



# INTIME for Individual Income Tax Customers

## User Guide



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# Welcome to INTIME for Individual income tax customers

The Indiana Department of Revenue's e-services portal, **INTIME** (Indiana Taxpayer Information Management Engine), offers customers the ability to manage their Individual income tax accounts in one convenient location, 24/7. This includes viewing refund amounts, making payments, setting up payment plans, and securely messaging DOR customer service.



This guide walks through creating an INTIME account and many of the tools available.

[Create a login](#) to take full advantage.

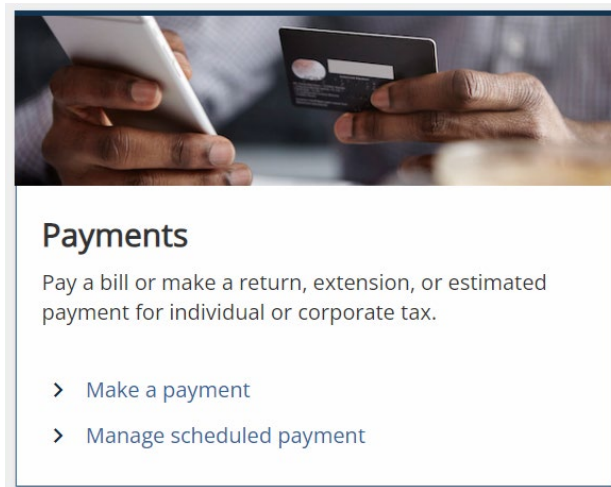
<b>Function</b>	<b>With Login</b>	<b>Without Login</b>
Bank and credit/debit payments	Yes	Yes
Change legal name and address	Yes	No
Check refund status	Yes	Yes
Filing extension request	Yes	Yes
Messaging with Customer Service	Yes	No
Payment plans	Yes	No
Request return transcripts	Yes	No
View electronic versions of official DOR letters	Yes	No
View payment history	Yes	No

# You can pay without a login

Various types of payments can be made **without** signing in to [INTIME](#) by locating the “Payments” panel on the landing page and selecting “Make a payment.”

- Non-bill payments (estimated and tax return payments)
- Bill payments
- Payment plan payments

Electronic payments can be made securely using a bank account (no fee) or credit/debit card (Discover, Mastercard, and VISA) (fee).



## Non-bill payments (estimated and tax return payments)

Non-bill payments that can be made without logging in include [estimated and tax return payments](#).

## Bill payments

Instructions on [making tax bill payments are available](#).

## Payment plan payments

Instructions on [making payment plan payments](#) are available.

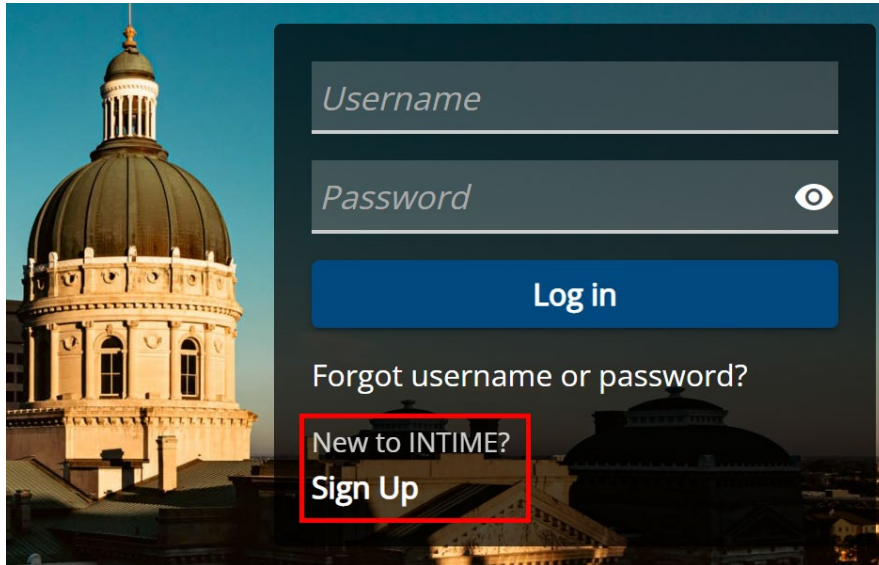
Customers who [establish a payment plan](#) with a DOR customer service representative receive vouchers to make payments using INTIME without logging in.

# Create an INTIME login for full access

Instructions on how to [Create an INTIME Login](#) are available.

Individual income tax customers need the following information to set up their INTIME account:

- Name and ID: Social Security Number (SSN) or Individual Tax Identification Number (ITIN) **and**
- Letter from DOR containing the unique Letter ID (upper-right hand corner) **or**
- Most recent return refund amount **or**
- Most recent specific line-item amount



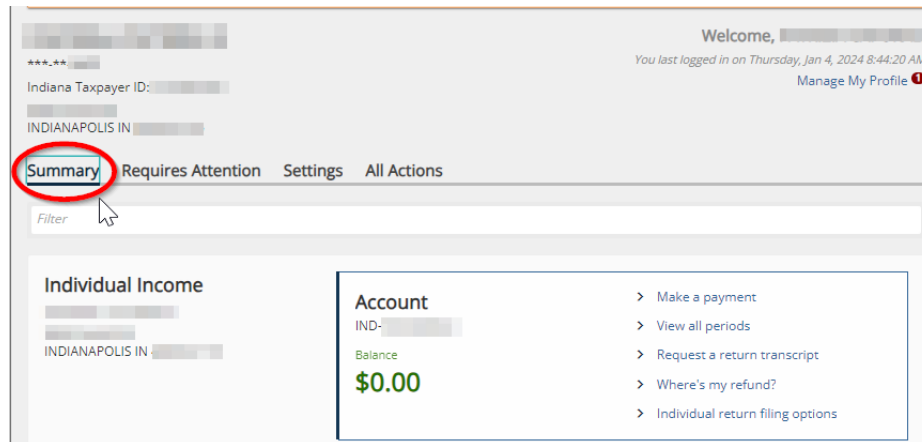
## Two-factor authentication

INTIME uses two-factor authentication each time customers log in. Verification codes are sent by email, text message (standard rates apply), or authenticator application.

Once verified, customers are logged in and begin at their account "Summary" tab.

# Account summary

Log in to access account information from the "Summary" tab, which includes balance due and some key actions.



## Make a payment

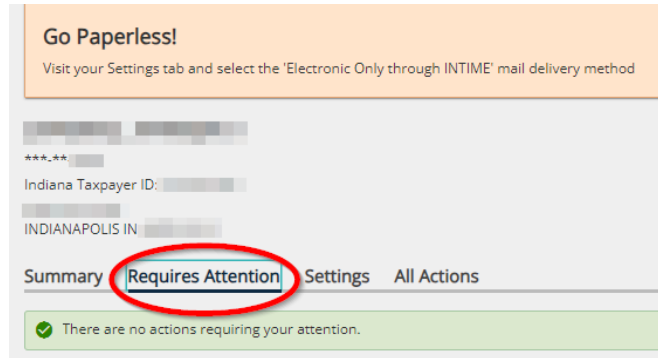
1. Select "Make a payment" and then a payment method: bank (no fee) or credit/debit card (fee)
2. Credit/debit payments: fee: \$1 plus 1.99% of the total payment (Discover, Mastercard, VISA)
3. Schedule estimated payment dates on or before the due date for the intended quarter
4. Select return payment period and payment date
5. Once payment is confirmed, a save and print friendly message will be available

## Request a return transcript

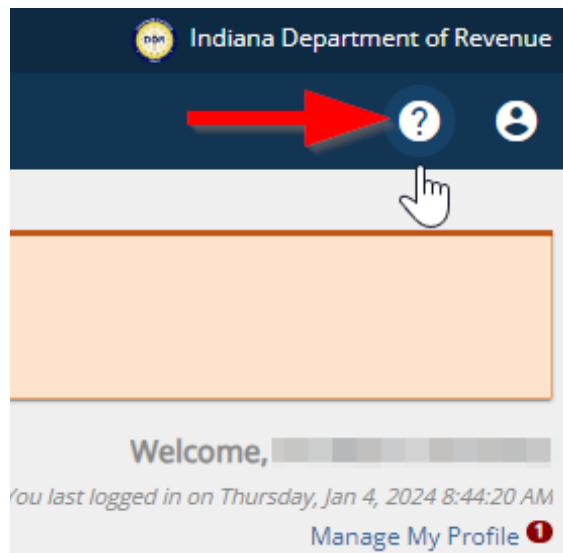
1. Select "Request a return transcript"
2. Use the drop-down menu to choose a filing period
3. Select "Next" to generate a PDF
4. Select "Submit" to complete the request and receive submission confirmation
5. Transcripts are accessed from the home screen by selecting "All Actions" and then "View letters." They can be accessed at any time.

# Requires attention

When something requires a customer's attention, it appears in the "Requires Attention" tab with a red circle and number indicating the quantity of notifications.

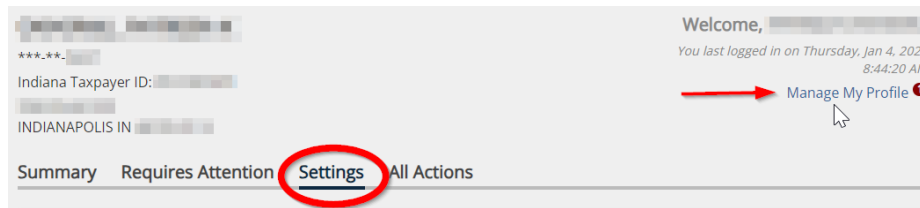


The question mark icon ("?") in the top-right corner links to DOR contact information for getting help resolving issues. It also allows customers to view Support IDs, which are referenced when contacting DOR with questions.



# Settings

Both profile and account settings are available from the “Settings” tab.



To make changes to a profile, select “Manage My Profile” and then “Profile” or the “More...” tab. Options include:

## Managing account access

Account security settings [grant and revoke access](#) to a tax practitioner or user to make payments and/or view an account for any period, from a specific date, or within a date range.

## Mail delivery options (go paperless)

Customers can choose to receive only paperless correspondence from DOR or get physical mail in addition to electronic delivery to their INTIME account.

## Email notifications

Customers can choose to turn their INTIME email notifications on or off.

## Default bank account

Customers can add multiple bank accounts and select a default bank account to make payments or receive direct deposit of refunds.



# All Actions

Customers can perform a number of tasks located in the “All Actions” tab.

Summary Requires Attention Settings **All Actions**

Q Search our online services

<p> <b>Letters</b></p> <p>View all letters you've received from the agency.</p> <ul style="list-style-type: none"><li>&gt; View letters</li><li>&gt; Respond to a letter, notice, or bill</li></ul>	<p> <b>Messages</b></p> <p>View all messages you've received from the agency.</p> <ul style="list-style-type: none"><li>&gt; Send a message</li><li>&gt; View messages</li></ul>	<p> <b>Payment plan</b></p> <p>Manage payment plans for all accounts.</p> <ul style="list-style-type: none"><li>&gt; View all payment plans</li><li>&gt; Add a payment plan</li><li>&gt; Cancel a payment plan</li></ul>
<p> <b>Where's my refund?</b></p> <p>Request the status of your individual income tax return refund.</p> <ul style="list-style-type: none"><li>&gt; Where's my refund?</li></ul>	<p> <b>Names &amp; addresses</b></p> <p>View or update names and addresses associated to this customer.</p> <ul style="list-style-type: none"><li>&gt; Manage names &amp; addresses</li></ul>	<p> <b>Power of attorney</b></p> <p>Request power of attorney access.</p> <ul style="list-style-type: none"><li>&gt; Request POA access</li></ul>
<p> <b>Manage account access</b></p> <p>Manage access for additional users or manage access that third party preparers have to your account.</p> <ul style="list-style-type: none"><li>&gt; Manage access</li></ul>	<p> <b>Submissions</b></p> <p>Check the status of a previous INTIME return, payment, or submission or view past submissions.</p> <ul style="list-style-type: none"><li>&gt; Search submissions</li></ul>	<p> <b>Tax account registration</b></p> <p>Register, renew or close a location or tax account.</p> <ul style="list-style-type: none"><li>&gt; Register or renew a tax account</li></ul>
<p> <b>Refund for tax on purchases</b></p> <p>Request a refund for Indiana tax that you have paid on purchases.</p> <ul style="list-style-type: none"><li>&gt; Submit a refund request on purchases</li><li>&gt; Submit a fuel tax refund claim</li></ul>	<p> <b>ST-200 application</b></p> <p>Apply for a sales tax exemption on your purchase of metered utilities or telecommunication services.</p> <ul style="list-style-type: none"><li>&gt; Apply for an exemption</li></ul>	<p> <b>How to file an individual return</b></p> <p>DOR is unable to accept and process your Indiana individual tax return through INTIME. Send your completed return, including all schedules and wage statements to the address at the bottom of your return.</p> <ul style="list-style-type: none"><li>&gt; Instructions for individual return filing</li></ul>
<p> <b>Legal protests</b></p> <p>Protest a notice of proposed assessment or refund denial.</p> <ul style="list-style-type: none"><li>&gt; Submit Protest Documentation</li></ul>		

# Letters

Letters, notices and bills sent to customers from DOR can be accessed from the “All Actions” tab by locating the “Letters” panel.

## Respond to a letter, notice or bill

To respond to DOR, select “View letters.”

1. From the “Inbox” tab, select any item in the “Type” column to open it
2. Enter the letter ID
3. Customers can respond and upload supporting documentation if needed
4. Follow the prompts to respond. Submission confirmation will be displayed.

# Messages

A customer can read and respond to messages or send a new message to Customer Service in the “Messages” panel under the “All Actions” tab.

When creating a new message, INTIME will ask for specific information to get the message to the appropriate person. An email alert is sent when DOR responds to a message.

Customers have access to an inbox, outbox, archive and search function.

# Payment plans

## Setting up a payment plan

DOR offers several ways to set up a payment plan, but the easiest and most efficient option is via INTIME. It offers the added convenience of scheduling automatic recurring payments, ensuring they are made on time, and eliminating the need for vouchers.

Detailed instructions for [setting up a payment plan using INTIME](#) are available.

## Make a payment on your payment plan

Customers can schedule automatic recurring payments, ensuring that they are made on time and eliminating the need for vouchers.

Customers who establish a payment plan with a DOR customer service representative outside of INTIME receive payment plan vouchers to make payments. Voucher Letter IDs are used to make a payment via INTIME without the customer needing an account or to be logged in.

Detailed instructions for [making a payment on a payment plan](#) are available.

## Cancel a payment plan

Customers can cancel an existing payment plan by selecting the corresponding checkbox in the “Cancel Plan” column. Customers should read the warning message before canceling their plan.

## View all returns and periods

Customers can access their return and payment history from any period.

## Where is my refund?

Customers can check the status of their refund without logging in or creating an account. Select “Where’s my Refund?” on the INTIME homepage to get started or log in and find the same option under “All Actions.”

Select and enter an ID type, the desired tax year, and the expected estimated refund amount. Then select “Search.”

The screenshot shows a web form titled "Where's my refund?". At the top left, it says "< SAMPLE, JOHN". Below the title, there are three input fields: "ID" with radio buttons for "SSN" and "ITIN", "Tax year", and "Refund amount". Each field has a red asterisk and the word "Required" below it. To the right of the input fields is a section titled "Additional information" which contains a paragraph of text and a blue box with a list of instructions: "To request your refund status: • Select SSN or ITIN and enter your corresponding ID. • Enter the tax year you are requesting the refund status for. • Enter the refund amount from your individual tax return which can be found on either: • line 21 of your IT-40 Individual Income Tax Return Form. • line 21 of your IT-40PNR Part-Year or Full-Year Nonresident Individual Income Tax Return Form. • line 10 of your IT-40RNR Reciprocal Nonresident Individual Income Tax Return Form." At the bottom right of the form is a blue "Search" button.

Allow several weeks for your refund to be posted before contacting DOR.

If you believe you should have received your refund after several weeks and requested direct deposit, review your return and INTIME account information to confirm your bank account information was entered correctly or contact your bank to rule out an issue on their end before reaching out to DOR.

## Update names and addresses

Customers can select “Manage names & addresses” and use the Names and Addresses tabs to make updates to their tax account(s). Legal name changes are for DOR only; supporting documentation is required.

# Power of Attorney for tax practitioners

Detailed instructions are available for [Individual income tax customers](#) and [Tax Practitioners](#).

A customer can grant access to their INTIME account to a tax practitioner by having them request access from their own account. The customer gets an email to log in to INTIME to review and approve the request.

Access is granted on a user-level basis, so if multiple tax preparers within a firm request access, the customer will need to approve the access for each requestor.

If the customer wishes to revoke a tax practitioner's access to their account, this can be done in the "All Actions" tab by selecting the "Manage POA access" link.

## Manage account access

Select "Manage account access" on the "All Actions" tab to find the following options:

### Manage account access

Customers can manage their own access in the "Your access" panel to see the type and level of access they have for an account.

### Manage additional users

A customer can choose to grant or revoke access to their account, determine the level of access, and create a login for an additional user(s) from the "Account access" and follow the instructions. Select any added user to modify their access.

### Manage ePOA access

A customer can allow a tax professional to request access to their accounts. Detailed instructions are available for [Individual income tax customers](#) and [Tax Practitioners](#).

### Client revocation of tax practitioner ePOA

Customers can revoke their tax practitioner's access by going to the "All Actions" tab and then "Manage account access" panel to select the link in the "Manage POA access" panel.

### Tax Practitioner revocation of ePOA

Tax practitioners can revoke their own access from the client's INTIME account from their own account in the "Your access" panel.

# Tax account registration

Register another tax account in the "All Actions" tab and locate the "Tax account registration" panel.

## Submissions

Go to the "All Actions" tab and select "Submissions." Submissions are items that have been entered in INTIME for processing, like a payment or request for a return transcript.

1. Submitted items that have not yet been processed can be found on the "Pending" tab.
2. Completed/processed payments and other items appear on the "Processed" tab listed by date.

## Sole proprietor registration

1. From the home page, under "Registration," select "New tax registration"
2. Under "Business tax registration," select "Register a new business tax account"
3. Review the information, select next, and under Customer Type, select Sole Proprietor
4. Enter the NAICS ([North American Industry Classification System](#)) code specific to the sole proprietor. Enter a key word in the "Search" to help locate a code.
5. Choose the tax type(s) to register. The hyperlink next to each tax type provides information for each of them. Select "Next" and continue to follow the prompts to enter information for each tax type selected.

If registering for retail sales tax, DOR will issue a Registered Retail Merchant Certificate (RRMC), which is valid for two years. The RRMC registration fee is \$25 per sales location registered.

## Register an aircraft

1. When registering an aircraft, a number of selections will be offered during the registration process including the owner type, if the aircraft is owned by multiple owners and the mailing address that should be used for the account. Aircraft information, location and usage should be entered on the following screen.
2. Enter aircraft purchase or transfer information. A tax calculation screen will appear next.
3. Any attachments, bill of sale, Form AE-5 or other written evidence to support the purchase price of the aircraft should be uploaded by selecting "Add attachment."
4. A fee summary will include the registration fee, excise, and sales tax due with the option to make a payment and the payment method. Continue to follow the prompts to complete the payment process.

## Request a refund for tax purchases

1. Request a refund for tax on purchases from the "All Actions" tab and locate the "Request for tax on purchases" panel to select "Submit refund request."

2. If a customer is exempt from paying sales tax and has the documentation proving sales tax has been paid on exempt purchases, continue to use the submission to request a refund.  
Note: If a refund request is based on a prior sales tax filing, the prior return should be amended rather than submitting a request for a refund on purchases.
3. Enter claim information to explain why a refund is due and select the relevant tax type. Details must be entered about each period from which a customer wishes to claim a refund.
4. Attach supporting documentation for the refund request before proceeding. Each document attached will appear in the list.
5. Disclosure
6. Once the request has been submitted, a confirmation message will be displayed.

## ST-200 application

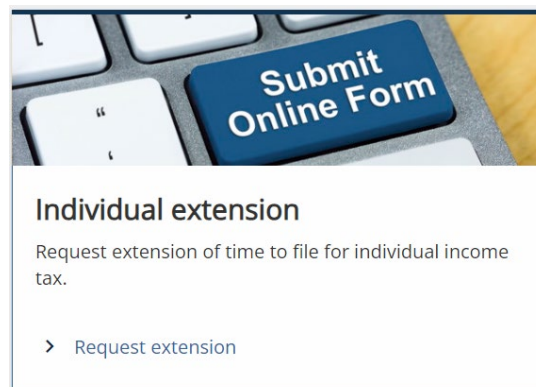
A customer can apply for a sales tax exception on a purchase of metered utilities or telecommunications services, if applicable, by going to the "All Actions" tab and locating the "ST-200 application" panel. Select the "Apply for an exemption" link and read the eligibility information before continuing. Follow the prompts to fill in the required information for mailing information, meter location information, customer information and utility company information.

## Extension of time to file

A request for an extension of time to file an Individual income tax return can be done only between January 1 and April 15. The INTIME landing page will display the "Individual extension" panel only during that period. Detailed instructions for [Requesting an Extension of Time to File via INTIME](#) are available.

While extension requests cannot be filed outside of that period of time, ([estimated](#)) payments can still be made.

Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at least 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.



## Incorrect contact information

If you need to update your INTIME contact information, select the user icon in the top right corner and then edit the contact information available on the screen.

To update legal name and address, go to the "All Actions" tab and the "Updating Name and Addresses" panel.

## Payment due date

If the Individual income tax return due date of April 15 falls on a weekend or legal holiday, any payment owed is due on the next business day. Payment can be made via INTIME with or without logging in.

## Payment history

1. To view payment history, go to the "All Actions" tab, locate the "Submissions" panel and select the "Search submissions" link. Submissions are items that have been entered in INTIME for processing. This includes returns and payments.
2. Payments or any items that have been submitted but that have not yet been processed can be viewed in the "Pending" tab.
3. Past payments or any items that have been completed or processed will appear in the "Processed" tab and listed by date. The "Search" function can help locate past items by entering a date range.

## Making estimated payments

Customers have the option to make a logged-in or non-logged-in payment. To make an estimated payment without logging in to an INTIME account, follow the directions in the "Non-Logged-In" section of this guide under "[Non-Bill Payments](#)."

To make an estimated payment while logged in to an INTIME account, go to the "Summary" tab and locate the "Make a payment" link in the "Account" panel. The option to make an estimated payment will appear in the "Payment type" drop-down.

## Individual income tax returns

DOR is unable to accept and process Indiana Individual income tax returns through INTIME. Completed returns, including all schedules and wage statements, should be sent to the address at the bottom of the return.

## Taxpayer rights and responsibilities

All Hoosiers have certain [rights and responsibilities](#) that correspond to Indiana tax laws.

# Contact us & news

## News & notices

Subscribe to all agency and tax-related news shared by DOR.

## Tax Bulletin

Subscribe to DOR's [monthly newsletter](#) dedicated to tax practitioners and businesses.

## Customer service

Message DOR through [INTIME](#) or [contact Customer Service](#) Monday through Friday, 8 a.m. – 4:30 p.m. ET

## Stay connected

- [LinkedIn](#)
- [X \(Twitter\)](#)
- [Instagram](#)
- [Facebook](#)