Project NextDOR Modernization Overview

*What is Project NextDOR* - In September 2018, the Indiana Department of Revenue (DOR) officially launched Project NextDOR, a multi-year modernization project of its tax systems. This project is a complete replacement of the system that is used to process taxes. The new technology allows Hoosier businesses and individuals, as well as DOR employees increased access to data and ability to view, register, file and pay for more tax types online than ever before.

DOR has spent the past two years laying the groundwork for Project NextDOR. The new system will be released in four rollouts, covering specific tax types over the next four years. Rollout 1 tax types launched Sept. 3, 2019.

For more information on Project NextDOR, visit [ProjectNextDOR.dor.in.gov](http://ProjectNextDOR.dor.in.gov).

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**Proposed Project Approach**

4 Major Rollouts over 4 Years

Core Processes:

- Revenue Accounting
- Payment Services
- Portal Services
- Account Maintenance
- Returns Processing
- Disbursements

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<thead>
<tr>
<th>Rollout 1 - Corporate</th>
<th>Rollout 2 - Sales/WTH</th>
<th>Rollout 3 - Individual</th>
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</thead>
<tbody>
<tr>
<td>2018</td>
<td>2019</td>
<td>2020</td>
<td>2021</td>
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Maintaining Current Systems and Processes
Who Should Use INTIME?

What is INTIME - The new online e-service portal, called the Indiana Taxpayer Information Management Engine (INTIME), offers expanded functionality for designated tax types in Rollout 1. Customers have the ability to file, pay, view and manage taxes in one convenient location.

Other designated tax types in Rollout 1 benefit from electronic filing (MeF).

Electronic Filing (MeF) Functionality

Available after 9/3/19
INTIME Username Creation

Step 1: Decide who will create the master logon for your organization
INTIME usernames are specific to each person, and passwords should not be shared with anyone. The first person to create a username for your organization will be assigned the role of “Master Logon.” This user will be able to manage access for other users in your organization and will have full access to your company’s own tax accounts.

Step 2: Navigate to INTIME using this web address:
intime.dor.in.gov

Step 3: Create your master logon username
Practitioners should locate the “Preparers” panel and click the “Register as a tax preparer” link.

Tip: Practitioners who have filed an Indiana Corporate or Partnership return in the past will need to select the “Create username” link. If you have not previously filed an Indiana Corporate or Partnership return, you will select the “Register preparer” link.

Step 4: Follow onscreen steps to create your logon
You will enter your business information and confirm your access using a recent payment amount or letter ID. If you don’t have these items, you can request a letter to be mailed to you to complete the registration. This is an essential step in protecting the sensitive information of you and your clients.

Step 5: Create username and password
This step requires you to create a unique username (may be an email address) and password. Note that your password:
• Must be at least eight characters long;
• Must include at least one uppercase letter;
• Must include at least one special character; and
• Cannot be the username or email address.

Step 6: Log in for the first time
Once you complete your username creation, you will be directed back to the INTIME homepage to log in for the first time. Enter your username and password.

Step 7: Two-factor authentication
Access security for INTIME is enhanced with two-factor authentication. This means that you will be required to enter an access code upon logging in that can be received by email, text message (standard text message rates apply), or authenticator application. Information on each of these options is included on the registration screen.
To initiate an electronic INTIME Power of Attorney (ePOA) access request, click the “All Actions” tab, then the “Request POA access” link.
Power of Attorney Frequently Asked Questions

Can I still use the paper POA-1 form?
Yes, you can still use the POA-1 form; however, a paper POA-1 will not result in gaining online access to client accounts in INTIME.

If my client approves the INTIME ePOA access request, do I still need a POA-1 form on file?
DOR will consider an INTIME ePOA equivalent to the POA-1 form for the purpose of discussing tax matters. DOR reserves the right to request the POA-1 form in certain circumstances, but in general, we will not require a POA-1 form in addition to an approved INTIME ePOA access request. The INTIME ePOA only allows clients to approve access to the accounts currently in INTIME. A POA-1 may be needed for other tax types.

Does my client need to access the internet/register for INTIME to approve my request?
If your client does not have the ability to access INTIME to approve your request, an access request letter will be mailed to his or her legal address on file with DOR. The letter can be used to approve your access request.

How long does it take to process an INTIME POA access request?
If your client is able to create a username and access INTIME, he or she can approve your request and provide immediate access. Mailed access approval forms may take several weeks to be received and processed. In either case, you will be notified by email when the access is granted.

Once clients have approved your ePOA access request, they will be added to your client list. When that process is complete, you may:

- View any outstanding actions for each client, which may include new letters or messages from DOR;
- Search the client list; and
- Manage which customers are initially visible using the “Manage Favorites” button.

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### Power of Attorney Options

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<td><strong>How to submit?</strong></td>
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<td>Paper Form</td>
<td>Tax return check box</td>
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<td><strong>Tax types</strong></td>
<td>See below*</td>
<td>All or specific tax type(s) noted on the form</td>
<td>Only that specific tax return</td>
</tr>
<tr>
<td><strong>Period covered</strong></td>
<td>All or specific filing periods</td>
<td>Specific tax period(s) noted on the form</td>
<td>Only that specific tax return</td>
</tr>
<tr>
<td><strong>Speak with DOR Customer Service</strong></td>
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<tr>
<td><strong>Access client tax records on INTIME</strong></td>
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<td><strong>Communicate with DOR through INTIME secure messaging</strong></td>
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<tr>
<td><strong>View client letters &amp; notices on INTIME</strong></td>
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*Tax Types Covered:
- C Corporation, S Corporation, Partnership, Financial Institution, Non-Profit, Utility Receipts, Aircraft Dealer, Aircraft Excise
- Additional tax types added as Project NextIDOR progresses through 2022
Sending and Receiving INTIME Messages

INTIME includes the ability to securely communicate with DOR about client tax accounts for which you have INTIME ePOA access.

From your client list, click the client name to enter their INTIME account. Select the “All Actions...” option and the “Messages” panel will be displayed. From here, you can view and respond to messages, or create a new message.

When creating a new message, INTIME will ask for some specific information to get the message to the right person.

**Tip:** You will receive an email alert when DOR responds to your message.
Managing Security and Access to Accounts

Security 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;
- May have access to customers and accounts that you do not have access to (each user has his or her own set of INTIME ePOAs).

**Tip:** As a “Master Logon,” you may only manage access for other users whose accounts you have access to.

**Revoking access to clients accounts**
Practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA). To do so, enter the client INTIME account, select the settings tab and cancel access to the client or accounts you no longer wish to access. If you cancel access to the client, it will automatically remove access to all the client’s accounts. When cancelling access to a specific account, access to the customer and any remaining accounts will be maintained.

**Client revocation**
Clients will have the ability to enter their own “Manage Access” tab and modify your level of access, including revoking your ePOA access.

**Helpful Hints and Reminders**

- Each member of your team will request INTIME ePOA access to their own client accounts.
- Creating additional users from your master logon account allows you to limit the amount of access to your own user tax records. You can also manage team access as needed using this method, including deactivating accounts when necessary.
- Some preparers may prefer to register all their clients upfront for the INTIME ePOA in order to see and be notified when new messages or letters are received from DOR.
Contact Us

Project NextDOR - ProjectNextDOR.dor.in.gov

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Aircraft Owners & Dealers: (317) 615-2544

linkedin.com/company/indiana-department-of-revenue/