

Managing Clients

The Indiana Personal Property Online Portal (PPOP-IN) allows taxpayers and their authorized agents to complete and submit business personal property tax forms online. You must register on PPOP-IN and be authorized by your client to complete and submit business personal property tax forms online. This Job Aid provides information on how to manage your clients in PPOP-IN.

For detailed instructions on how to register as an Agent on PPOP-IN, view the *Registering for PPOP-IN – Authorized Agent Quick Reference Guide (QRG)*.

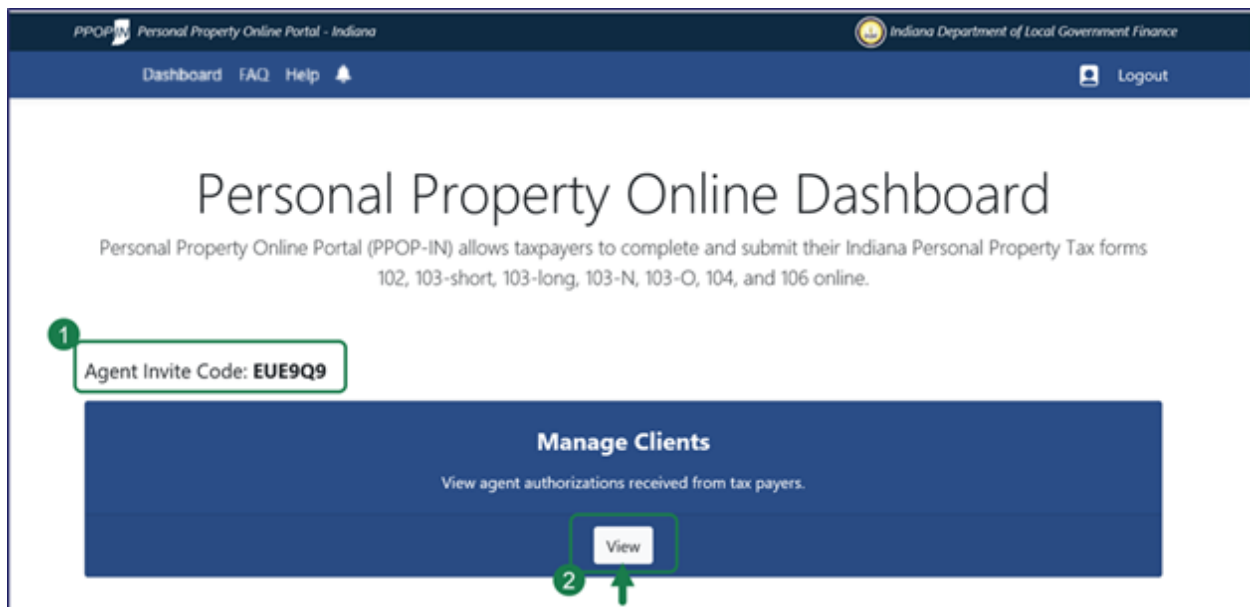
To manage your clients and file business personal tax filings on their behalf, follow these steps:

1. Log in to PPOP-IN (<https://www.ppopin.in.gov/>).

Note: Take note of your Agent Invite Code on the page. This is your unique code as an authorized agent.

2. Click the **View** button on your Dashboard (see Figure 1).

Figure 1: Personal Property Online Dashboard



View Taxpayers Page

The *View Taxpayers* page appears. The following are the three areas on the *View Taxpayers* page (see Figure 2.)

1. **Taxpayer Table** – This is a listing of Taxpayers who have authorized you to manage their business personal property taxes.
2. **View Filings Section** – Clicking the **View Filings** button will open a list of all your clients and their tax filings.
3. **Agent Invite Code** – This is the unique six-digit code you provide to your clients to obtain their authorization to file personal property taxes on their behalf.

Figure 2: View Taxpayers Page

View Taxpayers

View Taxpayers who have given you permission to complete and submit their personal tax filings.

Instructions:
View Taxpayers that have entered your Invitation Code below.
To accept a Pending taxpayer, click Accept. To decline a Pending taxpayer, click Decline.
You can Reactivate a Taxpayer you have declined or revoked.
You are unable to interact with a Taxpayer who has revoked you.

Taxpayers that have already authorized you to manage their property taxes:

Taxpayer Name ▾	Taxpayer Phone ▾	Taxpayer Email ▾	Taxpayer Status ▾	Actions
Glenn Seger	8125502475	khris.seger+taxpayerthree@gmail.com	Revoked	Revoked by Taxpayer
Howard Weiss	No Number Listed	agenttest@extraale.com	Revoked	Revoked by Taxpayer
Kelly Smith		kelly.smith@linuxmail.org	Authorized	Select Decline
Khris Seger	8125502475	khris.seger+taxpayertwo@gmail.com	Revoked	Revoked by Taxpayer
Taxpayer-Test PPOTFS-Test	8123302475	ppotfs.taxpayer@gmail.com	Authorized	Select Decline

View Filings:

View in-progress and prior year tax filings of all taxpayers.

[View Filings](#)

Agent Invite Code:

A3YM6F

Taxpayer Table

The Taxpayer Table on the *View Taxpayers* page shows a list of Taxpayers who have authorized you to manage their business personal property taxes. The list displays each Taxpayer’s name, phone number, e-mail address, status, and actions you may take for each Taxpayer. Under the **Actions** column (see Figure 3), you may perform the following actions:

- Accept a pending Taxpayer by clicking the **Accept** button.
- Decline a pending Taxpayer by clicking the **Decline** button.
- Reactivate a Taxpayer you have declined by clicking the **Reactivate Taxpayer** button.
- Select a Taxpayer to open the selected client’s tax filings by clicking the **Select** button.

Figure 3: Taxpayer Table – Actions Column

View Taxpayers

View Taxpayers who have given you permission to complete and submit their personal tax filings.

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You are unable to interact with a Taxpayer who has revoked you.

Taxpayers that have already authorized you to manage their property taxes:

Taxpayer Name ▾	Taxpayer Phone —	Taxpayer Email —	Taxpayer Status —	Actions
Glenn Seger	8125502475	khris.seger+taxpayerthree@gmail.com	Authorized	<div style="display: flex; gap: 5px;"> Select Decline </div>
Howard Weiss	No Number Listed	agenttest@extraale.com	Revoked	Revoked by Taxpayer
Kelly Smith		kelly.smith@linuxmail.org	Authorized	<div style="display: flex; gap: 5px;"> Select Decline </div>
Khris Seger	8125502475	khris.seger+taxpayertwo@gmail.com	Revoked	Revoked by Taxpayer
Taxpayer PPOTFS	8123302475	ppotfs.taxpayer@gmail.com	Declined	<div style="display: flex; gap: 5px;"> Reactivate Taxpayer </div>

Note: A status of “Revoked by Taxpayer” in the Actions column indicates that a Taxpayer has revoked your authorization to file tax filings on his or her behalf. You are unable to interact with a Taxpayer who has revoked you.

Open Tax Filings

To open a client’s tax filing to view, complete, or download it, follow these steps:

1. Click the **Select** button for the client whose tax filing you want to open (see Figure 4).

Figure 4: Select Taxpayer

View Taxpayers

View Taxpayers who have given you permission to complete and submit their personal tax filings.

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You are unable to interact with a Taxpayer who has revoked you.

Taxpayers that have already authorized you to manage their property taxes:

Taxpayer Name ▾	Taxpayer Phone —	Taxpayer Email —	Taxpayer Status —	Actions
Glenn Seger	8125502475	khريس. seger+taxpayerthree@gmail.com	Revoked	Revoked by Taxpayer
Howard Weiss	No Number Listed	agenttest@extraale.com	Revoked	Revoked by Taxpayer
Kelly Smith		kelly.smith@linuxmail.org	Authorized	<input type="button" value="Select"/> <input type="button" value="Decline"/>
Khris Seger	8125502475	khريس. seger+taxpayertwo@gmail.com	Revoked	Revoked by Taxpayer
Taxpayer PPOTFS	8123302475	ppotfs.taxpayer@gmail.com	Declined	<input type="button" value="Reactivate Taxpayer"/>

A confirmation message appears asking if you want to select that Taxpayer (see Figure 5).

2. Click the **Confirm** button.

Figure 5: Select Taxpayer - Confirm Button

Notice: Confirm Action ×

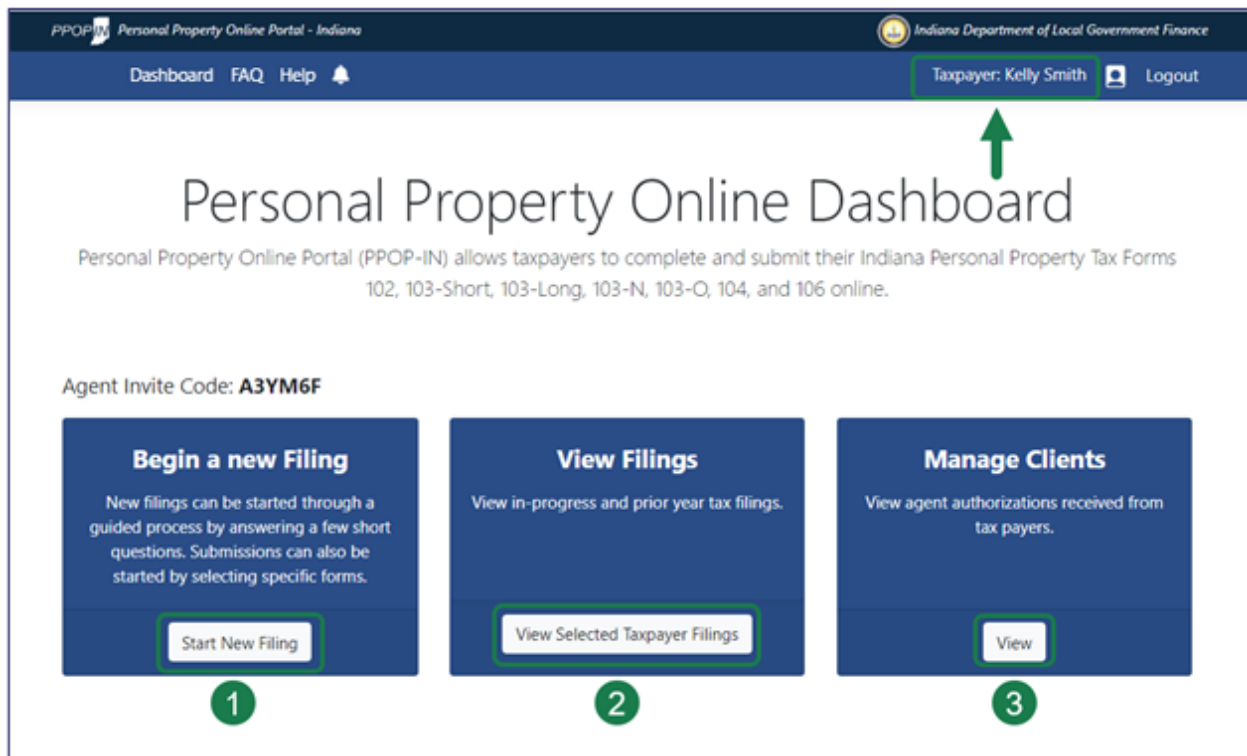
Are you sure you want to select Kelly Smith?

The selected Taxpayer's dashboard appears (see Figure 6). From the Taxpayer's dashboard you may:

1. Start a new filing by clicking the **Start New Filing** button to begin a new tax filing for the selected Taxpayer.
2. View the selected Taxpayer's filings by clicking the **View Selected Taxpayer Filings** button to open in-progress tax filings to view or resume, view submitted tax filings, and delete in-progress tax filings for the selected Taxpayer
3. View and manage your clients by clicking the **View** button to deselect the selected Taxpayer from the Taxpayer Table and choose another Taxpayer's filings to view or open.

Note: The selected Taxpayer's name appears in the upper right on the blue navigation bar.

Figure 6: Selected Taxpayer's Dashboard



View Selected Taxpayer Filings

Clicking the **View Selected Taxpayer Filings** button on your client’s dashboard opens the tax filings for the Taxpayer you selected (see Figure 7).

Figure 7: Filings Page for Selected Taxpayer

Taxpayer Name	Business	Year	County	District	Status Date	Status	Due Date	Filing ID	Actions
Kelly Smith	Smith Farms	2020	Adams	NORTH BLUE CREEK TOWNSHIP	06:39 AM 10/26/2020	Submitted	6/17/2020	376	View
Kelly Smith	Kelly Farms	2020	Bartholomew	CLAY TWP	02:53 PM 10/27/2020	Submitted	6/17/2020	632	View
Kelly Smith	No Company Name Given	2020	Adams	No District Selected	02:56 PM 10/27/2020	Submitted	6/17/2020	498	View
Kelly Smith	Smith Ent	2020	Adams	NORTH BLUE CREEK TOWNSHIP	02:14 PM 10/28/2020	Submitted	6/17/2020	341	View
Kelly Smith	Smith Inc	2020	Adams	NORTH BLUE CREEK TOWNSHIP	04:00 PM 10/29/2020	Submitted	6/17/2020	506	View
Kelly Smith	No Company Name Given	2020	Vigo	No District Selected	10:20 AM 11/9/2020	Submitted	6/17/2020	199	View
Kelly Smith	Name	2020	Adams	NORTH BLUE CREEK TOWNSHIP	02:03 PM 12/5/2020	Submitted	6/17/2020	669	View
Kelly Smith	Whatever	2020	Vigo	NEVINS TOWNSHIP	04:21 PM 10/29/2020	Revision in Progress	6/17/2020	282	Open
Kelly Smith	Smith Concrete	2020	Vigo	PIERSON TOWNSHIP	10:43 AM 11/2/2020	Rejected	6/17/2020	543	View

The *Filings* page lists the tax filings for the client’s businesses, including year, county, district, status date, status, due date, filing ID, and actions you may take for each tax filing. The selected Taxpayer’s name appears in the upper right of the page in the blue navigation bar.

On the *Filings* page, you may perform the following actions:

- Click the **View** button to review a submitted tax filing for each business.
- Click the **Open** button to view or resume an open tax filing for each business.

Note: You and your client both may open and work on new and in-progress tax filings.

View Filings Section

In the *View Filings* section of the *View Taxpayers* page, click the **View Filings** button to view a list of clients who have authorized you as their agent (see Figure 8).

Figure 8: View Filings Section

View Taxpayers

View Taxpayers who have given you permission to complete and submit their personal tax filings.

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Kelly Smith		kelly.smith@linuxmail.org	Authorized	Select Decline
Khris Seger	8125502475	khris.seger+taxpayertwo@gmail.com	Revoked	Revoked by Taxpayer
Taxpayer-Test PPOTFS-Test	8123302475	ppotfs.taxpayer@gmail.com	Authorized	Select Decline

View Filings:
View in-progress and prior year tax filings of all taxpayers.

[View Filings](#)

Agent Invite Code:
A3YM6F

[Back](#)

The *Filings* page opens, displaying a list of your clients (see Figure 9). The list displays each Taxpayer’s name, business name, tax year, county, district, status date, status, filing ID, and actions you may take for each Taxpayer. Clicking the **Select Taxpayer** button opens the selected Taxpayer’s dashboard where you may start a new filing, view or resume an in-progress filing, and view prior-year tax filings (see Figure 6).

Figure 9: Filings Page

Filings								
Click on Select Taxpayer button below to select a taxpays to resume or view an open filing. Click view to review a submitted filing or click ope								
Taxpayer Name	Business	Year	County	District	Status Date	Status	Filing ID	Actions
Khris Seger	a	2020	Adams	MONROE TOWN-WASHINGTON TOWNSHI	02:48 PM 12/29/2020	New Filing	194	Select Taxpayer
Khris Seger	My Farm	2020	Adams	MONROE TOWN-WASHINGTON TOWNSHI	02:45 PM 12/29/2020	New Filing	192	Select Taxpayer
Taxpayer PPOTFS	XSoft, Inc.	2020	Allen	ST. JOSEPH	02:31 PM 12/29/2020	New Filing	190	Select Taxpayer
Khris Seger	Dave's Chickens	2020	Adams	NORTH WASHINGTON TOWNSHIP	02:23 PM 12/29/2020	New Filing	189	Select Taxpayer
Taxpayer PPOTFS	wertwert	2020	Adams	HARTFORD TOWNSHIP	02:19 PM 12/29/2020	New Filing	188	Select Taxpayer
Khris Seger	Dave's Chickens	2020	Adams	PREBLE TOWNSHIP	02:16 PM 12/29/2020	New Filing	187	Select Taxpayer
Khris Seger	Samponite	2020	Adams	NORTH BLUE CREEK TOWNSHIP	02:08 PM 12/29/2020	New Filing	186	Select Taxpayer

For instructions on starting and submitting tax filings, view these resources:

- *Starting a New Property Tax Filing QRG*
- *Completing and Submitting a Property Tax Filing QRG*