

# **INTIME ePOA Access**

### **Instructions for Clients**

A client (Business tax or Individual Income tax customer) can grant a tax practitioner access to their INTIME account with an electronic Power of Attorney (ePOA). If needed, more information on POA and ePOA, including frequently asked questions (FAQs), is available on <u>DOR's website</u>.

A tax practitioner will initiate an ePOA access request from their own account in INTIME. Here is what happens next:

#### If the client has an INTIME account logon:

You will receive an email (to the email address you registered with) advising you to log in to <u>INTIME</u> to approve the ePOA and account access request from your tax practitioner. The approval process is quick and will provide immediate access to the tax practitioner.

#### If the client has not yet signed up for access to INTIME:

A letter will be mailed to your legal address on file with DOR that will include instructions on how to sign up and access your INTIME account to approve the tax practitioner's ePOA request. Several INTIME guides and step-by-step instructions (for Individual Income tax or Business tax customers) are available on <u>DOR's INTIME Tax Center</u> page, if needed.

#### If the client doesn't have online access to approve the ePOA request:

A letter will be mailed to your legal address on file with DOR. It will provide additional information and instructions on how to complete, sign, and return the enclosed form by mail to authorize the tax practitioner's access request.

**Note:** When using this method, be sure to check the boxes on the form to approve what ePOA access is approved for specific tax accounts.

**Step 1:** The client/taxpayer will log in to their own INTIME account and go to the "Requires Attention" (tab) page where they will see the "Open power of attorney request" panel. Click on the "Manage power of attorney access" hyperlink.



**Step 2:** The name of the tax practitioner (and the preparer's company name) and a list of business tax accounts (or tax account(s) for Individual income tax customers) will appear with the options to approve access to all accounts, reject access to all accounts, or provide access to select accounts.

NTIME Indiana Taxpayer Inf	formation Management Engine	· · · · · · · · · · · · · · · · · · ·
SAMPLE COMPANY		
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quest		
Account Information		
Approve or reject access for	the requested account(s)	
Approve or reject access for AMPLE PREPARED on SAMPLE PREPARE Ccess level and whether or not the access Account Type	the requested account(s) IR has requested Power of Attorney access to the following account ty is accepted or rejected. Access Level	pe(s). Please review the information below and select the appropriate
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**Step 3:** Confirmation that access has been granted to a tax practitioner will be provided and can be printed (or saved as a PDF) for your records.

<b>Indiana Taxpayer Information Management Engine</b>	?	8
< SAMPLE COMPANY		
Confirmation		
Your request has been submitted.		
Your confirmation number is 0-000-076-048		
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. Mot 8:00am - 4:30pm.	1day – Fri	iday,
Printable View		
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## Managing INTIME Account POA Access

**Step 1:** To manage tax practitioner access to an INTIME account, go to the "All Actions" (tab) page, locate the "Manage account access" panel, and click on the "Manage access" hyperlink.

⑦ Manage account access
Manage access for additional users in your organization or manage access that third party preparers have to your accounts.
> Manage access

**Step 2:** To verify, make changes, or revoke ePOA, go to the "Manage POA access" panel and click on the "Manage POA access" hyperlink.

<b>NTIME</b> Indiana Taxpayer Information M	Management Engine	<b>9 9</b>
< SAMPLE COMPANY		
Account access SAMPLE COMPANY 00-0000000		
Account access	$\sim$	
• Manage additional users	Manage POA access	♡ Your access
Manage access for additional users in your organization.	Manage POA access that third-party preparers have to your tax accounts.	Remove or manage your existing access to internal and client tax accounts.
> Manage Internal users	Manage POA access	Manage your access
00. Add additional logan		
Add an additional logon to manage select accounts.		
> Add an additional logon		

**Step 3:** This page provides information to verify who has access to your account and what level of access they have. By selecting the tax preparer's name (hyperlinked on the left) you can manage their access to your account on the following screen.

INTIME	Indiana Taxpayer Information Management Engine ?	8
< Account a	ccess	
Power of	Attorney Access	
These settings prevented from	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 n requesting access to your accounts.	
	Allowed : Yes	
	Default Access : Account Manager	
	Default Account Access : File Returns and Make Payments	
Logons		Ŧ
sampleprepar	er SAMPLE PREPARER sample@email.com	

**Step 4:** This screen will display information about the tax practitioner's access to your account and the level of access they have to each account.

Indiana Taxpayer Information Management Engine					8
Power of Attorney Access           Power of Attorney Logon         > Manage Account Access           Full Access         samplepreparer           sAMPLE PREPARER         cample@mail.com					
Access Settings for	samplepreparer		Manage Filter		
General Access		Account Manager			
Alternative Fuel Decal	AFD-0000133841	File Returns and Make Payments	All Periods		
Alcohol	ALC-0000193233	File Returns and Make Payments	All Periods		
Aviation Fuel	AVF-0000160465	File Returns and Make Payments	All Periods		
Cigarette	CIG-0000169294	File Returns and Materauments	All Periods		

To manage the degree of access to a tax account, click on the "Manage Account Access" hyperlink.

TIME Indiana	Taxpayer Information	n Management Engine		?	8
< Power of Attorney Acce	55				
Power of Attorney Full Access samplepreparer SAMPLE PREPARER sample@email.com Access Activity	Logon		> Manage Account Access		
Access Settings for	samplepreparer		Manage		
SAMPLE COMPANY - 00-0000	0000				
General Access		Account Manager			
Alternative Fuel Decal	AFD-0000133841	File Returns and Make Payments	All Periods		
Alcohol	ALC-0000193233	File Returns and Make Payments	All Periods		
Aviation Fuel	AVF-0000160465	File Returns and Make Payments	All Periods		
Cigarette	CIG-0000169294	File Returns and Male Payments	All Periods		

**Step 5:** On this screen, a client can change the level of access they provide to their tax practitioner for a specific tax account by clicking on the associated (third column) hyperlink.

**Level of access options:** Information only, File Returns only, Payments only, or File Returns and Make Payments. A client can also revoke access to a specific tax account by clicking the "Cancel Access" hyperlink for that account.

Indiana Taxpayer Information Management Engine					8
< samplepreparer					
Manage Access for samplepreparer					
SAMPLE COMPANY - 00-0000000					
General Access	00-0000000	Account Manager	Cancel Access		
Alcohol	ALC-0000193233	File Returns and Make Payments	Cancel Access		
Alternative Fuel Decal	AFD-0000133841	File Returns and Make Payments	Cancel Access		
Aviation Fuel	AVF-0000160465	File Returns and Make Payments	Cancel Access		
Cigarette	CIG-0000169294	File Returns and Make Payments	Cancel Access		
Cigarette Tax Stamps	CTS-0000152910	File Returns and Make Payments	Cancel Access		
County Innkeeper	CIT-0000135627	File Returns and Make Payments	Cancel Access		
Electronic Cigarette	ECG-0000150022	File Returns and Make Payments	Cancel Access		
Fuel Inventory	IVT-0000166609	File Returns and Make Payments	Cancel Access		
Gasoline Use	GUT-0000144181	Returns and Make Payments	Cancel Access		

More information on POA and ePOA

Power of Attorney Options Business Tax Customers Individual Tax Customers Tax Practitioners INTIME Resources