



Indiana Automatic Taxpayer Refund (ATR) Checklist:

Claiming the \$200 Refundable Tax Credit

Click checkbox to mark complete.

Check Your Eligibility

You are eligible to claim the Automatic Taxpayer Refund (ATR) \$200 refundable tax credit only if ALL the following statements are true:

- You are a full-year Indiana resident.
- You did NOT receive the \$325 ATR (or \$650 ATR for married filing jointly).
- You received Social Security benefits in 2022.
- You are not claimed as a dependent on someone else's 2022 income tax return.

Review ATR Instructions and FAQs

Learn more at dor.in.gov/individual-income-taxes/automatic-taxpayer-refund.

Complete the Appropriate 2022 Indiana Resident Tax Form

Available at dor.in.gov/tax-forms/2022-individual-income-tax-forms.

- **Form IT-40:** Full-year Indiana resident
You must include Schedule 5 and add \$200 ATR tax credit on line 11.
[Instructions available.](#)
- **Form IT-40PNR:** Full-year Indiana resident with a part-year or nonresident spouse
You must include Schedule F and add \$200 ATR tax credit on line 11.
[Instructions available.](#)
- **Form SC-40:** Seniors who file to claim the Unified Tax Credit for the Elderly
You must enter \$200 on Line G if one filer is eligible (or \$400 if married filing jointly and both spouses meet the requirements.) [Instructions available.](#)

Provide Documentation to Confirm 2022 Social Security Benefits:

Failure to include required 2022 documentation or information will result in the ATR refundable tax credit being denied:

- **If filing electronically:** Provide information from boxes 1, 2, and 5 on Form SSA-1099 for yourself (and/or your spouse if married filing jointly) **or** complete the required information indicating Supplemental Security Income (SSI) eligibility.
- **If filing by paper:** Include a copy of Form SSA-1099 **or** a letter from the Social Security Administration indicating eligibility with your return.

File Your 2022 Indiana Resident Tax Form by Dec. 31, 2023

Include all supporting documentation and file **no later than Dec. 31, 2023.**