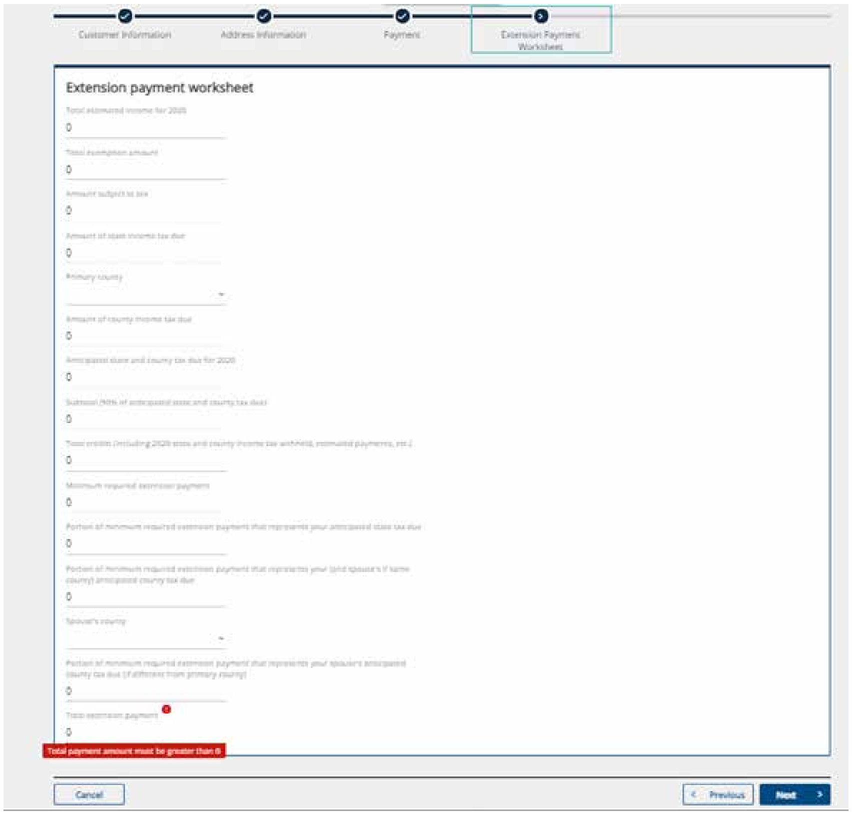
Step 3: Extension Payment

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.



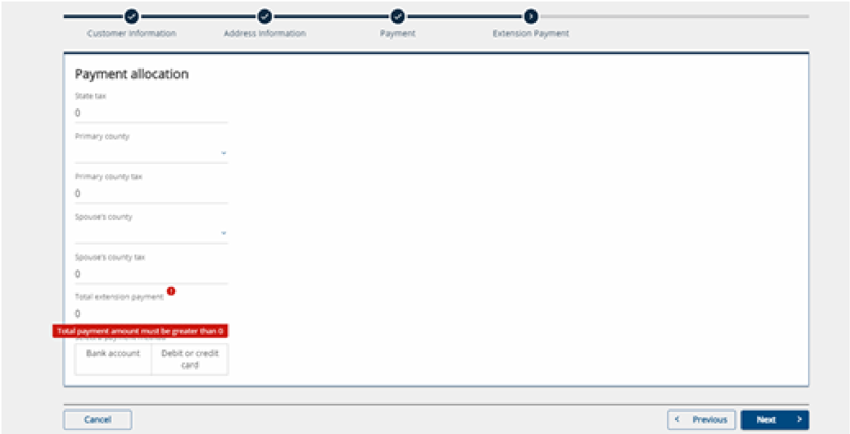
NOTE: Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at least 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.

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



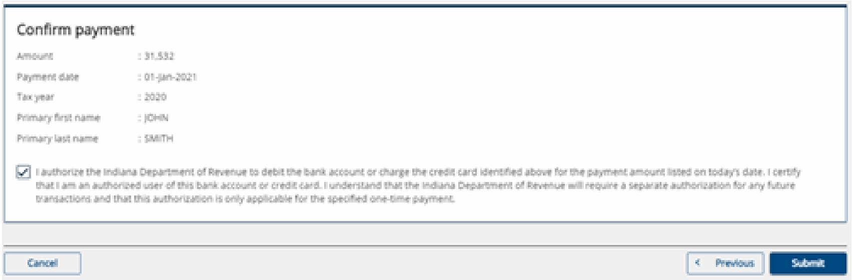
Provide the payment allocation information along with primary county and county tax (and spouse's county if applicable) and select a payment method; bank account or credit/debit card. Follow the prompts to enter payment information for either bank account or credit/debit card. Once that has been completed,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

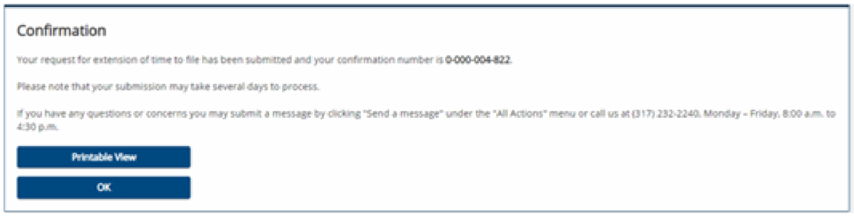


Step 4: Confirmation

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.



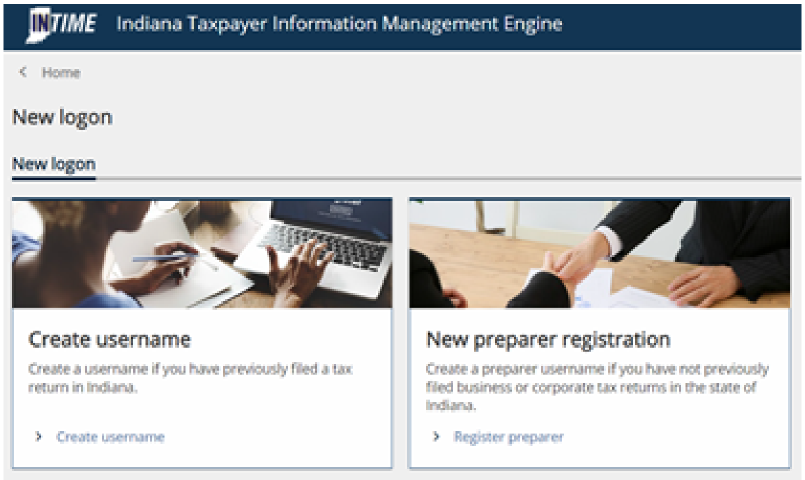
Once submitted, a confirmation message will be displayed and sent to the email that was previously provided. A "Printable View" option is available to save or print a copy for a customer's records.



Log In to INTIME

Overview

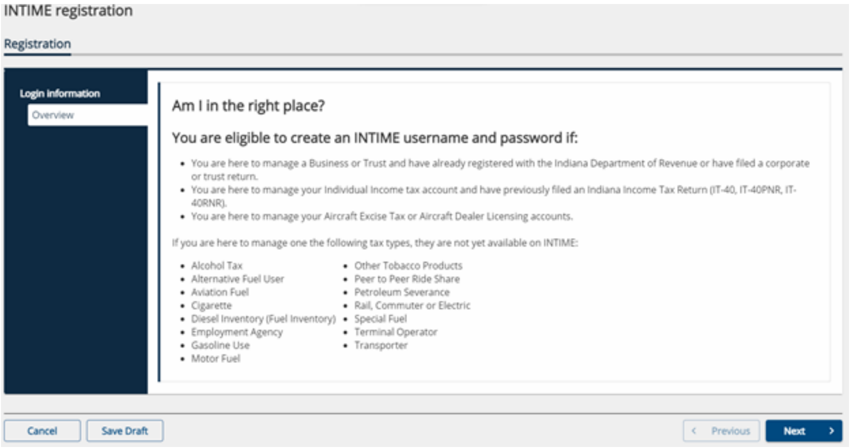
When creating your INTIME logon, there is an option to “Create username” or perform a “New preparer registration.” Individual income tax customers should select “Create a username.”



Creating a logon

Step 1: Am I in the right place?

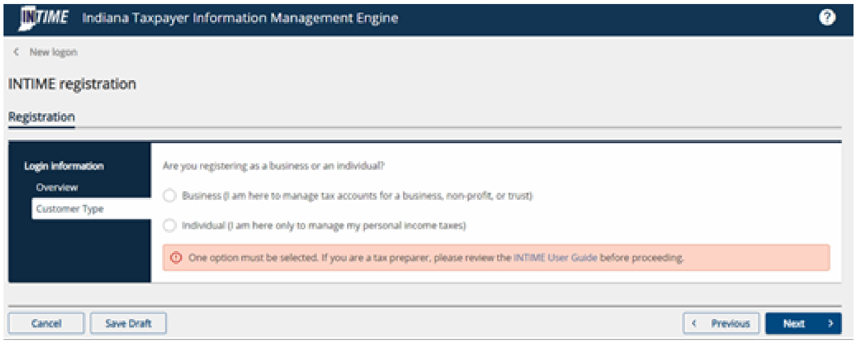
This registration overview page provides some context for creating a username and password for INTIME. If the customer is creating an INTIME account to manage their individual income tax and has previously filed an Indiana tax return (IT-40, IT-40PNR, IT-40RNR), they are in the right place and can click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



Step 2: Customer Type

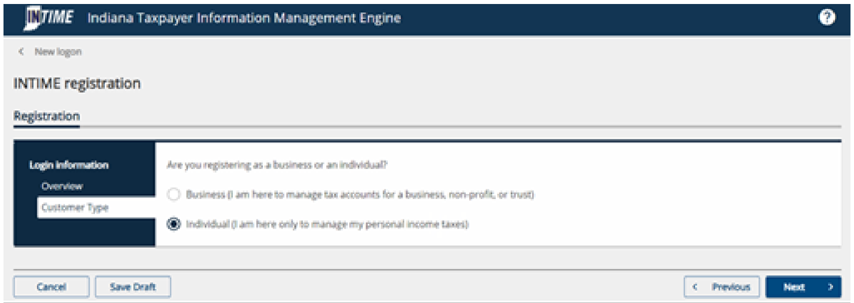
There are two customer type registration options:

- Business
- Individual



Step 2: Individual Customer

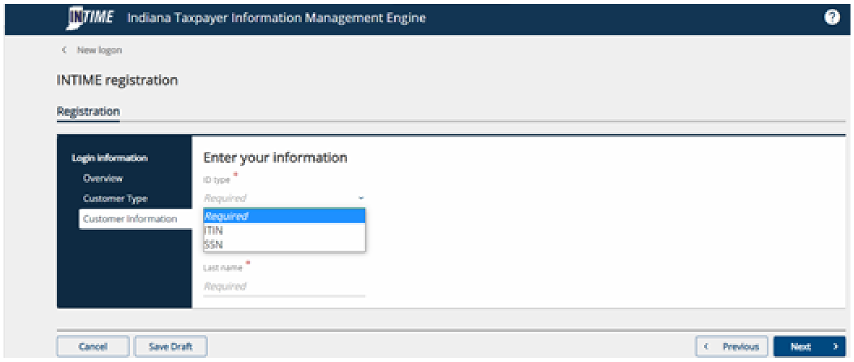
Individual income tax customers select “Individual” option to register for access to their account.



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)

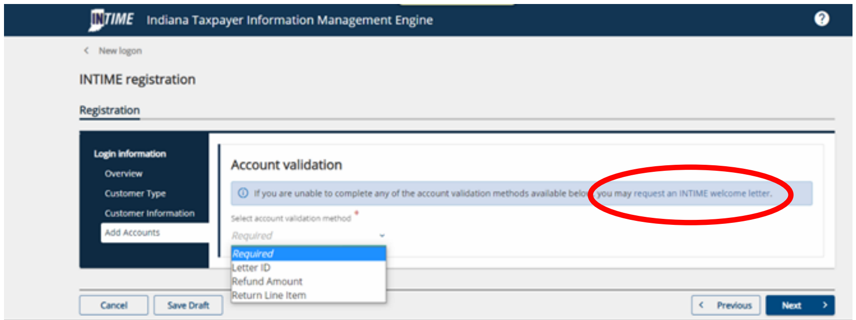


Step 4: Add account access

The customer has a choice of three account validation methods:

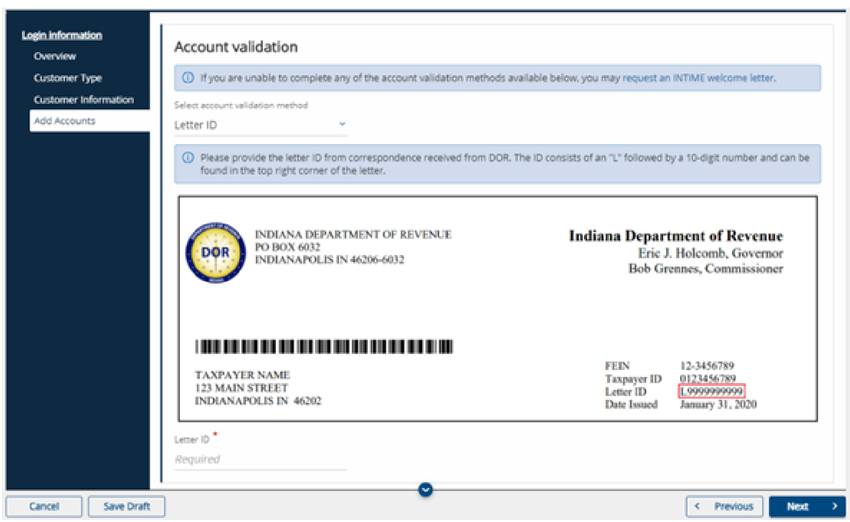
- Letter ID
- Refund amount
- Previous tax return line item

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.



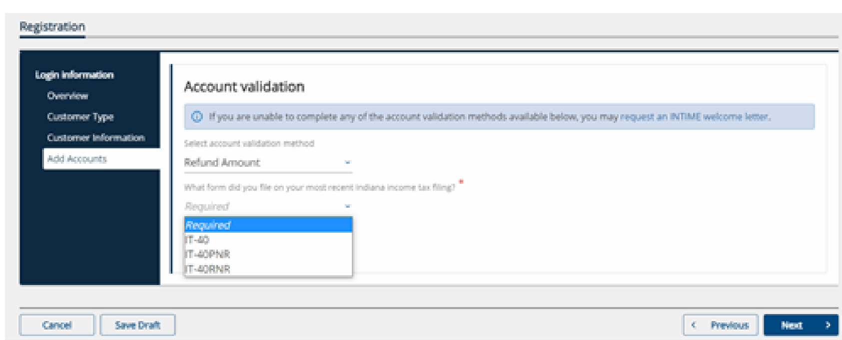
Letter ID:

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.



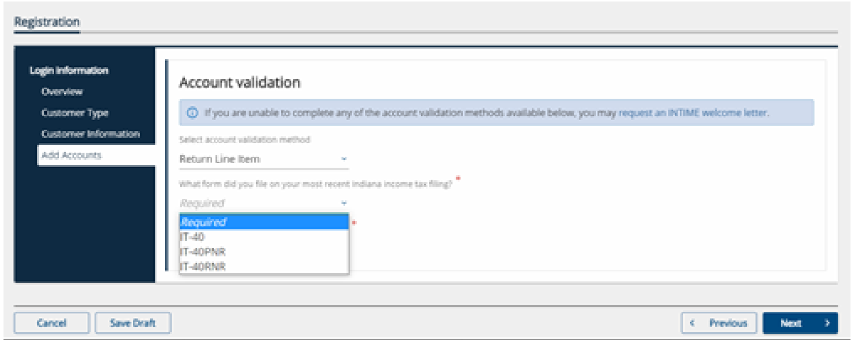
Refund Amount:

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



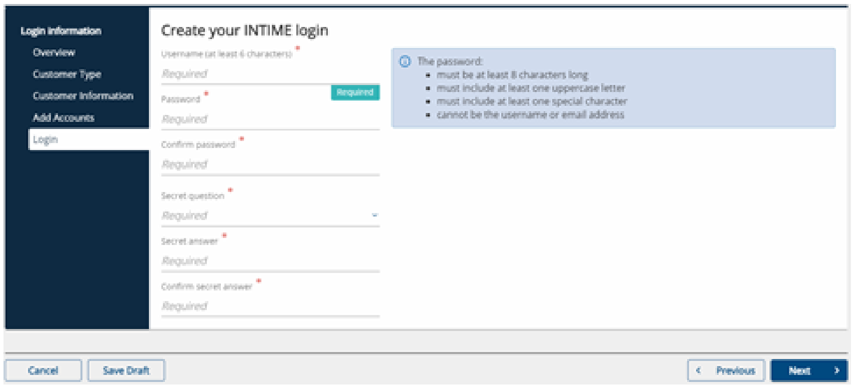
Return Line Item:

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



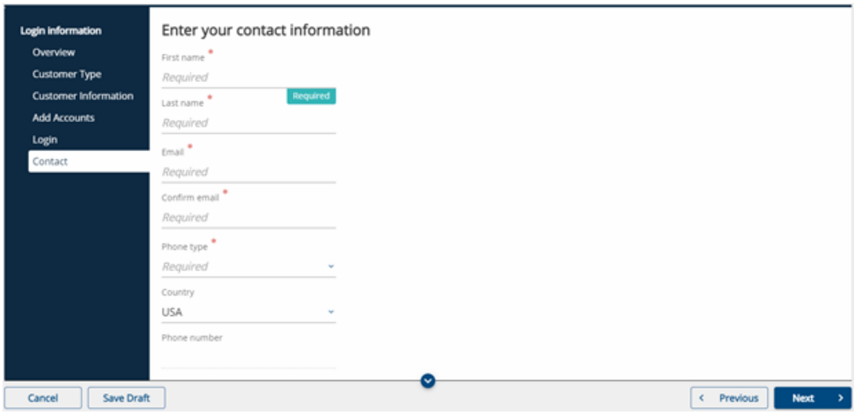
Step 5: Login

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



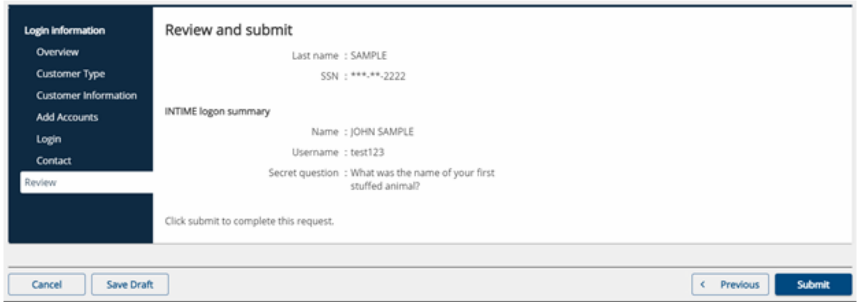
Step 6: Contact Information

Enter all the required contact information.



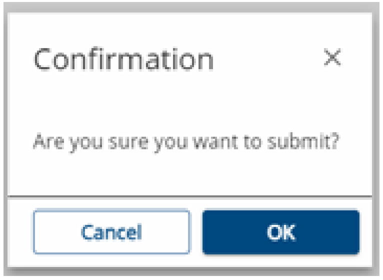
Step 7: Review

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



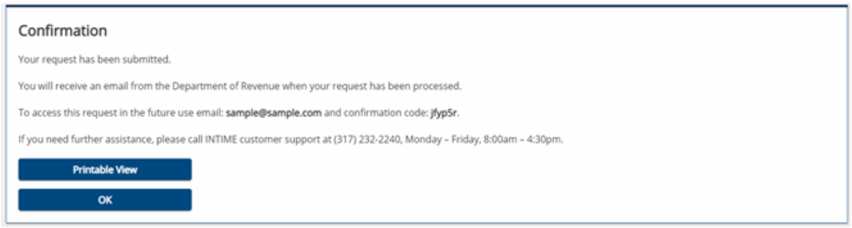
Step 8: Submitting the request

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



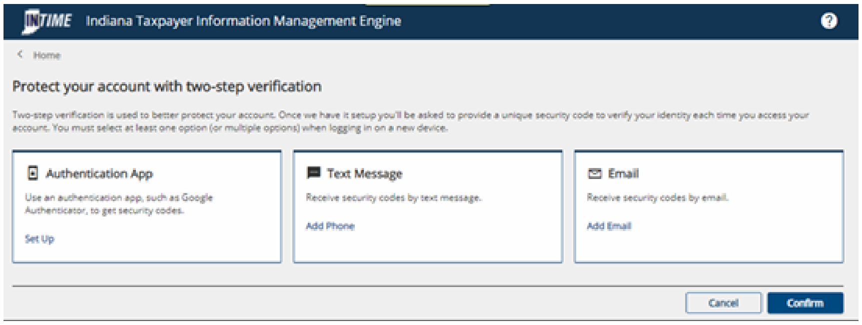
Step 9: Confirmation

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.

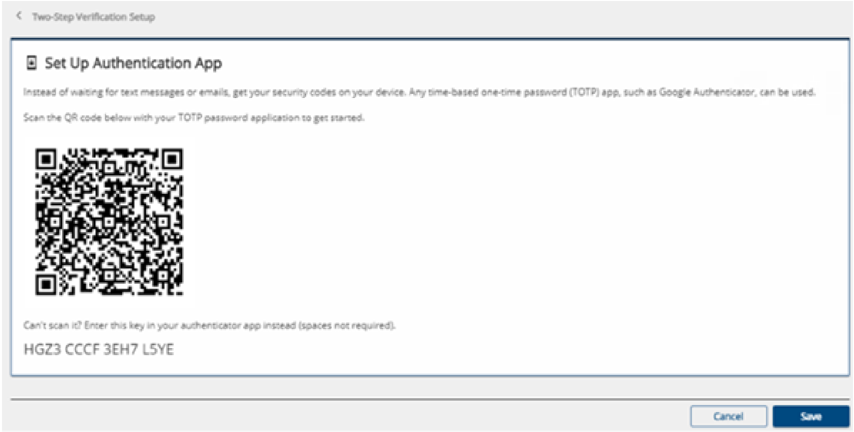


Two-Step Verification

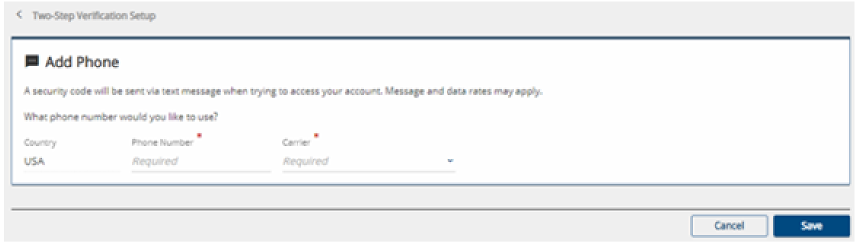
DOR knows the importance of customer account security and uses the two-step verification method for access to INTIME. Customers must choose their preferred two-step verification method before proceeding. The three options include the use of an authentication app, a text message receipt, or an email receipt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

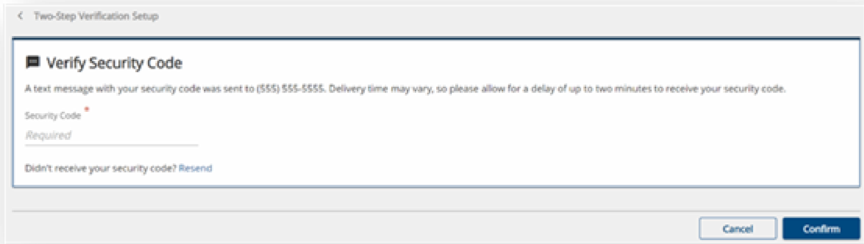


Authentication App



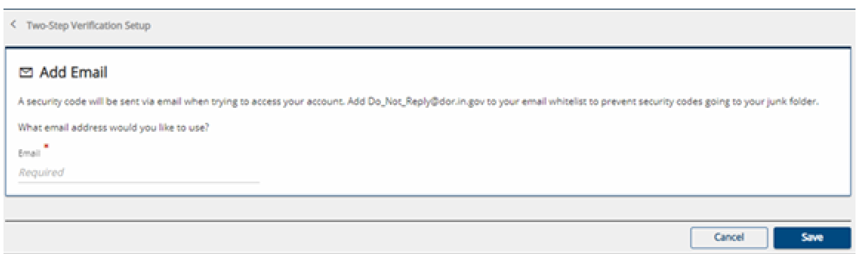
Text Message

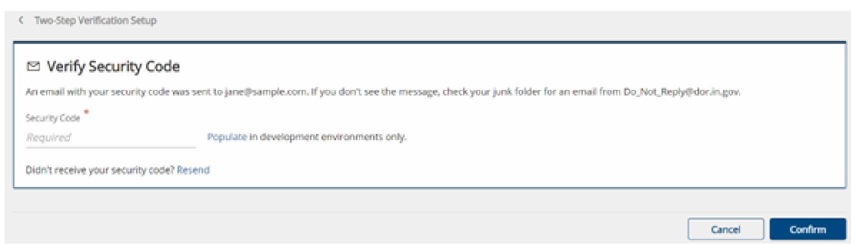




Email

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

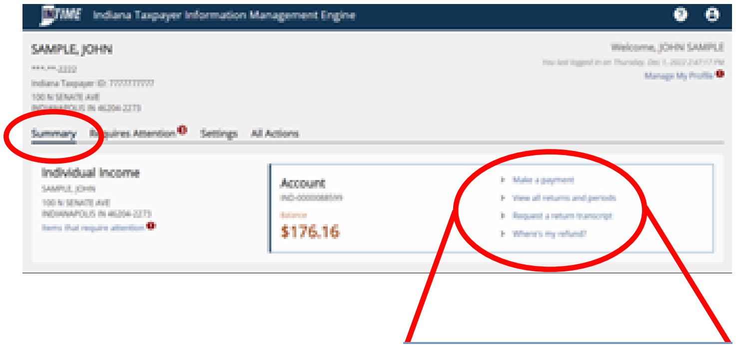


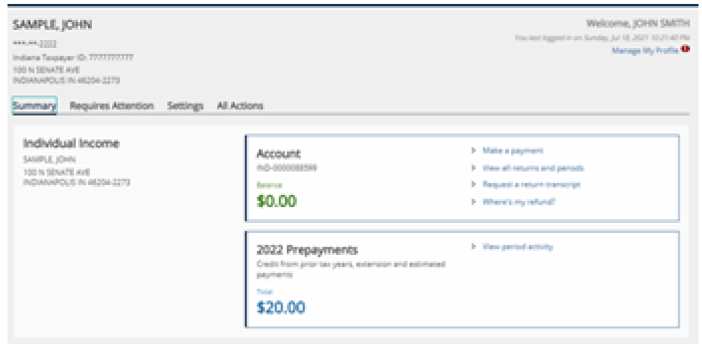


“Summary”

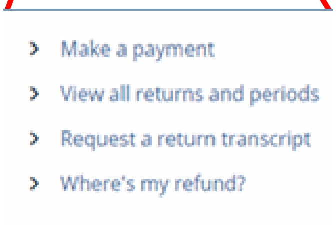
When logged in to INTIME, a customer will be able to view their account on the “Summary” tab.

It will look similar to the following examples:



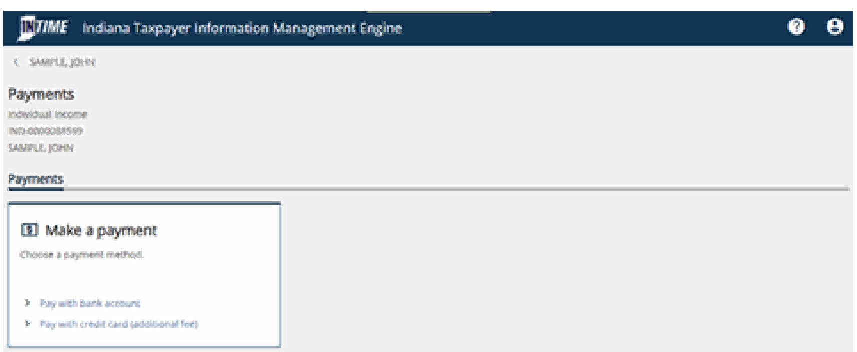


The “Account” panel provides the customer a list of options/actions to perform:

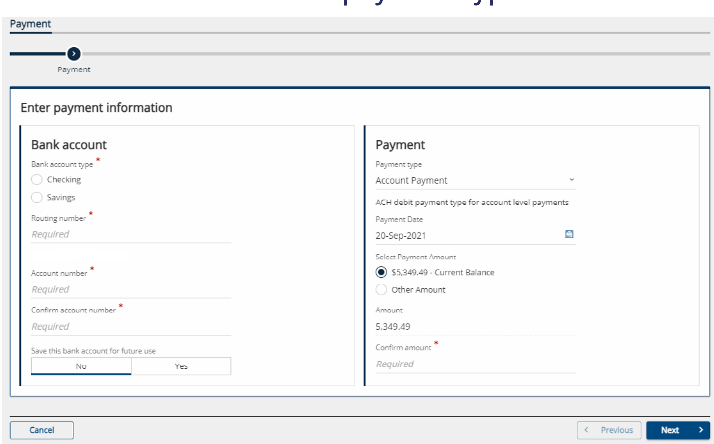


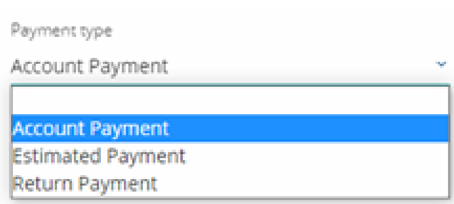
Make a Payment

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).

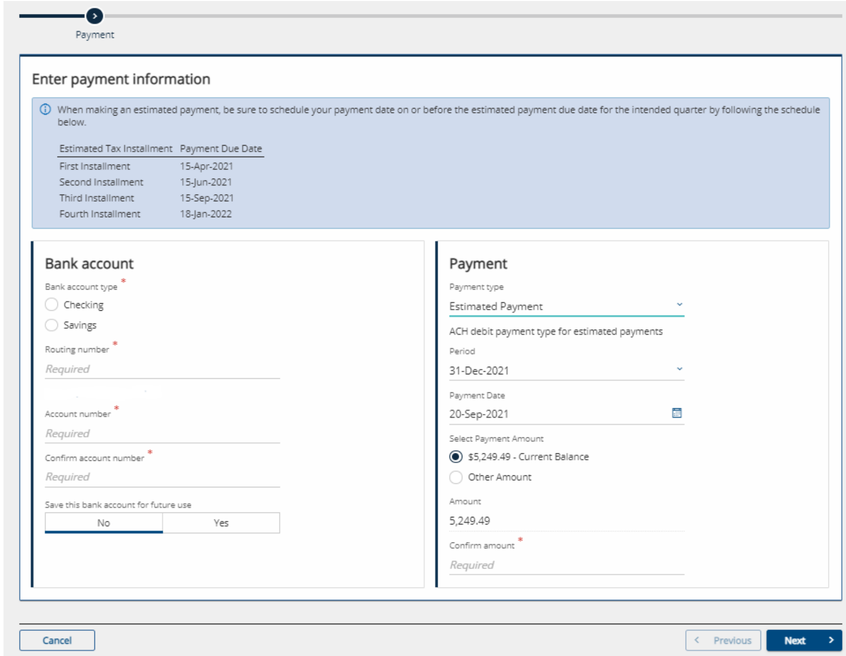


Step 2A: When making a payment from a **bank account**, the customer will be asked to enter payment information and select a payment type.

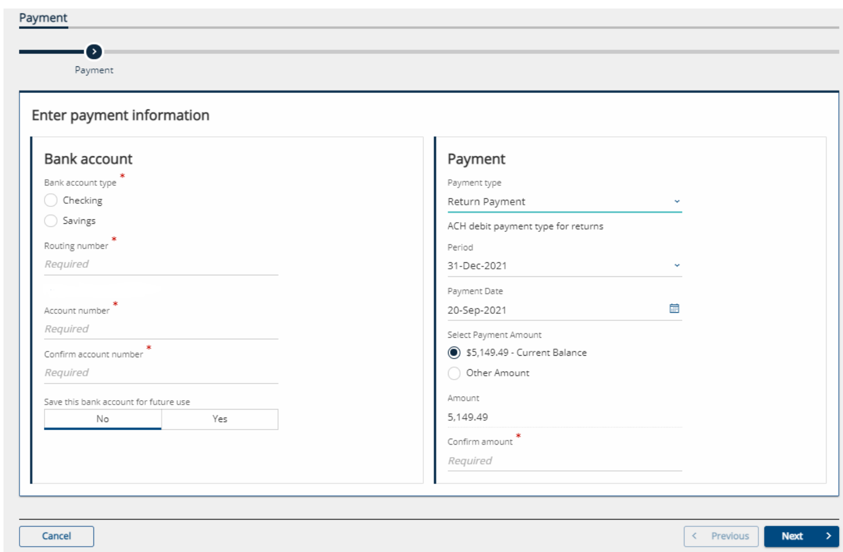




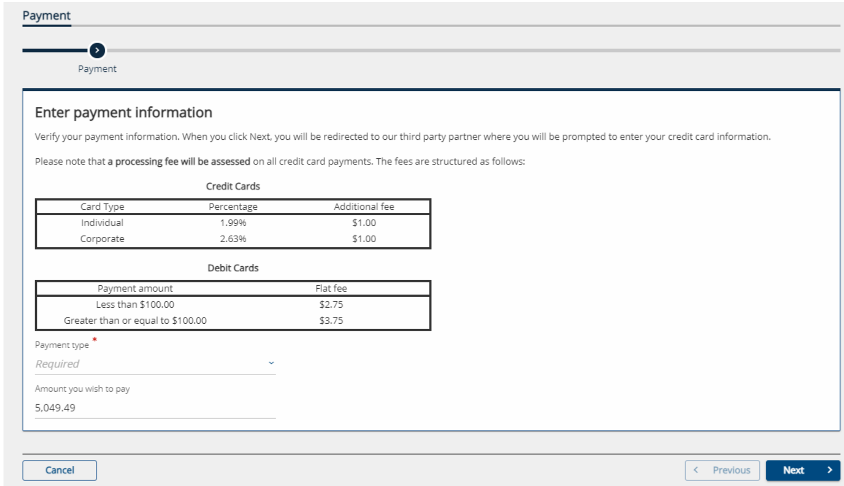
When making an estimated payment, be sure to schedule your payment date on or before the due date for the intended quarter.



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



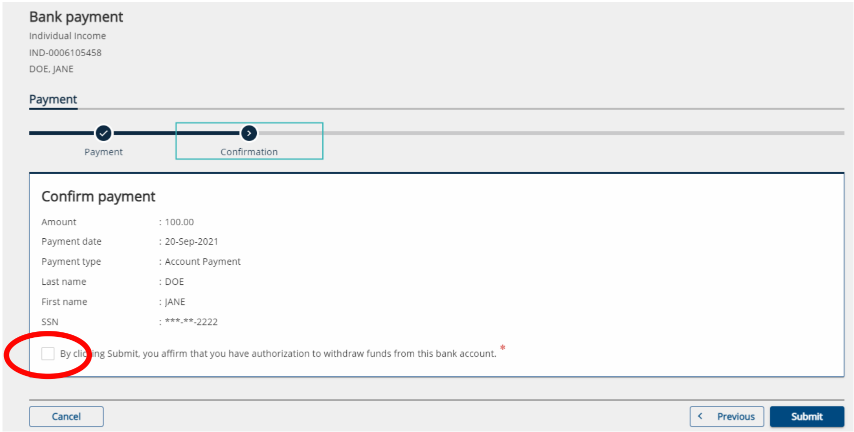
Step 2B: When making a payment with a **credit or debit card**, the customer will be asked to select a payment type and enter the payment amount.

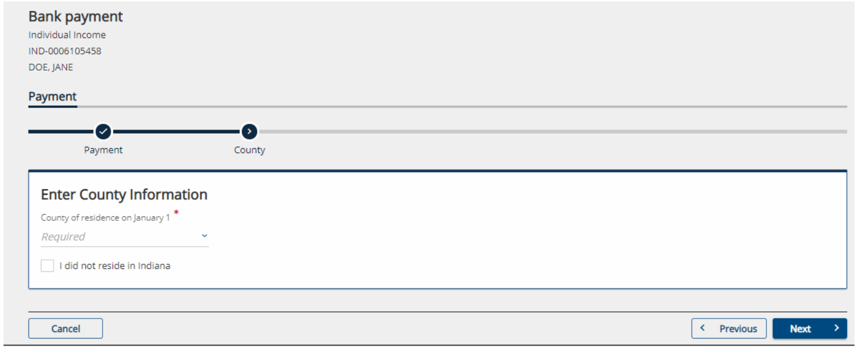


After verifying the information is correct and clicking "Next," customers will be redirected to the following screen to complete the credit or debit card payment process. Only Discover, Mastercard or VISA are accepted.

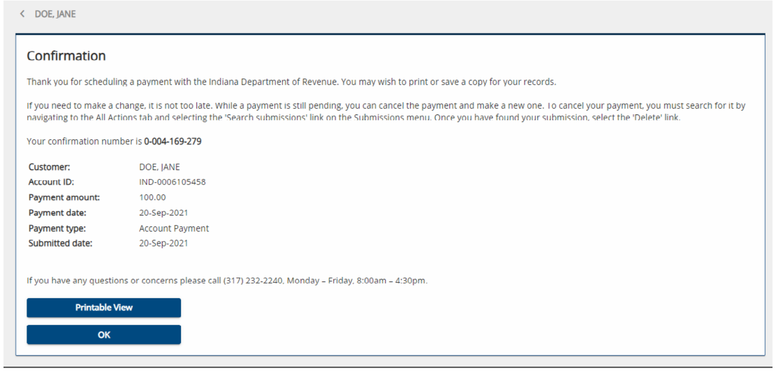
NOTE: A fee will be charged by the credit card processor based on the amount of the payment. The online transaction fee is $1 plus 1.99% of the total payment.

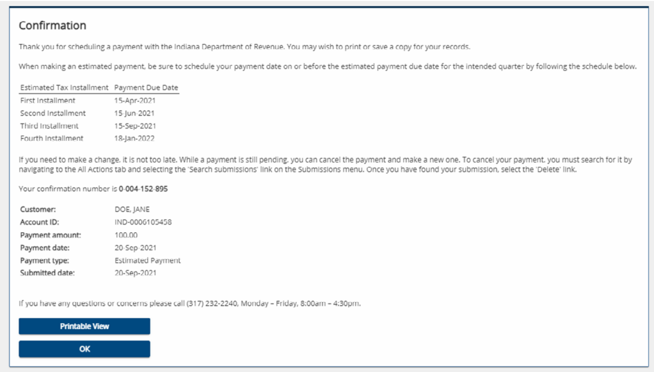
Step 3: A confirmation request will be displayed and the customer will be asked to check the box if they can affirm that they are authorized to withdraw funds from the bank account they entered. When making estimated payments you will be asked to enter your county of residence on January 1 or check the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





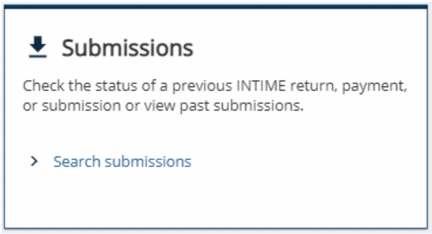
Step 4: Once the request has been submitted, a confirmation message will be displayed. A "Printable view" option is available to save or print a copy for recordkeeping.



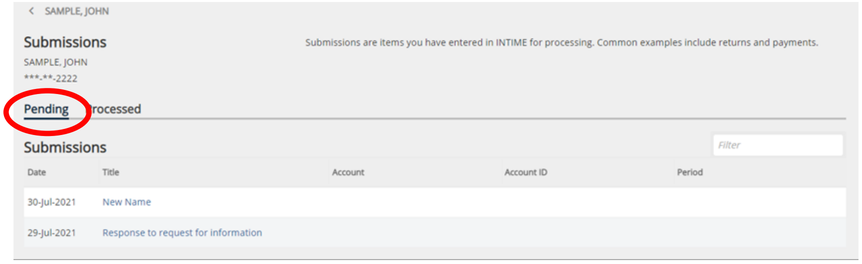


Payment History

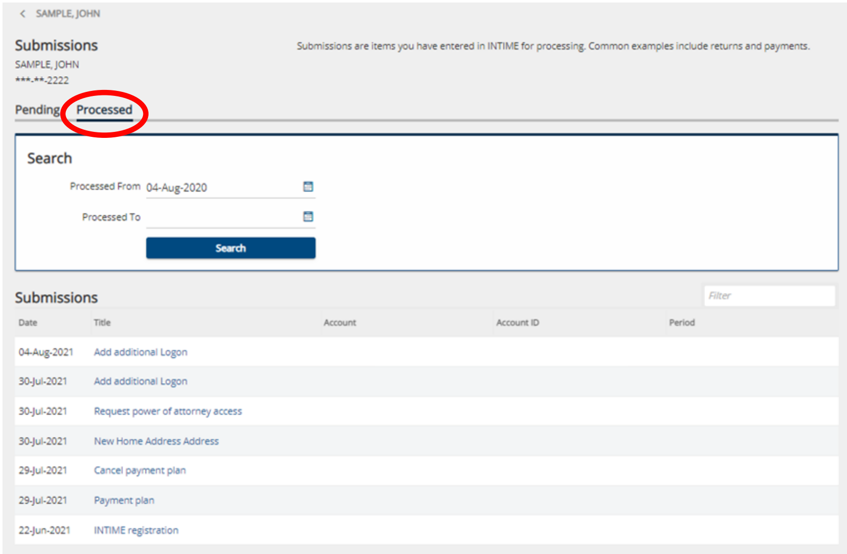
Step 1: To view payment history, go to the "All Actions" tab and locate the "Submissions" panel and click on the "Search submissions" link. Submissions are items that have been entered in INTIME for processing. This includes returns and payments.



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.

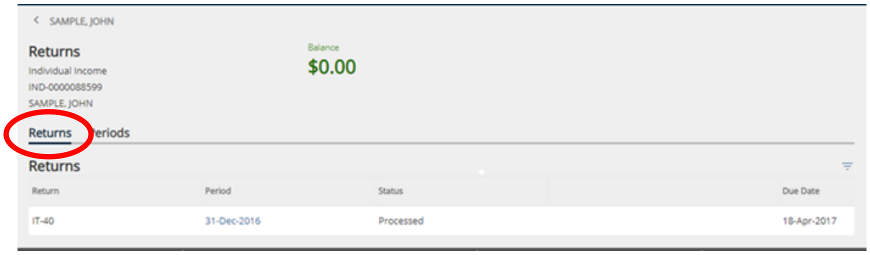


View All Returns and Periods

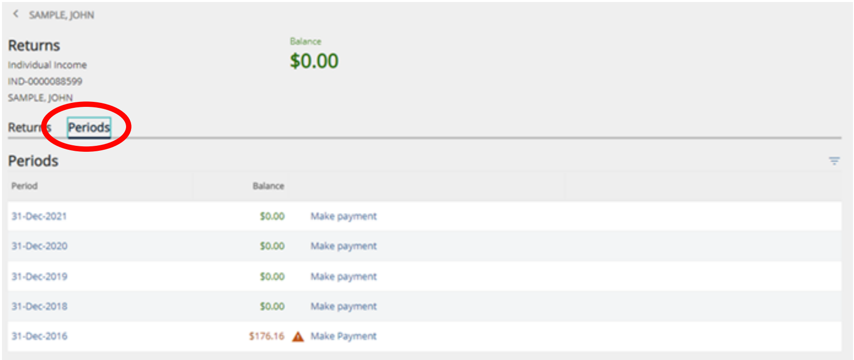
When the option to view all submitted returns and periods is selected, a customer will have two tabs to choose from:

- Returns
- Periods

Returns Tab

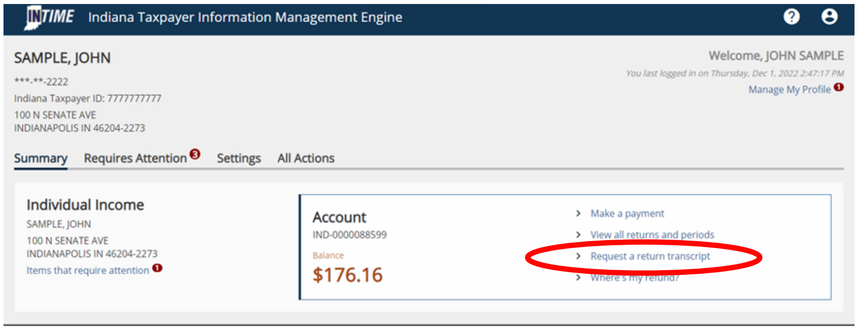


Periods Tab

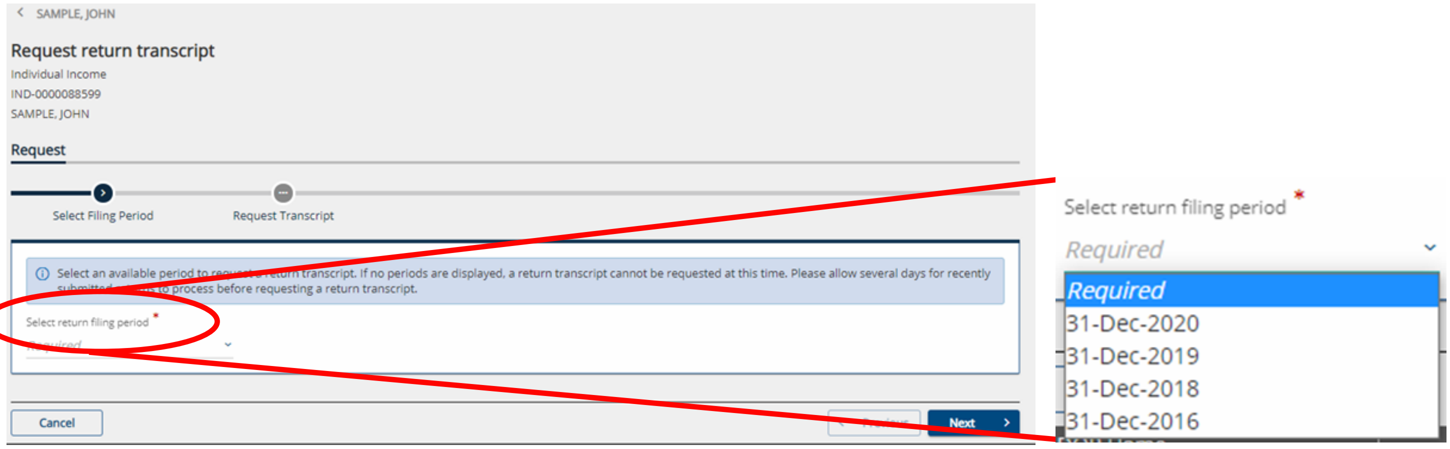


Request a Return Transcript

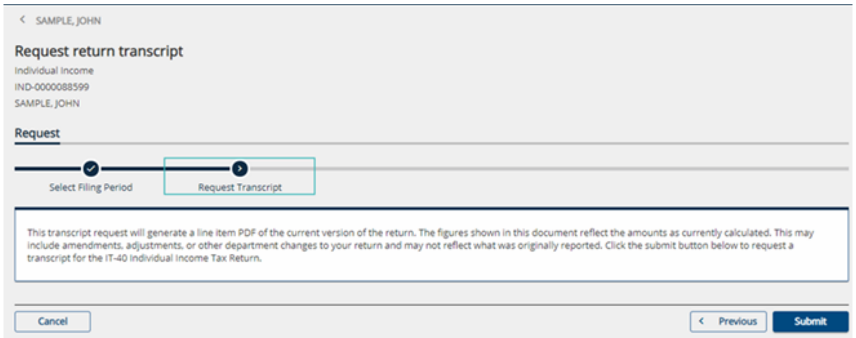
Step 1: To request a return transcript, go to the “Summary” tab where the “Account” panel is located and click on the “Request a return transcript” hyperlink.



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.”

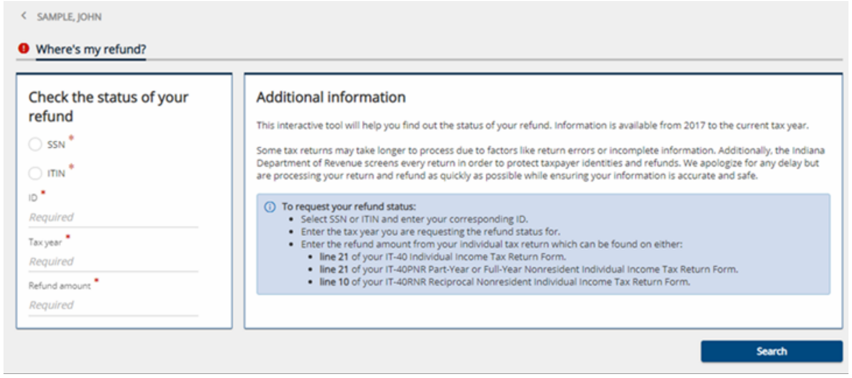


Step 3: The next screen will provide some information on generating a PDF of the requested transcript. Click on the “Submit” button to complete the request. A confirmation of submission will be displayed.



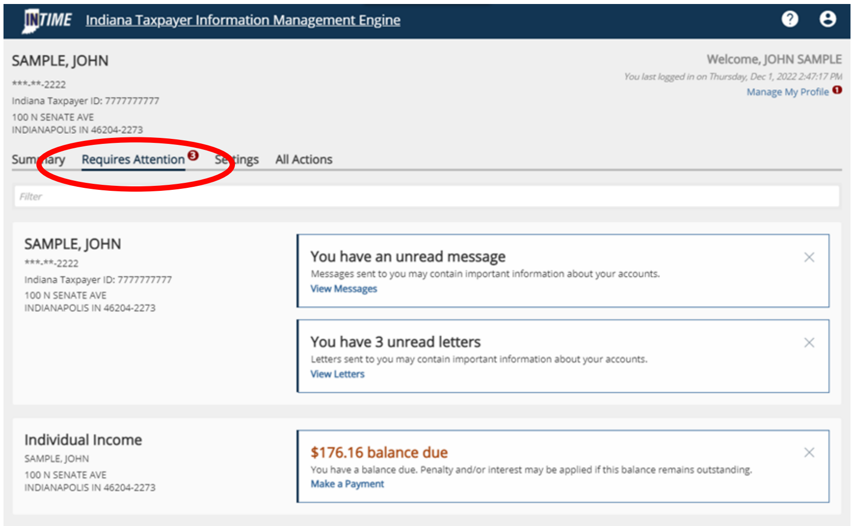
Where’s my Refund?

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.



“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.

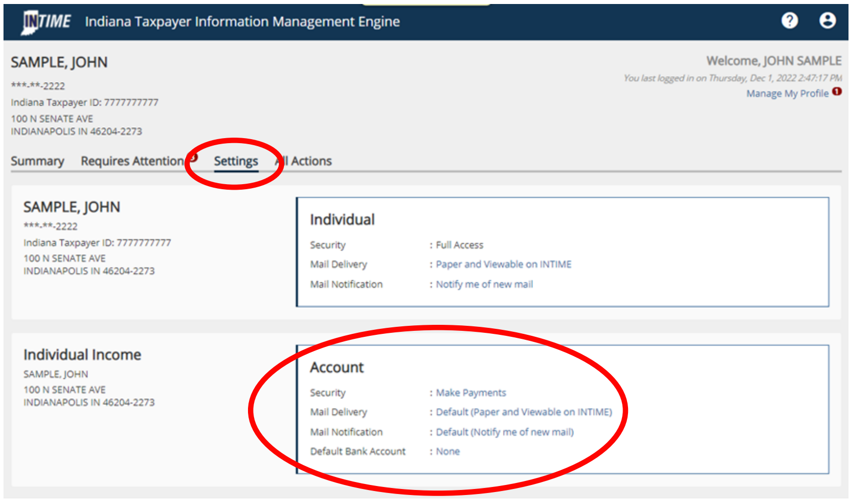


NOTE: The question mark icon in the top right corner links to the DOR Contact Us webpage. It also allows the customer to view a support ID. If the customer calls DOR with an INTIME question, a support person could use this ID to view the customer’s current INTIME session in real-time.

“Settings”

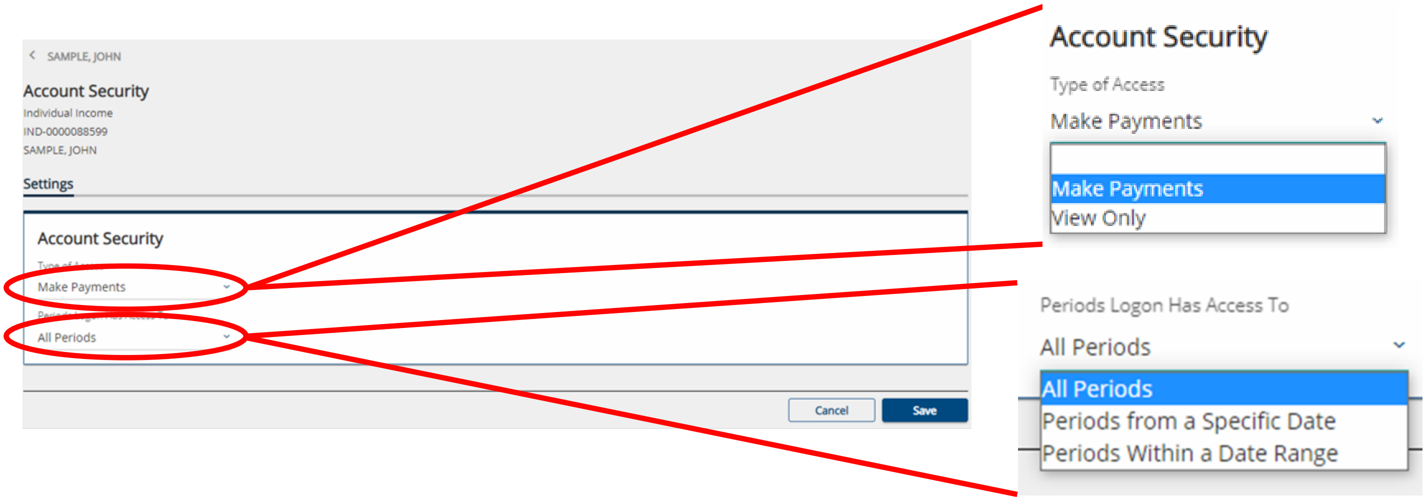
A number of actions are available via the “Settings” tab including the options for both individual and account settings:

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



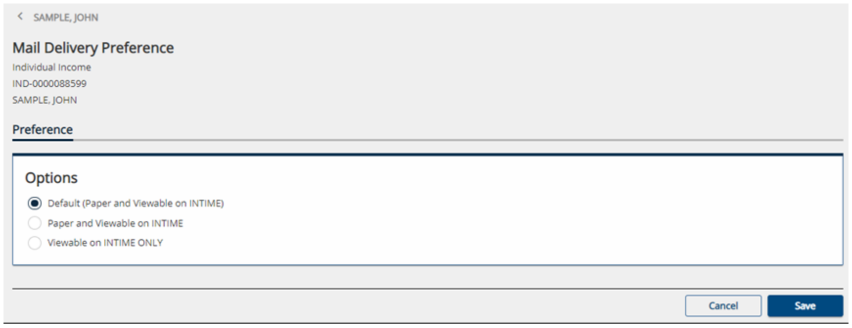
Managing Security

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.



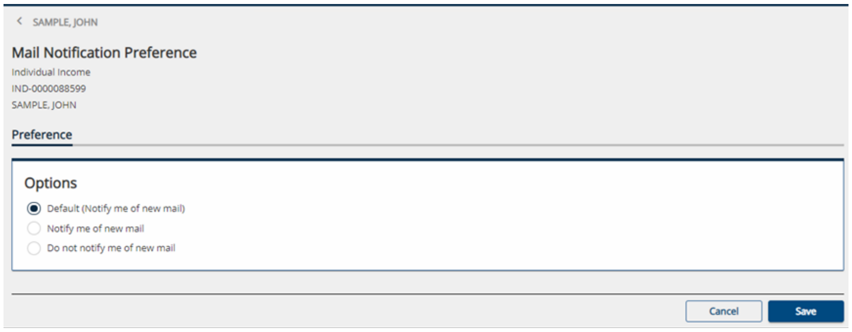
Mail Delivery Options

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.



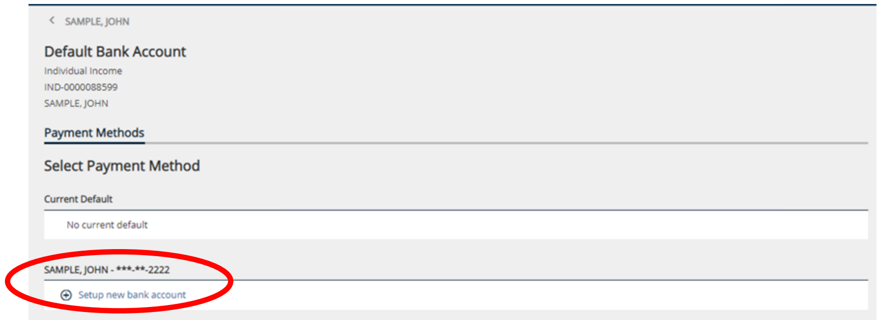
Mail Notifications

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

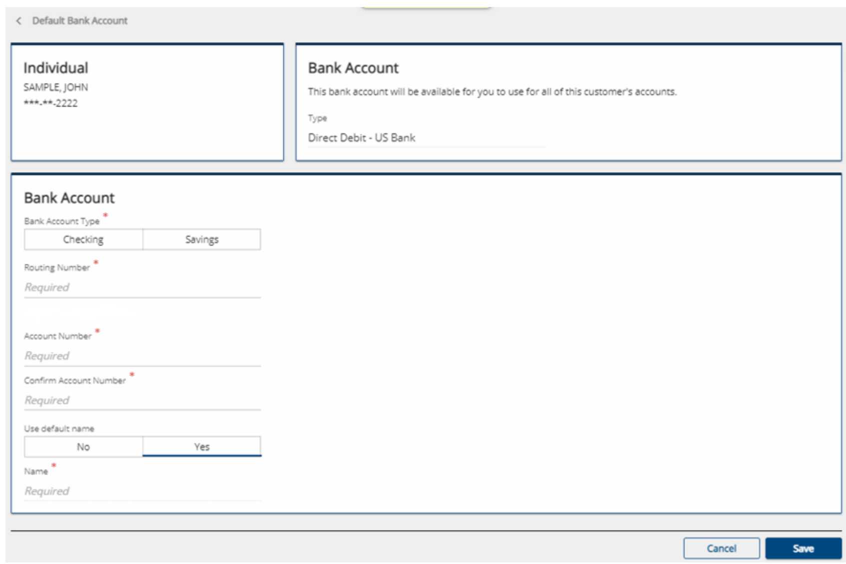


Default Bank Account

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.”

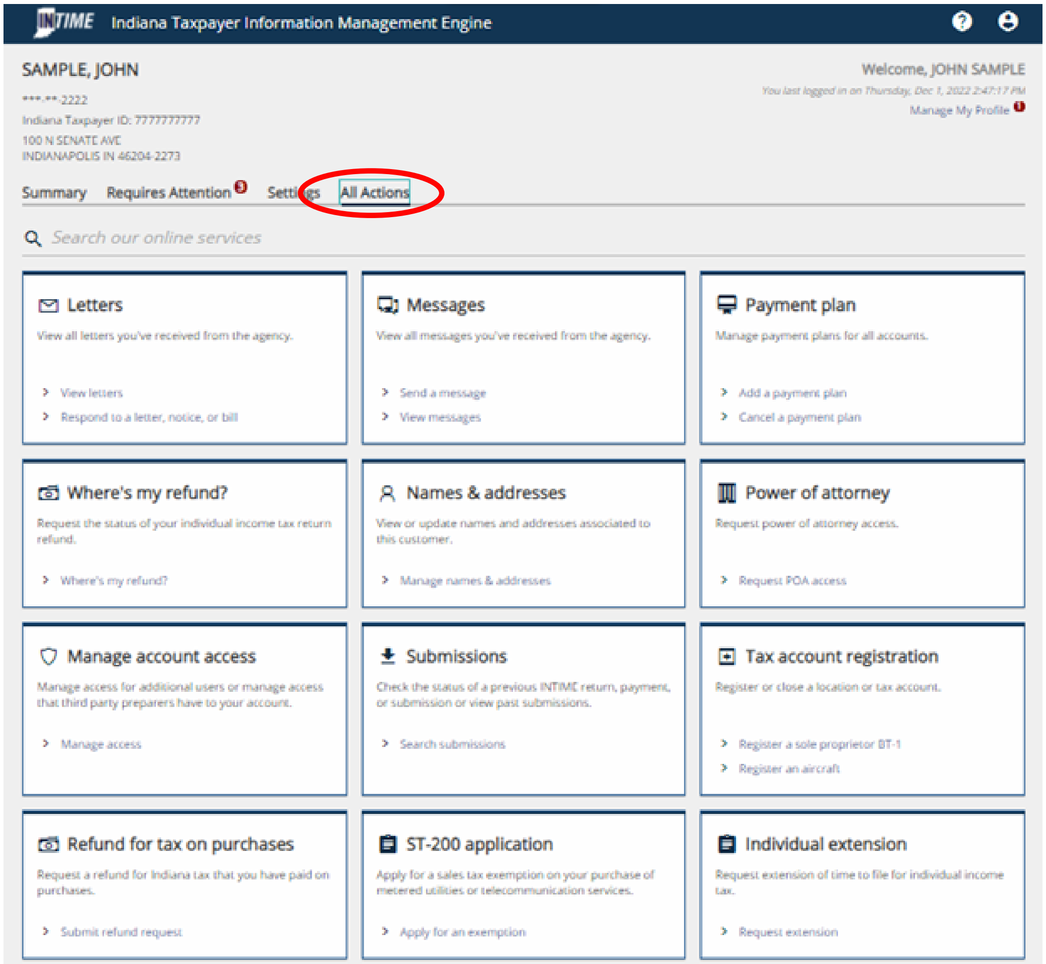


Step 2: Enter the required information and follow the prompts to add, remove, or rename a default bank account.



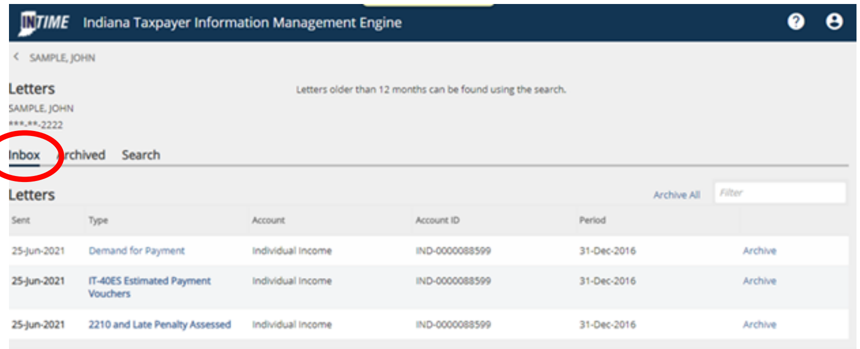
“All Actions”

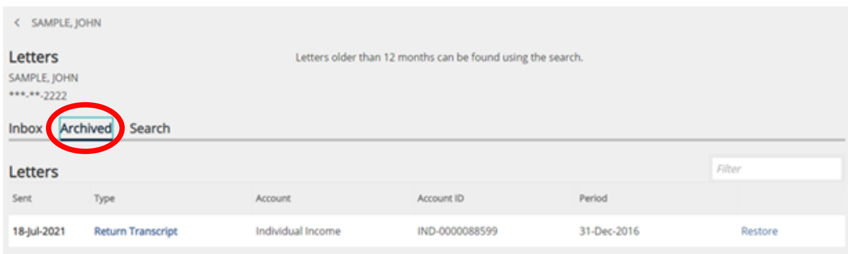
The customer can perform a number of tasks using the “All Actions” tab.

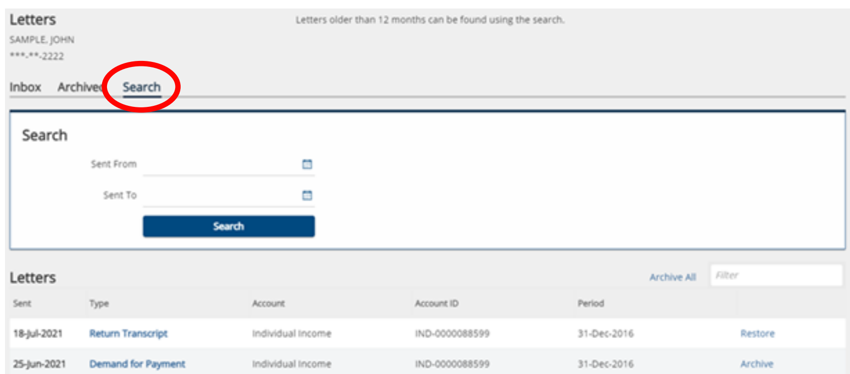


Letters

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.”

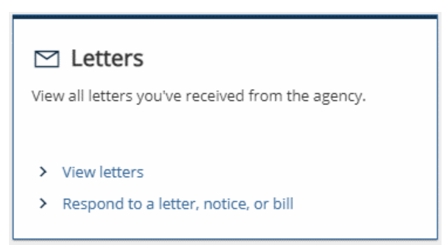






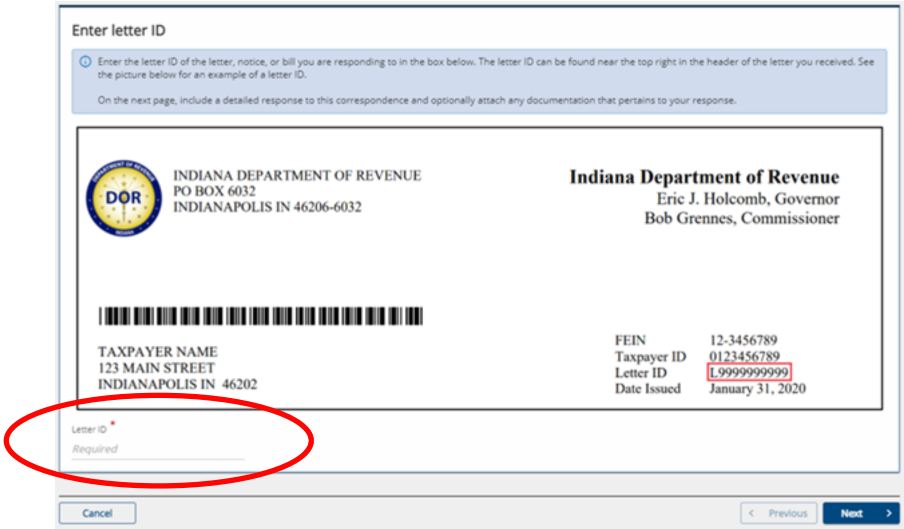
Respond to a Letter, Notice or Bill

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.

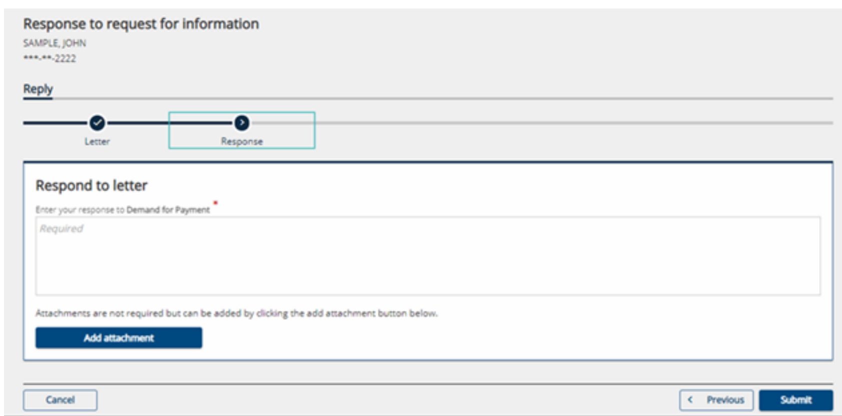


Step 1: In the "Inbox" tab, click a hyperlinked item in the "type" column to open it.

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



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.

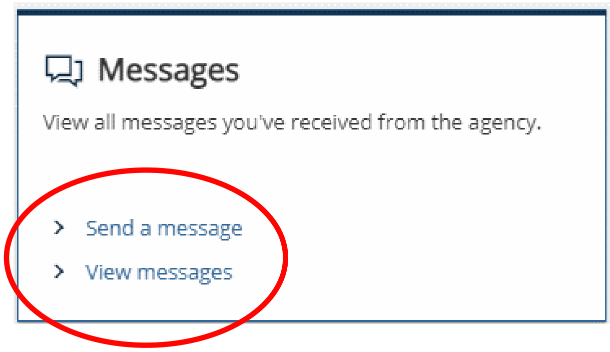


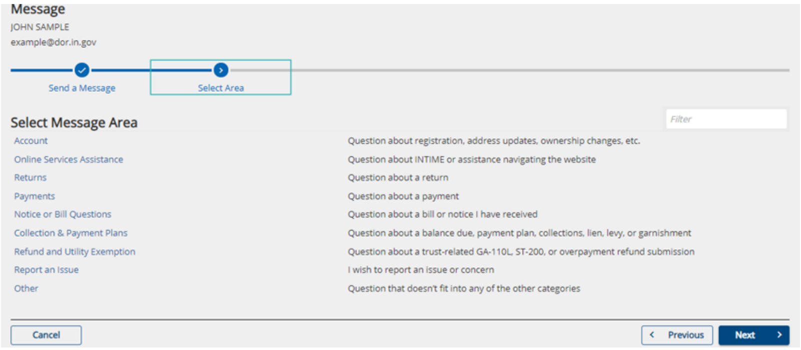
Sending and Receiving INTIME Messages

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.

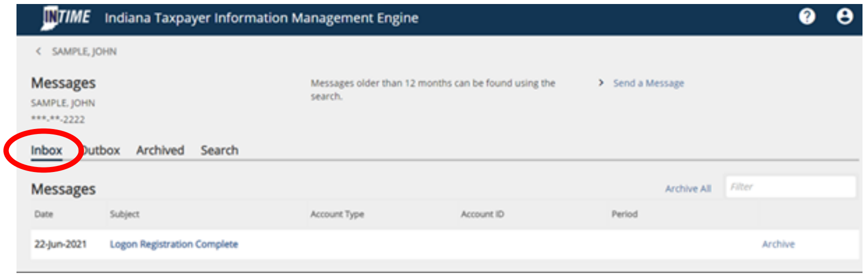
When creating a new message, INTIME will ask for some specific information to get the message to the appropriate person.





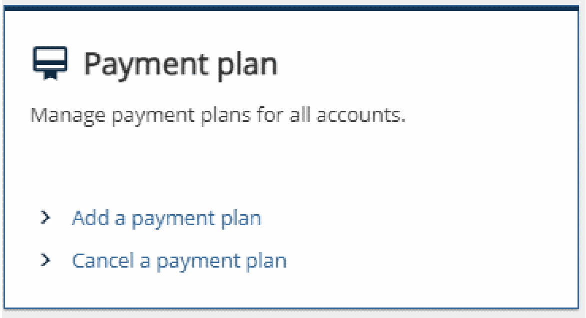
TIP: *An email alert will be sent when DOR responds to your message.*

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



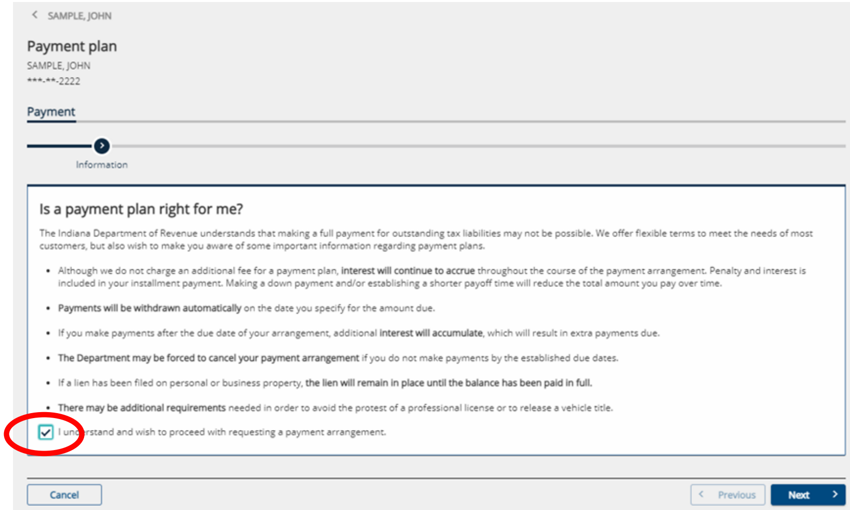
Payment Plans

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



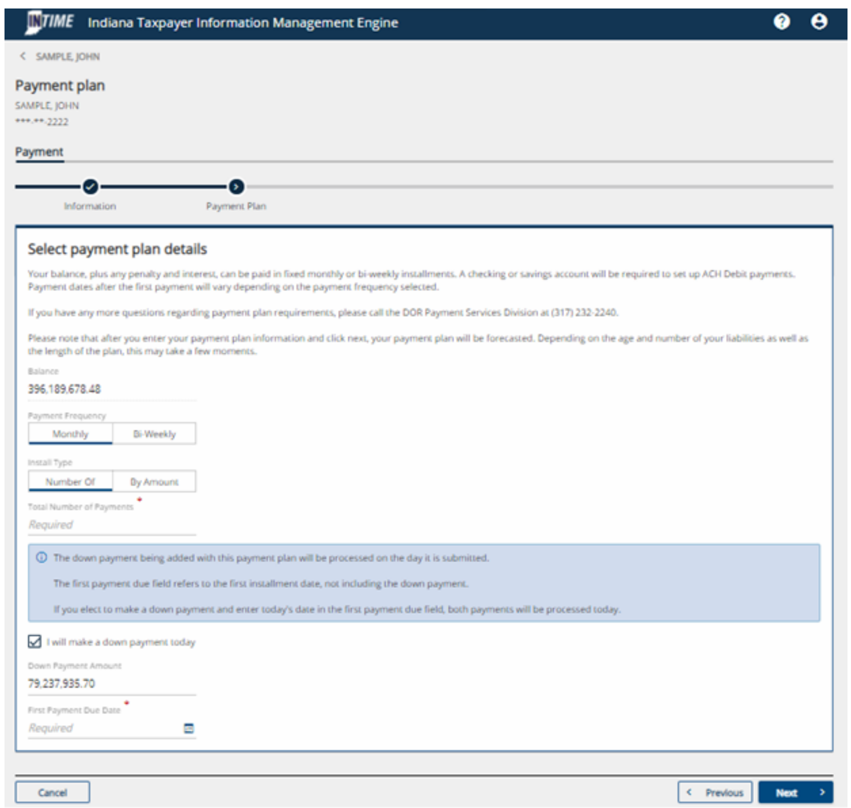
Add a Payment Plan

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.

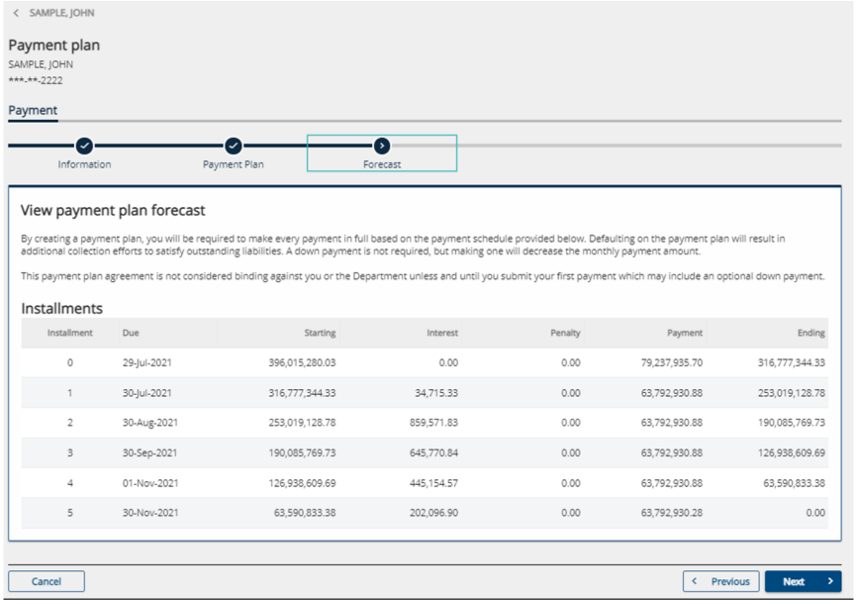


NOTE: A checking or savings account will be required to set up ACH debit payments. Installment payments will be withdrawn automatically from the bank account provided on the dates requested by the customer.

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.



Step 3: A payment plan forecast will be provided.



< SAMPLE, JOHN

Payment plan

SAMPLE, JOHN

***-**-2222

Payment

Information Payment Plan Forecast

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.

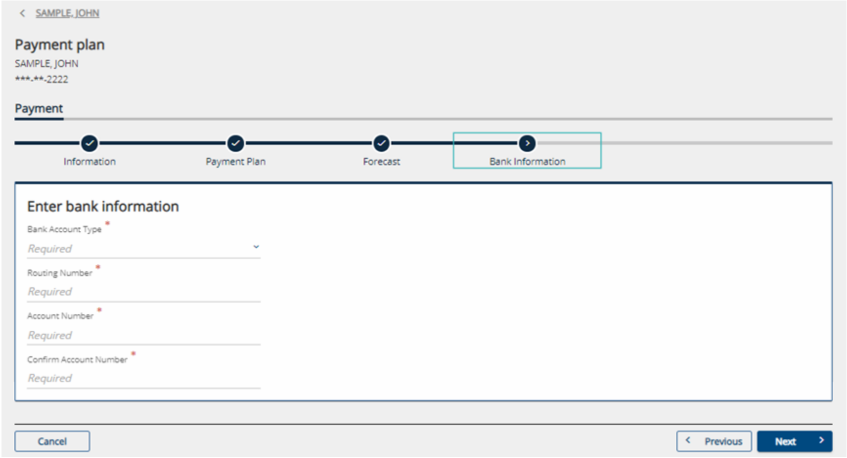
This payment plan agreement is not considered binding against you or the Department unless and until you submit your first payment which may include an optional down payment.

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 *

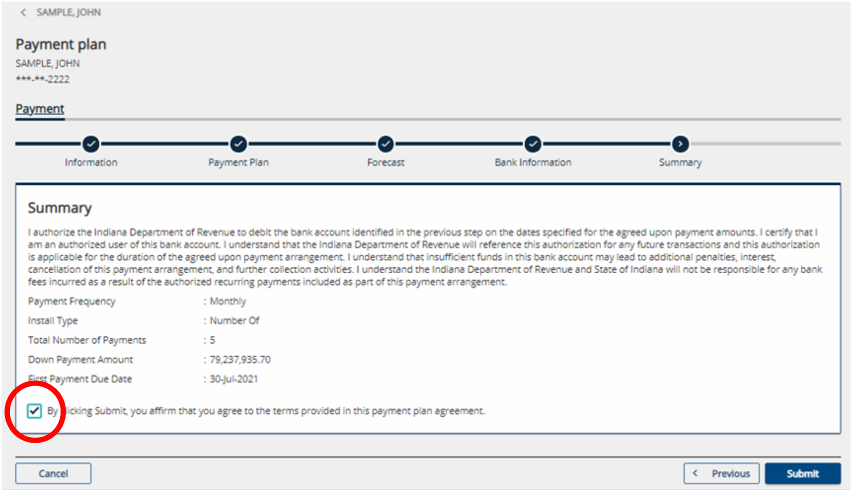
Required

Confirm Account Number *

Required

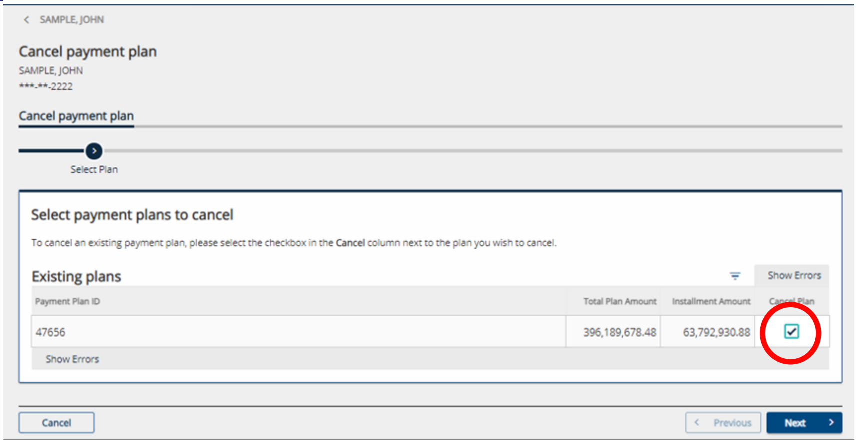
Cancel < Previous Next >

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.

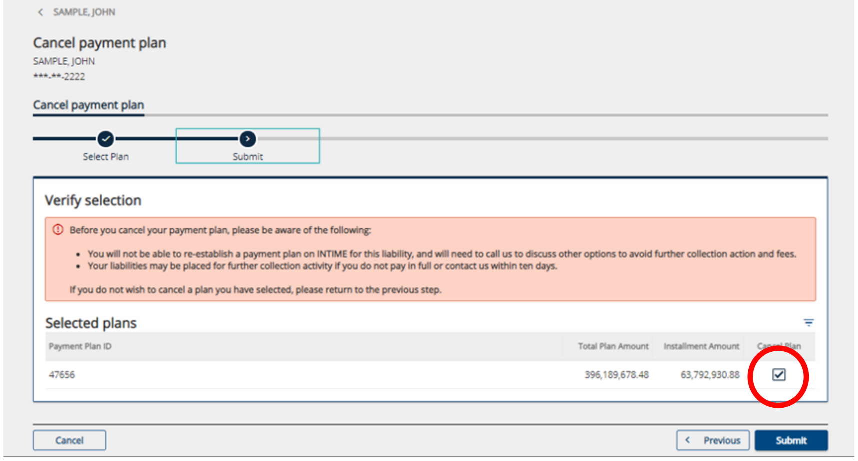


Cancel a Payment Plan

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

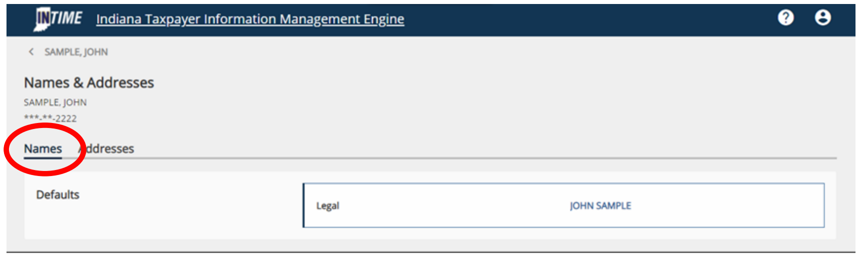


Step 2: Prior to clicking the “Submit” button to cancel the plan, customers should read the warning message. Once the cancellation has been submitted, a confirmation message will be displayed.



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.



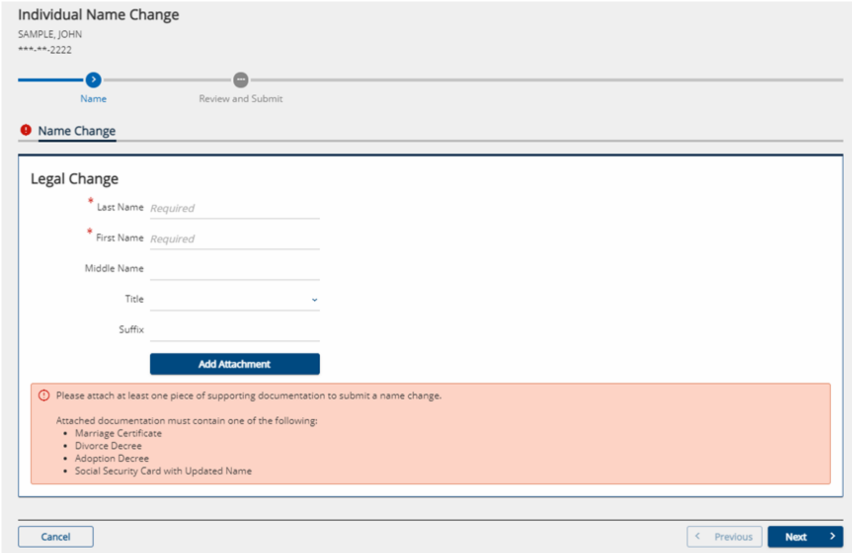
Update Name

Step 1: Legal Name Change

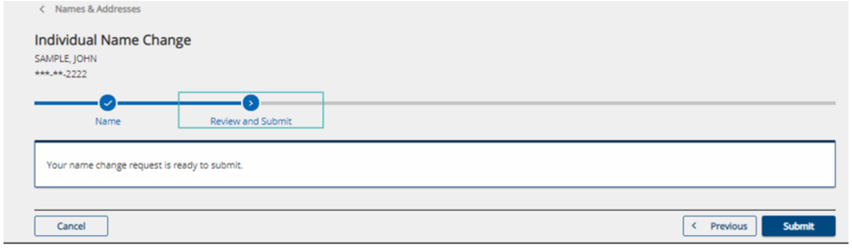
A customer can select “Change this name.” A warning will appear at the top of the screen noting that this is only a name change with DOR.

Step 2: Add Supporting Documentation

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

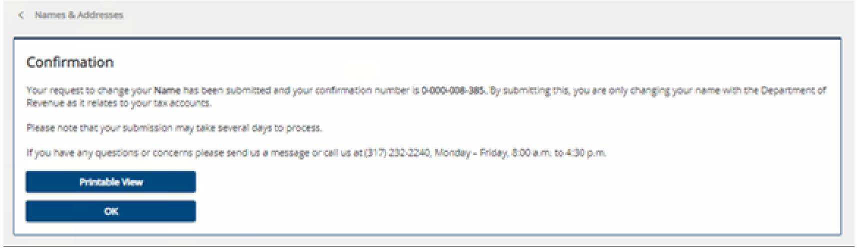


Step 3: Review and Submit



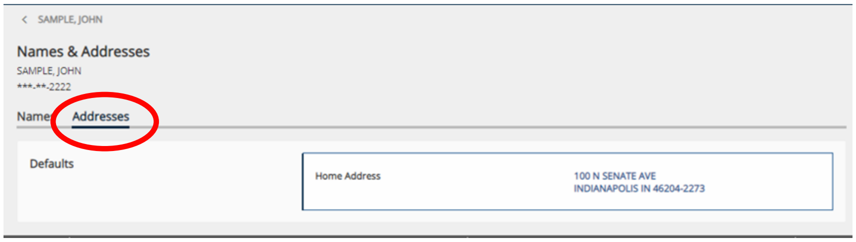
Step 4: Confirmation

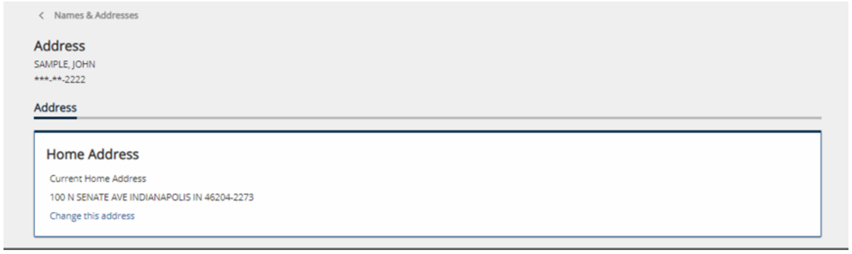
An additional link to contact the Secretary of State is provided in case the customer missed the first warning about how this name change is only for DOR as it relates to their tax accounts.



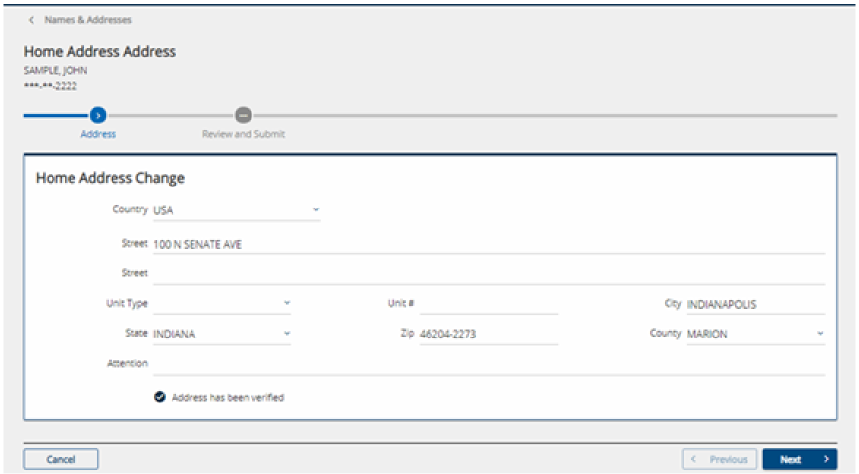
Update Addresses

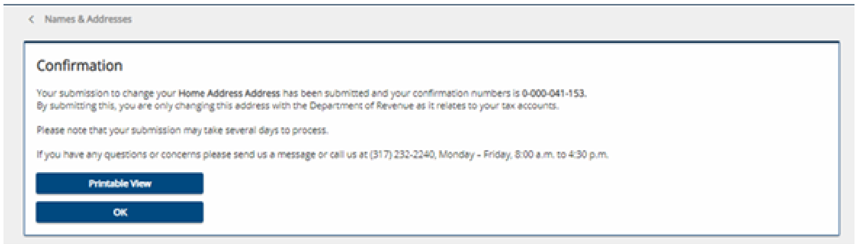
Step 1: The "Addresses" tab lists any addresses associated with the customer. After clicking on the hyperlinked address, select "Change this address" to make an update.





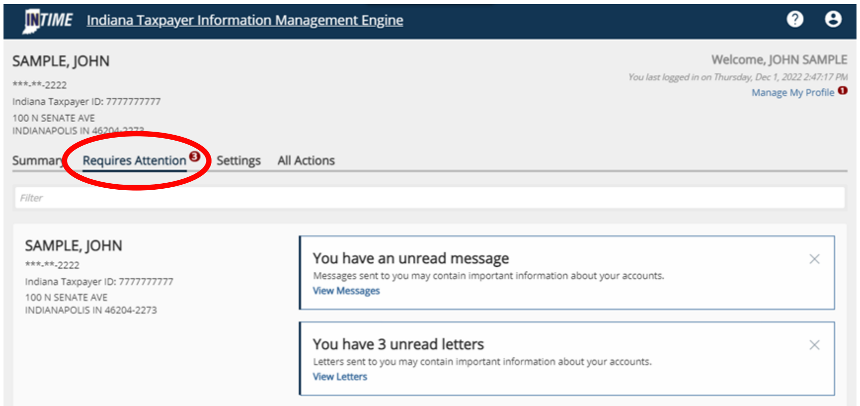
Step 2: Enter the new address, then review and submit. Once the request has been submitted, a confirmation message will be displayed. A “Printable view” option is available to save or print a copy for recordkeeping.



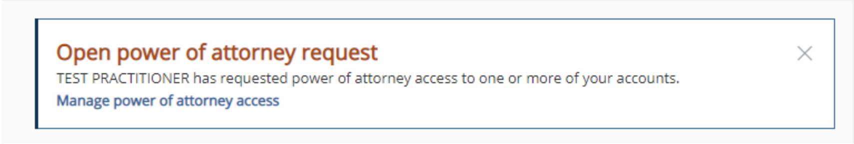


Power of Attorney Access for Tax Practitioners

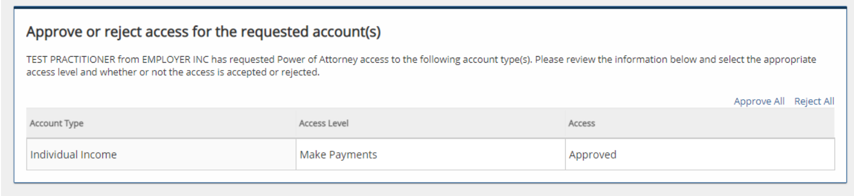
If a customer would like to provide access to their INTIME account to a tax practitioner, the process will begin with the tax practitioner requesting access from their own account. Once that occurs, the customer will be notified and can log in to their own INTIME account to review and approve the access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



The request will appear like the following:



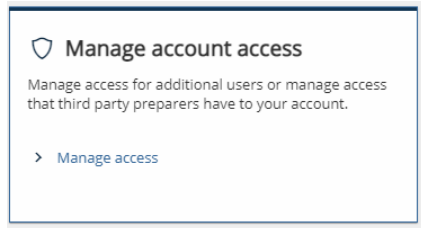
NOTE: Access is granted on a user level basis, so if multiple tax preparers within a firm request access, the customer will need to approve the access for each requestor.



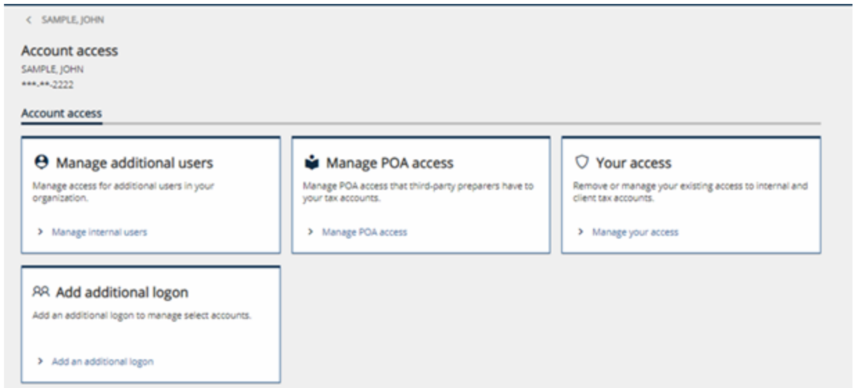
If at a later date the customer wishes to revoke the tax practitioner's access to their account, this can be done in the "All Actions" tab by selecting the "Manage POA access" hyperlink. Instructions can be found in the "Manage POA access" section of this guide.

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.

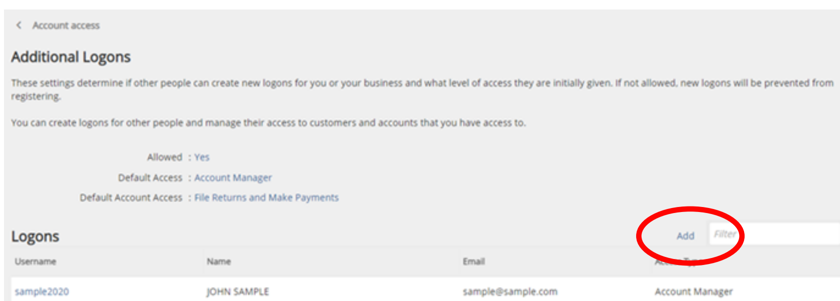


Step 1: Select from the following types of access that can be managed.



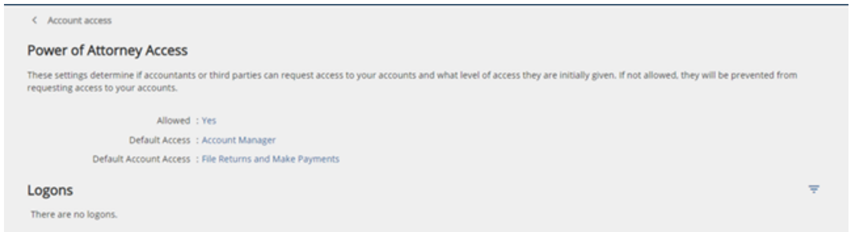
Manage Additional Users

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).



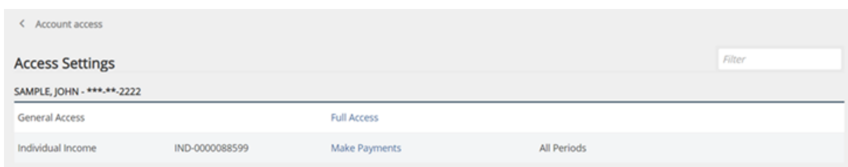
Manage POA Access

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.



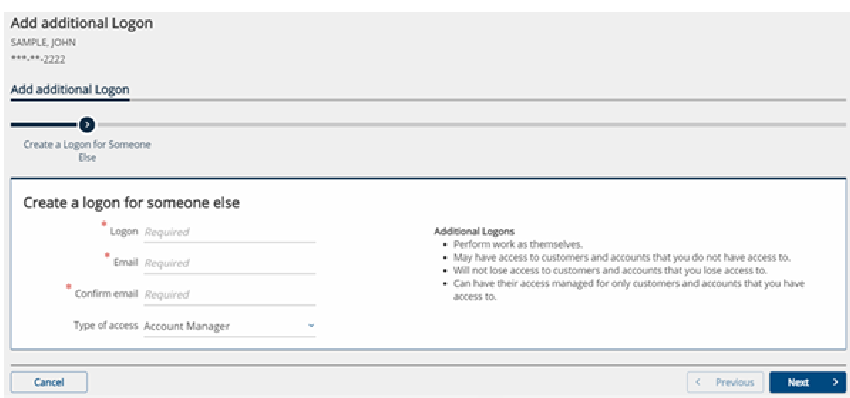
Manage Your Access

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

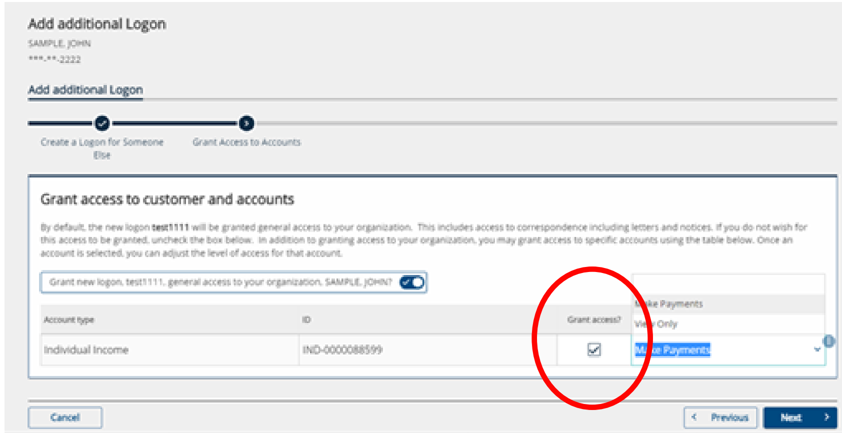


Add Additional Logon

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.



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.



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

Revoking Access to a Client's Account(s)

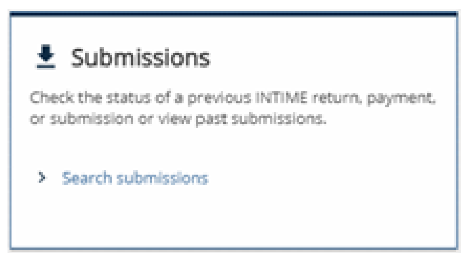
Tax practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA). To do so, practitioners should enter the client's INTIME account, select the "Settings" tab and cancel access to the client or accounts they no longer wish to access.

Client Revocation

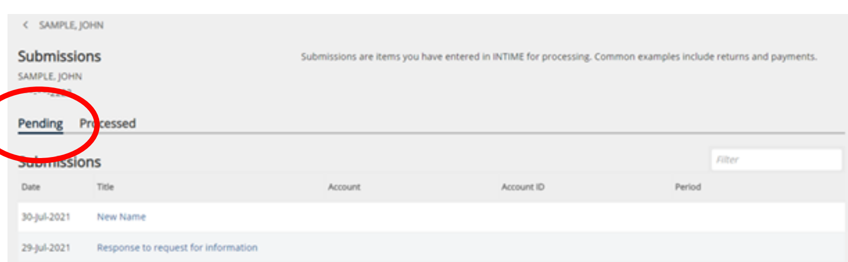
Individual income tax customers have the ability to modify their tax practitioner's access by going to the "Settings" tab to revoke practitioner ePOA access.

Submissions

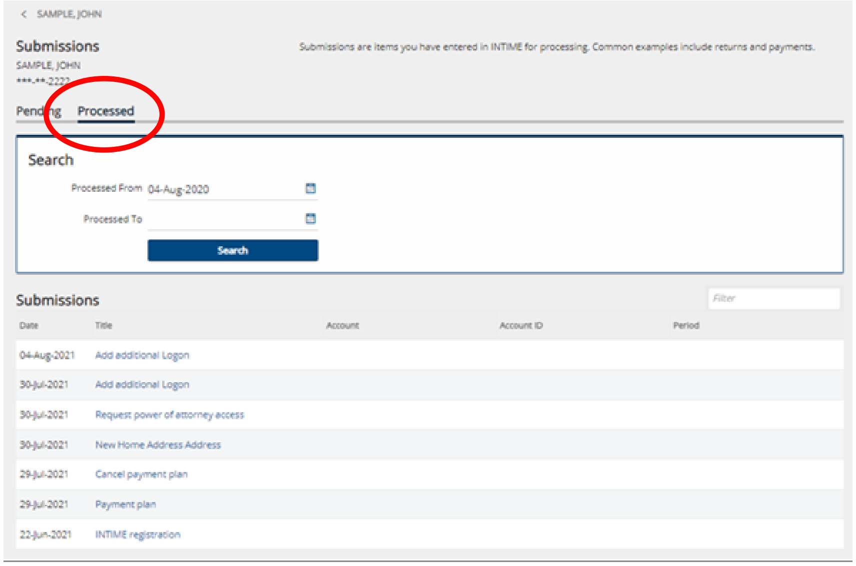
A customer wanting to check on the status of a submission to DOR can do so by going to the "All Actions" tab, locating the "Submissions" panel and clicking on the hyperlink. Submissions are items that have been entered in INTIME for processing such as a payment, a request for a return transcript, etc.



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

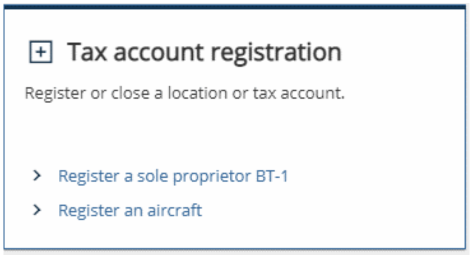


Step 2: Past payments or any items that have been completed or processed will appear in the "Processed" tab and listed by date. The "Search" function can help locate past items by entering a date range.



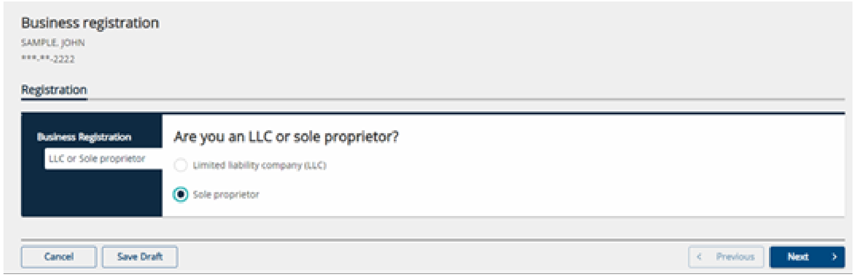
Tax Account Registration

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



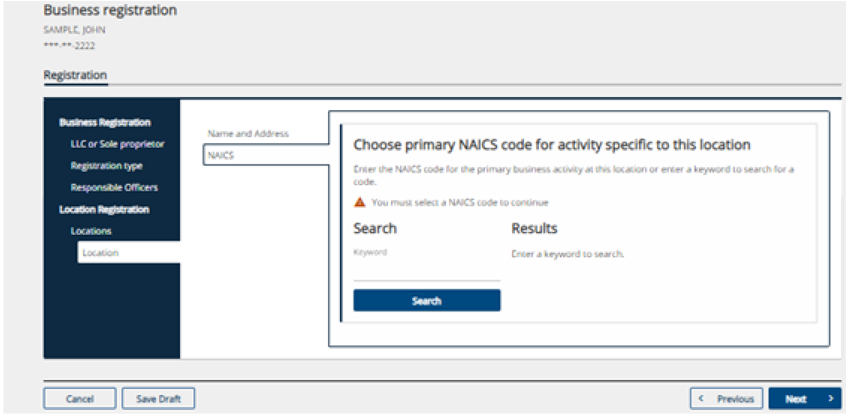
Sole Proprietor Tax Account Registration

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.

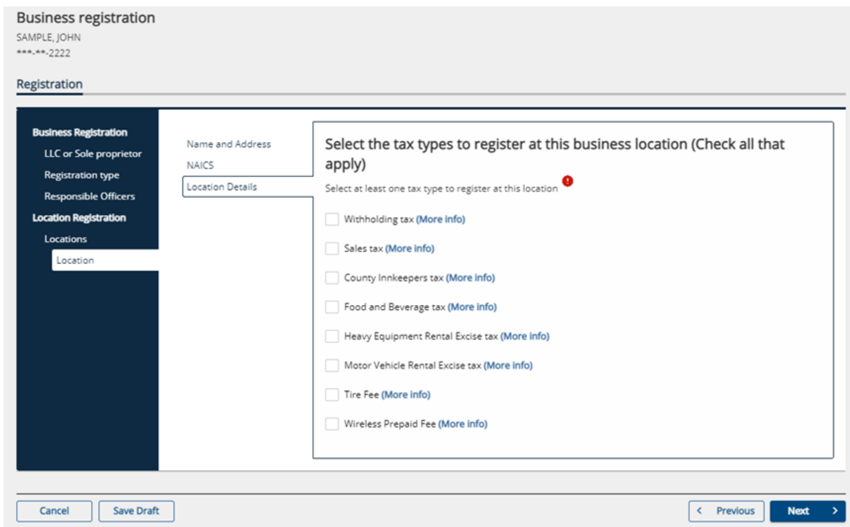


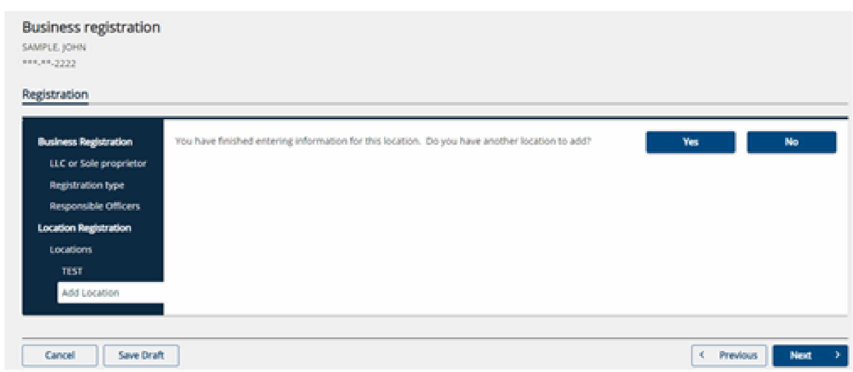
NOTE: If limited liability company (LLC) is selected, the customer will need to log off and register as a separate entity with INTIME.

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.



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.

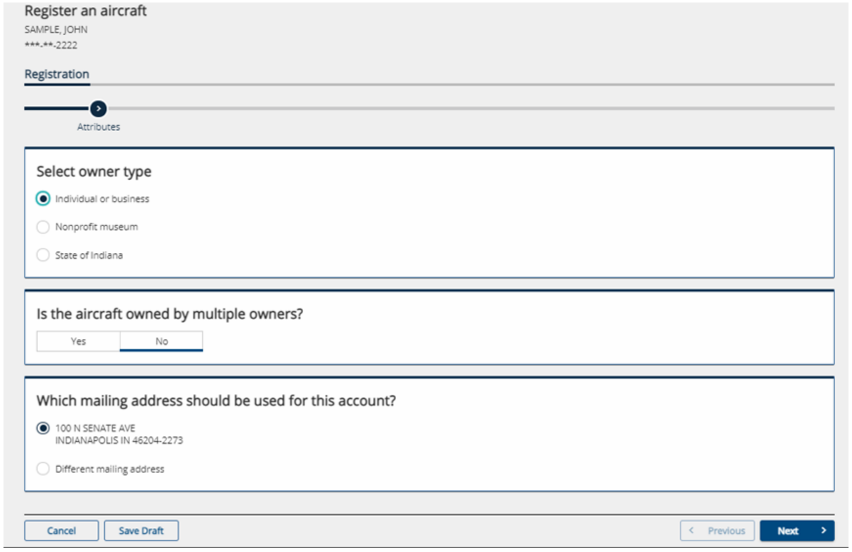




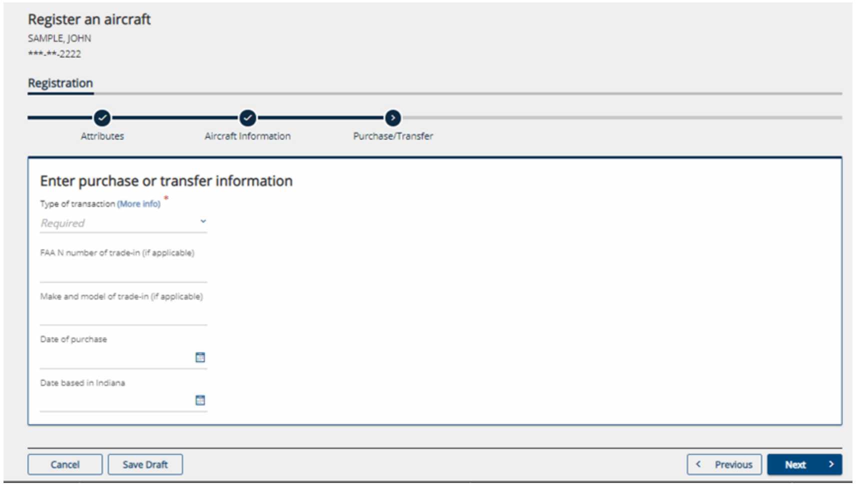
NOTE: If registering for retail sales tax, DOR will issue a Registered Retail Merchant Certificate (RRMC), which is valid for two years. The RRMC registration is fee is $25 per sales location registered.

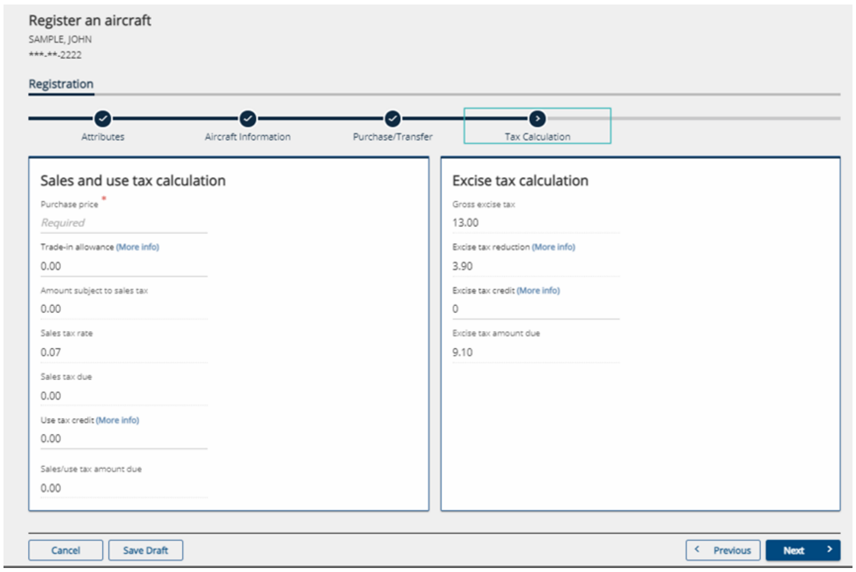
Register an Aircraft

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.

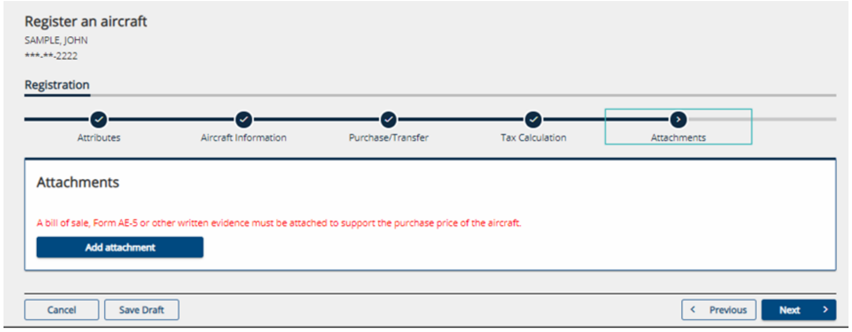


Step 2: Enter aircraft purchase or transfer information. A tax calculation screen will appear next.

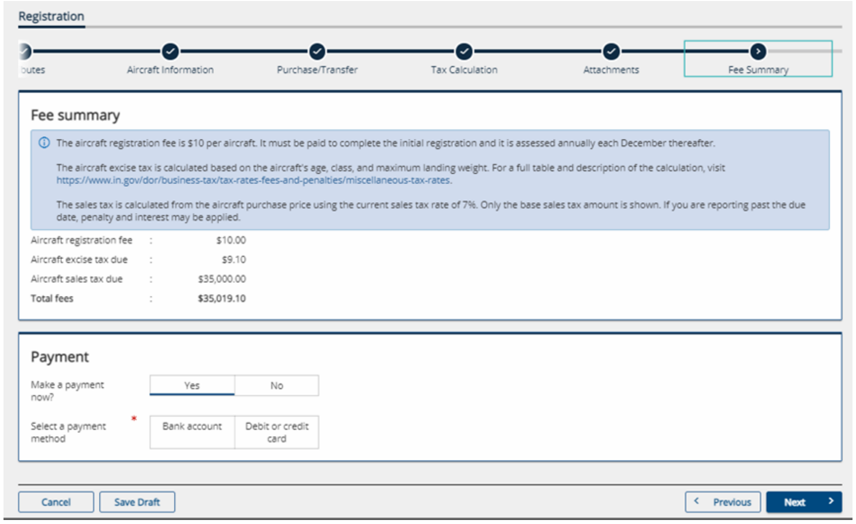




Step 3: Any attachments, bill of sale, Form AE-5 or other written evidence to support the purchase price of the aircraft should be uploaded by clicking “Add attachment.”

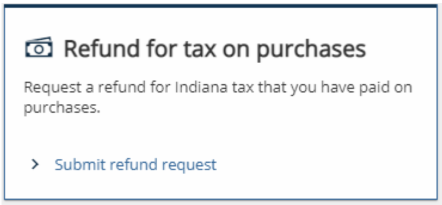


Step 4: A fee summary will include the registration fee, excise, and sales tax due with the option to make a payment and the payment method. Continue to follow the prompts to complete the payment process.

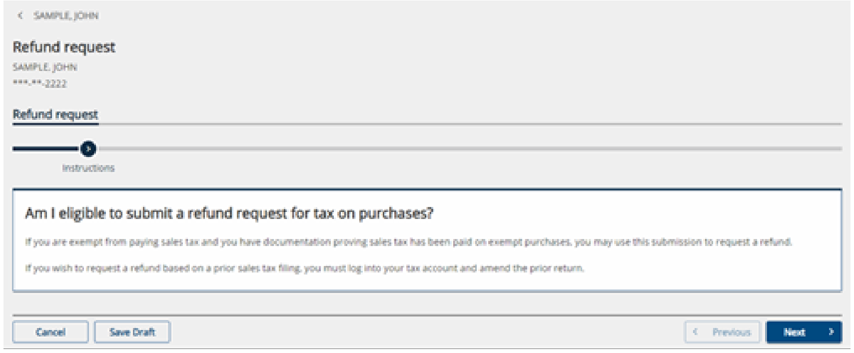


Request a Refund for Tax on Purchases

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.

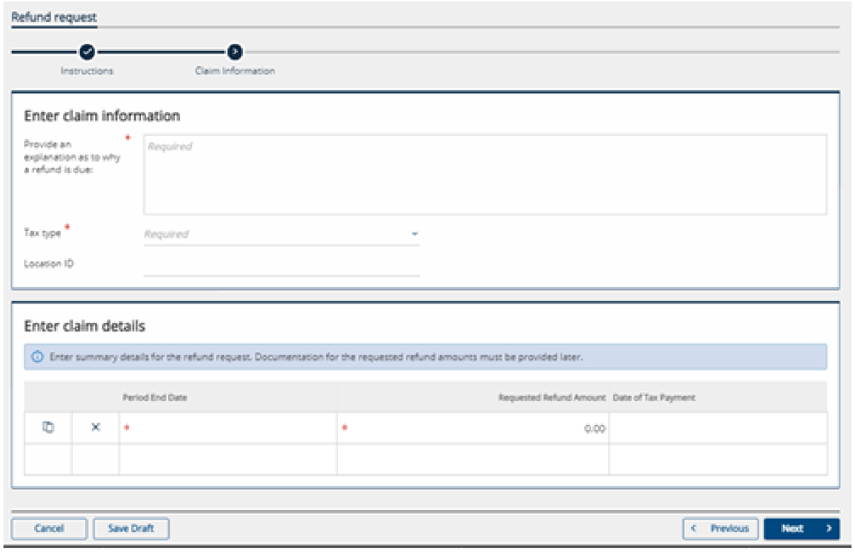


Step 1: Instructions



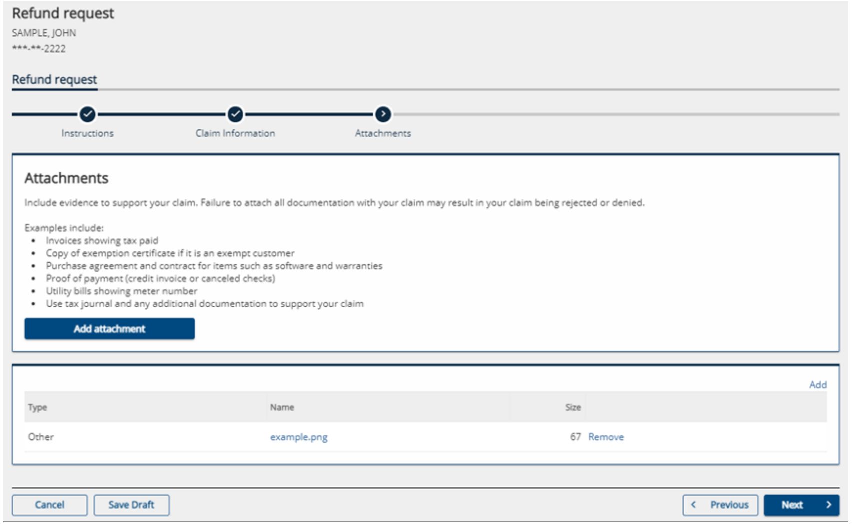
Step 2: Claim information

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.

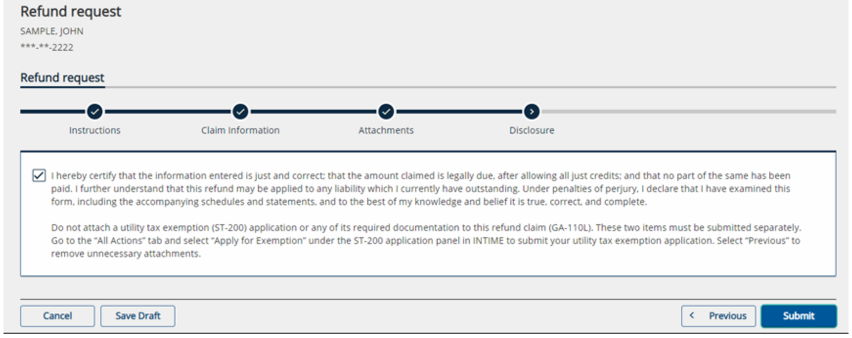


Step 3: Attachments

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

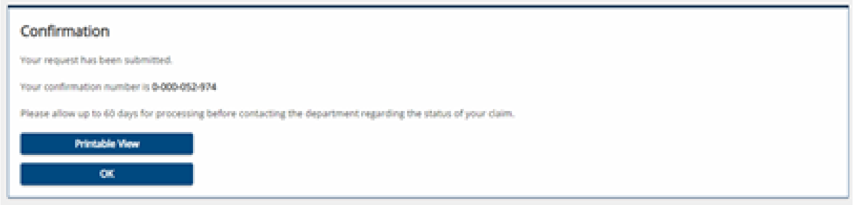


Step 4: Disclosure



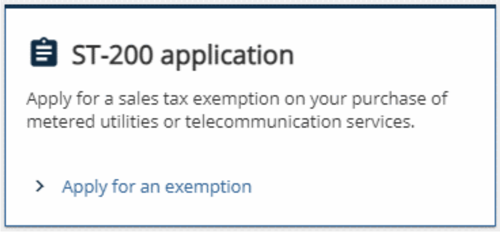
Step 5: Confirmation

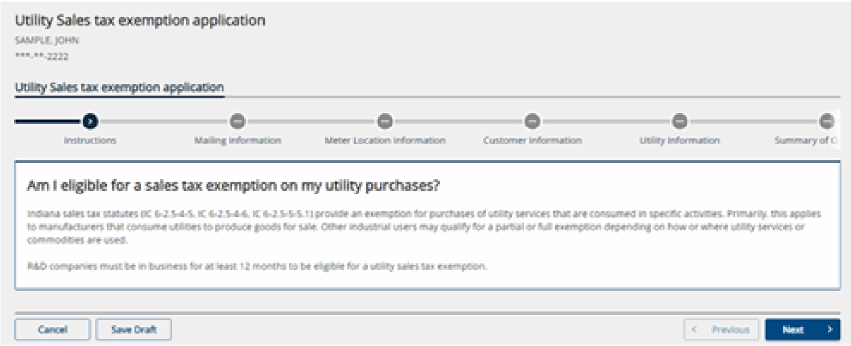
Once the request has been submitted, a confirmation message will be displayed.



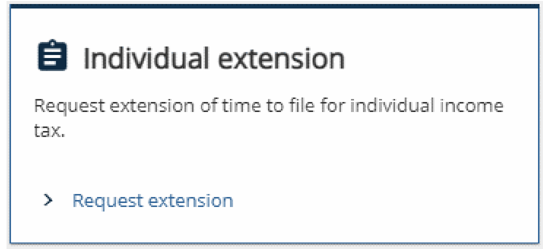
ST-200 Application

A customer can apply for a sales tax exception 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.



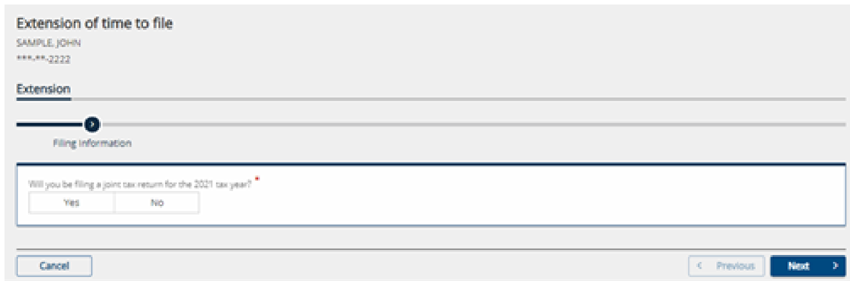


Individual Extension

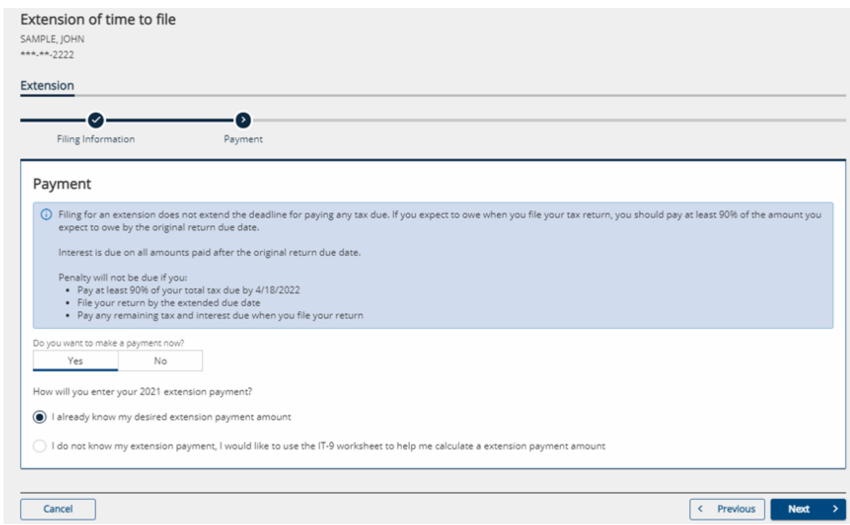


Customers can request an extension of time to file an individual income tax from the “All Actions” tab and the “Individual extension” panel.

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.

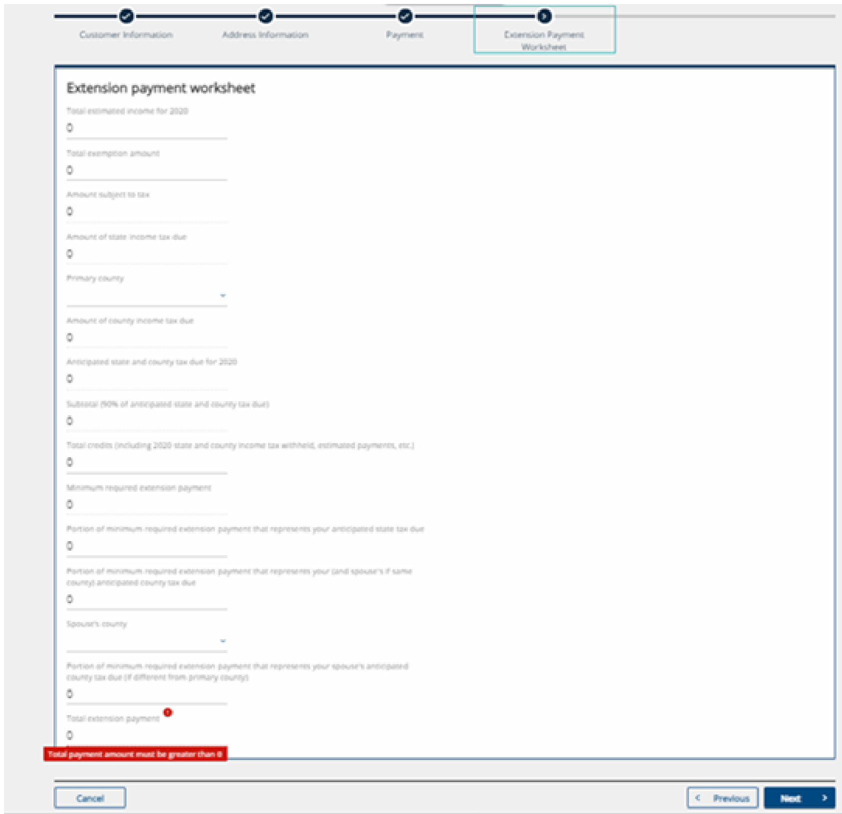


Step 2: If the amount of the extension payment is unknown, select that option and an extension payment worksheet will be provided.

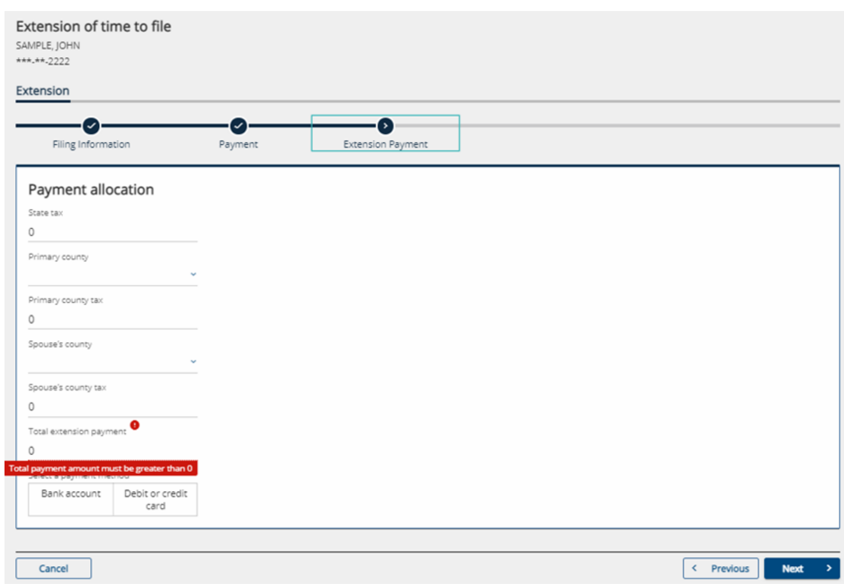


NOTE: Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at last 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.

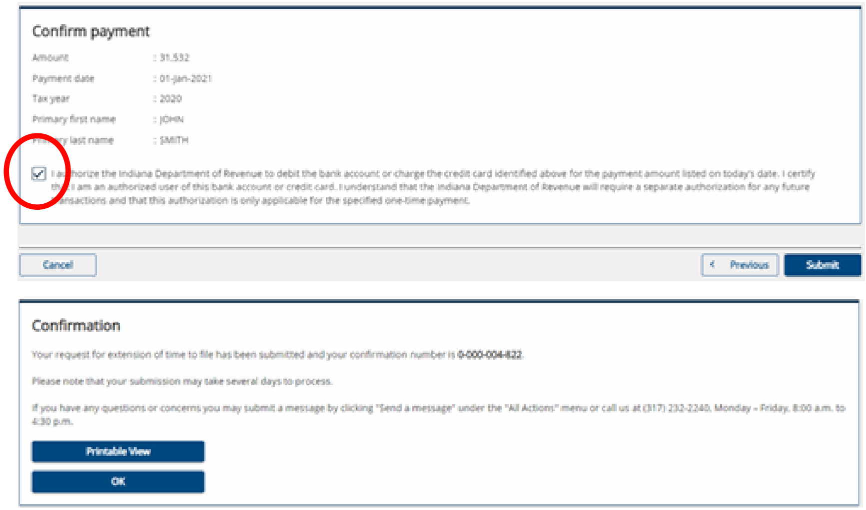
Step 3: Provide the payment allocation information along with primary county and county tax (and spouse's county if applicable) and select a payment method: bank account or credit/debit card. Follow the prompts to enter payment information for either bank account or credit/debit card. Once that has been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



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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