

Today's Topics of Discussion

- 2022 Fiscal Year-End Review
- Automatic Taxpayer Refund
- Indiana Transparency Portal
- Hoosier START
- Auditor's Office Updates

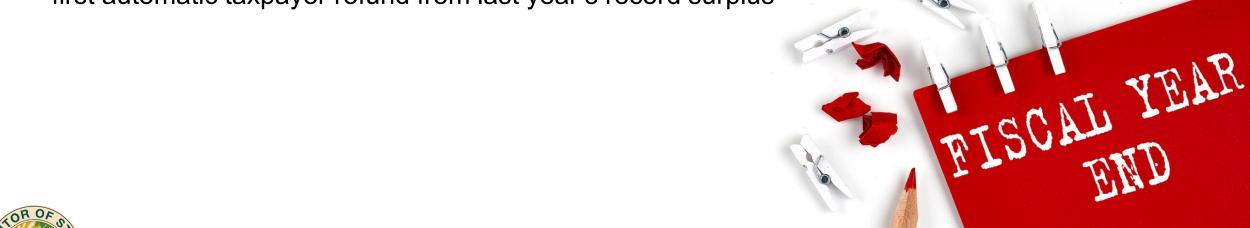




2022 Fiscal Year-End

- \$6.1 Billion in State Reserves
 - Collecting \$1.24 Billion more than last forecasted
 - Full report is available on the State Budget Agency's website

 Gov. Holcomb called a Special Session to return \$1 Billion to Hoosier taxpayers in addition to the first automatic taxpayer refund from last year's record surplus





Automatic Taxpayer Refunds (ATR)

- Hoosier taxpayers received \$325 (or \$650) in ATRs as a result of 2021 & 2022 year-end reserve balances
 - FY2021 Split \$1.1 billion between Hoosier taxpayers & teacher pensions, creating the first
 ATR of \$125 per taxpayer
 - FY2022 IGA created legislation & Gov. Holcomb signed SEA 2 to provide an additional
 \$200 per taxpayer
- AOS printed & distributed more than 1.5 million checks
 - Combined both ATRs into one check to save the state over \$1 million
 - Began printing in August & finished mailing in September
- IN Dept. Of Revenue (DOR) handled all direct deposits

Did you receive your ATR?

YES, I did receive my ATR!

- You are among the 1.3 or 83% checks cashed thank you!
- If you haven't cashed your check, please do so at your earliest convenience; we all know how annoying reconciling items can be

NO, I did not receive a direct deposit or mailed check!

- Did you qualify?
- Were you contacted by DOR regarding an offset?
- Did DOR have your correct mailing address?

Next Steps? Contact DOR after November 1 to allow returned mail to process



Steps to Reissue ATR Checks

Recipient received check but lost or damaged and needs reissued

- Visit the AOS website & complete the Affidavit for Lost or Not Received Warrant SF# 42850
- Send the completed form to the AOS Office; do not send in the original check

Recipient of the check is now deceased

- Visit the AOS website & complete the <u>Distributee's Affidavit for Disposition of Estates SF# 49377</u>
- The widow or executor of the estate needs to file with AOS & include a copy of the death certificate with supporting documentation; do not send in the original check

Recipients received a joint check, but are now divorced

Mail the <u>original</u> check along with a written request to divide the refund to:

Indiana Department of Revenue Attn: Non-Responsible Spouse PO Box 7202 Indianapolis, IN 46207

Additional ATR Questions

AOS Contact Information

- Email: Comments@auditor.IN.gov
- Phone: 317-232-3300
- Emily Boesen at Eboesen@auditor.in.gov or 317-232-3301

Office hours are Monday-Friday 8:00 a.m. - 4:30 p.m. ET

DOR asks customers to use the INTIME customer portal for direct messaging



Indiana Transparency Portal (ITP)

www.IN.gov/ITP



Utilizing ITP: Examples

- How can you & your teams utilize ITP?
 - ✓ Review local tax distributions & surrounding areas
 - ✓ Local Government tab links to Gateway for easy access
 - ✓ Review financial statements & audit reports by the State Board of Accounts
 - ✓ Search & review state contracts & Buy Indiana options
- How can your constituents utilize ITP?
 - ✓ Review local tax distributions & surrounding areas for comparison
 - ✓ Review state expenditures & revenues
 - ✓ Explore Indiana Gateway's financial reporting on local government spending

www.IN.gov/ITP





Hoosier START Update



Save Today And Retire Tomorrow



October is National Retirement Security Month – are you ready?

- Hoosier START is the State of Indiana Public Employees' Deferred Compensation Plan
 - Our retirement savings plan is designed to help eligible public employees complement their Indiana Public Retirement System (INPRS) pension
 - Hoosier START offers both 457(b) & 401(a) Plans
- In April, Nationwide became the new, third-party administrator providing account services to Plan participants



AOS Office Updates

Payroll & Human Resource modernization nearly completed

- Launched in May & impacted all 33k state employees within all branches
- Converted & modernized human resources & payroll systems
- Created self-service & manager self-service options for benefits, leaves, timesheets & W2s

Coming Soon!

- 2023 legislative proposals
- 2023 County Auditor visits
 - "Meet & Greet" with County Auditor & Team
 - Schedule for March November 2023
 - Don't wait on us reach out to schedule yours



