INtax to INTIME

Migration Instructions - Practitioner Edition

INTIME

Indiana Department of Revenue

Migration from INtax to INTIME

- Beginning September 8, 2020, existing customers who currently file business sales and withholding taxes via INtax should begin migrating their accounts to INTIME. This document contains step-by-step instructions to “migrate” existing information to your new INTIME account. This includes importing client lists.
- In order to provide adequate time for our customers to complete this transition, INtax will remain available for existing customers to allow for the following:
  - Existing INtax customers can file and pay on current periods until Dec. 31, 2020. If you need to file past periods, you will need to migrate to INTIME.
  - File and pay will be limited to any existing clients. If you need to add a client, you will have to migrate to INTIME and then add the client.
  - INtax will remain available to support the Indiana filing requirement for the 2020 WH-3 between Jan. 1 and Feb. 28, 2021.
- Customers will need to re-enter bank account information in INTIME once a new logon has been created. All banking information is encrypted for your protection.

Ready to move to INTIME?

Moving to INTIME as soon as it goes LIVE will allow practitioners to immediately benefit from the new system features including the flexibility to control access to accounts.

1. Decide who in your office will control access for other team members.

2. This representative will be the first to register for INTIME by creating a username and password for access, and becomes the master logon for your organization.

3. Log in to INtax to obtain a migration code. This code is unique to the specific user and their business access. This migration code will be displayed in INtax beginning on Sept. 8th, 2020.

4. Go to INTIME at intime.dor.in.gov.

5. Select "Don't have a username? Create one." to create a username and password for INTIME.

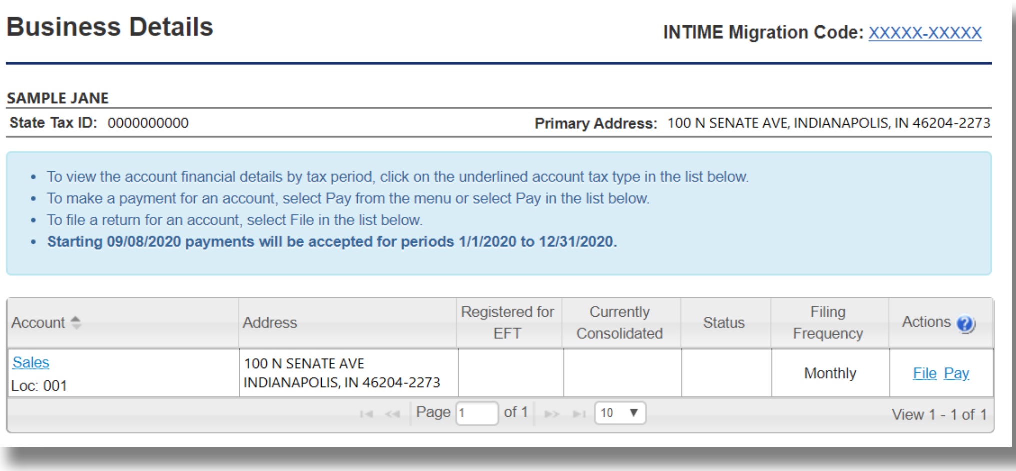
INSTRUCTIONS

Practitioners will need to appoint one designated individual to control access to INTIME for their organization.

- This representative will be the first to register for INTIME by creating a username and password for access and becomes the master logon for your organization.
- Once the master logon has been created and migration has been completed, other representatives can begin to use INTIME. Each representative should use their own migration code to maintain legacy access and ePOAs for their clients. Please refer to the INTIME User Guide for more information on setting up accounts.

Account Validation Method:

Step 1: Log in to INtax at www.intax.in.gov/login to find your migration code. Go to "Business Details" and make note of the INTIME migration code in the top right corner. This code is unique to the specific user and their business access.



Business Details — **INTIME Migration Code:** XXXXX-XXXXX

SAMPLE JANE

State Tax ID: 0000000000 — **Primary Address:** 100 N SENATE AVE, INDIANAPOLIS, IN 46204-2273

- To view the account financial details by tax period, click on the underlined account tax type in the list below.
- To make a payment for an account, select Pay from the menu or select Pay in the list below.
- To file a return for an account, select File in the list below.
- **Starting 09/08/2020 payments will be accepted for periods 1/1/2020 to 12/31/2020.**

Account	Address	Registered for EFT	Currently Consolidated	Status	Filing Frequency	Actions
Sales Loc: 001	100 N SENATE AVE INDIANAPOLIS, IN 46204-2273				Monthly	File Pay

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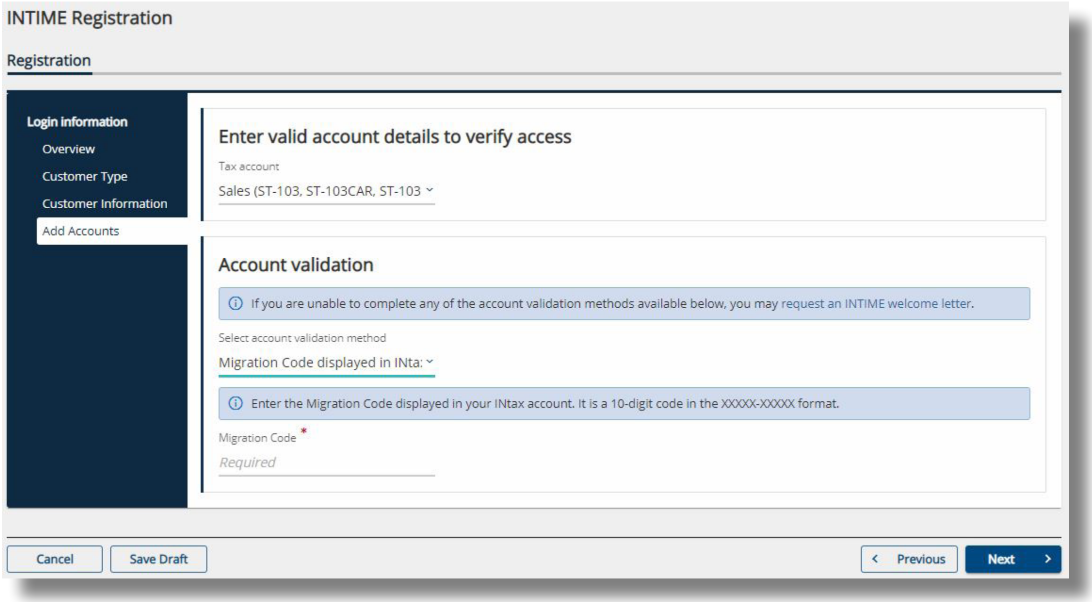
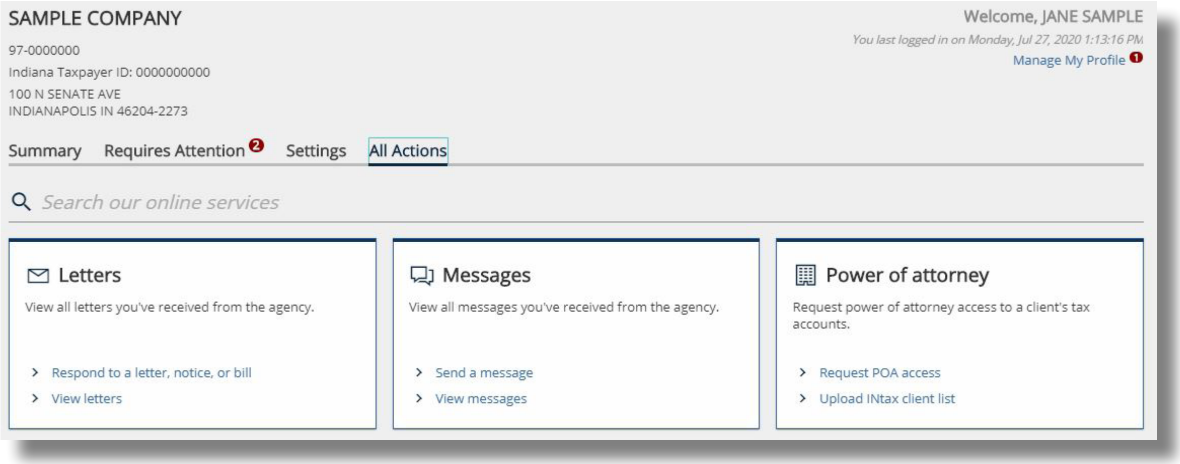
Step 2: Click the INTIME migration code or go to INTIME.dor.in.gov and select “Don’t have a username? Create one” to create a username and password for INTIME. Enter migration code displayed in INtax to validate the account. Continue to follow the instructions on your screen.



Uploading INtax Client Lists to INTIME

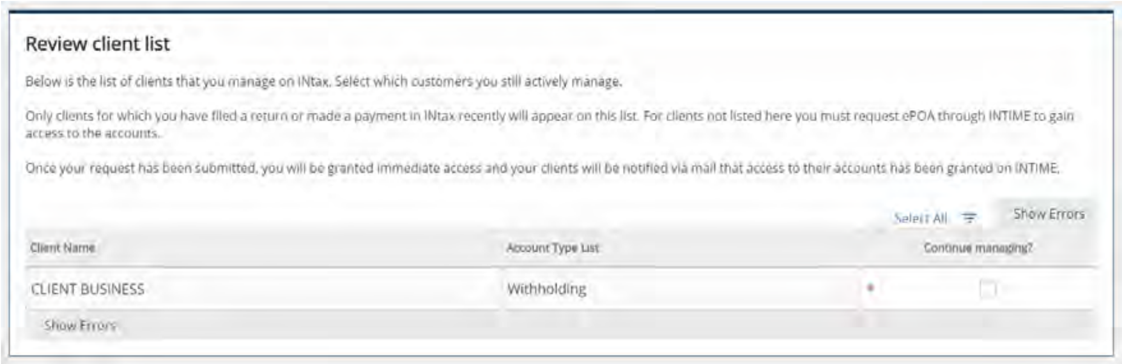
Preparers who have access to file and pay for clients will be able to upload their existing INtax clients into INTIME.

Step 1: Navigate to “All Actions” tab and select “Upload INtax client list” under the “Power of Attorney” menu.



Step 2: You will be required to enter your 10-digit INtax access code associated with your INtax login. Click “Next” and your client list will appear. If you used your INtax access code to create your INTIME login, you will not be asked to enter it again. Simply select “Next” and your client list will be displayed.

Step 3: You will have the option to edit your client list before proceeding. Click “Select All” to continue to manage all of your existing INtax clients in INTIME. If there are any clients that you no longer manage, you may remove them from your list by unchecking the corresponding box in the “Continue managing?” column. Each migrated client will receive a letter to notify them that their account has been moved to INTIME and that you retain access. **NOTE:** Only clients for which you have filed a return or made a recent payment in INtax will appear on this list. For clients not listed, you must request ePOA through INTIME to gain access to those accounts.



Step 4: Click “Submit” to complete your request. To view your clients, log off and log back in to refresh your details. The clients list will appear on the home page after logging in. **NOTE:** If there are 100 or more clients to import, it may take up to 45 minutes before the full client list will appear.

Begin Using INTIME

- Practitioners will be able to immediately file and pay for existing clients after the migration is complete. INTIME will allow practitioners the option to view client letters from DOR. This option will require practitioners to request ePOA access from their current clients in order to be notified and see correspondence from DOR related to their client accounts in INTIME.
- When adding new clients directly in INTIME, practitioners will need to have an approved ePOA to access their account. Once approved, access will be granted to file, pay, and view correspondence from DOR related to the client's account.
- Practitioners will need to register all their clients upfront for the INTIME ePOA in order to see and be notified when new messages or letters are received from DOR.
- Each member of your team will request INTIME ePOA access to their own client accounts.

Managing Security and Access to Accounts

Security is handled independently for each user. A "Master Logon" may create additional usernames for your organization and manage the level of access allowed to your own tax records. Keep in mind that additional users:

- Will perform work as themselves;
- Client accounts from legacy system should be migrated to INTIME using the migration code. One that is completed, the individual user can select clients to whom they wish to have continued access.
- May have access to customers and accounts that you do not have access to (each user has his or her own set of INTIME ePOAs).

Tip: *As a "Master Logon," you may only manage access for other users whose accounts you have access to.*

Revoking Access to Client Accounts

Practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA). To do so, enter the client's INTIME account, select the "Settings" tab and cancel access to the client or accounts you no longer wish to access. If you cancel access to the client, it will automatically remove access to all the clients accounts. When canceling access to a specific account, access to the customer and any remaining accounts will be maintained.

Client Revocation

Clients will have the ability to enter their own "Manage Access" tab and modify your level of access, including revoking practitioner ePOA access.

Contact Us

Project NextDOR - ProjectNextDOR.dor.in.gov

Tax Practitioner Hotline Packet - in.gov/dor/files/dor-tax-pract-packet.pdf

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