# INtax Taxpayer Guide

August 2020

INTAX.IN.gov
Easy · Efficient · Electronic

Indiana Department of Revenue

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# Introduction

Welcome to INtax, Indiana's free online tool to manage business tax obligations for Indiana retail sales tax, withholding tax, out-of-state sales tax, gasoline use tax, metered pump sales tax, tire fees, fuel tax, wireless prepaid fees, type II gaming fees, food and beverage tax, county innkeeper's tax, alcohol excise tax, other tobacco products excise tax, and heavy equipment rental tax.

INtax supports the following tax forms: ST-103, ST-103MP, ST-103P, ST-103CAR, WH-1, WH-3, TF-103, SF-900, SF-401, MF-360, WPC-103, TTG-103, GT-103DR, FAB-103, CIT-103, ALC-W, ALC-FW, ALC-DWS, ALC-M, ALC-PS, (OTP) CT-19, OTP-M, OTP-PACT, and HRT-103.

The *INtax Taxpayer Guide* reviews the many functions of INtax with step-by-step instructions and images of active INtax screens. This guide assumes you already have registered your business with INtax.

Before you begin using INtax, you'll need your username and password. Please make sure you are able to log in to INtax.

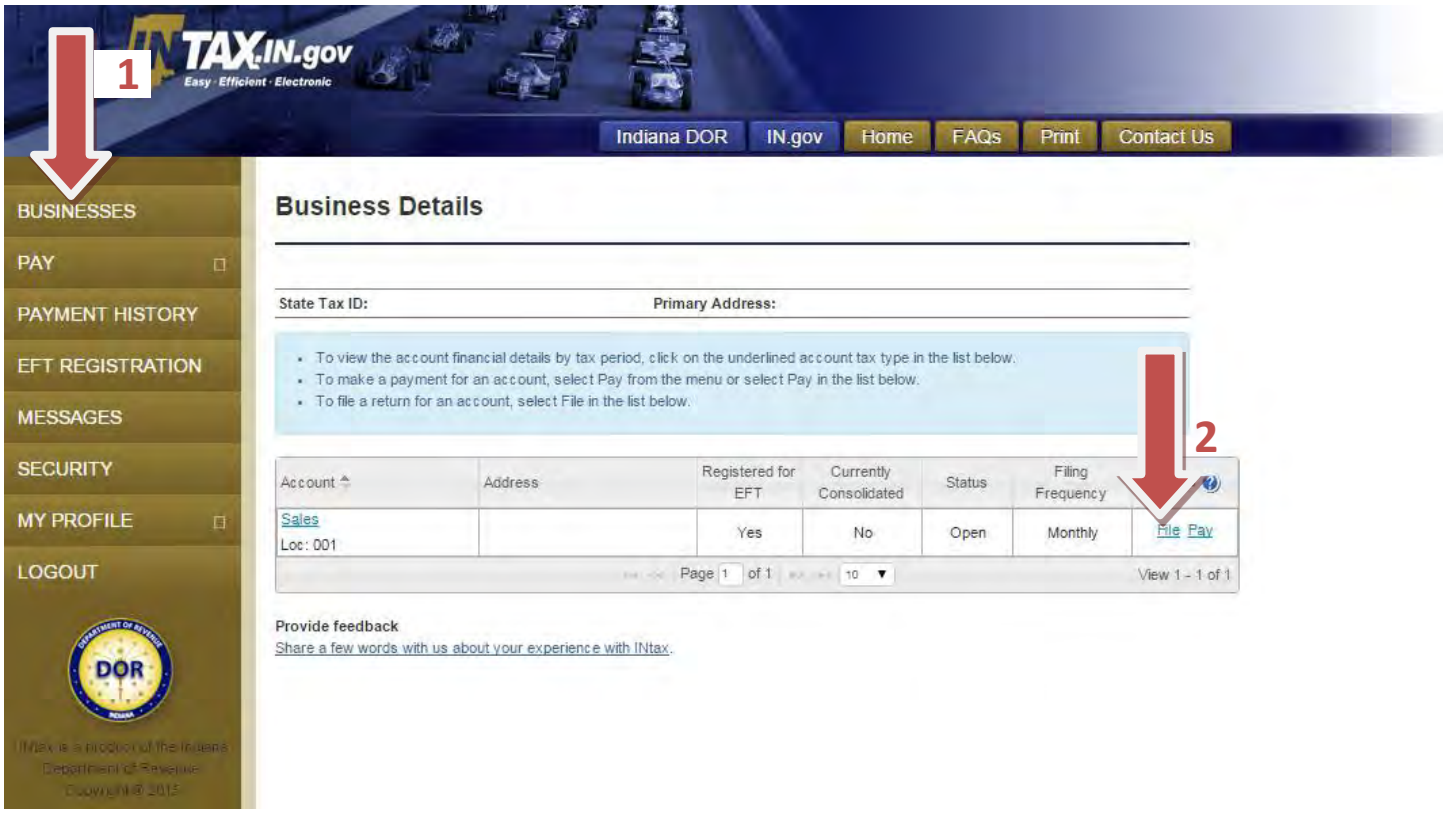
# File a return

To file a return using INtax, follow these steps:

**Step 1:** Select **Businesses** (see arrow #1 below) to navigate to the Business Details page.

**Step 2:** For the row of the tax type account for which you want to file a return, select **File** (see arrow #2 below) in the Actions column. For some tax type accounts, you will be asked for additional information to determine which form you want to file.

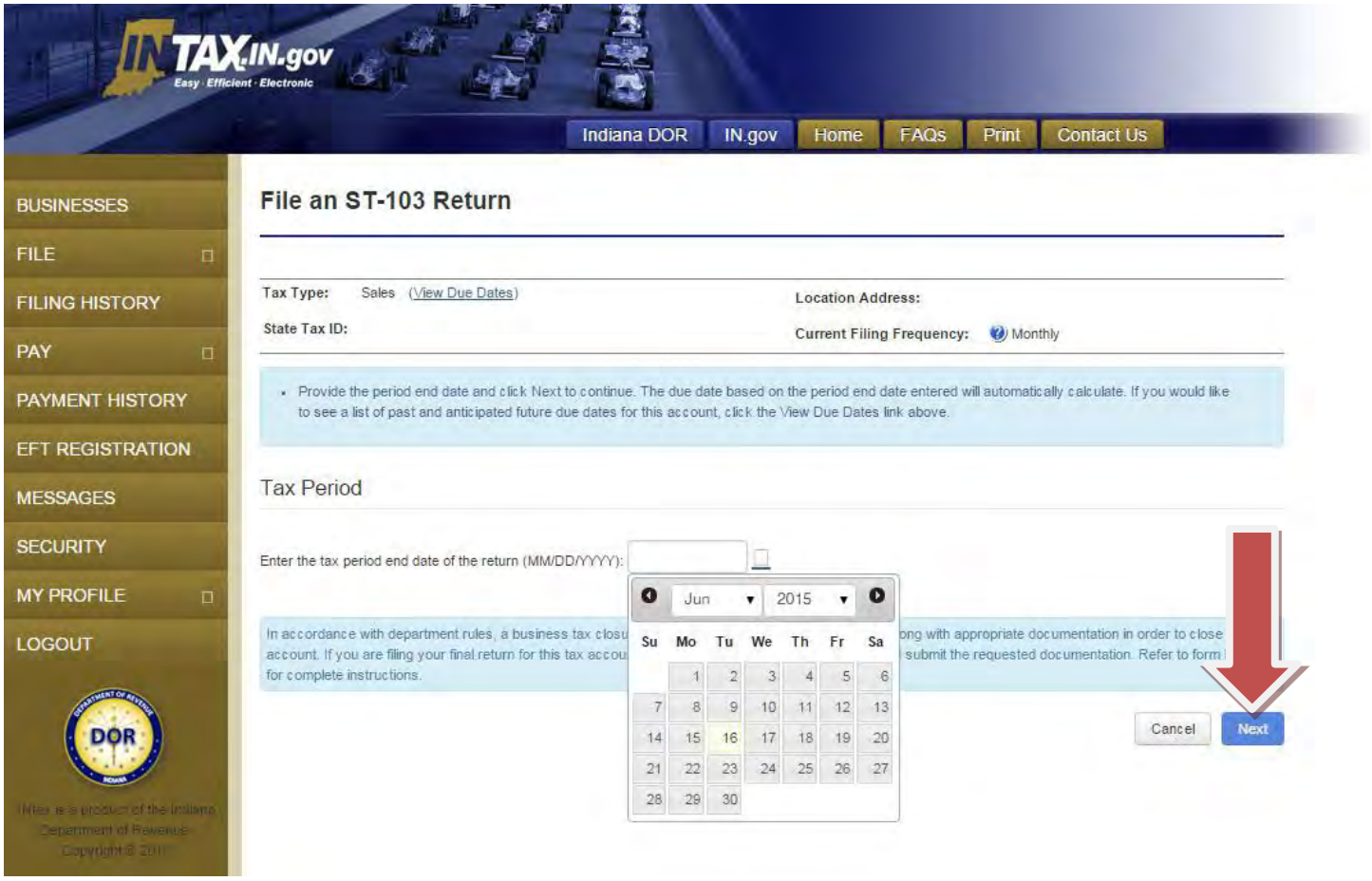
*Note: Remember to file first and then pay.*



**Step 3:** The following pages may vary depending on the type of return you are filing.

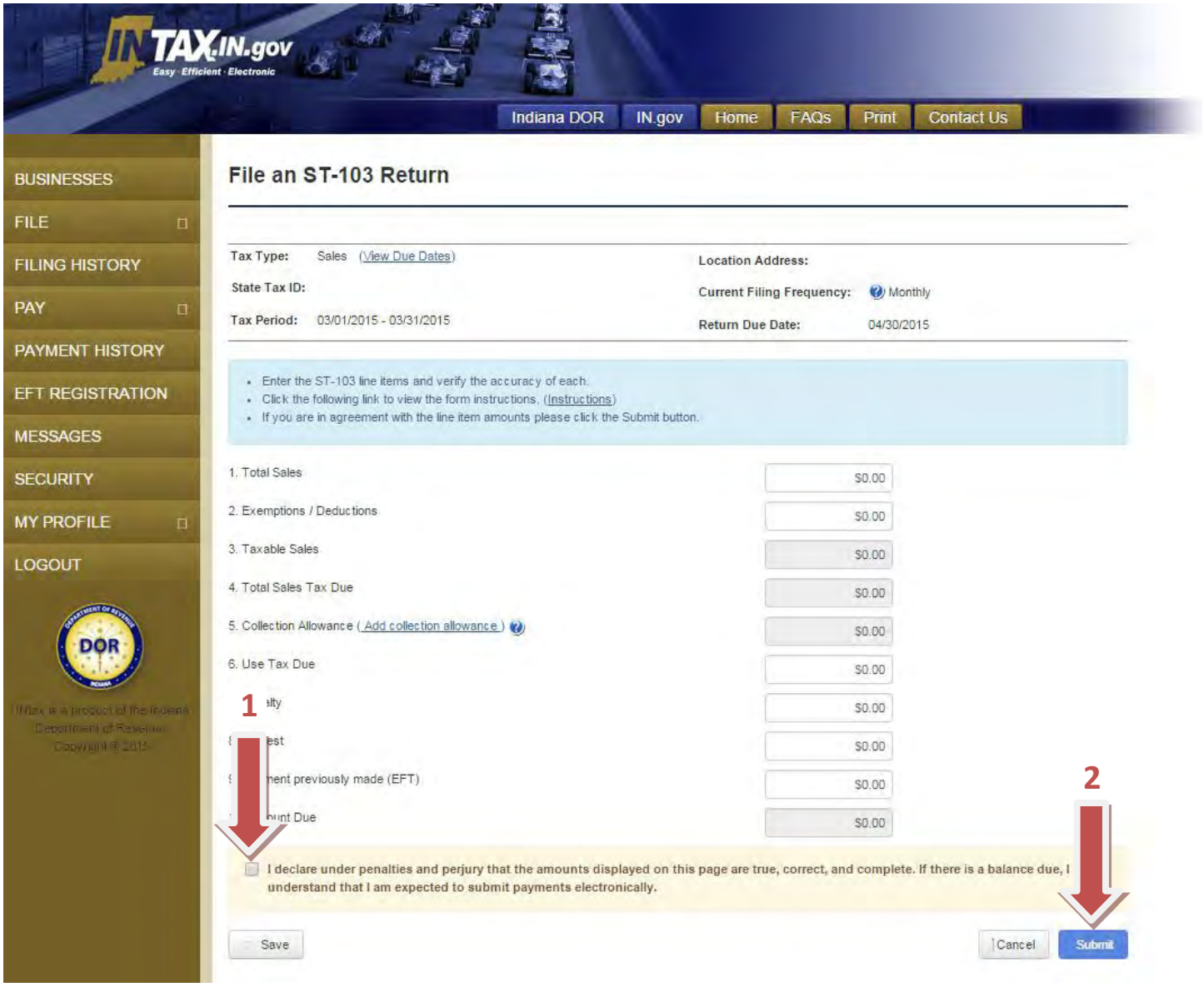
Enter the correct period end date, and then select **Next.**

*Note: This is the last day of the month/year that you have collected tax, not the due date of the return being filed.*

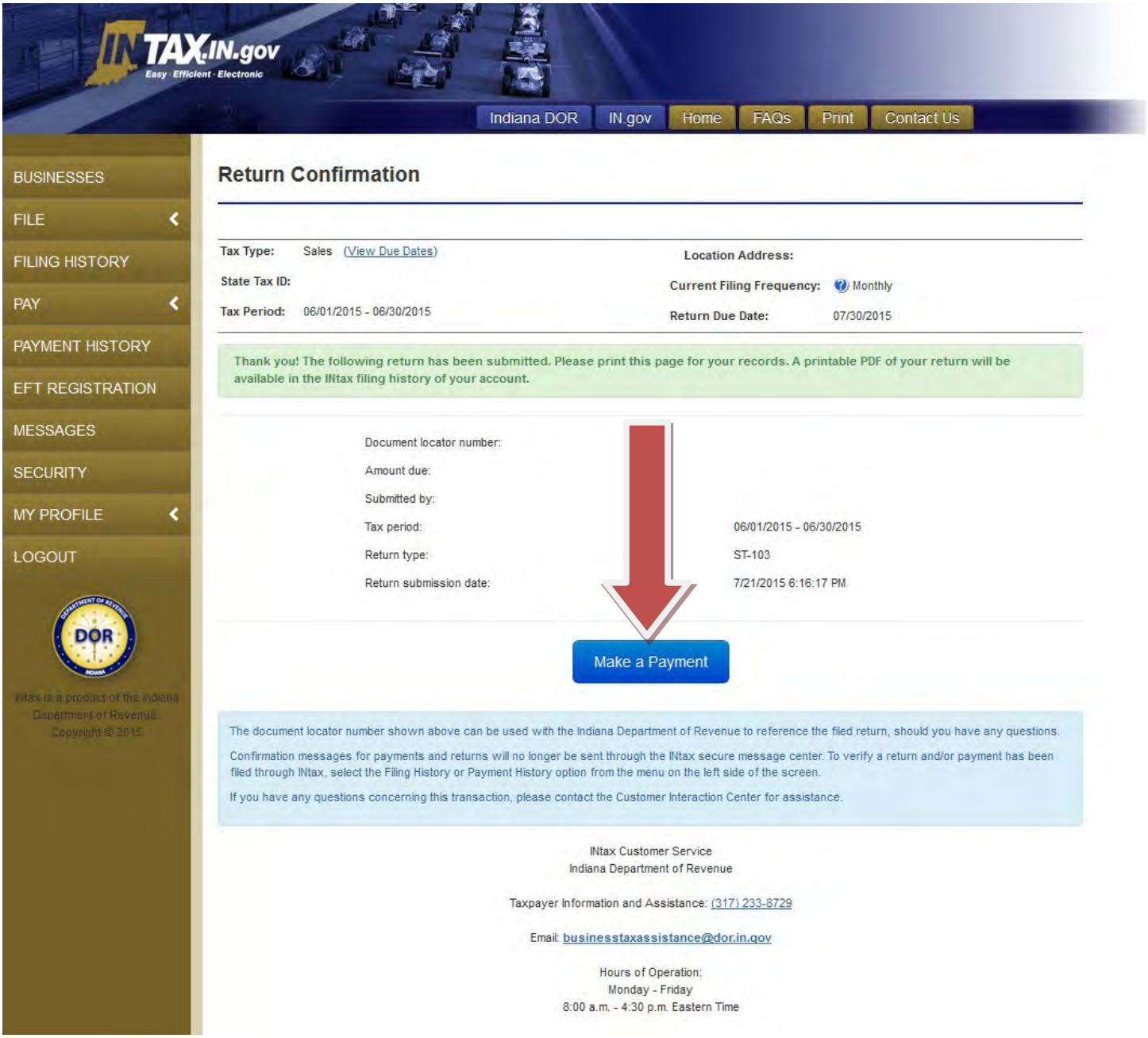


**Step 4:** Enter all return information.

**Step 5:** Check the box (see arrow #1 below) to declare that the amounts are correct, and then select **Submit** (see arrow #2 below)**.**



A Return Confirmation page displays after the return has been submitted successfully. To make a payment in INtax, select **Make a Payment** on the confirmation screen.



# Make a payment

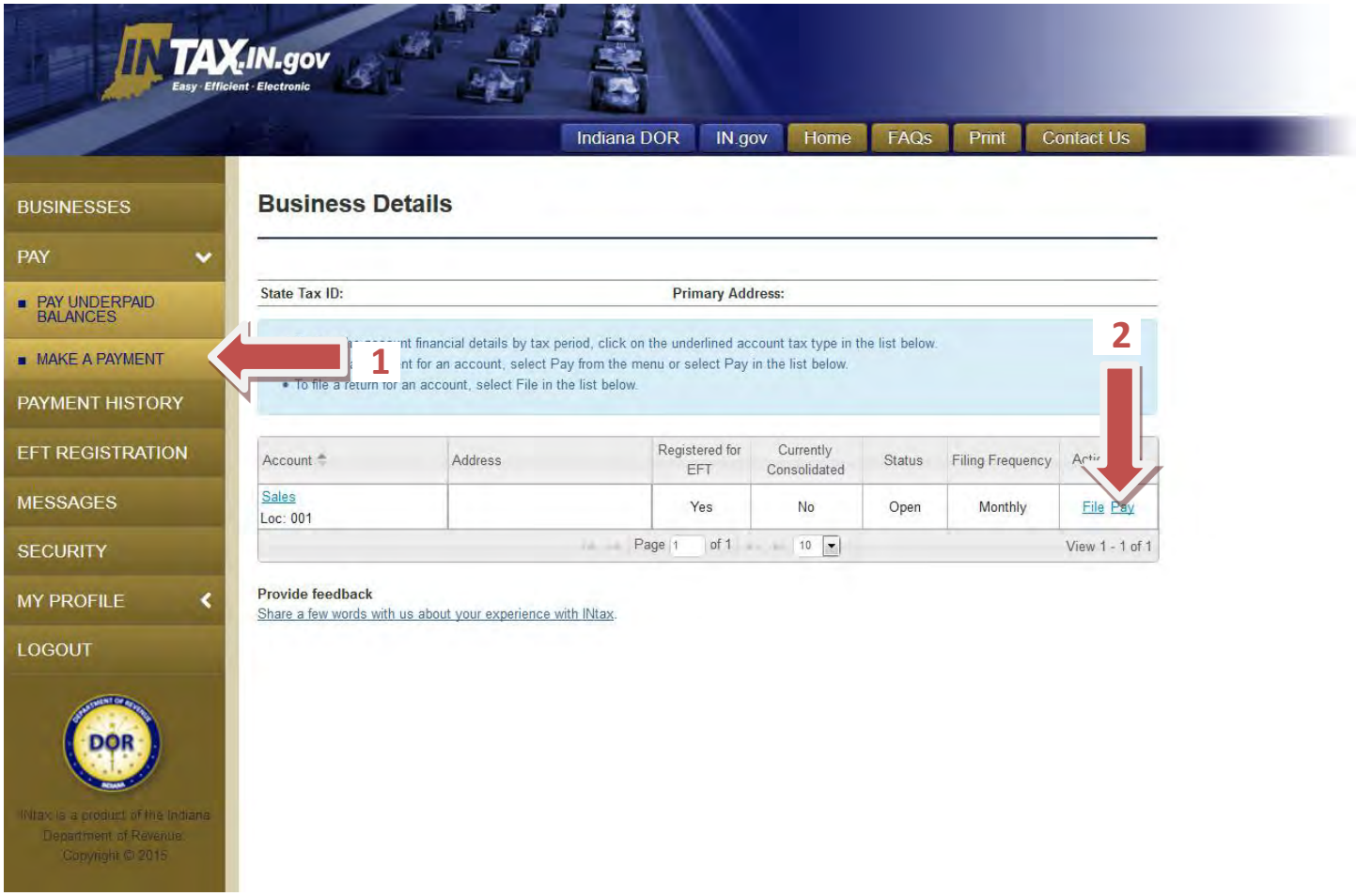
To make a payment using INtax, follow these steps:

*Note: If you selected **Make a Payment** from the Return Confirmation page after successfully submitting a return, skip to Step 3.*

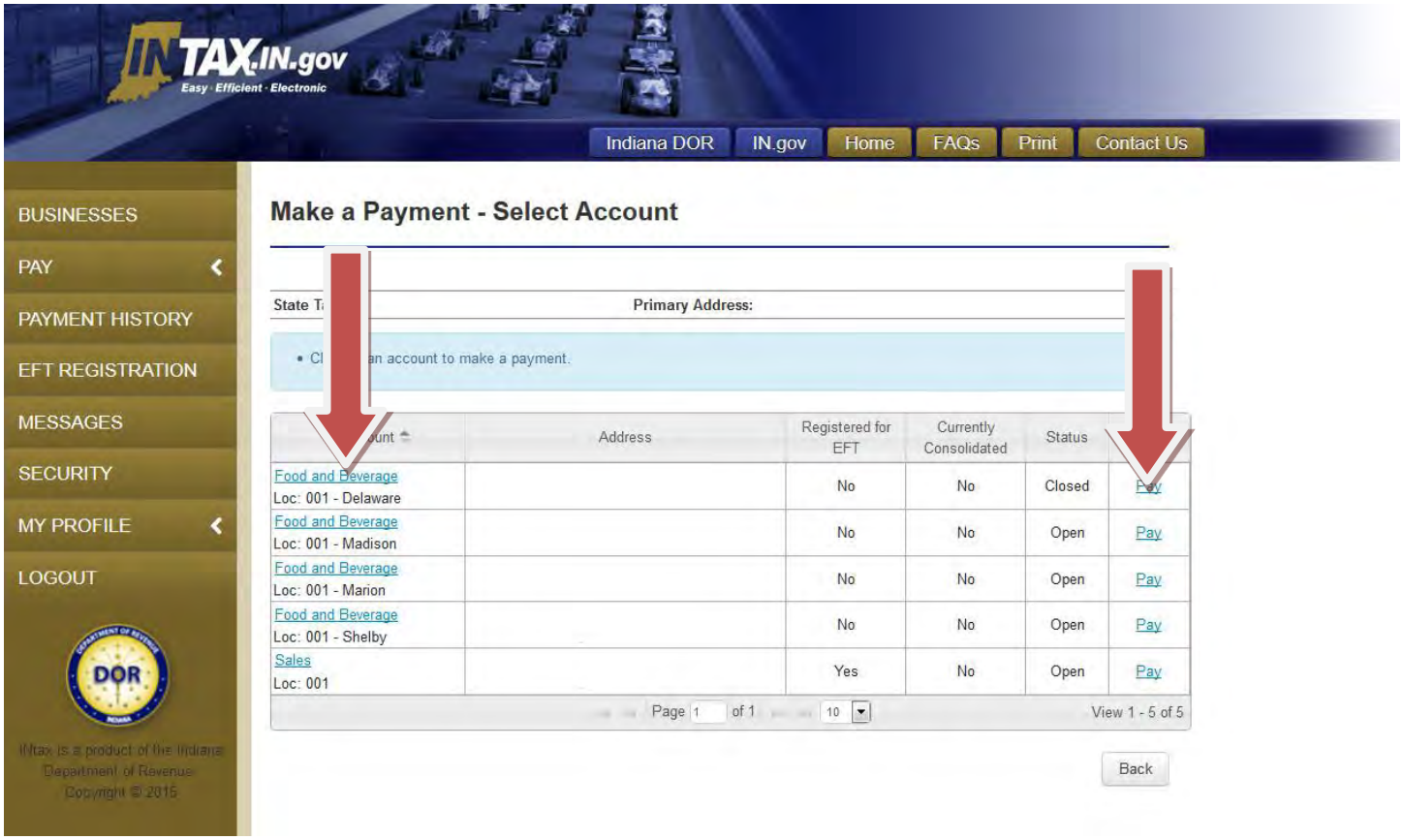
**Step 1:** Select **Pay**, then select **Make a Payment** (see arrow #1). If you only have one tax type account registered to your INtax username, skip to Step 3.

Alternatively, for the row of the tax type account for which you want to make a payment, you can select **Pay** (see arrow #2 below) in the Actions column. If you choose this alternative, skip to Step 3.

*Note: Remember to file first and then pay.*

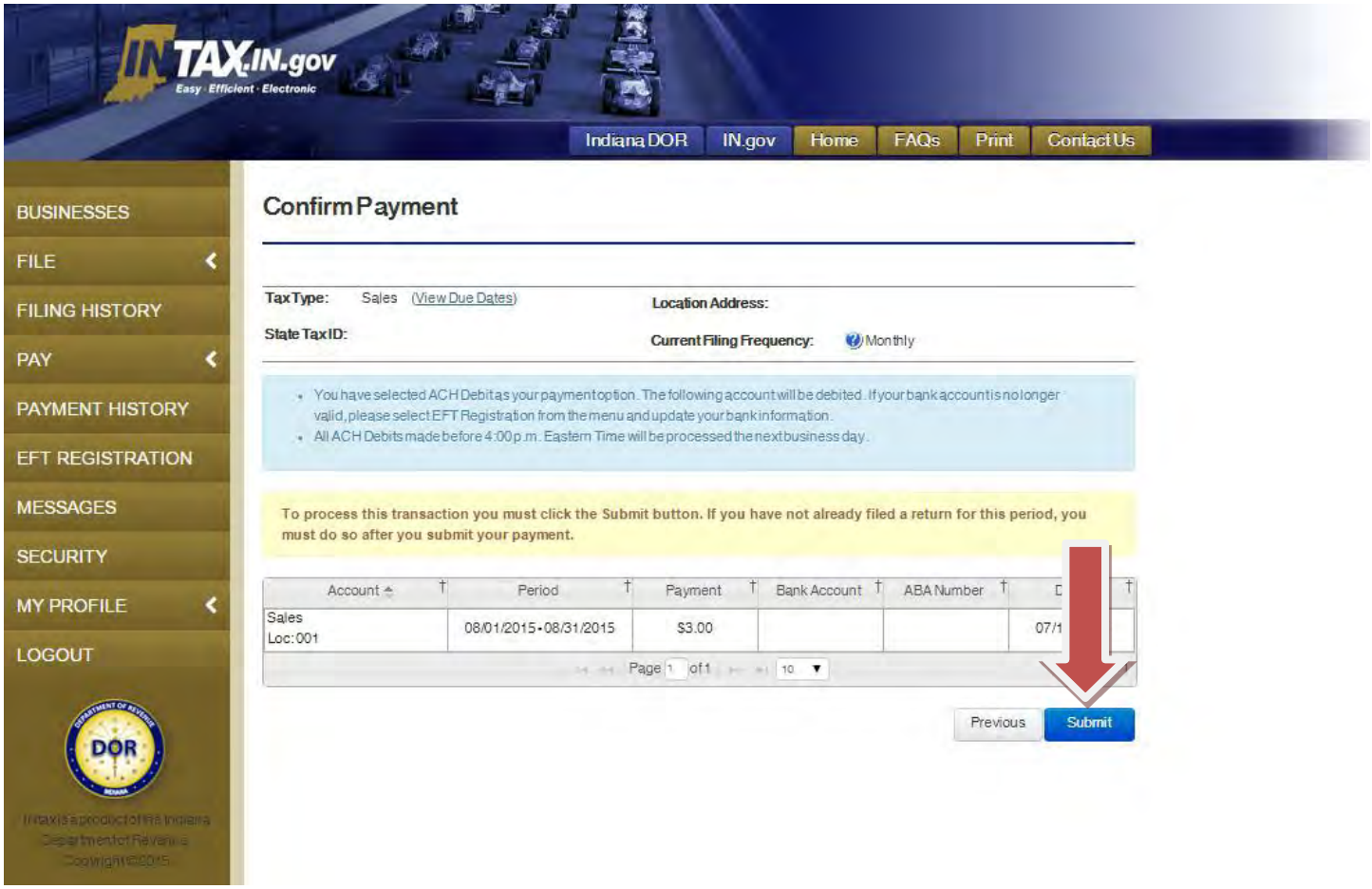


**Step 2:** Select either the name of the tax type account for which you would like to make a payment, or select **Pay** in the Actions column for the row of the tax type account for which you would like to make a payment.

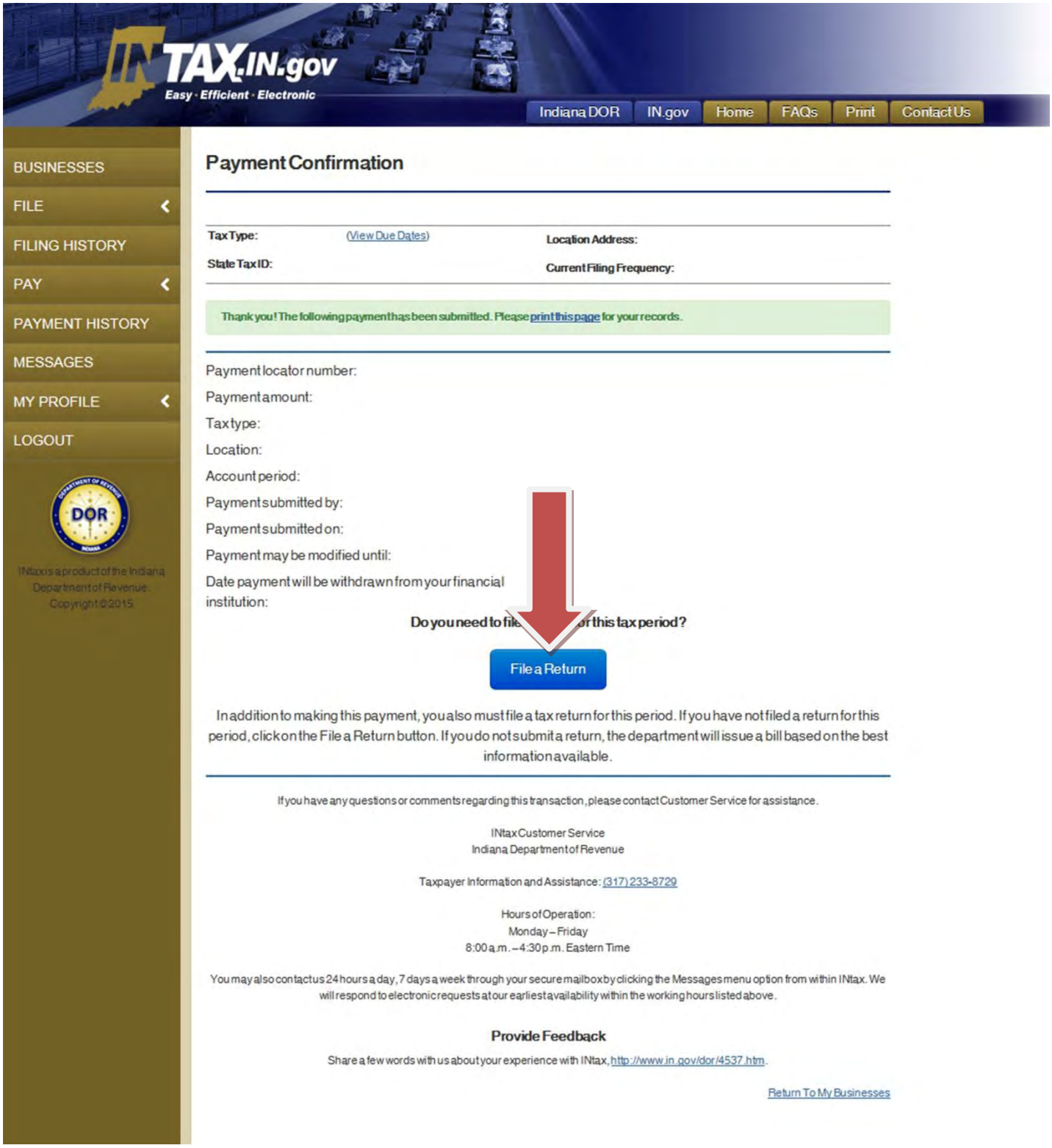


**Step 3:** From the dropdown menu, select the period dates for which you would like to make a payment and enter the payment information. Then, select **Continue.**

**Step 4:** Review the Confirm Payment page to ensure the submitted payment information is correct. Once you have verified the information is correct, select **Submit** to process your payment. If it is not correct, select **Previous** to edit the information.



**Step 5:** A Payment Confirmation page displays after the payment has been submitted successfully. Print this page for your records. If you have not filed the return, select **File Return** from the Payment Confirmation page. Depending on the tax type, INtax may populate the form with information or you may have to choose the form type.



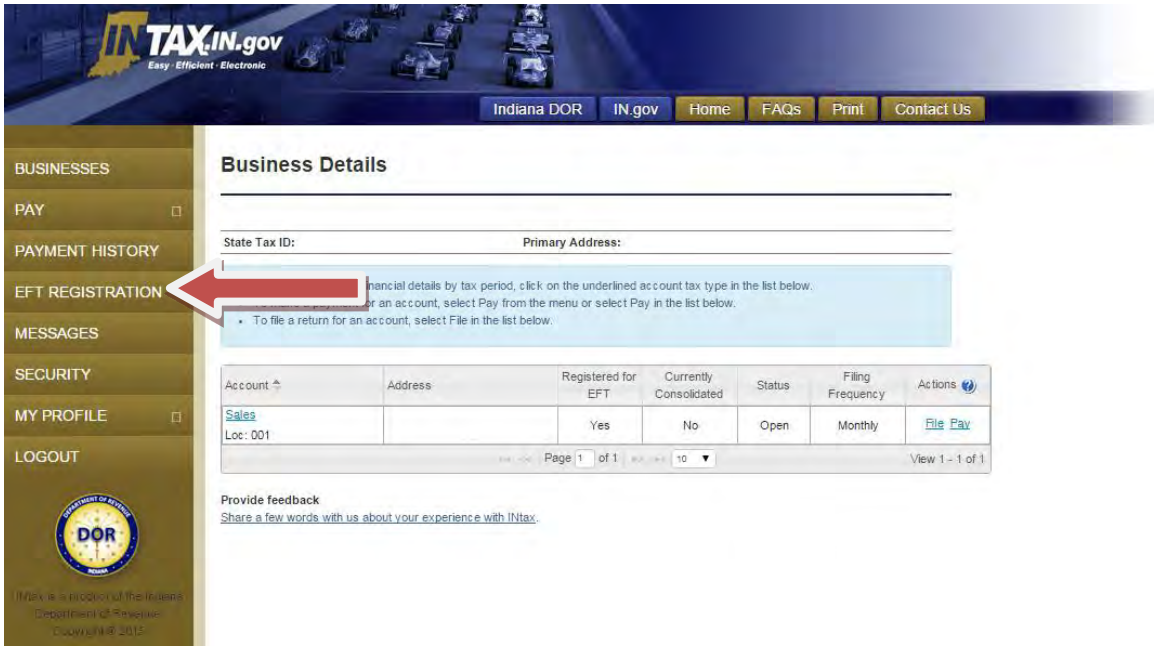
# Electronic Funds Transfer

Electronic Funds Transfer (EFT) is a fast and secure way for businesses to transfer funds. Businesses using INtax to file returns also are required to register for and submit tax payments by EFT.

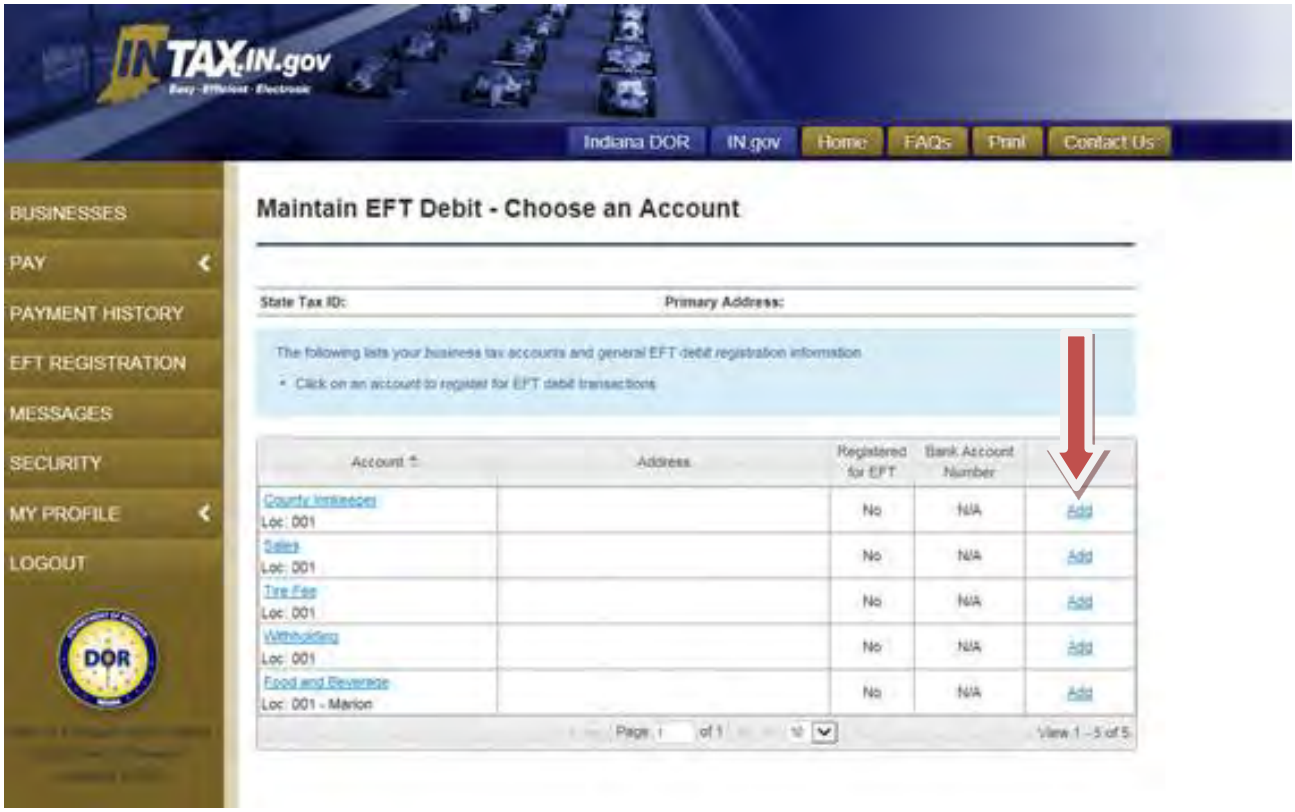
*Note: Payment options for alcohol and other tobacco products (OTP) tax types are different. To submit an ACH credit payment for alcohol or OTP taxes, please refer to the electronic funds transfer (EFT) guide online at www.in.gov/dor/online-services/pay-taxes-electronically. You may make a payment using an electronic check, credit card or debit card by visiting www.payINgov.com/specialtax. Convenience fees for these options apply. For more information, visit www.in.gov/dor/business-tax/electronic-filing-for-alcohol-taxpayers (Alcohol) or http://www.in.gov/dor/business-tax/cigarette-and-other-tobacco-products-tax (OTP).*

To register EFT information, follow these steps:

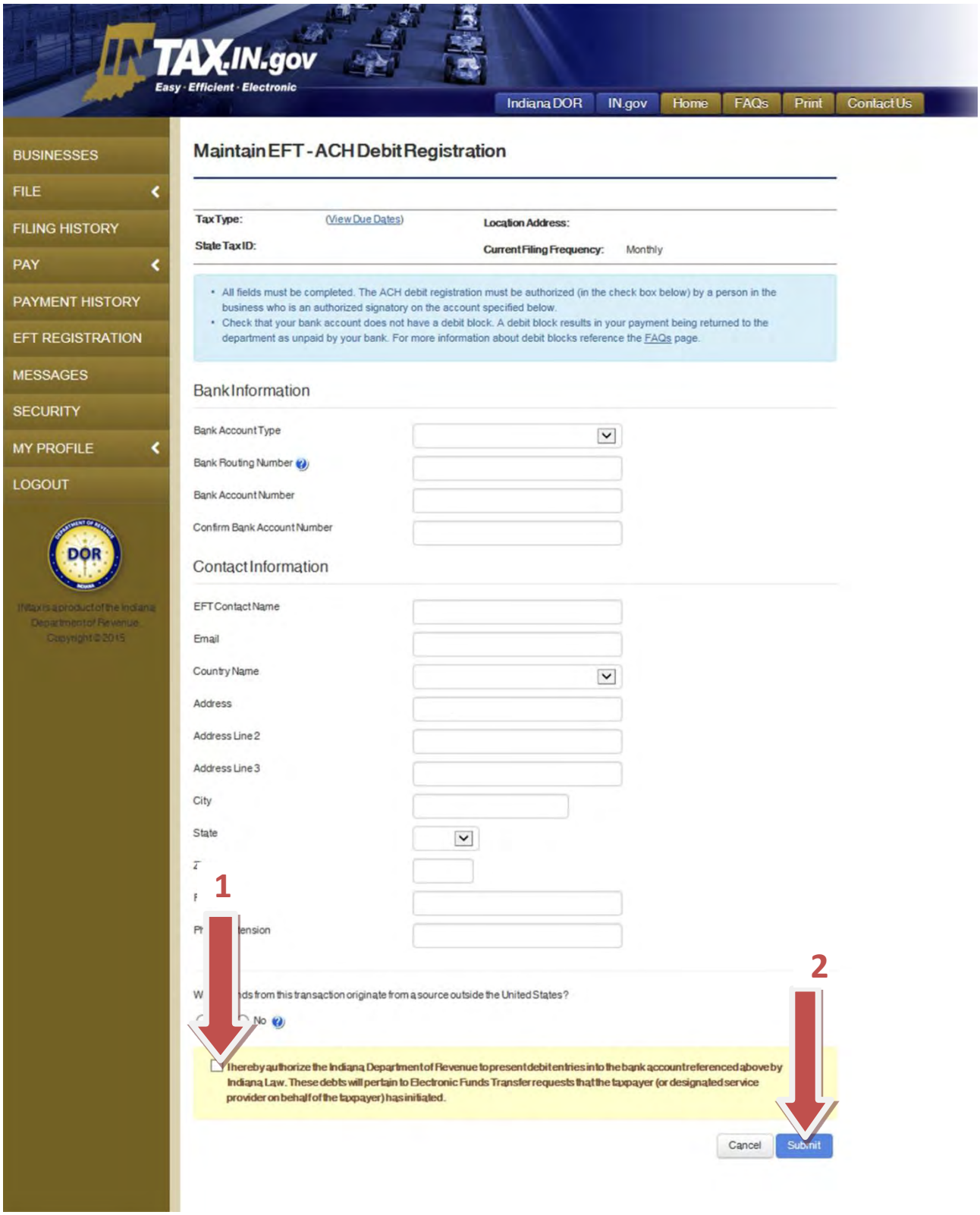
**Step 1:** From the left navigation, select **EFT Registration**.



**Step 2:** This screen lists your accounts and indicates whether they are registered for EFT. Select the account for which you want to add/register an EFT Profile by selecting **Add**.



**Step 3:** Fill in the required information, check the box authorizing the department to debit your account (see arrow #1 below), and select **Submit** (see arrow #2 below) to complete your EFT registration.

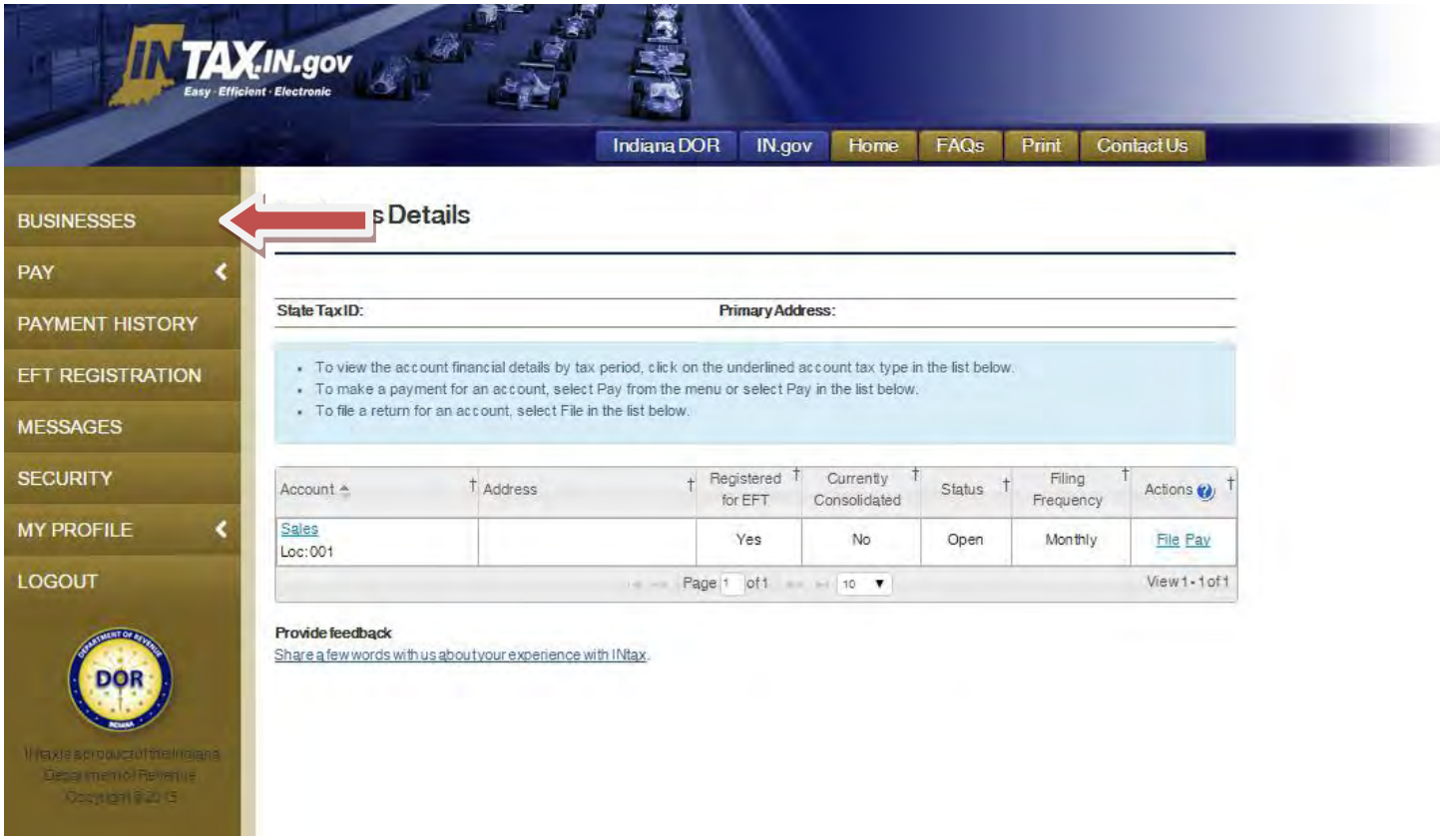



Congratulations! You successfully completed your EFT registration for the selected tax type.

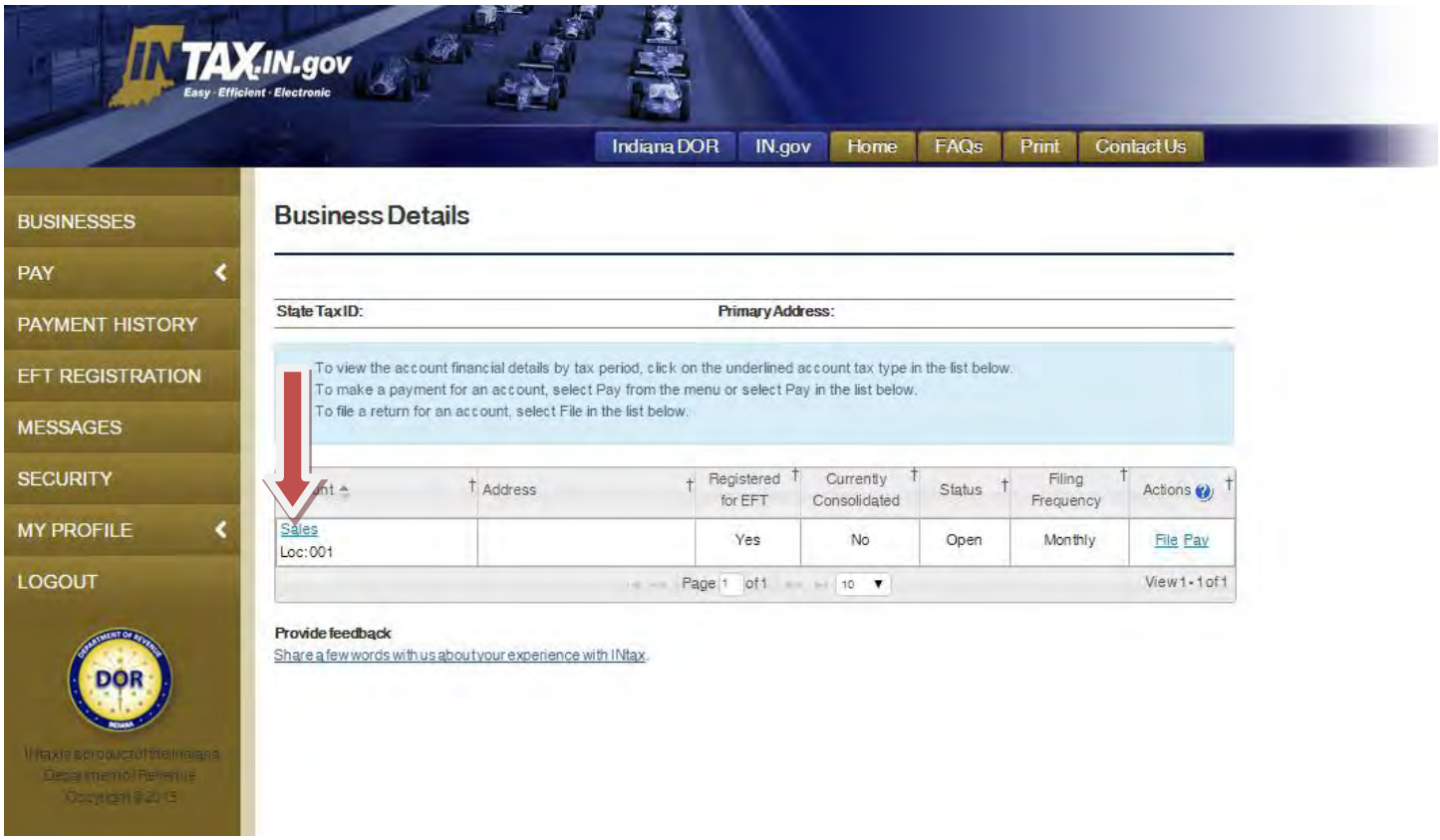
# View filing history

To view your filing history, follow these steps:

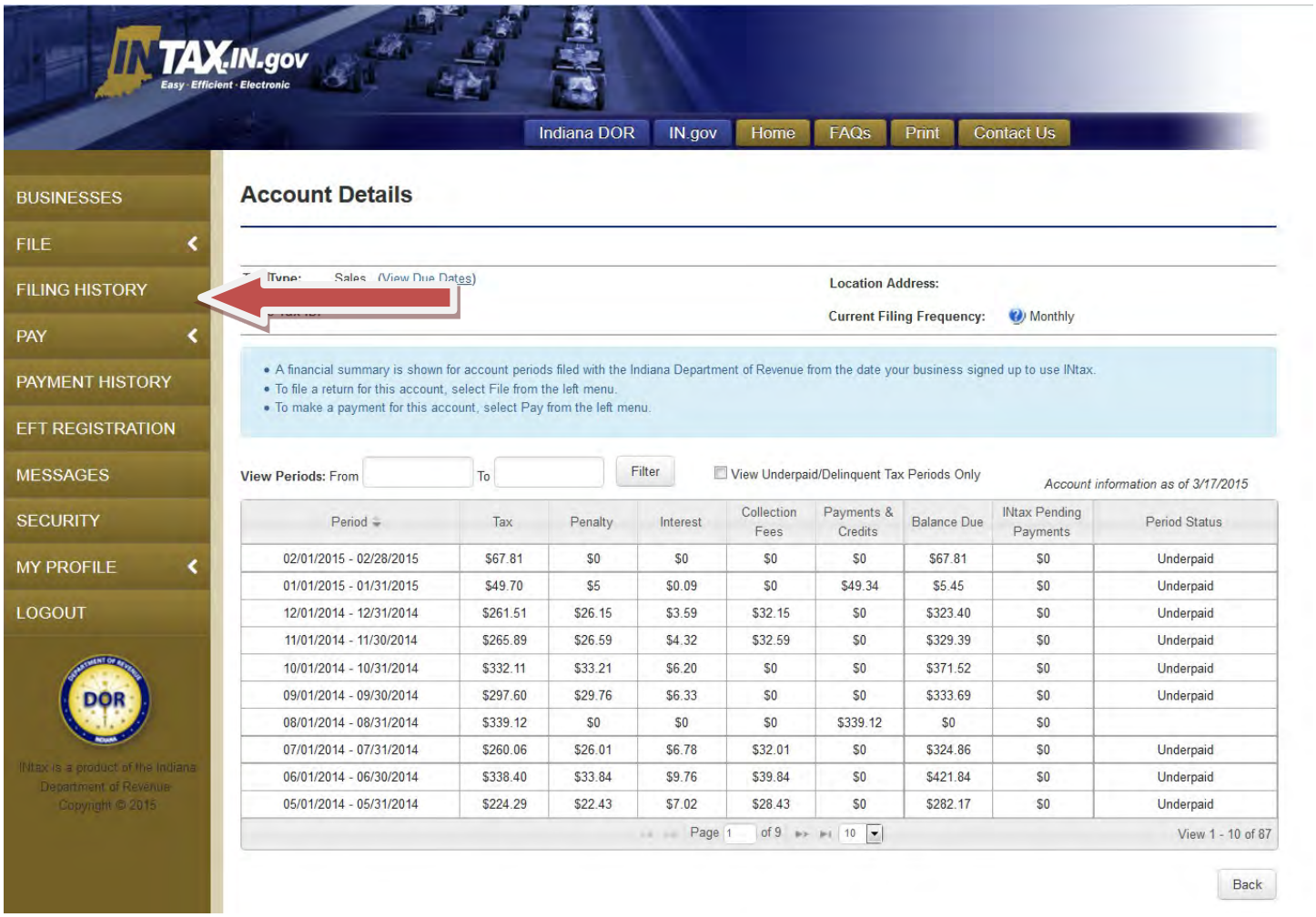
**Step 1:** Select **Businesses** in the left navigation to view the Business Details page.



**Step 2:** Next, select the tax type account you want to review.



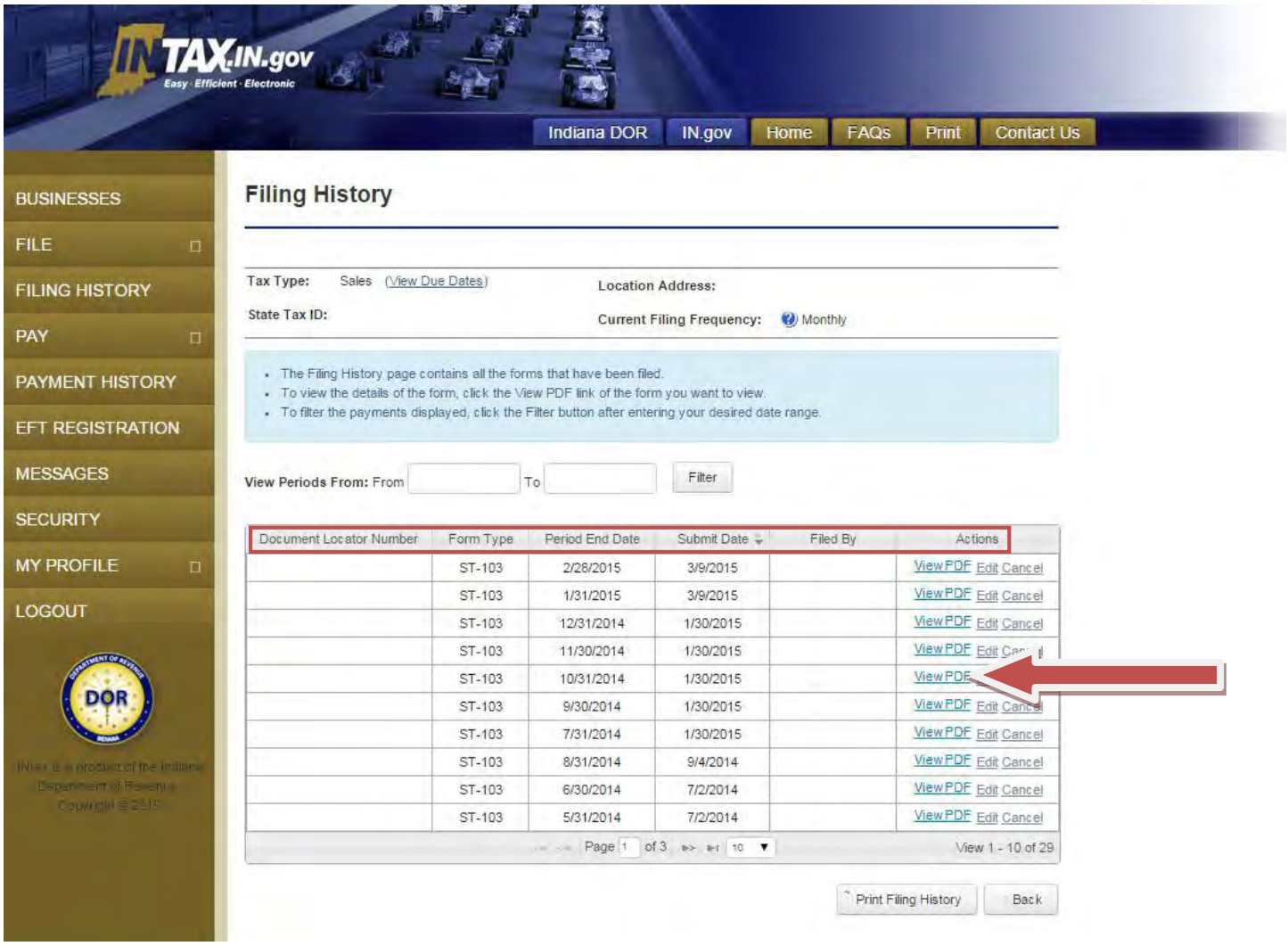
**Step 3:** The Account Details page displays, and **Filing History** appears in the left navigation. Select **Filing History.**



**Step 4:** The returns submitted for the tax type account can be sorted by the document locator number, form type, period end date, and submission date. Select one of the column titles (highlighted by the red box) to sort by that category.

You also can select **View PDF Version** (see arrow below) to see PDF versions of the returns you have filed. This is also the page where you can edit or cancel a return that has not yet been submitted for processing. If the **Edit** and **Cancel** options are disabled, the return already has been submitted for processing and cannot be edited or cancelled.

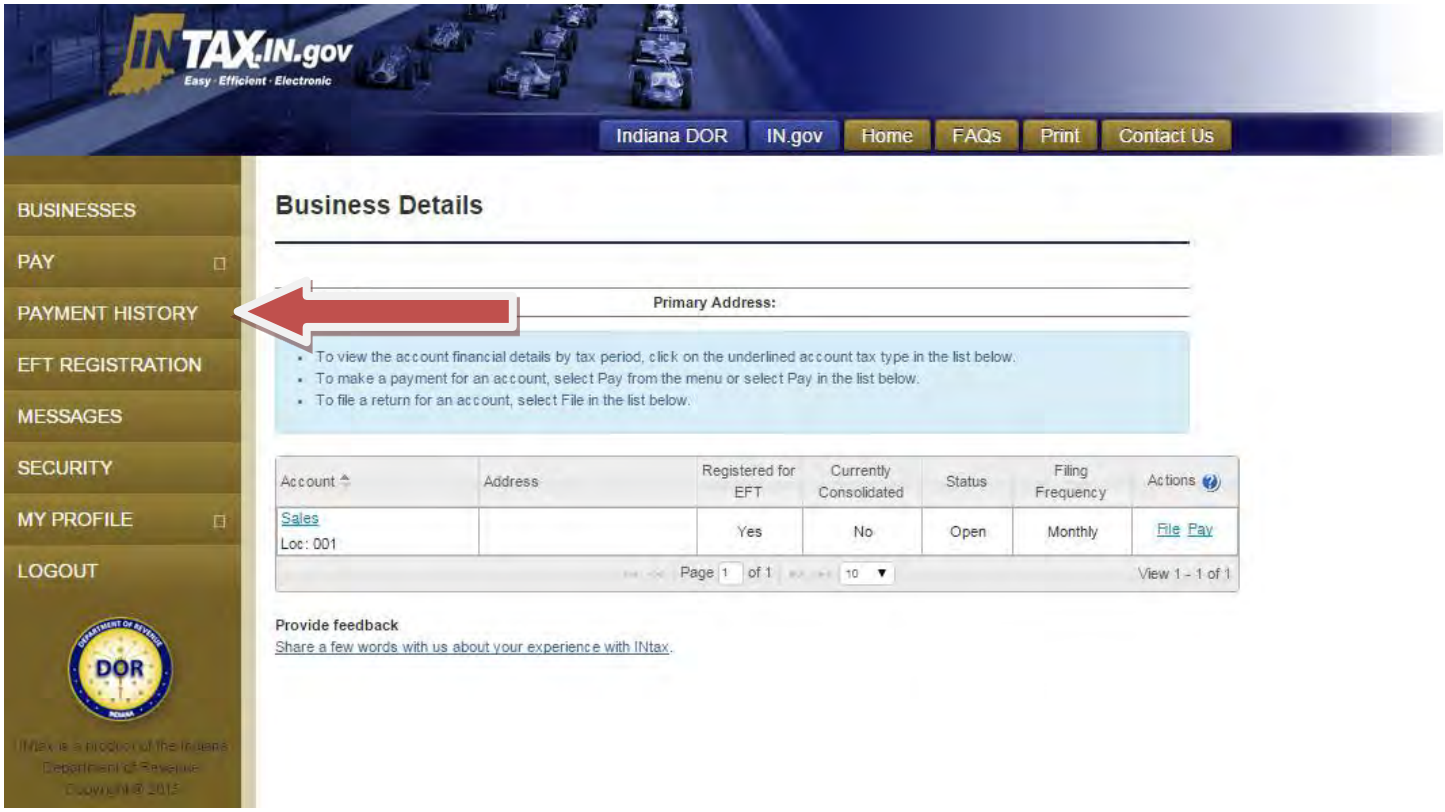
If you need to edit a form after it has been submitted for processing, you must send a message to the department using the INtax messaging center.



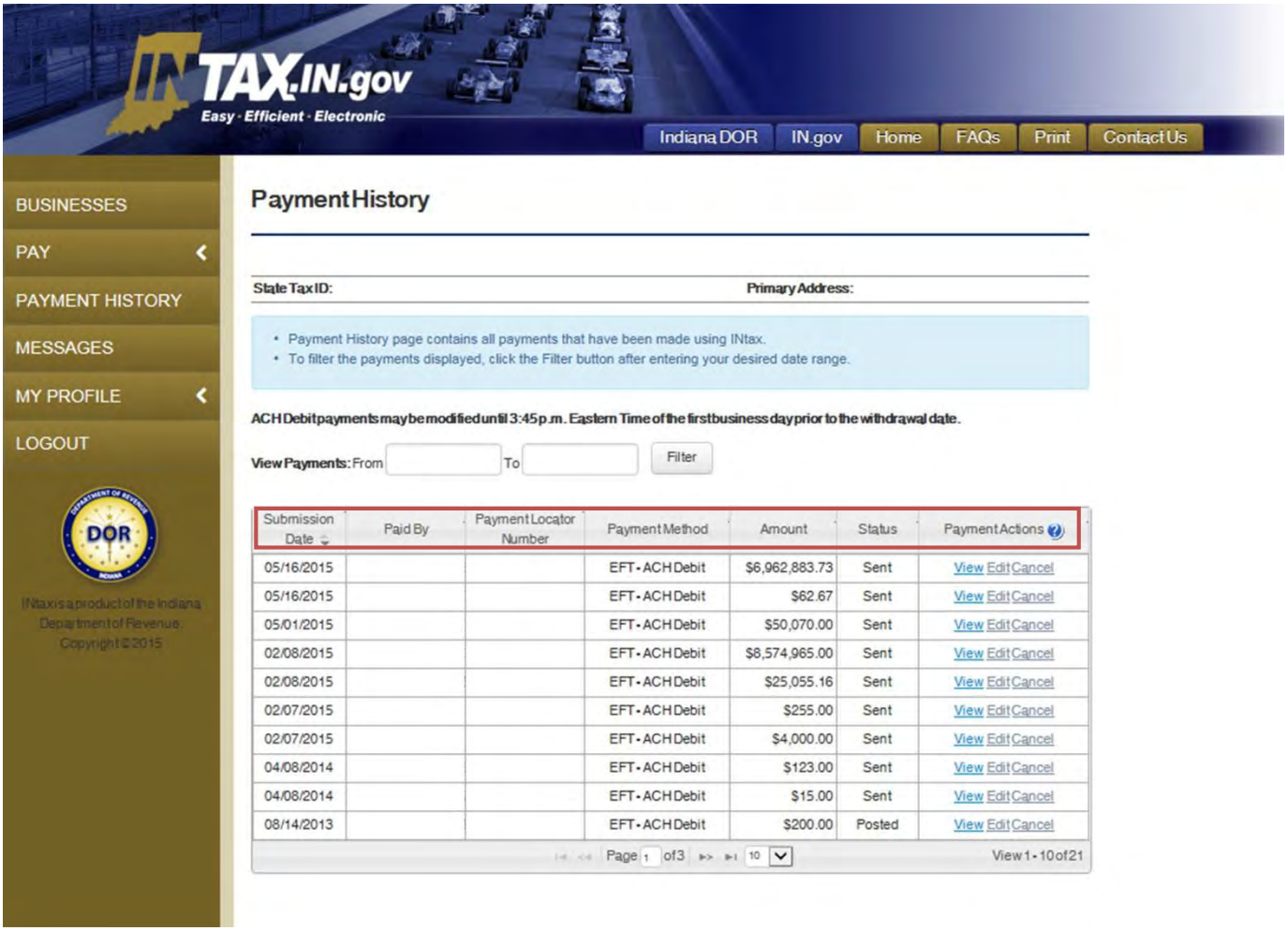
# View payment history

To view your payment history, follow these steps:

**Step 1:** Select **Payment History**.



**Step 2:** The submitted payments can be sorted by the submission date, paid by, payment locator number, payment method, amount, and status. Select one of the column titles (highlighted by the red box) to sort by that category.



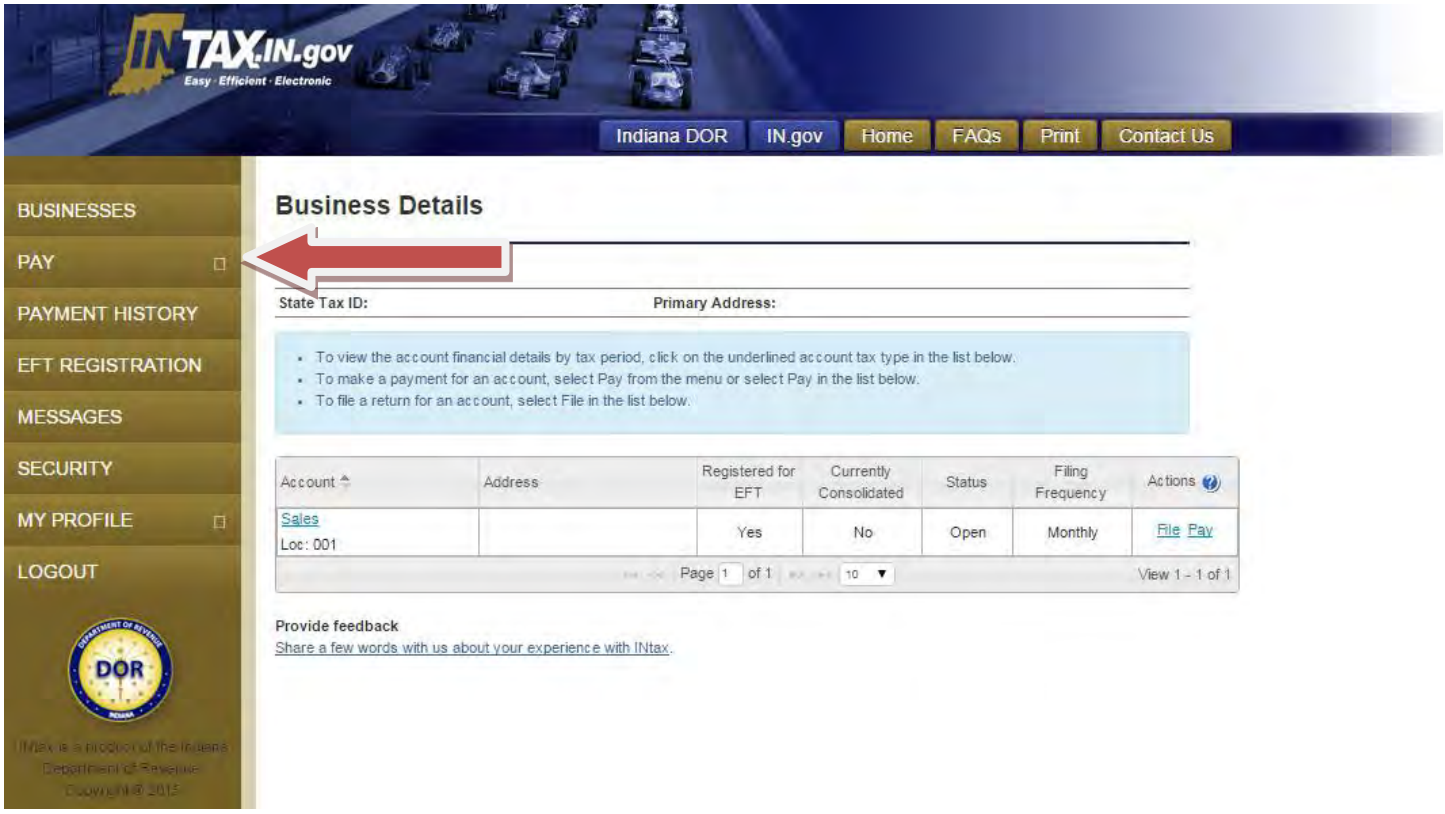

You can edit EFT payments until 3:45 p.m. (Eastern Time) of the first business day prior to the withdrawal date. If the **Edit** and **Cancel** options are disabled, the payment cannot be edited or cancelled. Credit card transactions cannot be edited or cancelled after they are submitted.

*Note: ACH credit, electronic check, credit card and debit card payments for alcohol or other tobacco products (OTP) taxes cannot be edited or cancelled.*

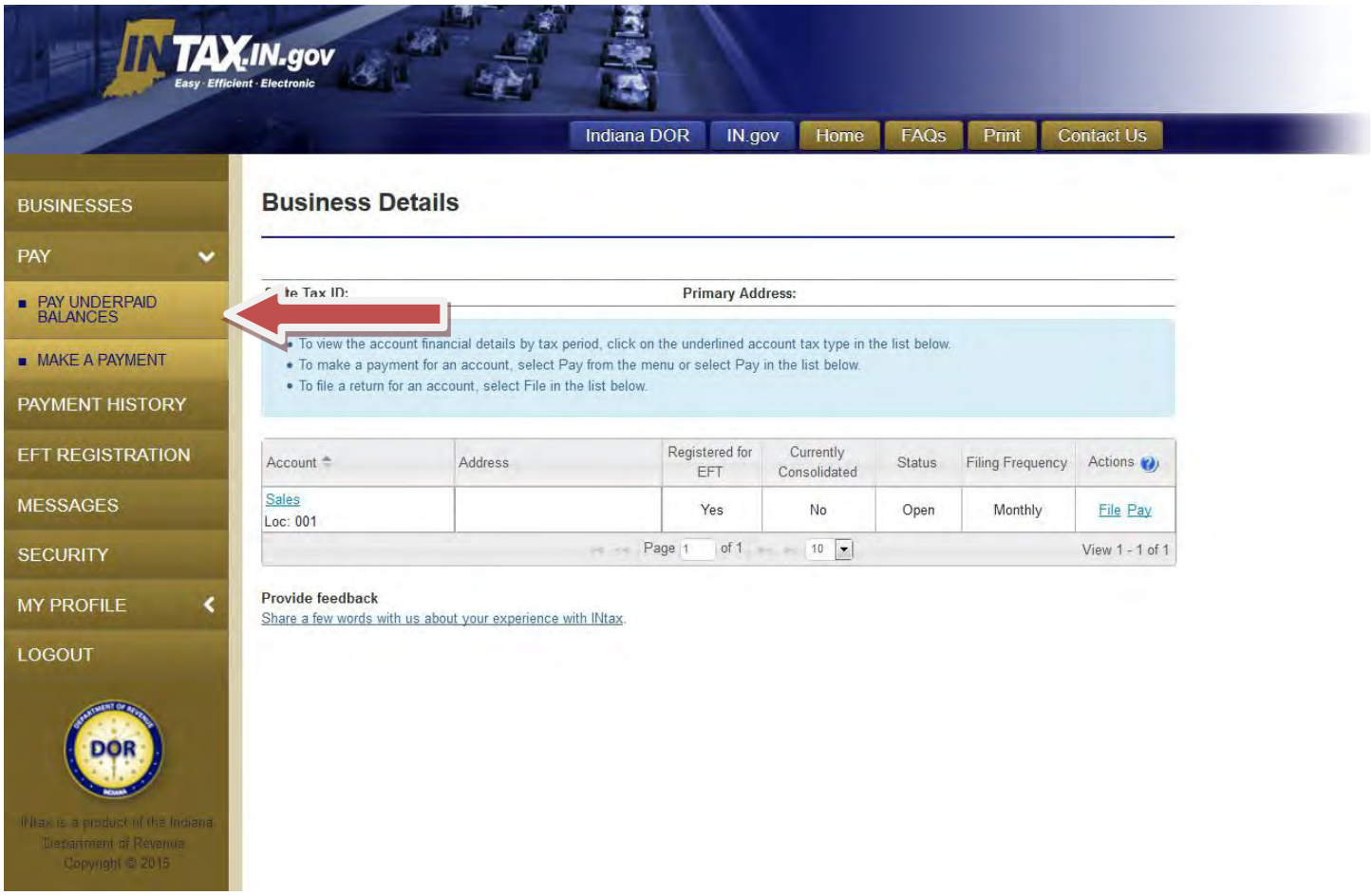
# Pay underpaid periods

To make a payment for an underpaid period, follow these steps:

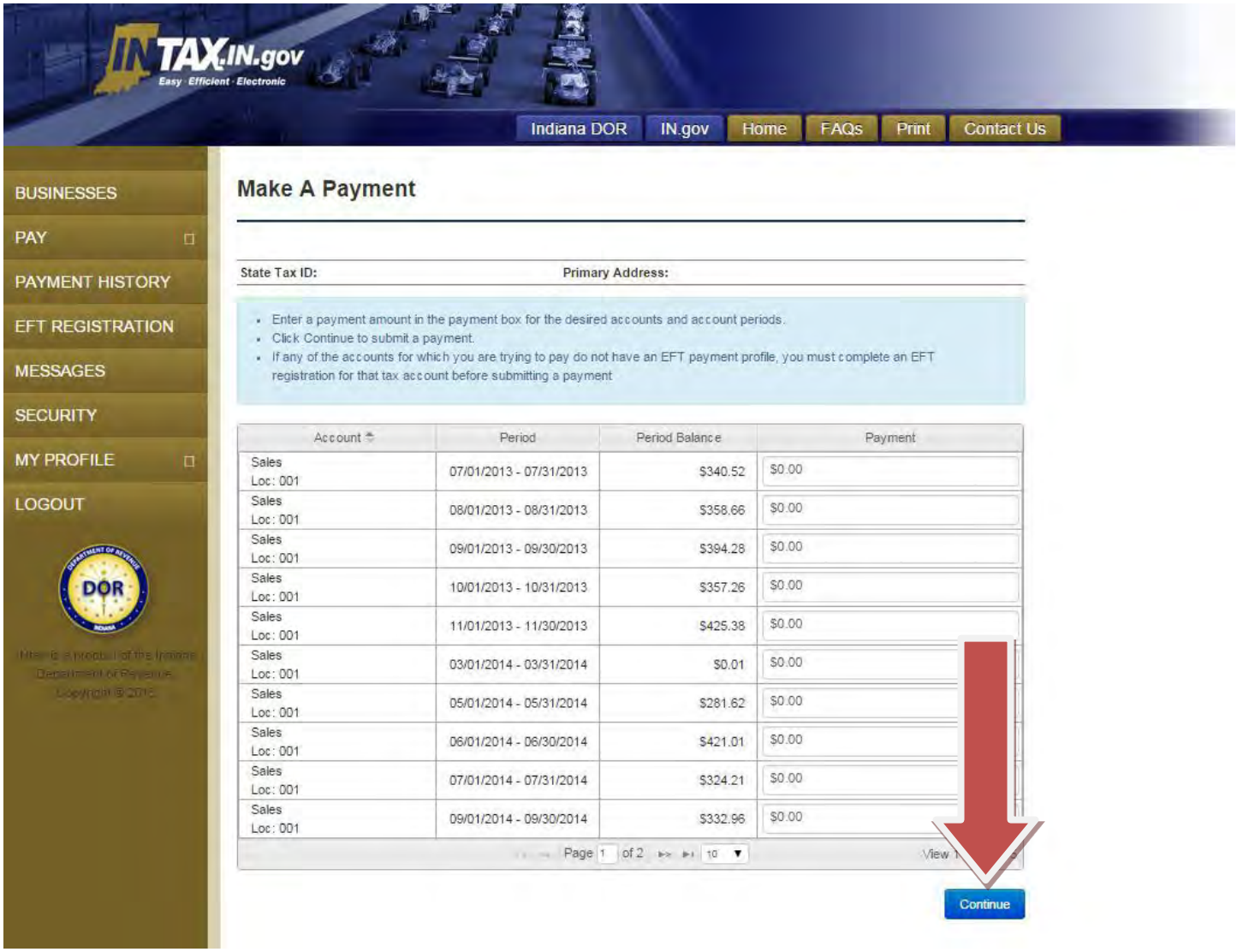
**Step 1:** Select **Pay**.



**Step 2:** Select **Pay Underpaid Balances.**

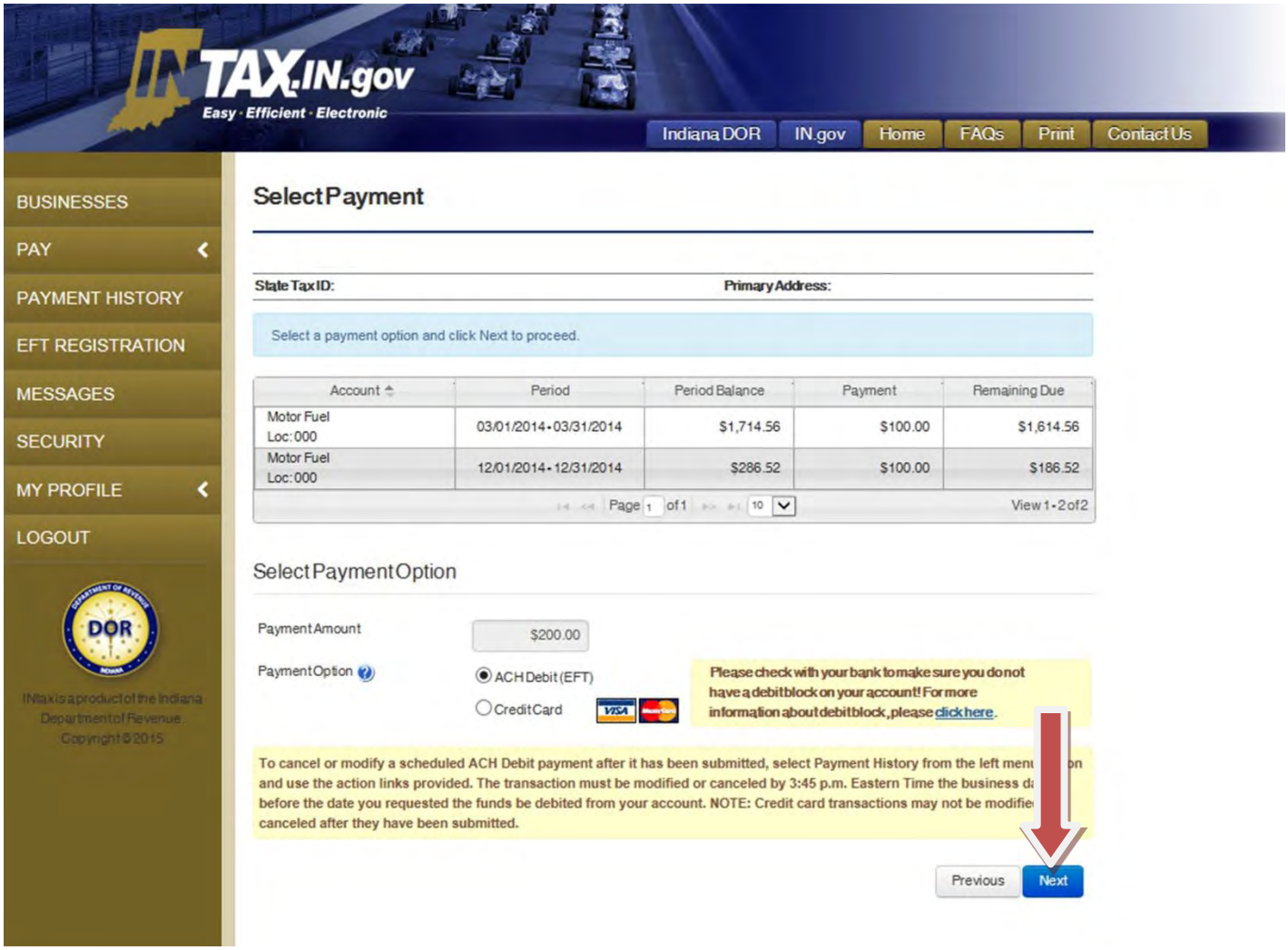


**Step 4:** A list of the underpaid balances displays with information including tax type and location, the period, and the period balance due. Enter the payment amount for each underpaid period, and then select **Continue.**

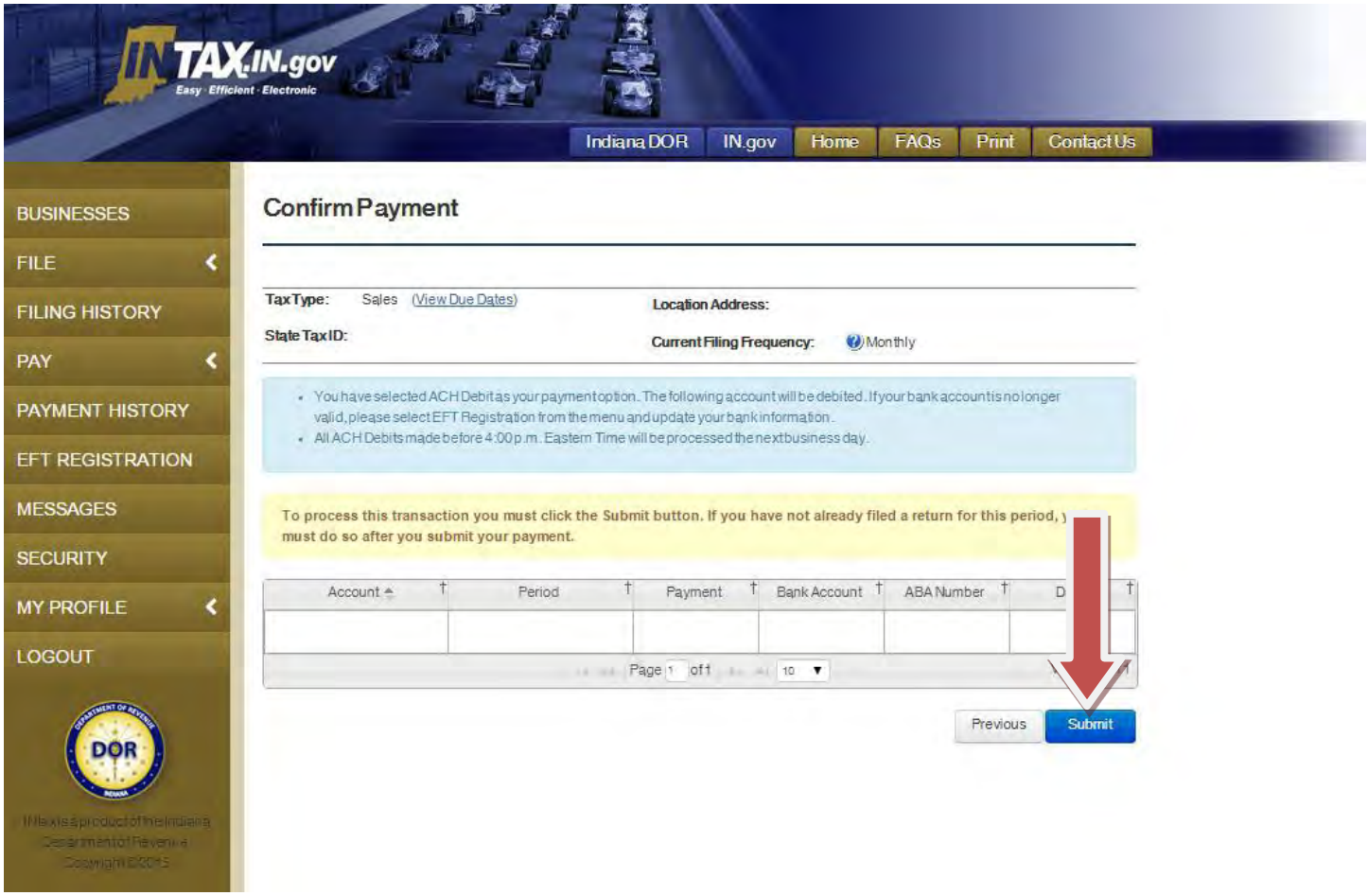



*Note: If an underpaid account is not listed, it may be on the next page. You can navigate between pages at the bottom of the table. Also, you can adjust how many records appear on one page.*

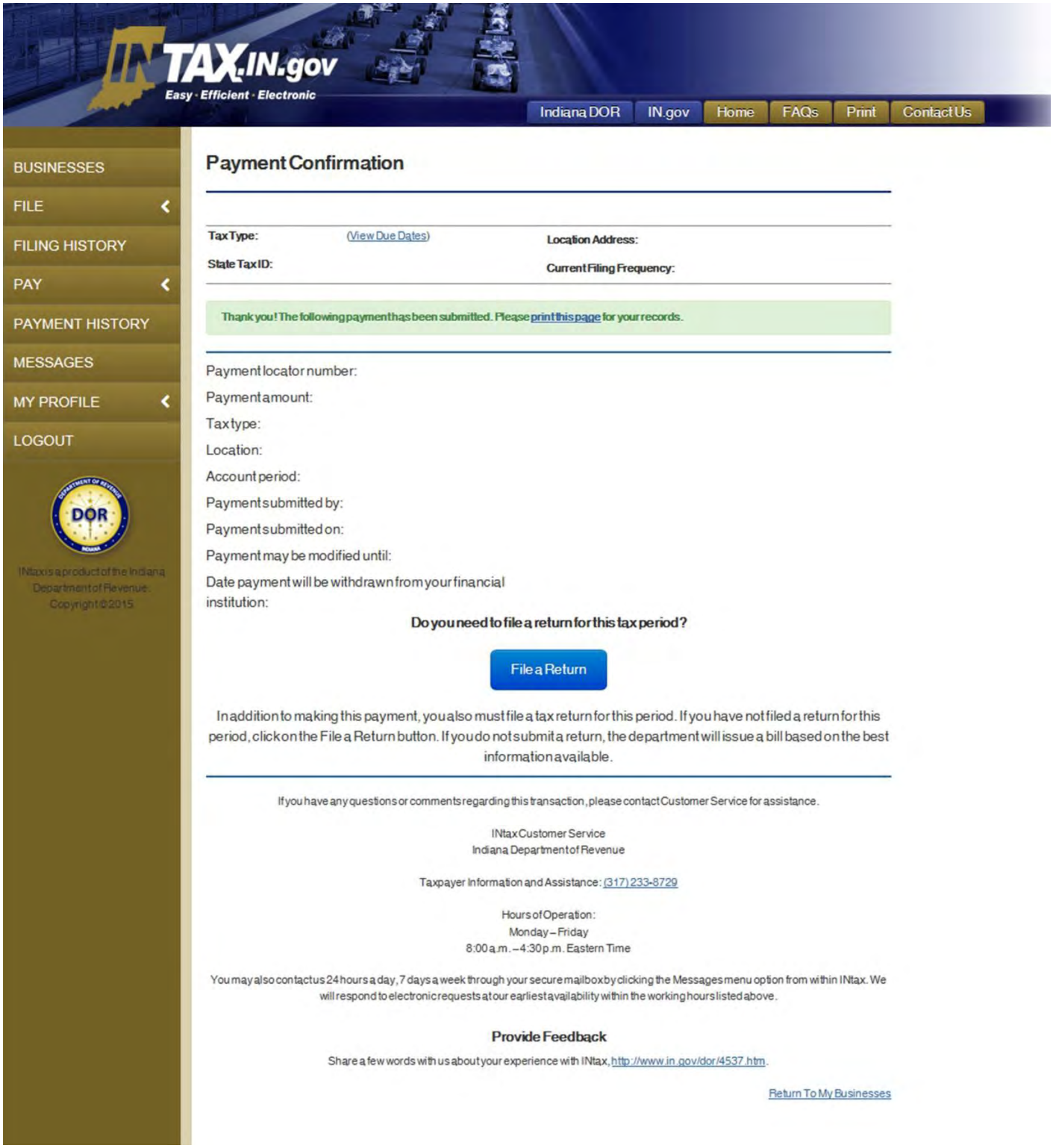
**Step 5:** The Select Payment page shows a list of underpaid accounts for which you have chosen to make a payment. Select your payment option. Review the information and ensure it is correct, then select **Next.**



**Step 6:** From the Confirm Payment page, you can review the payments one last time. Select **Submit** to process the payment.



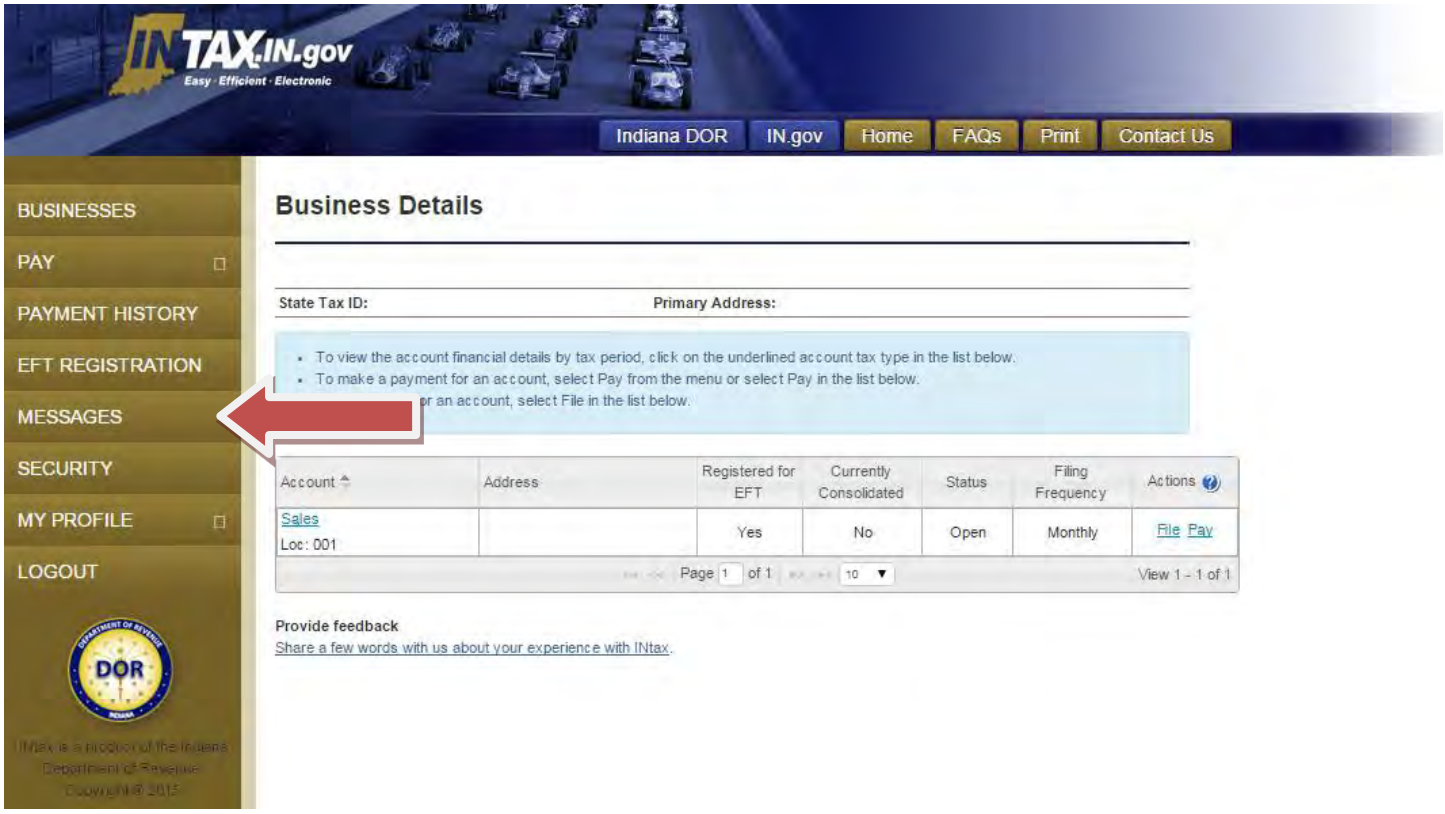
**Step 7:** A Payment Confirmation page displays after the payment has been submitted successfully. Print this page for your records.



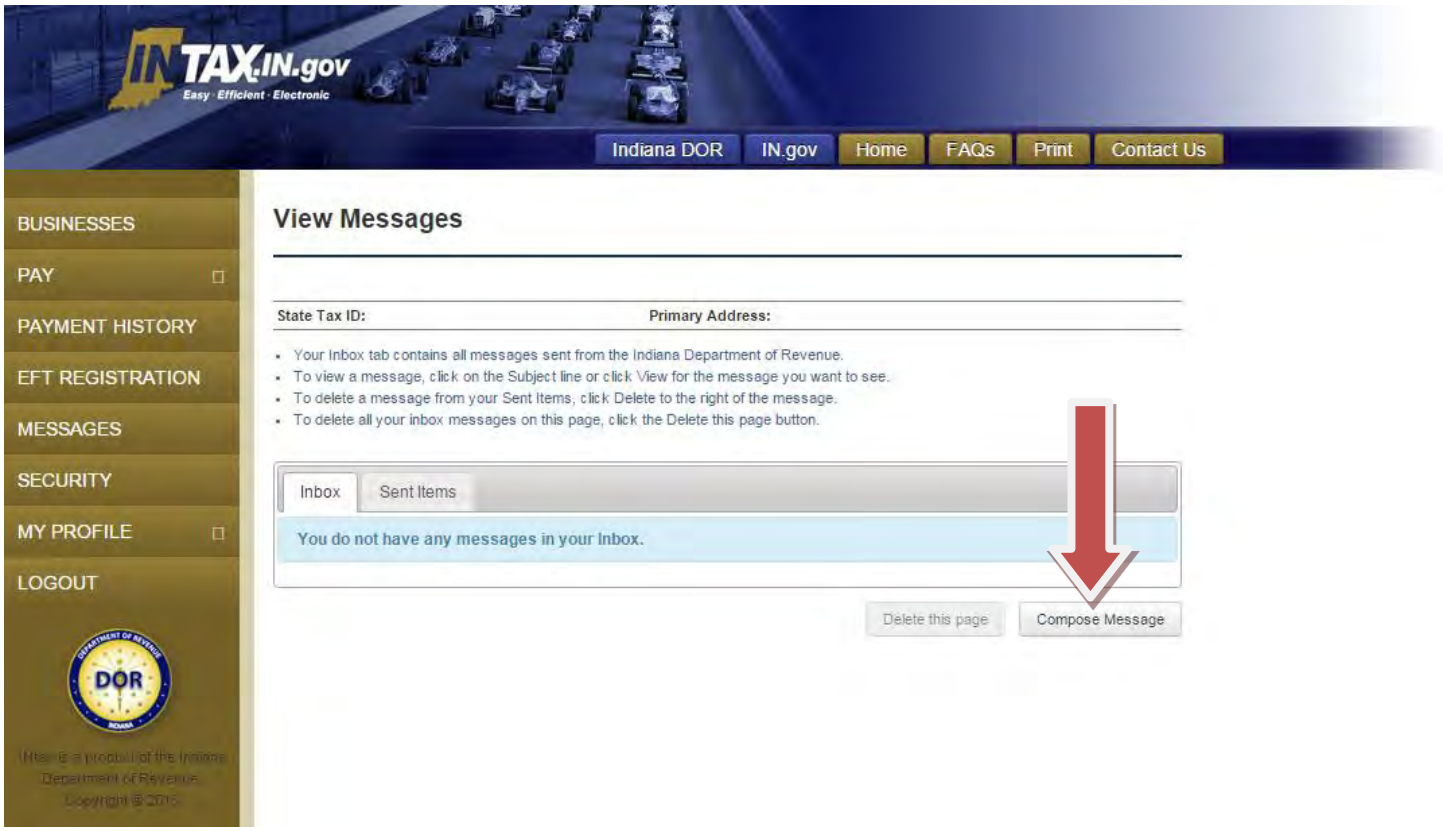
# Send and receive messages

To send and receive messages in INtax, follow these steps:

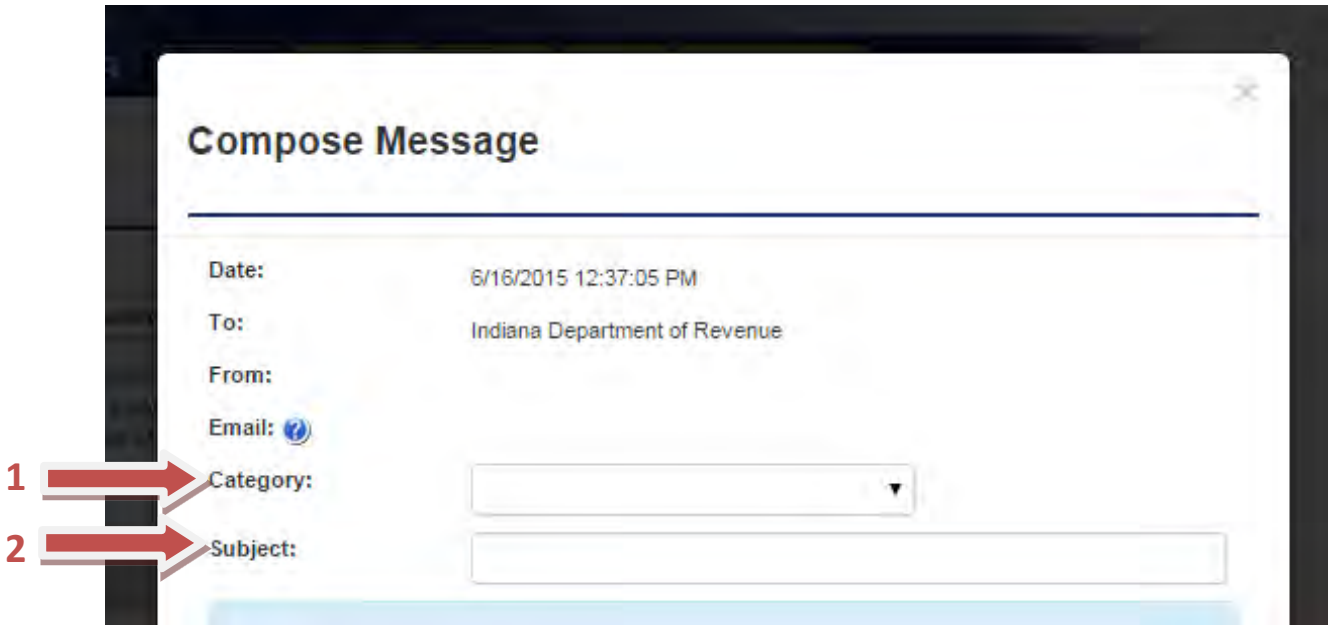
**Step 1:** From any page, select **Messages**.



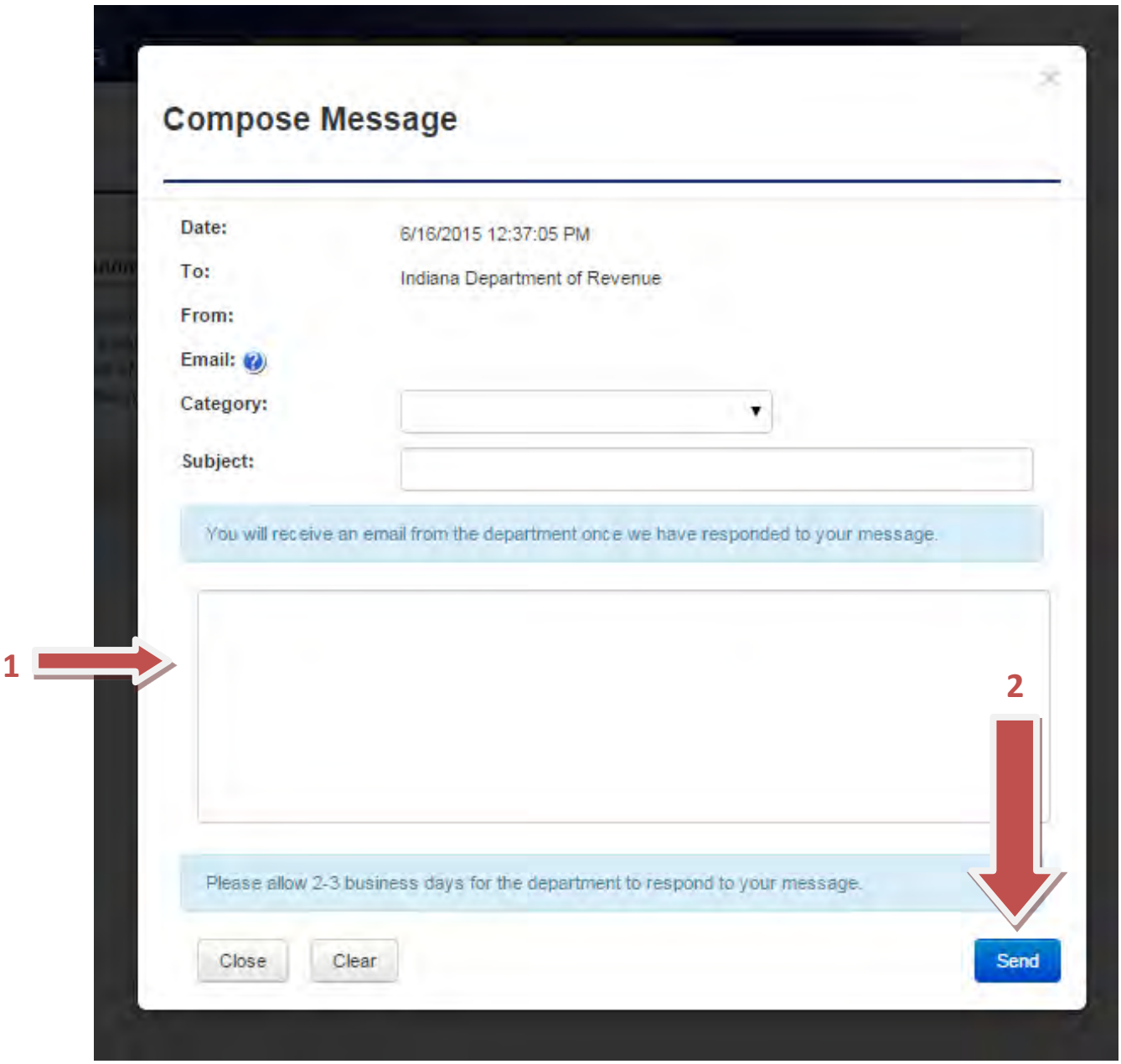
**Step 2:** Select **Compose Message**.



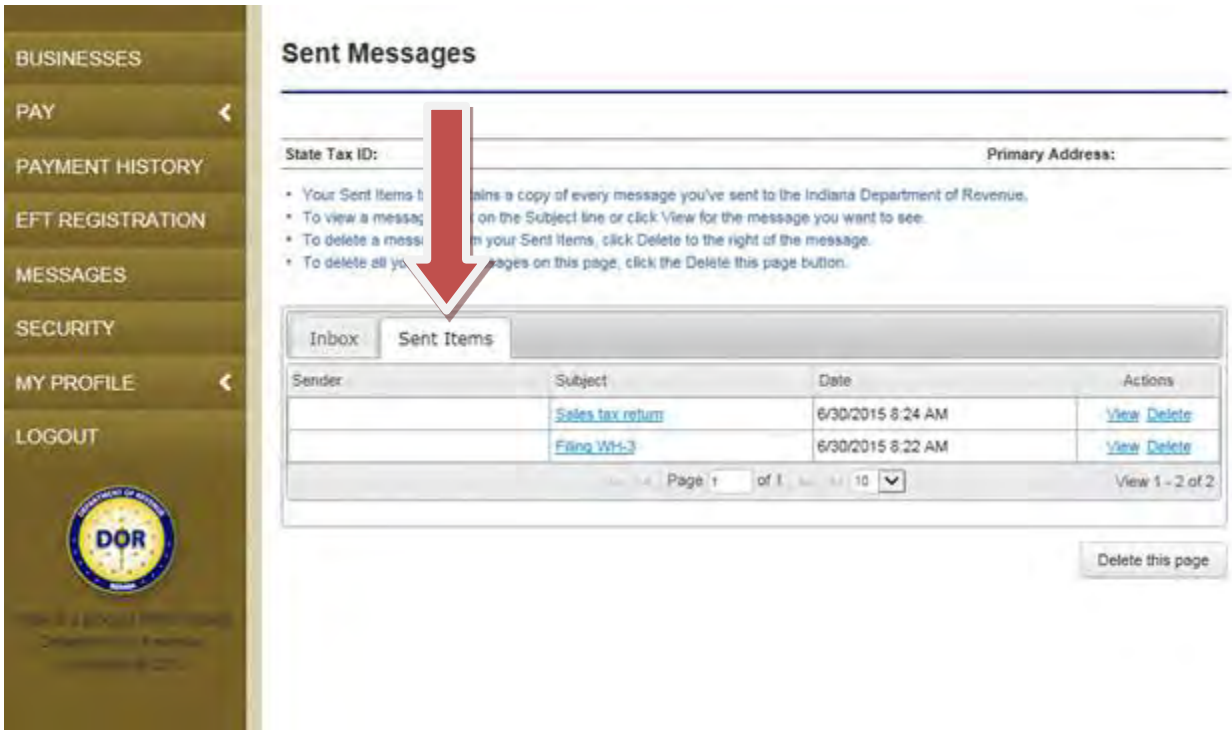
**Step 3:** A Compose Message window appears. You can use the INtax Message Center to make requests regarding your tax accounts. Select the appropriate category from the drop down menu (arrow #1 below) and type a subject for your message in the subject box (arrow #2 below).



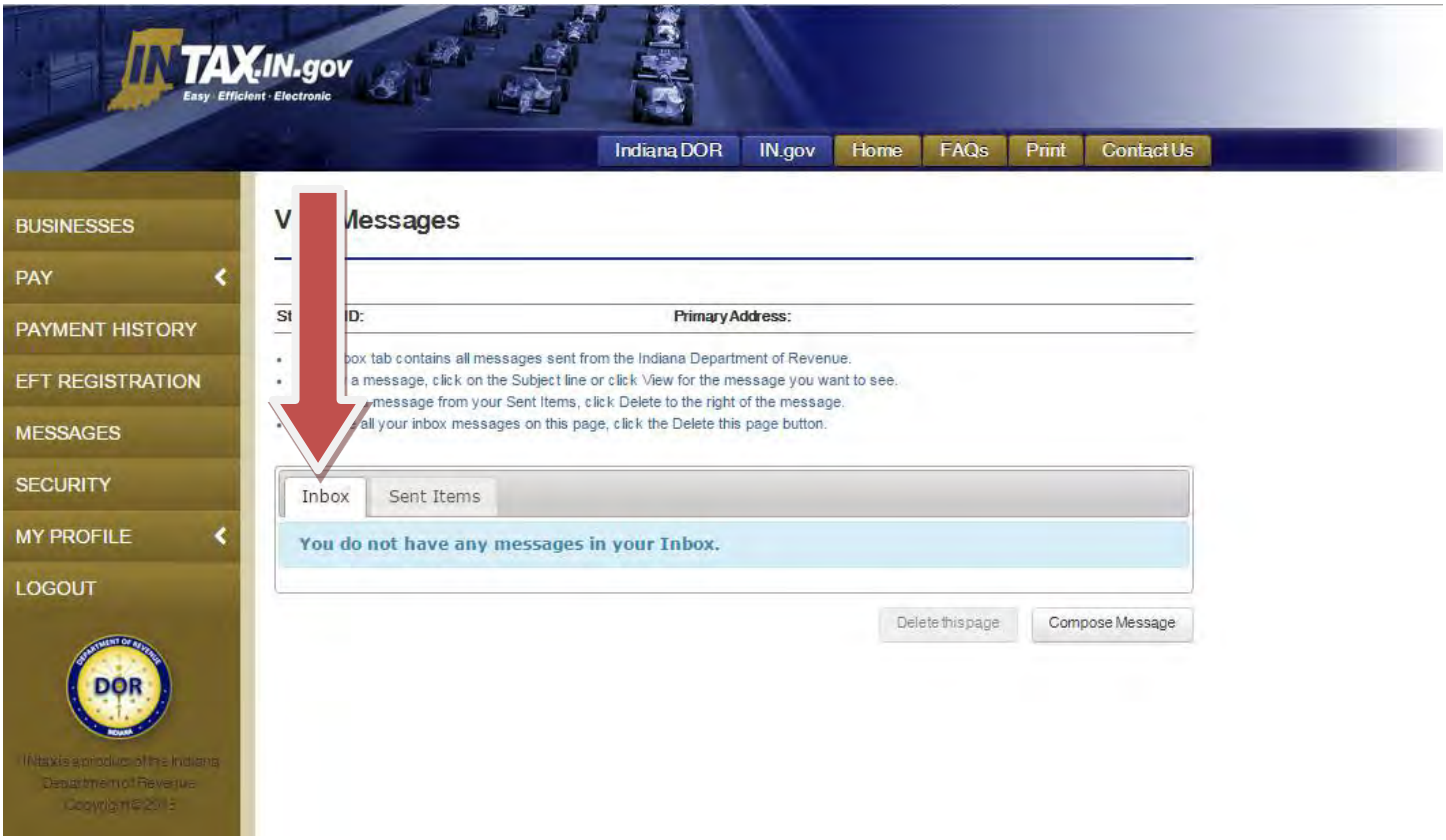
**Step 4:** Type your message in the body of the email (arrow #1 below). Select **Send** (arrow #2 below)**.**



**Step 5:** To confirm your message was sent, select **Sent Items**. This shows a list of messages successfully sent to the department. Please allow two to three business days for the department to respond.



**Step 6:** Once the department has responded to your message, an email is sent to the email address on file notifying you a message has been sent to your Secure Message Inbox in INtax. You can view messages the department has sent by selecting **Inbox.**



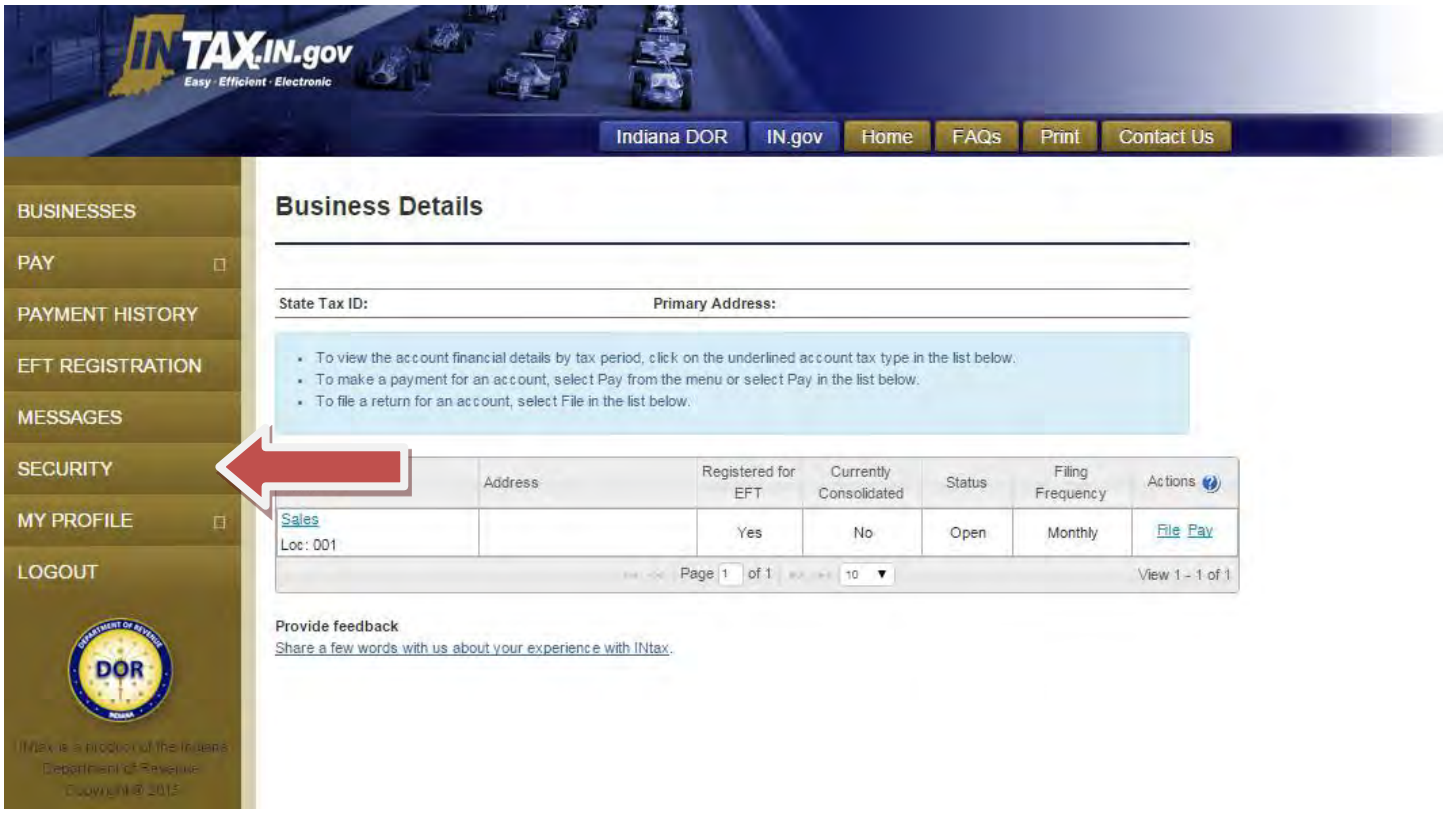
# Manage users

From the Security page, you can add and delete users and manage their security rights to the account.

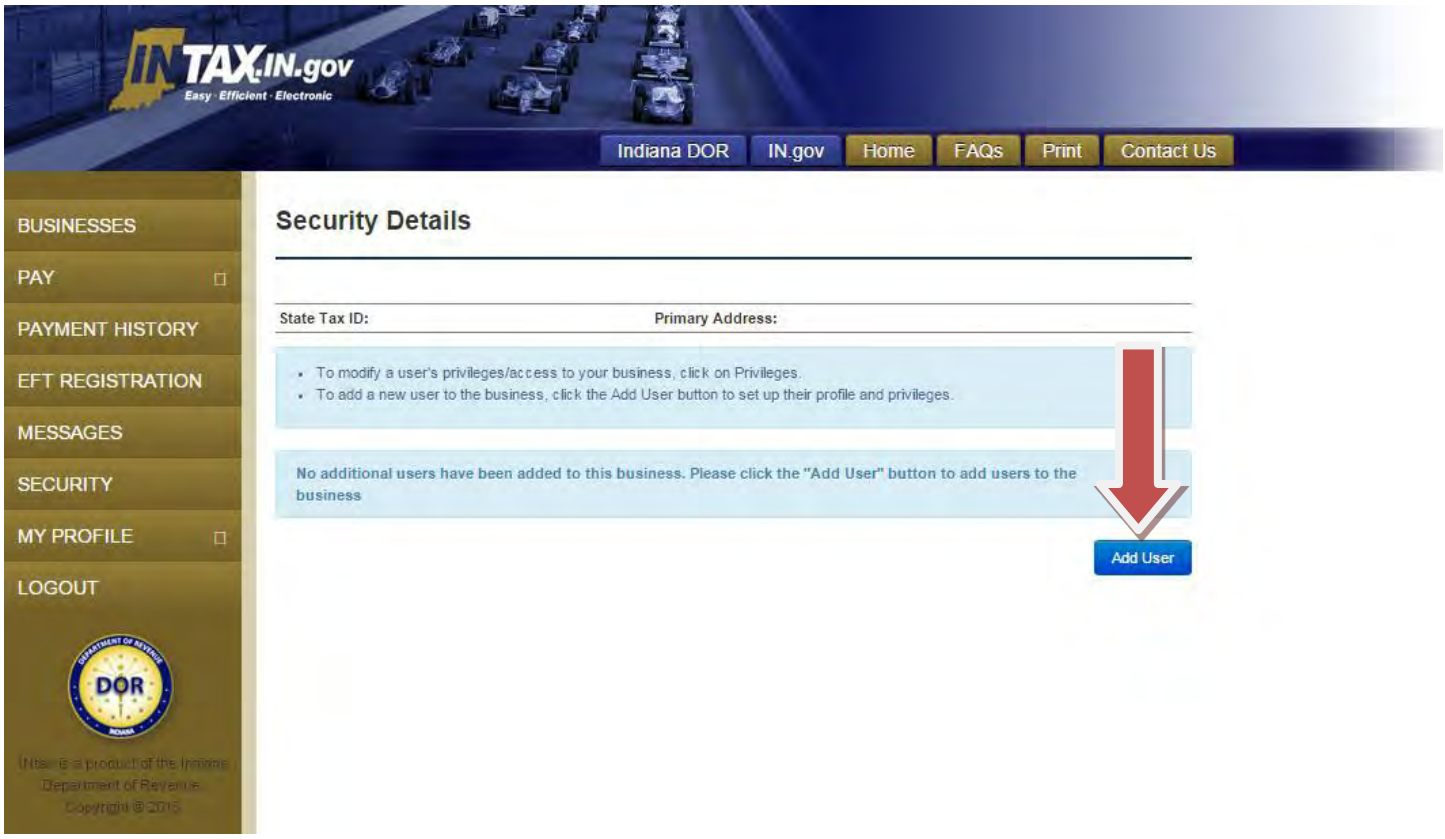
## *Add a user*

To add a user, follow these steps:

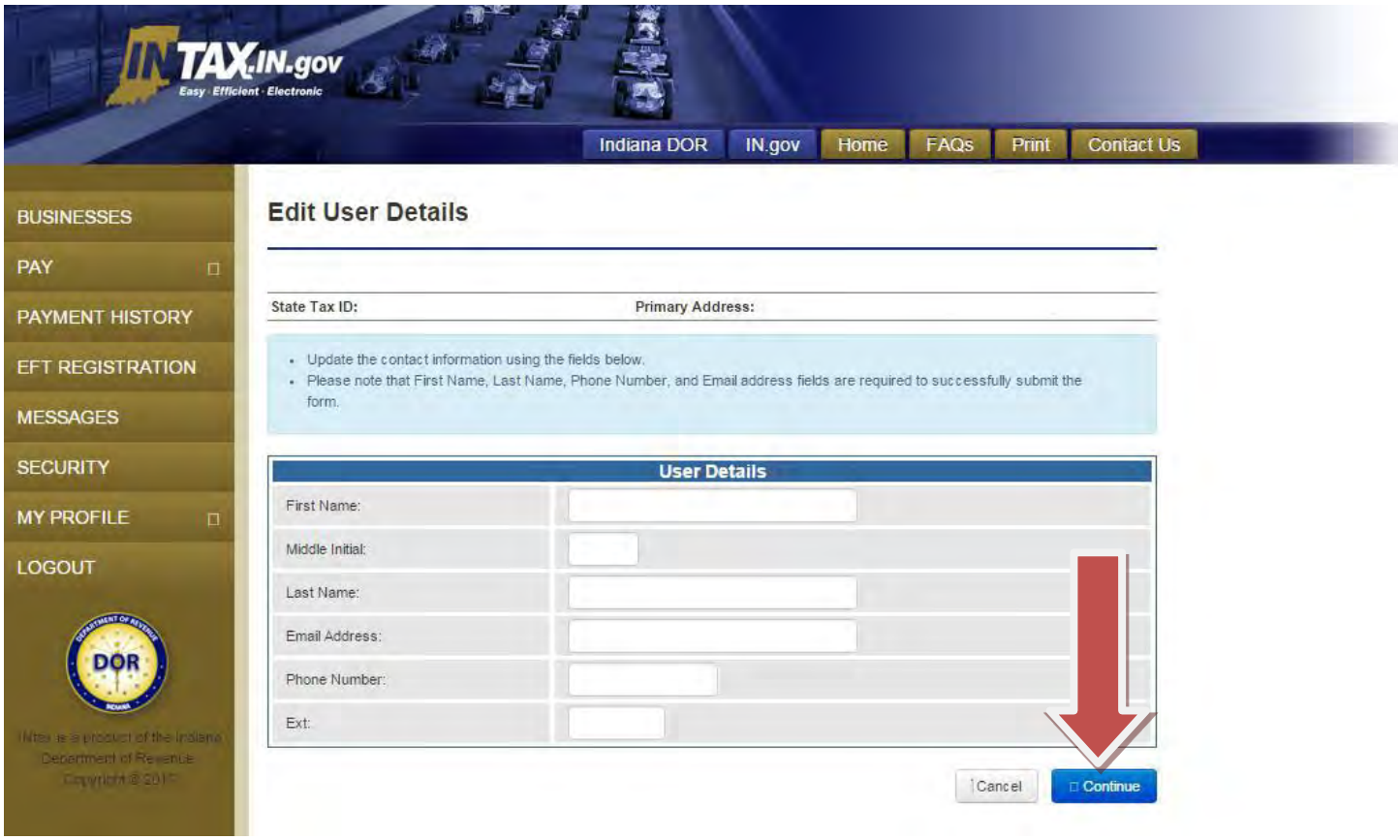
**Step 1:** From any page in INtax, select **Security**.



**Step 2:** Select **Add User**.



**Step 3:** Enter the first name, last name, email address, and contact phone number of the user you wish to add. Select **Continue**.

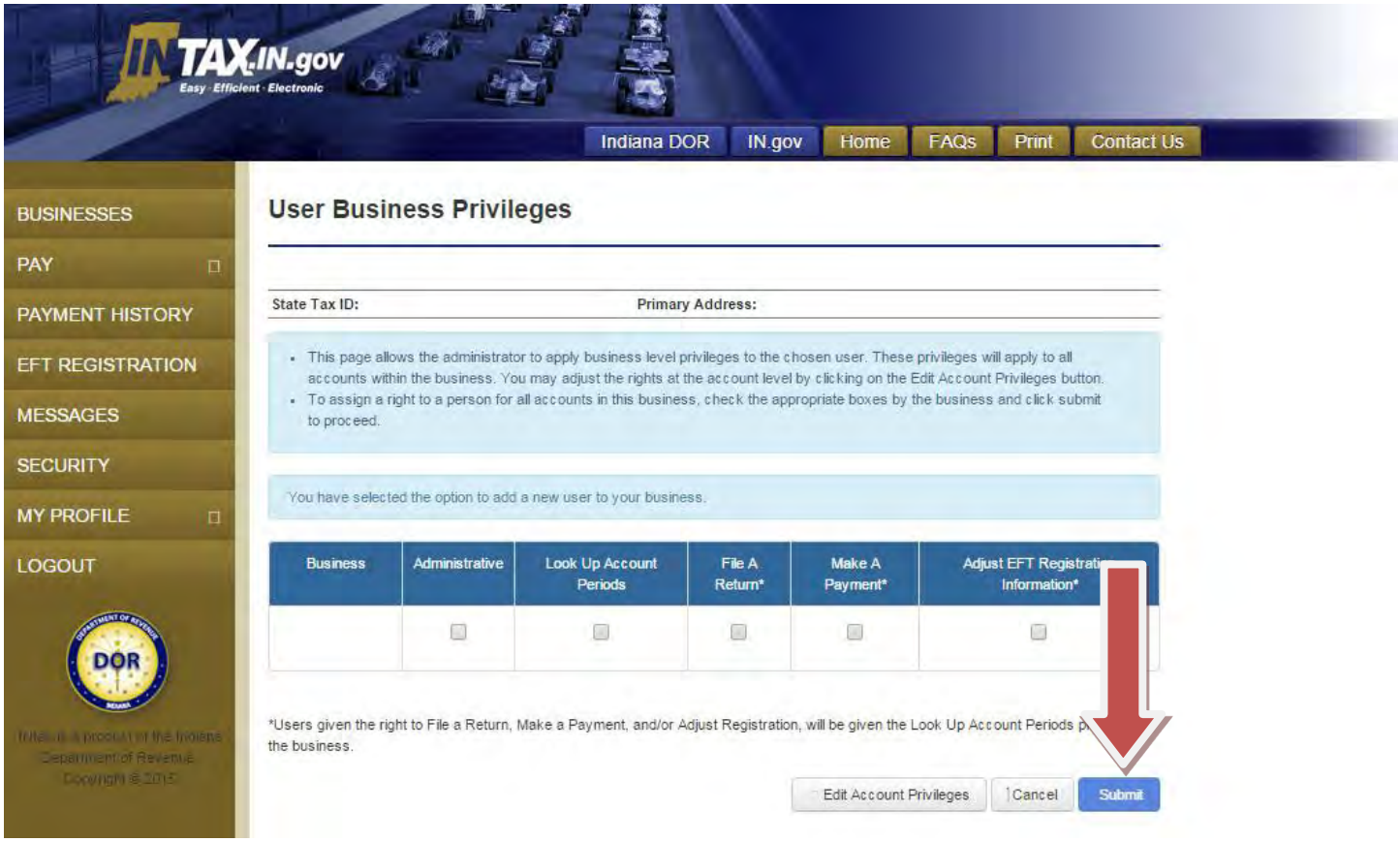


**Step 4:** You are able to set specific business level privileges for the user by checking the boxes below.

Select administrative to grant the user complete access. Administrative level privileges include the ability to use INtax as if the user is the business owner, which allows the user to change access for other users.

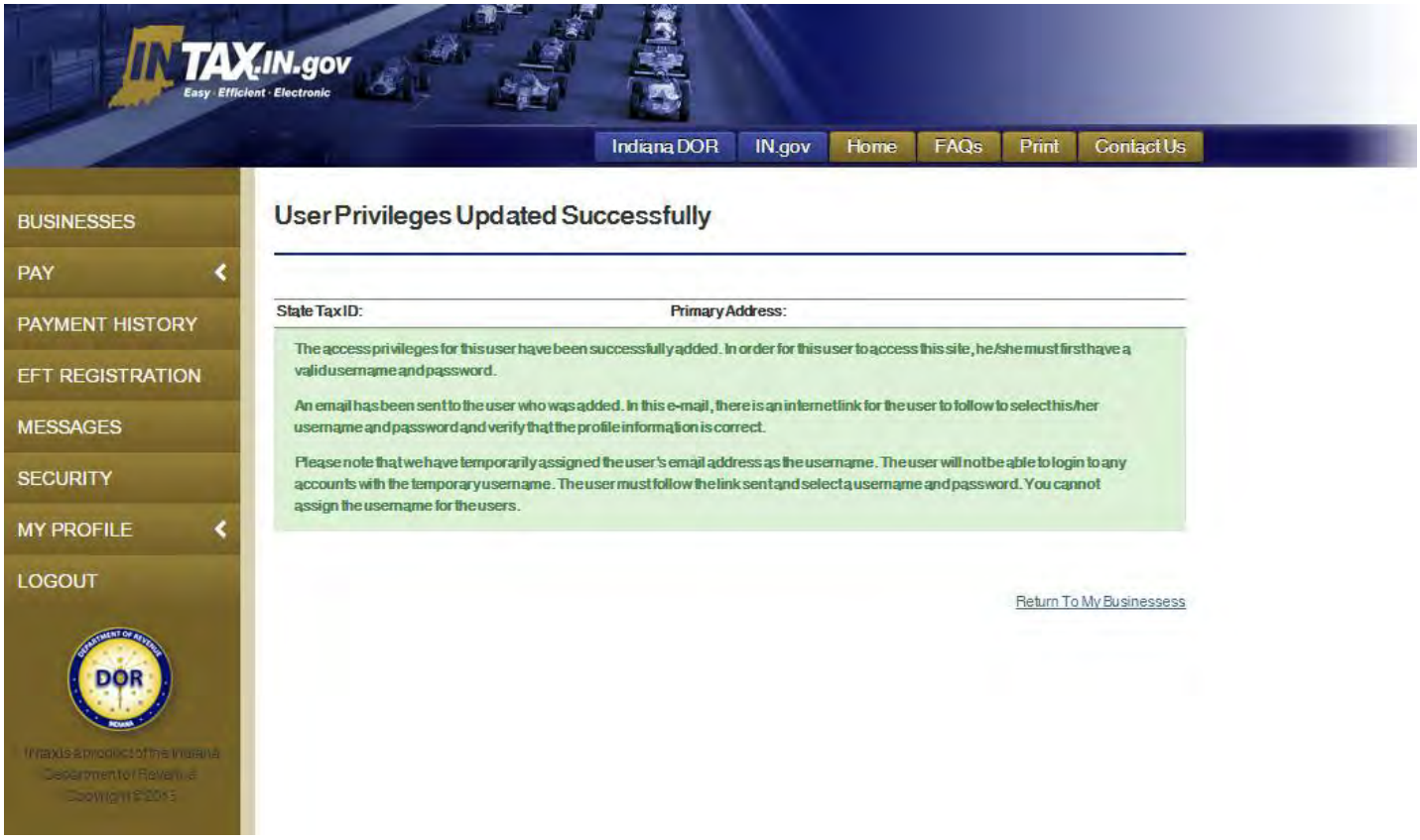
Users assigned the right to file a return, make a payment, or adjust EFT registration also are assigned the right to look up account periods for your business account.

Once you have assigned the appropriate business level privileges to the user, select **Submit.**



**Step 5:** The next page confirms the user has been added.

INtax sends the newly added user an email containing a link, which allows the new user to access INtax to select his or her own username and password.

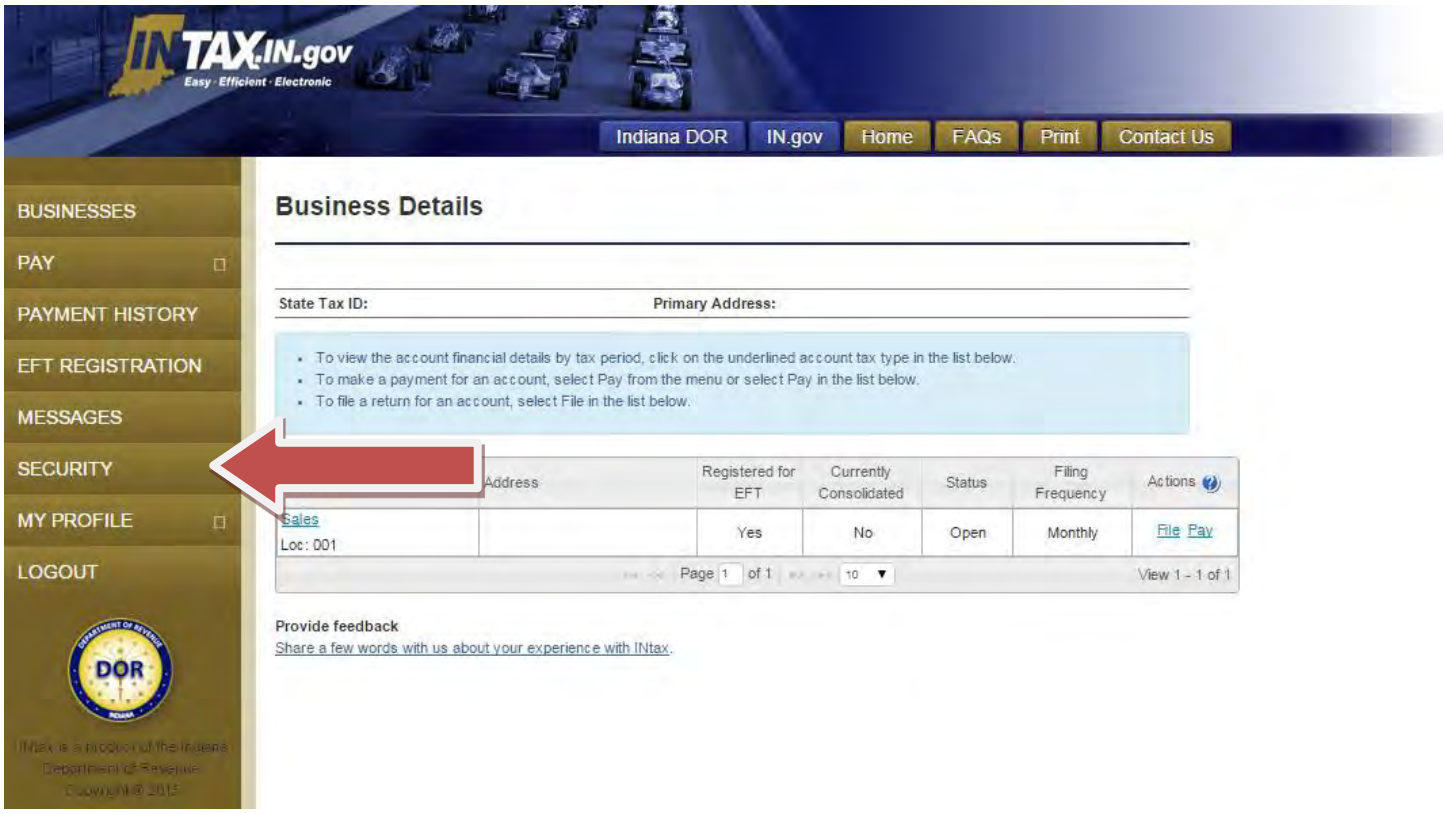


## *Adjust a user's privileges*

Note: At any time, an administrative user can adjust the business level privileges of other users.

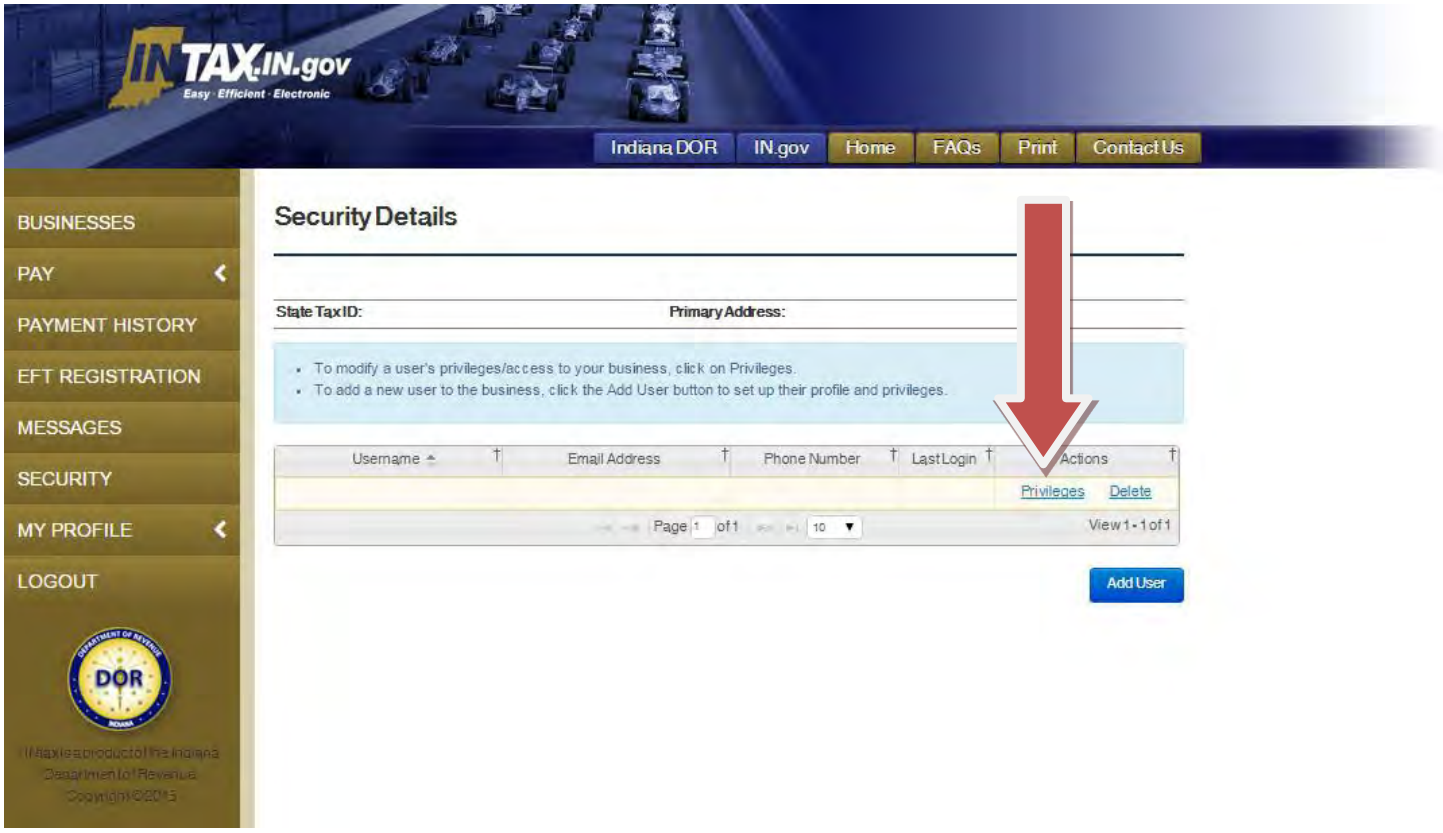
To adjust a user's rights, follow these steps:

**Step 1:** Select **Security**.

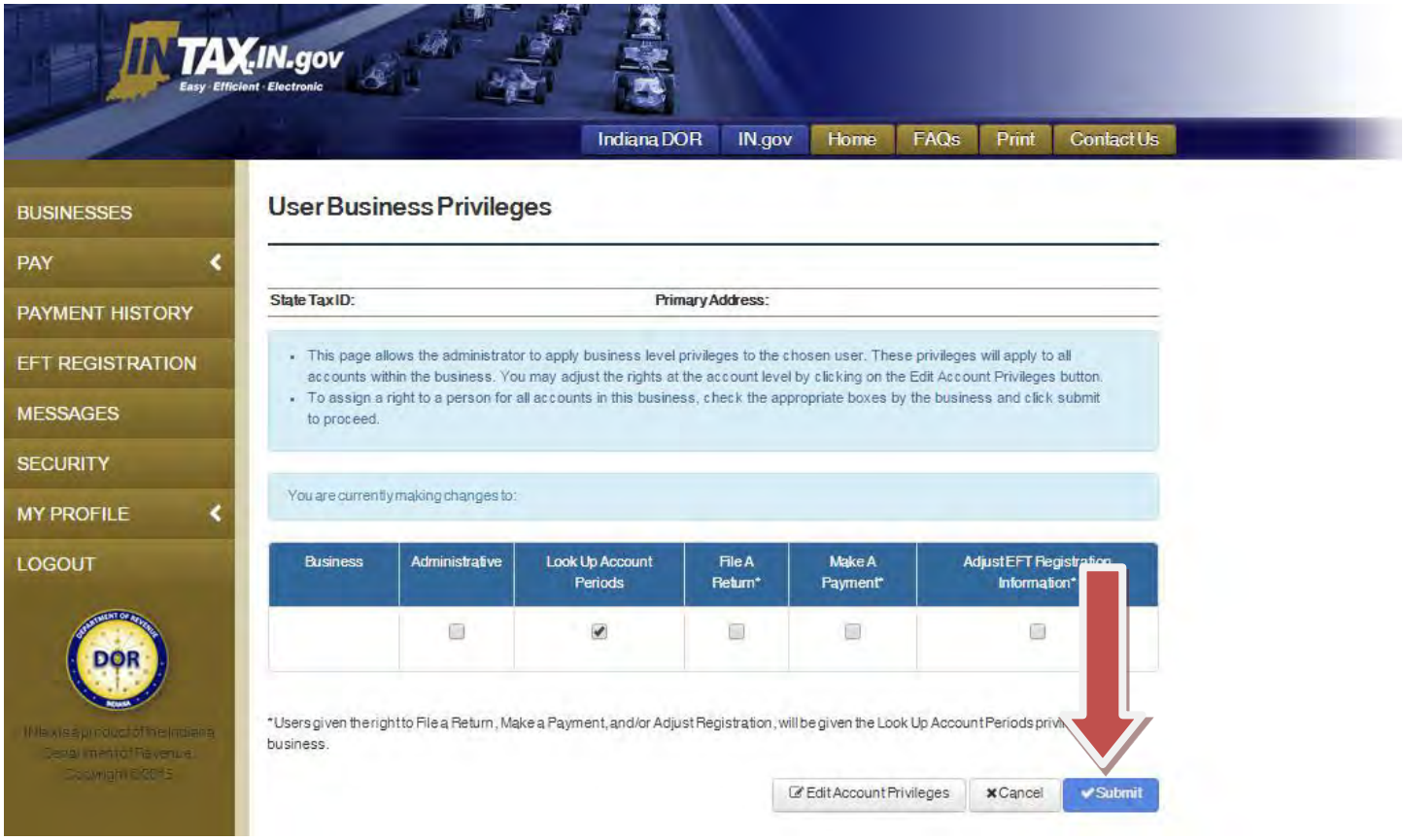


**Step 2:** Select **Privileges** of the user account for which you want to change privileges.

*Note: You also may delete the user from the Security Details page.*



**Step 3:** From the User Business Privileges page, you can change a user's privileges. Once the desired privileges have been assigned, select **Submit** to complete the process.

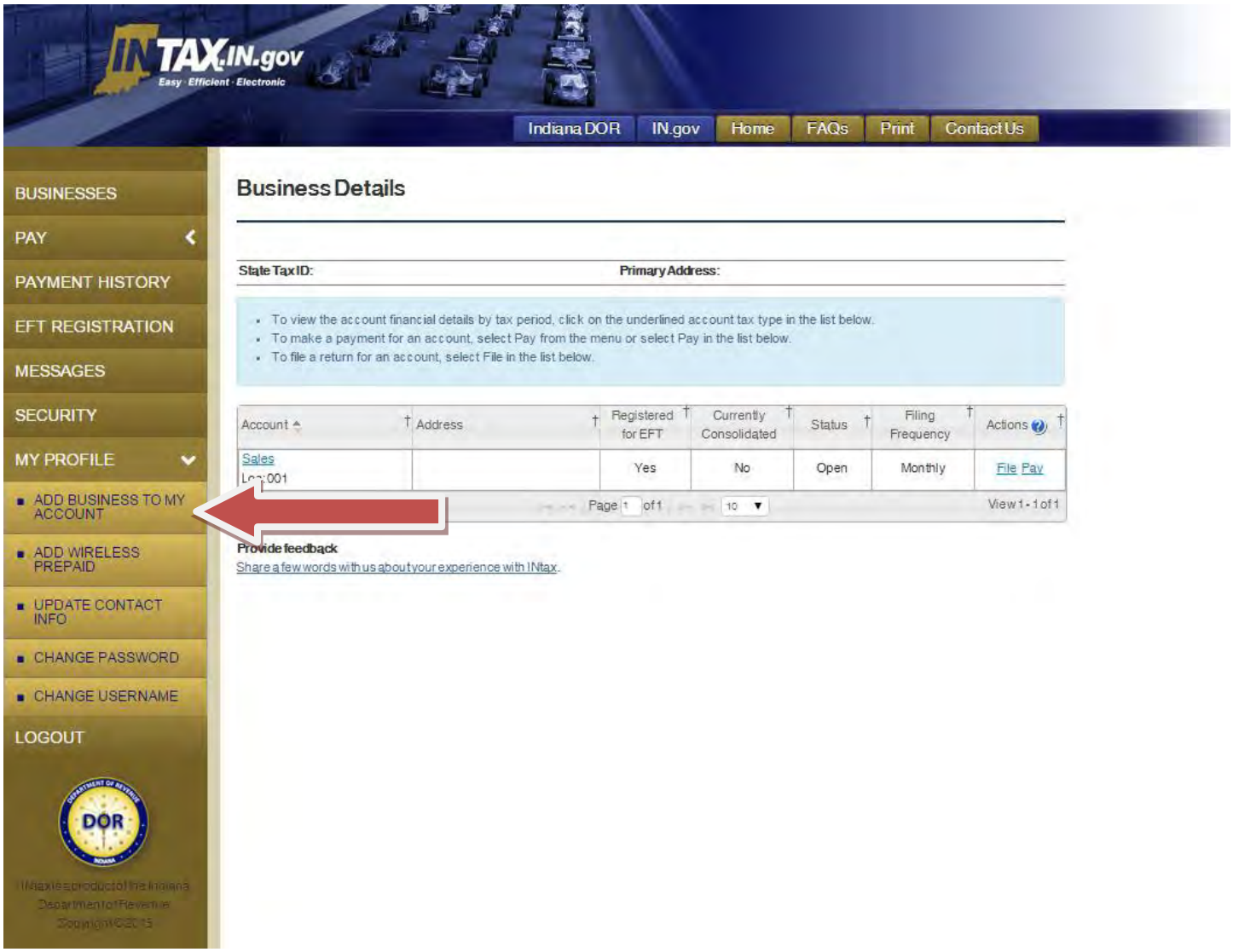


# Add a business

If you have more than one business, you can add more businesses to your INtax profile. To do so, follow these steps:

*Note: If you are a tax professional managing taxes for a client, please see the Tax Professionals Guide at [www.in.gov/dor/4336.htm](www.in.gov/dor/4336.htm).*

**Step 1:** Select **My Profile**, then **Add a Business to My Account**.



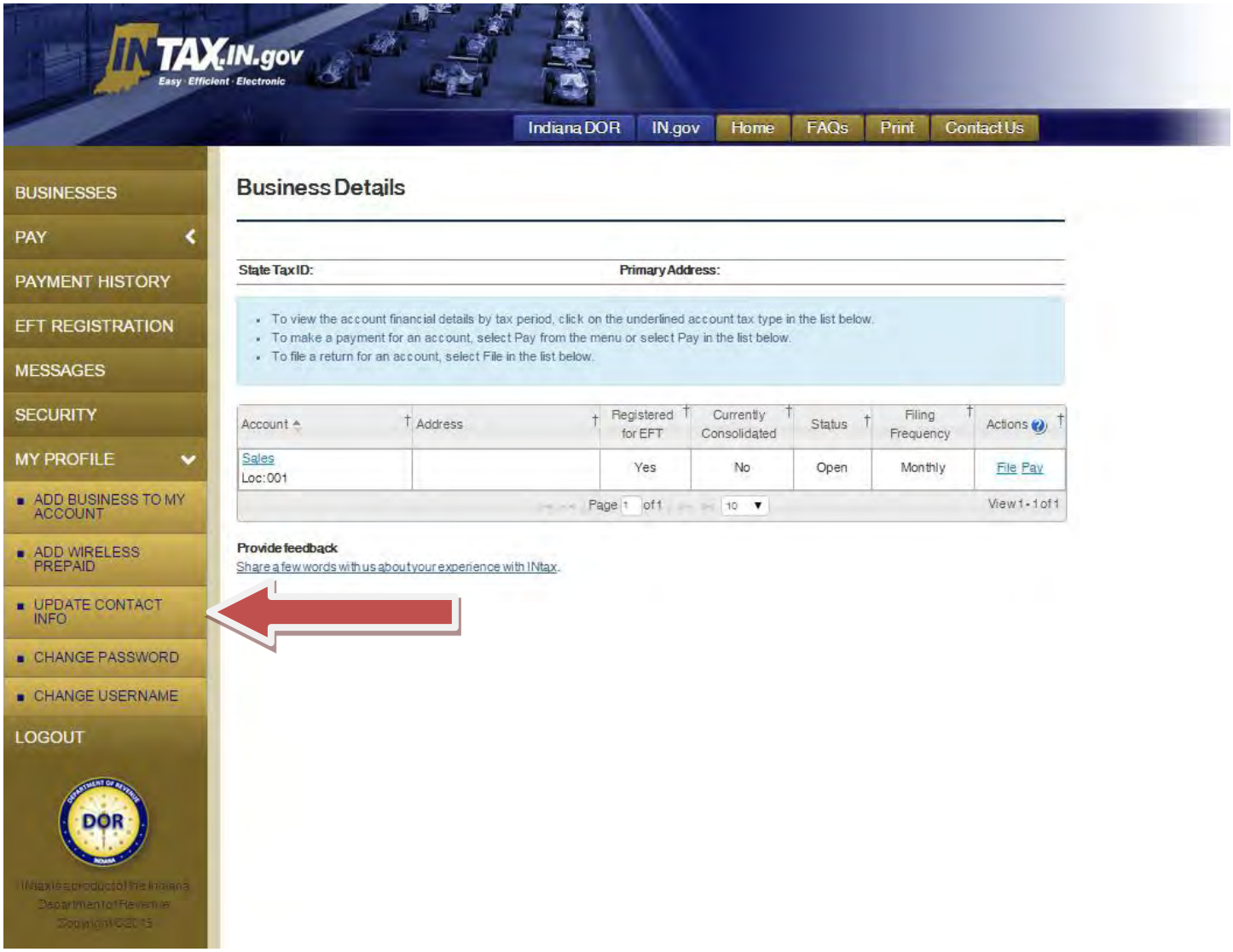

**Step 2:** You must complete the registration process for each business you wish to add to your account by answering the questions and verifying the account information. After you submit the information about your additional business, the department will verify the information. Once the information has been verified, the business appears on your Business Details page.

# Update contact information

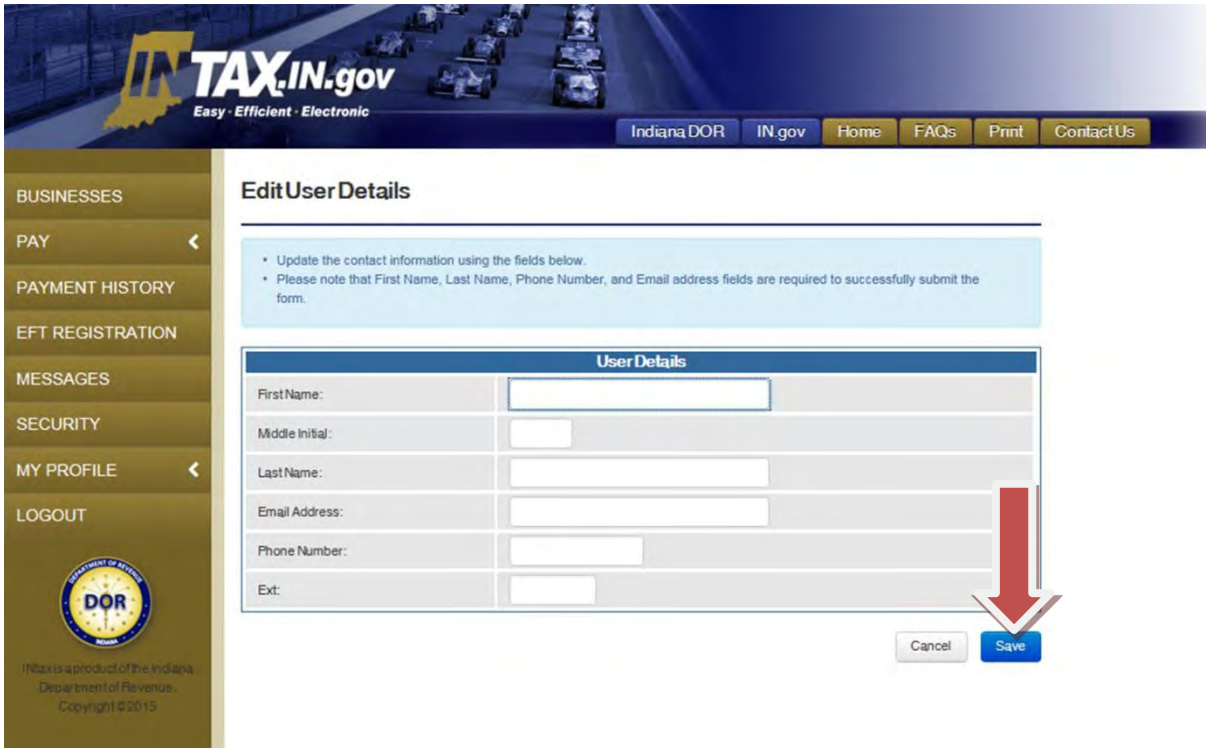
*Note: If the address listed in your INtax User Profile is not correct, send a message to the department using the INtax Message Center.*

To update your phone number, email address, or other contact information, follow these steps:

**Step 1:** Select **My Profile,** then **Update Contact Info.**



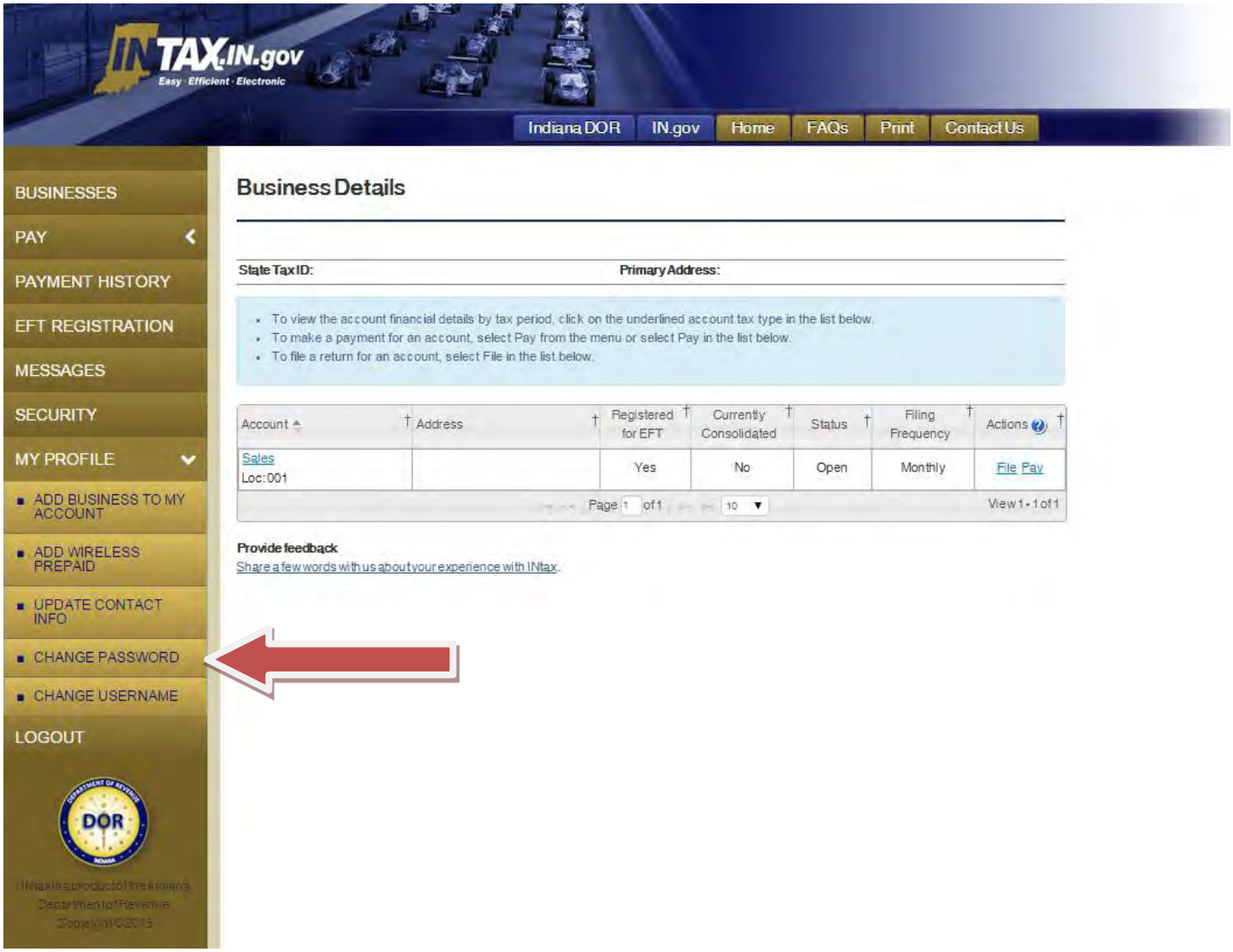
**Step 2:** Change the name, phone number, and email address associated with your INtax profile as desired. After you have made your changes, select **Save.**



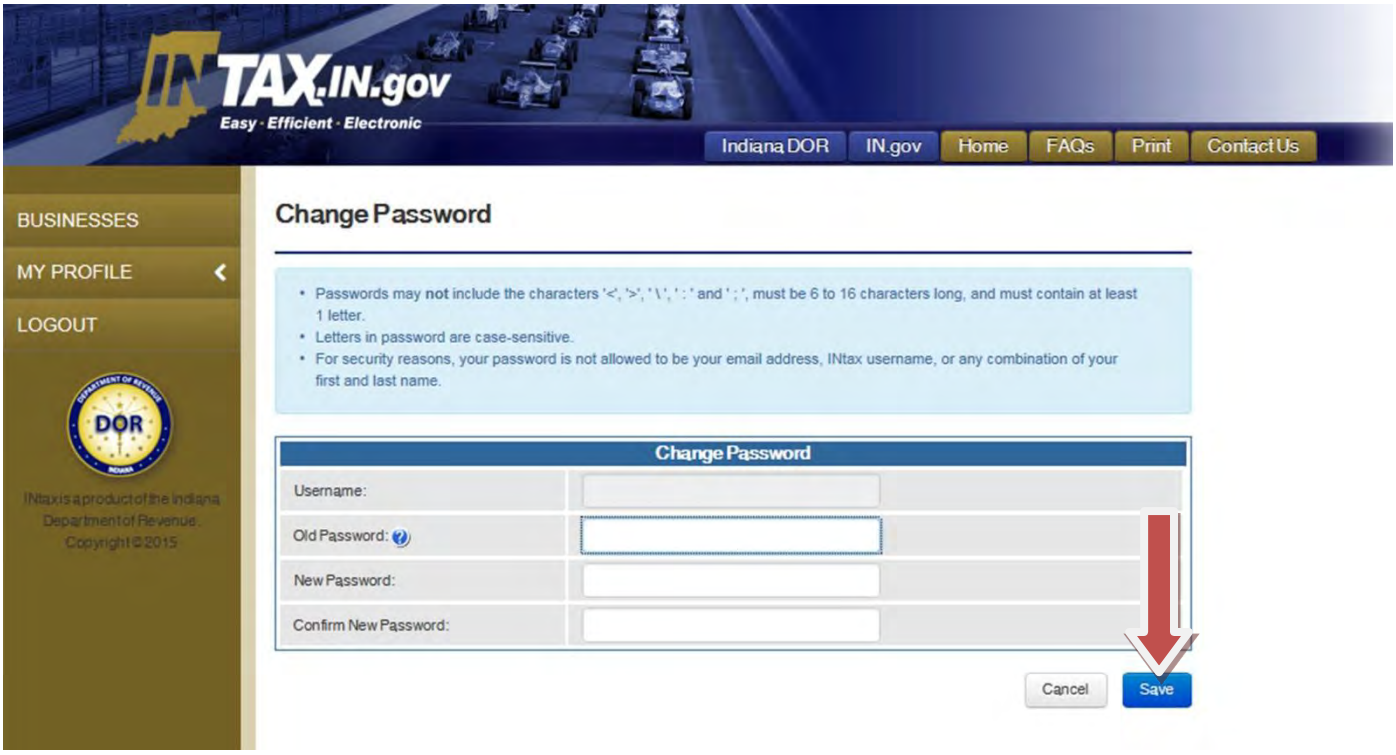
# Change password

To change your INtax password, complete the following steps:

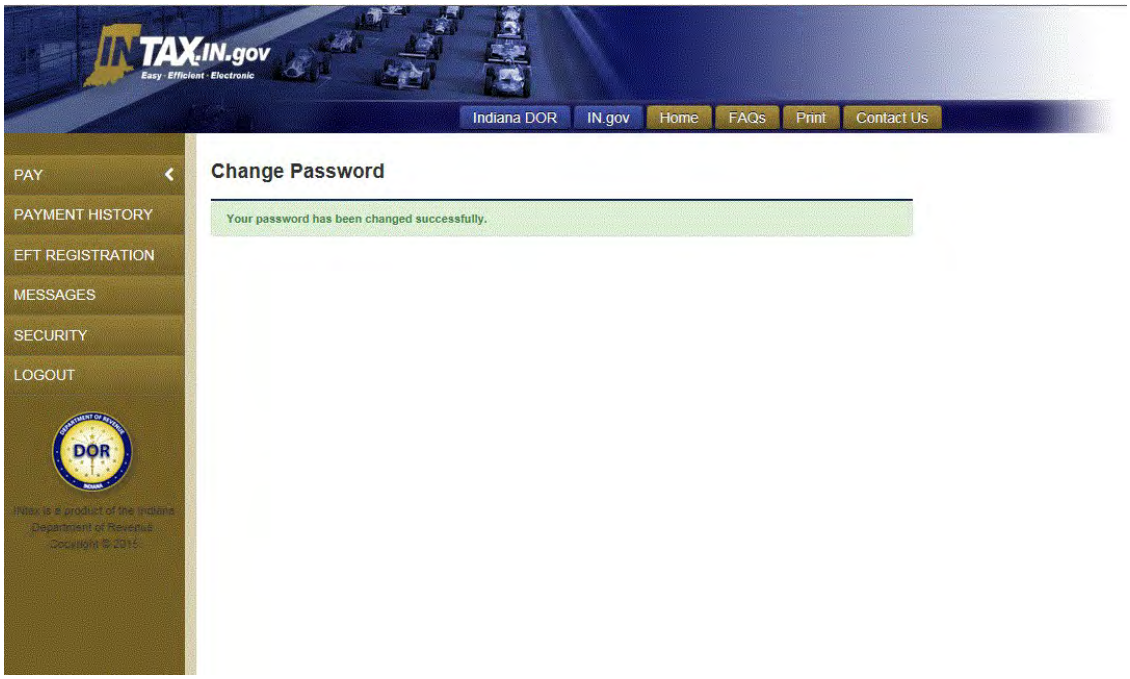
**Step 1:** Select **My Profile,** then **Change Password**.



**Step 2:** Enter your current password in the Old Password field**.** In the New Password field**,** enter the new password you would like to use. Reenter the new password in the Confirm Password field to confirm it is typed correctly. Once you have completed these steps, select **Save.**



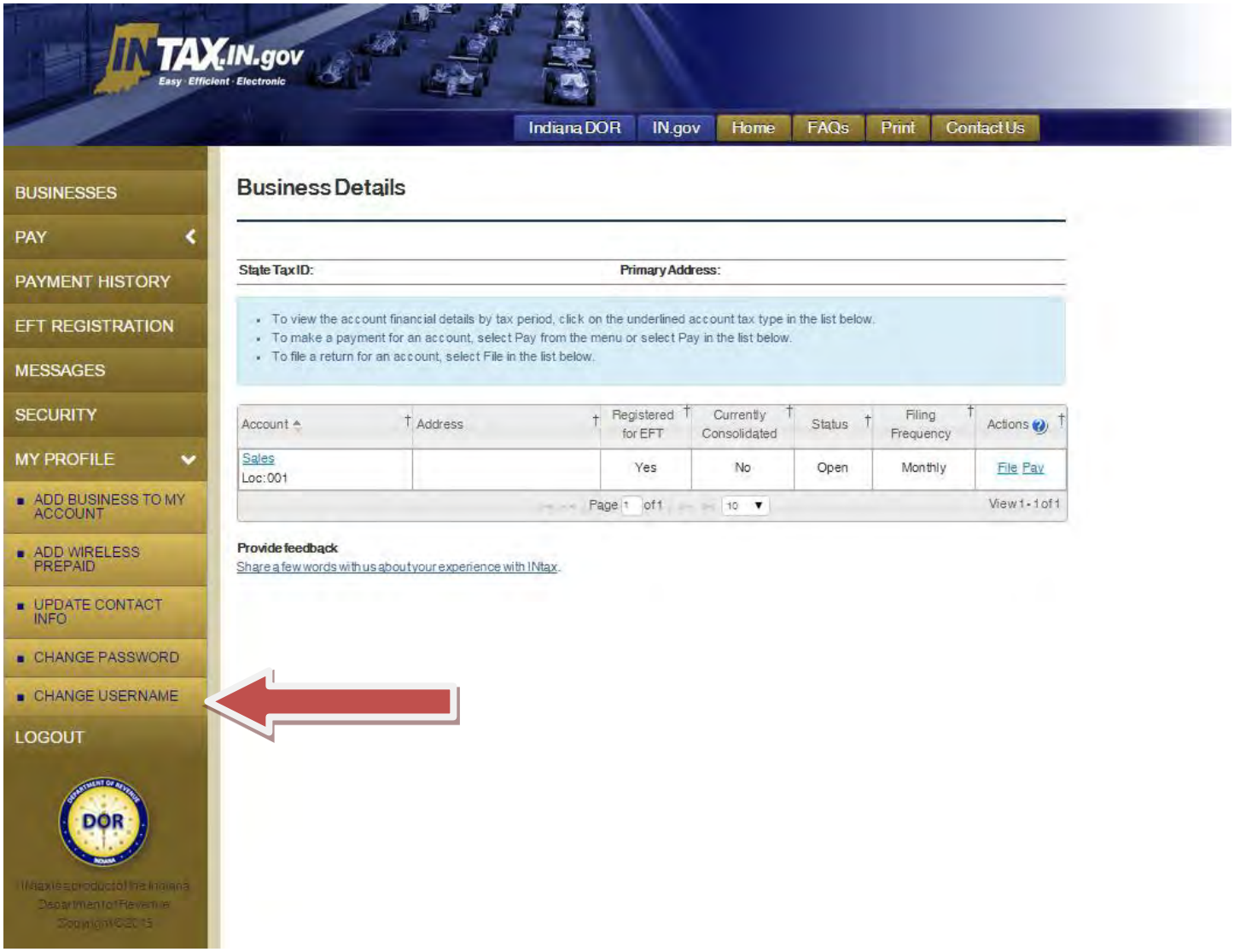

The next page confirms your password change is successful.



# Change username

If you want to change your username, complete the following steps:

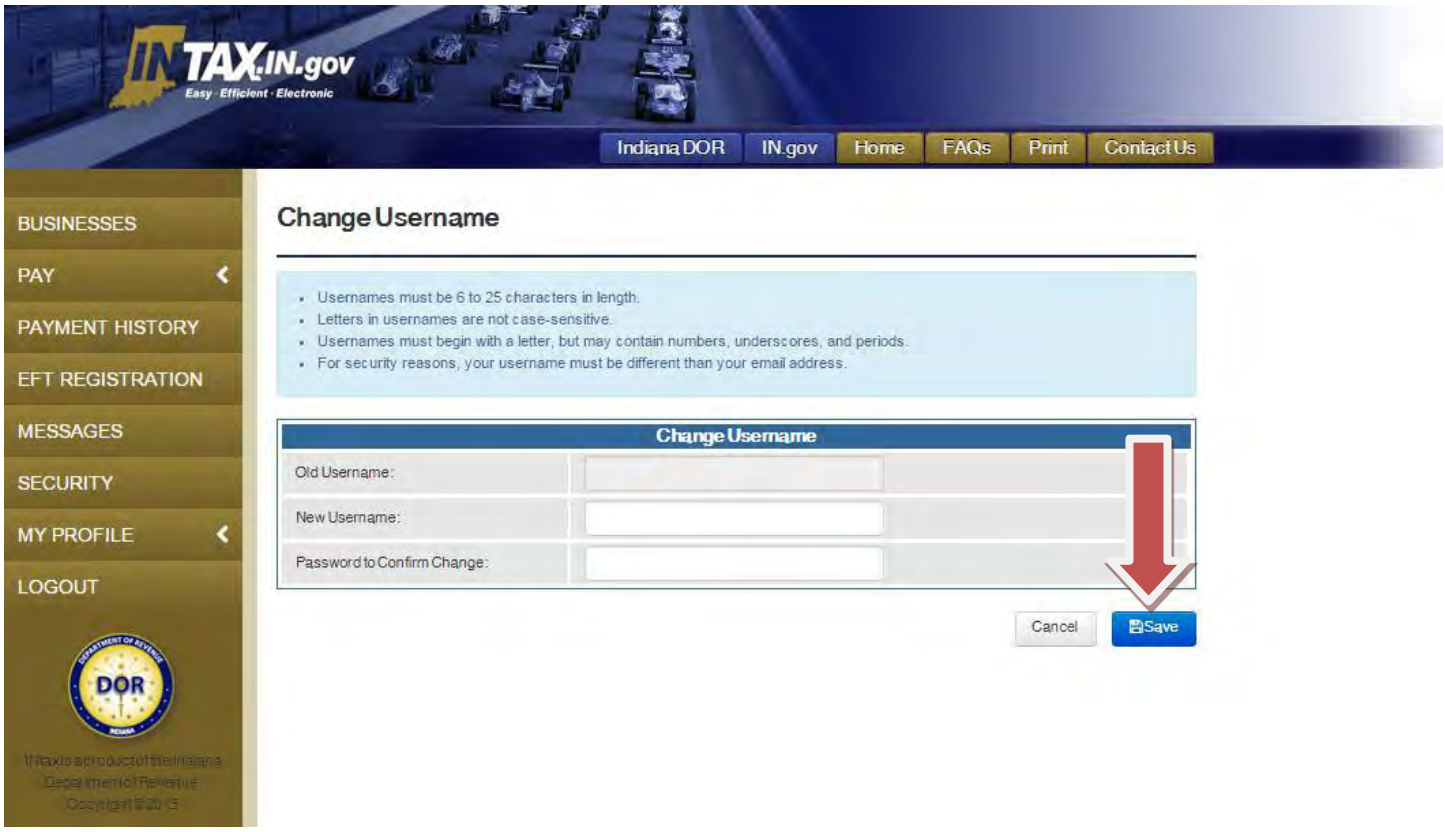
**Step 1:** Select **My Profile,** then **Change Username**.



**Step 2:** Your current username is displayed. Enter the new username you have chosen in the New Username field.

*Note: If you select a username that is already in use, you will be prompted to enter a different username.*

To confirm the change, enter your current password in the Password to Confirm Change field. Once you've completed these steps, select **Save.** The next page confirms your username change is successful.



# Additional information

- *Filing Frequency Status Change*: The department reviews taxpayer accounts annually. Based on these reviews, your filing frequency status might change, which can affect your due dates. To avoid penalty and interest, please review the due dates on your returns.

- *Closing a Business*: To close a business, you must complete Form BC-100. Form BC-100 is available at www.in.gov/dor/tax-forms/business-tax-forms, or you can call the department at (317) 615-2581 to have one mailed to you.

- *Incorrect Information*: If you need to update your contact information, select **My Profile**, and then select **Update Contact Info.** Make the necessary changes, then select **Save.** If the address listed in your INtax User Profile is not correct, send a message to the department using the INtax Message Center. Select **Messages**, and then select **Compose Message.** Be sure to include the TID number of the account to be changed and the correct address.

- *No Tax Is Due*: You must file a return even when you have no tax due, unless your account has been closed. If you do not file a return, the department will issue a tax bill based on the best information available.

- *Due Date*: If the due date on your return falls on a weekend or legal holiday, your payment and return are due on the next business day. For a list of state holidays, visit www.in.gov/spd/2555.htm.

- *FAQs*: The **FAQs** link at the top of the page provides answers to common questions. If you don't find the information you need and still have a question, you can select the **Messages** link from the left menu navigation to submit a question to the department.

- *INtax Phone Line*: If you have a specific question not addressed in the FAQs, guides, or video tutorial, call the INtax phone line at (317) 232-2240.