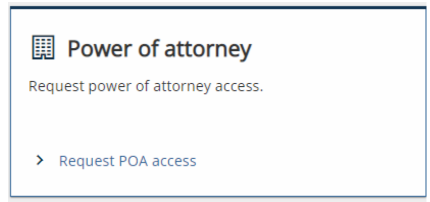
INTIME Electronic Power of Attorney (ePOA)

Instructions for Tax Practitioners

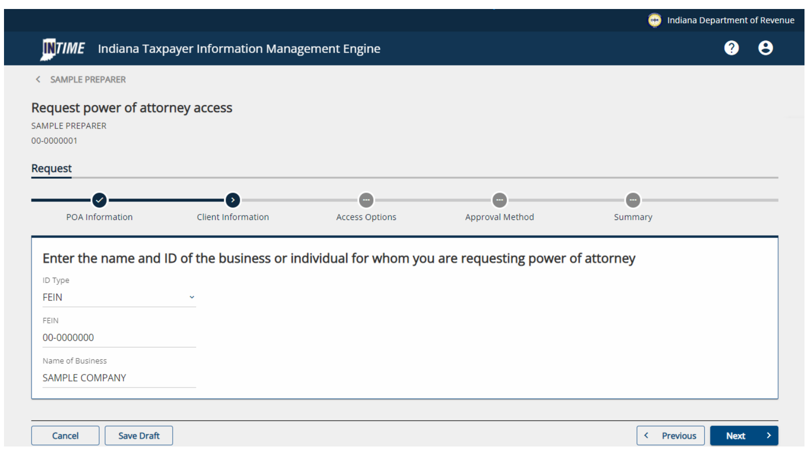
A tax practitioner can be granted access to a client's INTIME account (Business or Individual income tax) with an electronic Power of Attorney (ePOA). Additional information and frequently asked questions on POA and ePOA are available.

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.

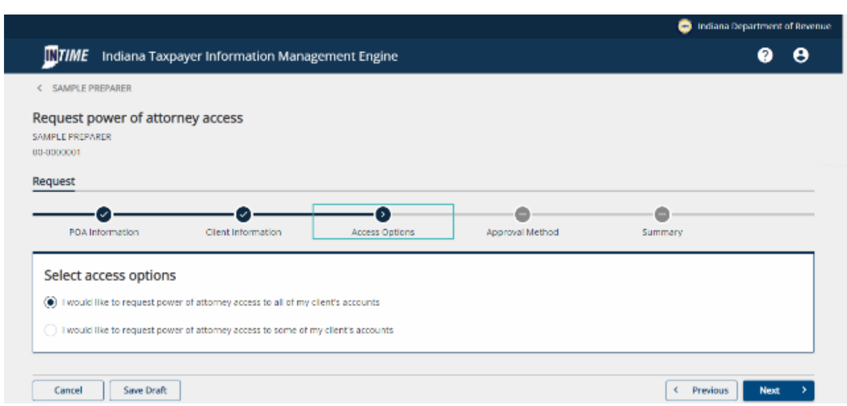


Request ePOA Access

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



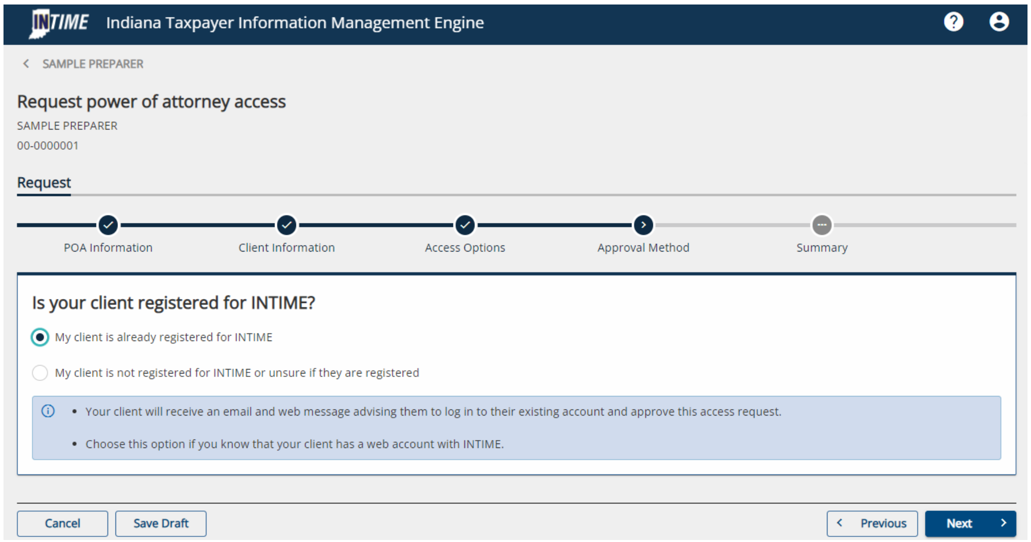
Select the option to request ePOA access to **all** the client's tax accounts or only specific tax accounts. If requesting access to only select accounts, the client will have the option to select which accounts to allow the tax practitioner to access. The tax practitioner will see these accounts only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



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.

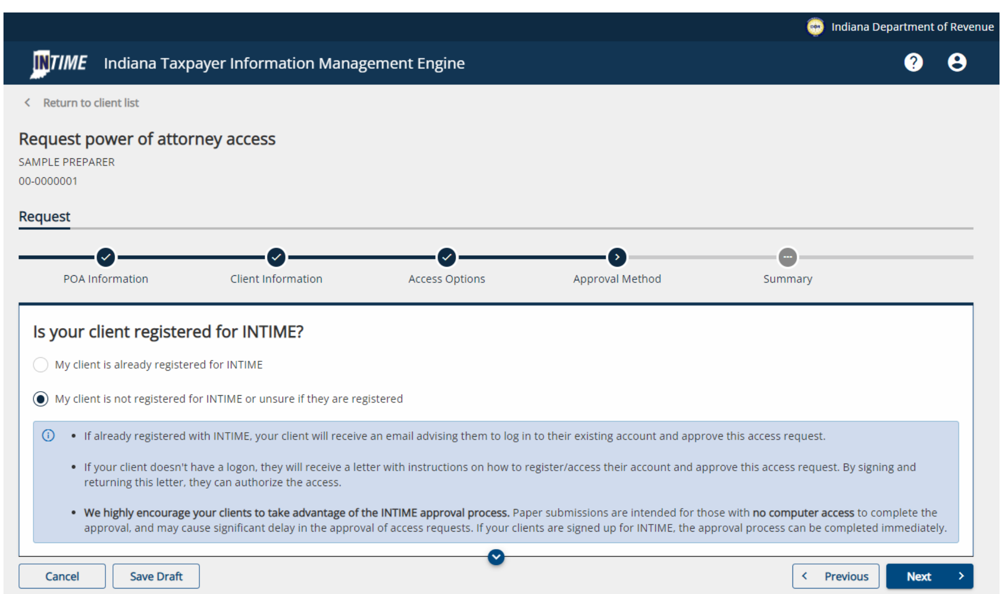


If your client doesn't use INTIME

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

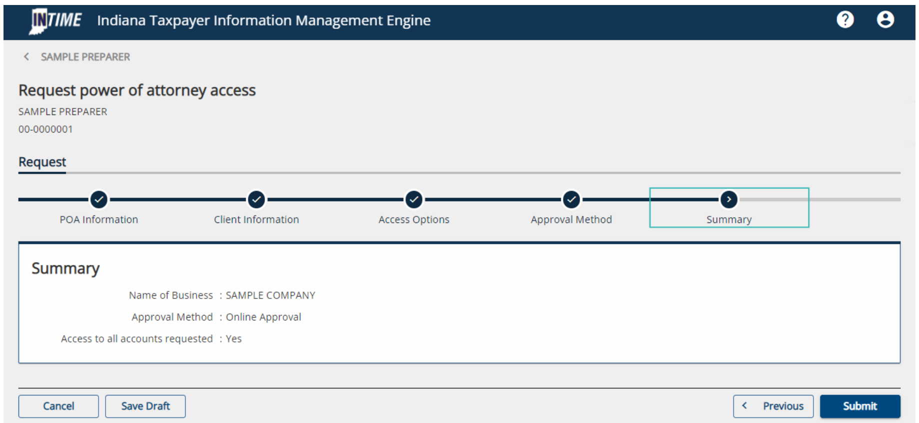
If registered, your client will receive an email about logging in to INTIME to approve your access. More information on INTIME is available.

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.



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.



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.