INTIME Electronic Power of Attorney (ePOA)

Instructions for Clients

A customer (Business or Individual income tax) can grant a tax practitioner access to their INTIME account with an electronic Power of Attorney (ePOA). Additional information and frequently asked questions on POA and ePOA are available.

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

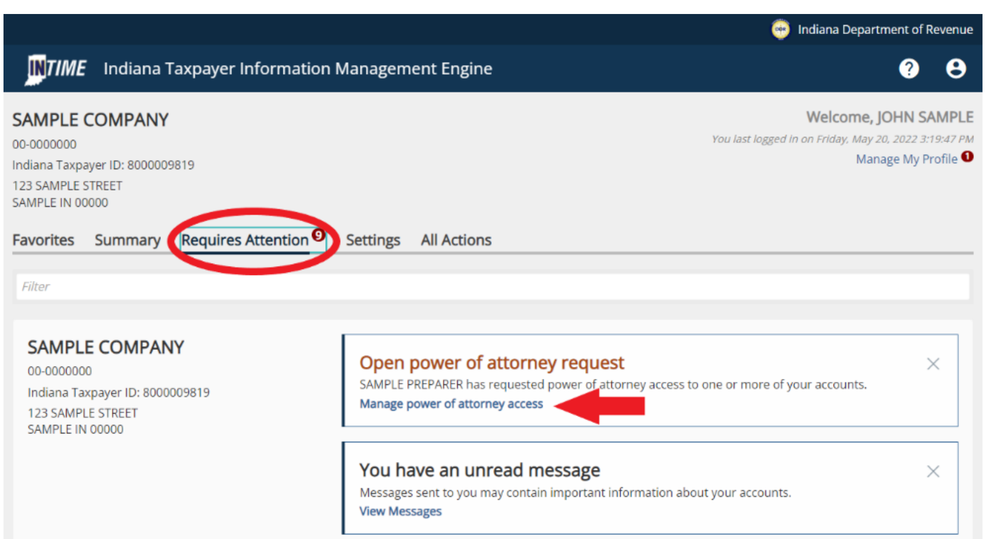
If you have an INTIME account logon
You will receive an email (to the email address you registered with) directing you to INTIME to approve the ePOA and account access request from your tax practitioner. The approval process is quick and provides immediate access to the tax practitioner.

If you have not 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 INTIME to approve your tax practitioner's ePOA request. INTIME information and guides are available.

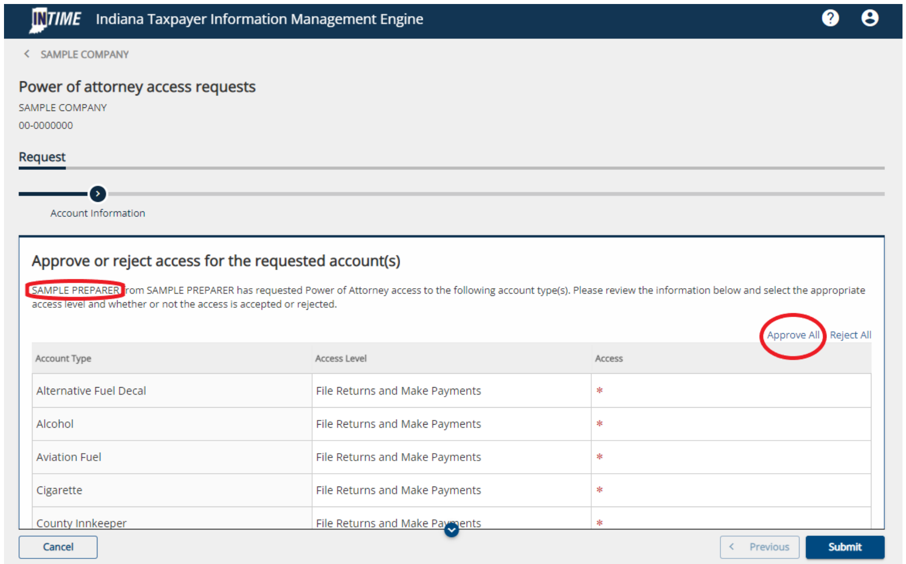
If you don't have online access to approve the ePOA request
A letter and form will be mailed to your legal address on file with DOR. It will provide additional information and instructions on how to complete, sign, and return the enclosed form by mail to authorize your tax practitioner's access request. When using this method, be sure to check the boxes on the form to approve ePOA access for each specific tax account.

Approve ePOA Access Request

Log in to INTIME and go to the "Requires Attention" tab to see the "Open power of attorney request." Select the "Manage power of attorney access."



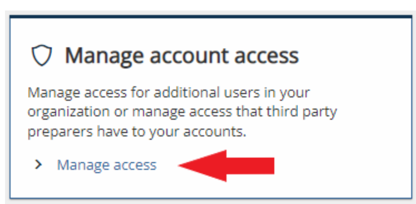
The name of your tax practitioner (and their company name) and a list of business tax accounts or Individual income tax account(s) will appear with the option to approve access to all accounts, reject access to all accounts, or provide access to select accounts.



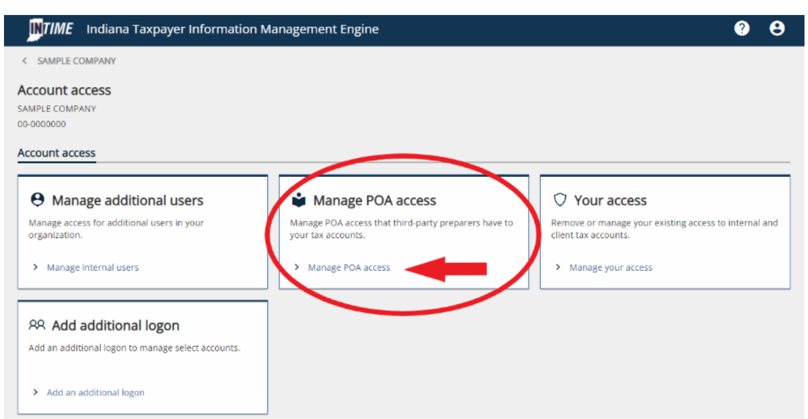
Confirmation that access has been granted to a tax practitioner will be provided and can be printed (or saved as a PDF) for your records.

Managing INTIME Account POA Access

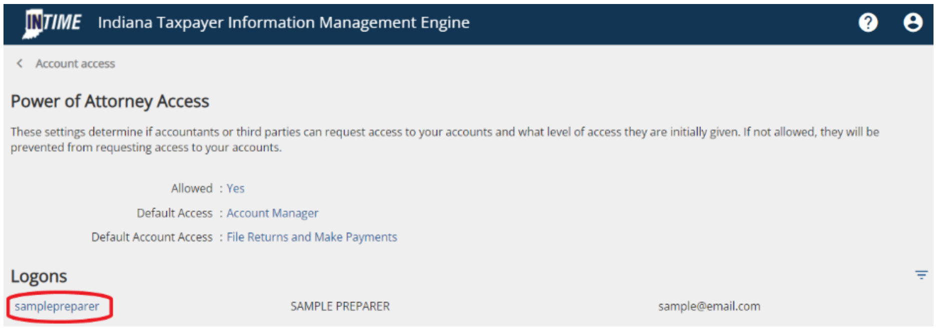
To manage tax practitioner access to your INTIME account, go to the “All Actions”, locate the “Manage account access” panel, and select “Manage access.”



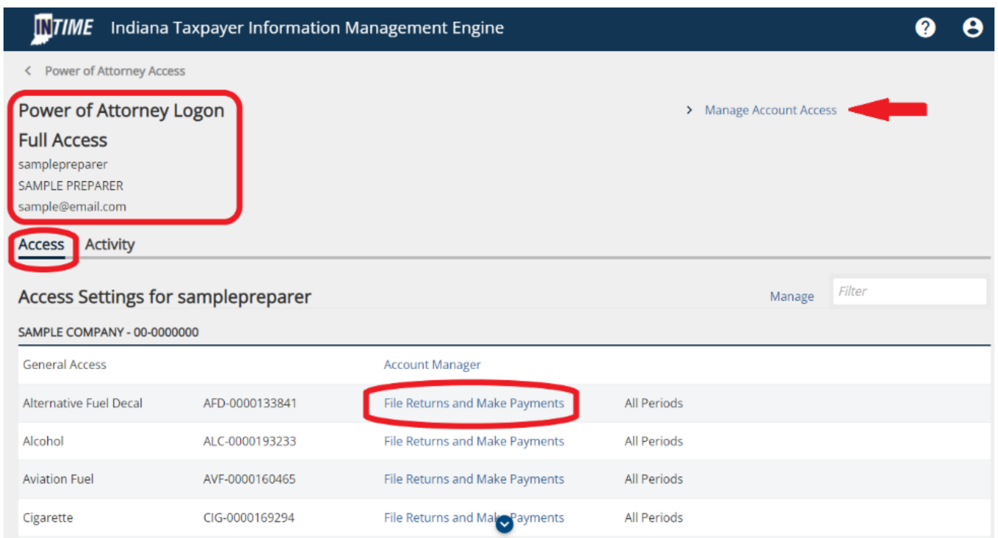
To verify, make changes, or revoke ePOA, go to “Manage POA access” and select “Manage POA access”



Verify who has access to your account and what level of access they have. By selecting the tax practitioner's name (hyperlinked on the left) you can manage their access to your account on the following screen.



Information about the tax practitioner's level of access to each account and activity is also available. To manage the degree of access to a tax account, select "Manage Account Access."



The level of access they provide to their tax practitioner can be changed for each tax account (third column) by clicking on them.

Level of access options include "Information only", "File Returns only", "Payments only", or "File Returns and Make Payments." Access to a specific tax account can be revoked by selecting the "Cancel Access" hyperlink for that account.