

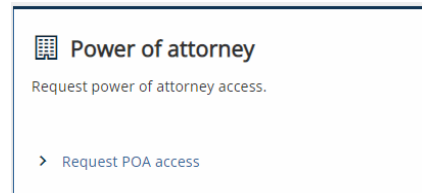


INTIME Electronic Power of Attorney (ePOA)

Instructions for Tax Practitioners

A tax practitioner can be granted access to a client's INTIME account ([Business](#) or [Individual](#) income tax) 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](#). Go to "All Actions" or "Preparer Actions," then locate "Power of attorney," then select "Request POA Access" and follow the prompts.



Request ePOA Access

Select the ID type and number, along with the name of the business or individual from whom you are requesting an ePOA.

The screenshot shows the 'Request power of attorney access' form in the INTIME system. The breadcrumb trail is 'SAMPLE PREPARER'. The form title is 'Request power of attorney access' with a sub-header 'SAMPLE PREPARER 00-0000001'. A progress bar shows five steps: POA Information (current), Client Information, Access Options, Approval Method, and Summary. The main form area contains the instruction: 'Enter the name and ID of the business or individual for whom you are requesting power of attorney'. Below this are fields for 'ID Type' (set to FEIN), 'FEIN' (00-0000000), and 'Name of Business' (SAMPLE COMPANY). At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Select the option to request ePOA access to **all** the client's tax accounts or only specific tax accounts. If requesting access to only select accounts, the client will have the option to select which accounts to allow the tax practitioner to access. The tax practitioner will see these accounts only after the ePOA is approved.

The screenshot shows the 'Request power of attorney access' form in the INTIME system, now at the 'Access Options' step. The breadcrumb trail is 'SAMPLE PREPARER'. The form title is 'Request power of attorney access' with a sub-header 'SAMPLE PREPARER 00-0000001'. The progress bar shows five steps: POA Information, Client Information, Access Options (current), Approval Method, and Summary. The main form area contains the instruction: 'Select access options'. Below this are two radio button options: 'I would like to request power of attorney access to all of my client's accounts' (selected) and 'I would like to request power of attorney access to some of my client's accounts'. At the bottom are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Select an approval method that best represents your client’s situation:

If your client has an INTIME account

Select the option for online approval. The client will receive an email advising them to log in to their account to approve the ePOA and account access request from their tax practitioner. The approval process is quick and will provide immediate access to the tax practitioner.

INTIME Indiana Taxpayer Information Management Engine

< SAMPLE PREPARER

Request power of attorney access

SAMPLE PREPARER
00-0000001

Request

POA Information Client Information Access Options Approval Method Summary

Is your client registered for INTIME?

My client is already registered for INTIME

My client is not registered for INTIME or unsure if they are registered

i • Your client will receive an email and web message advising them to log in to their existing account and approve this access request.

• Choose this option if you know that your client has a web account with INTIME.

Cancel Save Draft < Previous Next >

If your client doesn't use INTIME

If your client doesn't use INTIME or is unsure if they are registered, select that option.

If registered, your client will receive an email about logging in to INTIME to approve your access. [More information on INTIME](#) is available.

If not registered, they will receive a letter by mail at the legal address on file with DOR that will include instructions on how to sign up and access their INTIME account to approve the ePOA request.

INTIME Indiana Taxpayer Information Management Engine

< Return to client list

Request power of attorney access

SAMPLE PREPARER
00-0000001

Request

POA Information Client Information Access Options Approval Method Summary

Is your client registered for INTIME?

My client is already registered for INTIME

My client is not registered for INTIME or unsure if they are registered

i • If already registered with INTIME, your client will receive an email advising them to log in to their existing account and approve this access request.

• If your client doesn't have a logon, they will receive a letter with instructions on how to register/access their account and approve this access request. By signing and returning this letter, they can authorize the access.

• We highly encourage your clients to take advantage of the INTIME approval process. Paper submissions are intended for those with no computer access to complete the approval, and may cause significant delay in the approval of access requests. If your clients are signed up for INTIME, the approval process can be completed immediately.

Cancel Save Draft < Previous Next >

If your client doesn't have online access

To approve the ePOA request, a letter and form will be mailed to your client's 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 a tax practitioner's access request. When using this method, be sure your client checks the boxes on the form to approve ePOA access for each specific tax account.

INTIME Indiana Taxpayer Information Management Engine

< SAMPLE PREPARER

Request power of attorney access

SAMPLE PREPARER
00-0000001

Request

POA Information Client Information Access Options Approval Method Summary

Summary

Name of Business : SAMPLE COMPANY
Approval Method : Online Approval
Access to all accounts requested : Yes

Cancel Save Draft Previous Submit

Confirmation of the submission will be provided. Note the confirmation number or print a copy (or save a pdf version) of the confirmation for your records.

Managing Security and Access to INTIME Accounts

Security and access to a client's account 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 and may have access to clients and tax accounts that a "Master Logon" does not have access to, as each user will have their own set of INTIME ePOAs.

Revoking Access to Client Accounts

Practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA) to a client's account:

- Enter the client's INTIME account and go to "Settings."
- Cancel access to the client or tax accounts you no longer wish to have. If you cancel access to the client, access to all of their accounts will automatically be removed. When cancelling access to a specific tax account, access to the customer and any remaining tax accounts will be maintained.

Client Revocation

Clients have the ability to enter their own "Manage ePOA Access" tab and modify a tax practitioner's level of access, including revoking practitioner ePOA access.