



# Auditor of State – County Auditor Conference

October 26, 2022

Tera Klutz, CPA  
Auditor of State

# Today's Topics of Discussion

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- 2022 Fiscal Year-End Review
- Automatic Taxpayer Refund
- Indiana Transparency Portal
- Hoosier START
- Auditor's Office Updates

**Let's get started**





# 2022 Fiscal Year-End Review

# 2022 Fiscal Year-End

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- \$6.1 Billion in State Reserves
  - Collecting \$1.24 Billion more than last forecasted
  - Full report is available on the State Budget Agency's website
  
- Gov. Holcomb called a Special Session to return \$1 Billion to Hoosier taxpayers in addition to the first automatic taxpayer refund from last year's record surplus





# Automatic Taxpayer Refunds

# Automatic Taxpayer Refunds (ATR)

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- Hoosier taxpayers received \$325 (or \$650) in ATRs as a result of 2021 & 2022 year-end reserve balances
  - FY2021 – Split \$1.1 billion between Hoosier taxpayers & teacher pensions, creating the first ATR of \$125 per taxpayer
  - FY2022 – IGA created legislation & Gov. Holcomb signed SEA 2 to provide an additional \$200 per taxpayer
- AOS printed & distributed more than 1.5 million checks
  - Combined both ATRs into one check to save the state over \$1 million
  - Began printing in August & finished mailing in September
- IN Dept. Of Revenue (DOR) handled all direct deposits



# Did you receive your ATR?

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**YES**, I did receive my ATR!

- You are among the 1.3 or 83% checks cashed – thank you!
- If you haven't cashed your check, please do so at your earliest convenience; we all know how annoying reconciling items can be

**NO**, I did not receive a direct deposit or mailed check!

- Did you qualify?
- Were you contacted by DOR regarding an offset?
- Did DOR have your correct mailing address?

**Next Steps?** Contact DOR after November 1 to allow returned mail to process



# Steps to Reissue ATR Checks

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## Recipient received check but lost or damaged and needs reissued

- Visit the AOS website & complete the [Affidavit for Lost or Not Received Warrant SF# 42850](#)
- Send the completed form to the AOS Office; do not send in the original check

## Recipient of the check is now deceased

- Visit the AOS website & complete the [Distributee's Affidavit for Disposition of Estates SF# 49377](#)
- The widow or executor of the estate needs to file with AOS & include a copy of the death certificate with supporting documentation; do not send in the original check

## Recipients received a joint check, but are now divorced

- Mail the original check along with a written request to divide the refund to:

Indiana Department of Revenue  
Attn: Non-Responsible Spouse  
PO Box 7202  
Indianapolis, IN 46207





# Additional ATR Questions

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## AOS Contact Information

- Email: [Comments@auditor.IN.gov](mailto:Comments@auditor.IN.gov)
- Phone: 317-232-3300
- Emily Boesen at [Eboesen@auditor.in.gov](mailto:Eboesen@auditor.in.gov) or 317-232-3301

Office hours are Monday-Friday 8:00 a.m. - 4:30 p.m. ET

DOR asks customers to use the INTIME customer portal for direct messaging





# Indiana Transparency Portal

# Indiana Transparency Portal (ITP)

[www.IN.gov/ITP](http://www.IN.gov/ITP)

**Indiana Transparency Portal**

ITP is an online solution designed to bring better visibility, openness and accountability to Indiana State Government. The ITP contains information ranging from agency budgets to state contracts and agency performance measures. We strive to utilize your tax dollars as efficiently and effectively as possible and we look forward to sharing this information with you.

- Assets**  
Learn more about real properties, computers, vehicles, and other assets owned by the State of Indiana  
[Learn More](#)
- Contracts**  
Find contracts entered into by state agencies and offices  
[Learn More](#)
- Employees**  
Find information about state employment and state employee salaries  
[Learn More](#)
- Finances** (NEW)  
Learn about expenditures, State Reserves, and liabilities  
[Learn More](#)
- Local Government** (NEW)  
Find financial information about local units of government and school corporations  
[Learn More](#)
- Vendors**  
Find information on companies and individuals who do business with the State of Indiana  
[Learn More](#)



# Utilizing ITP: Examples

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- How can you & your teams utilize ITP?
  - ✓ Review local tax distributions & surrounding areas
  - ✓ Local Government tab links to Gateway for easy access
  - ✓ Review financial statements & audit reports by the State Board of Accounts
  - ✓ Search & review state contracts & Buy Indiana options
- How can your constituents utilize ITP?
  - ✓ Review local tax distributions & surrounding areas for comparison
  - ✓ Review state expenditures & revenues
  - ✓ Explore Indiana Gateway's financial reporting on local government spending

[www.IN.gov/ITP](http://www.IN.gov/ITP)





# Hoosier START Update



Save Today And  
Retire Tomorrow



*October is National Retirement Security Month – are you ready?*

- Hoosier START is the State of Indiana Public Employees' Deferred Compensation Plan
  - Our retirement savings plan is designed to help eligible public employees complement their Indiana Public Retirement System (INPRS) pension
  - Hoosier START offers both 457(b) & 401(a) Plans
- In April, Nationwide became the new, third-party administrator providing account services to Plan participants





# AOS Office Updates

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Payroll & Human Resource modernization nearly completed

- Launched in May & impacted all 33k state employees within all branches
- Converted & modernized human resources & payroll systems
- Created self-service & manager self-service options for benefits, leaves, timesheets & W2s

Coming Soon!

- 2023 legislative proposals
- 2023 County Auditor visits
  - “Meet & Greet” with County Auditor & Team
  - Schedule for March – November 2023
  - Don’t wait on us – reach out to schedule yours







THANK YOU