



INTIME for Individual Income Tax Customers

User Guide



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Welcome to INTIME for Individual Income tax customers

The Indiana Department of Revenue’s (DOR) e-services portal, [INTIME](#) (Indiana Taxpayer Information Management Engine), offers the ability to manage your Individual Income tax account in one convenient location, 24/7. This includes viewing refund amounts, making payments, setting up payment plans, and securely messaging DOR customer service.

This guide walks through creating an INTIME account and many of the tools available.

[Create a login](#) to take full advantage.

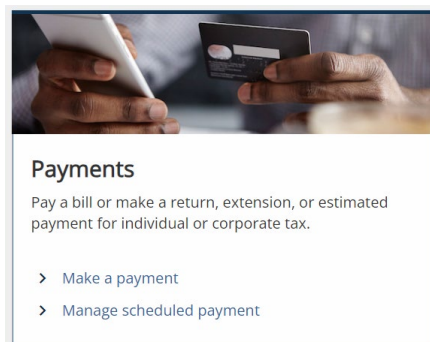
Function	With Login	Without Login
Bank and credit/debit payments	Yes	Yes
Change legal name and address	Yes	No
Check refund status	Yes	Yes
Filing extension request	Yes	Yes
Messaging with Customer Service	Yes	No
Payment plans	Yes	No
Request return transcripts	Yes	No
SC-40 Unified Tax Credit for the Elderly	Yes	Yes
View electronic versions of official DOR letters	Yes	No
View payment history	Yes	No

You can pay without a login

Various types of payments can be made **without** signing in to [INTIME](#) by locating the “Payments” panel on the landing page and selecting “Make a payment.”

- Non-bill payments (estimated and tax return payments)
- Bill payments
- Payment plan payments

Electronic payments can be made securely using a bank account (no fee) or credit/debit card (Discover, Mastercard, and VISA) (fee).



Non-bill payments (estimated and tax return payments)

Non-bill payments that can be made without logging in include [estimated and tax return payments](#).

Bill payments

Instructions on [making tax bill payments are available](#).

Payment plan payments

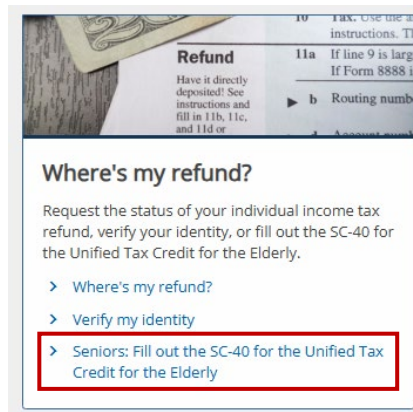
Instructions on [making payment plan payments](#) are available.

Customers who [establish a payment plan](#) with a DOR customer service representative receive vouchers to make payments using INTIME without logging in.

You can submit Form SC-40, the Unified Tax Credit, without a login

Seniors can submit the Form SC-40 on INTIME without an account.

1. Locate the “Where’s my refund?” panel on the INTIME landing page and select “Seniors: Fill out the SC-40 for the Unified Tax Credit for the Elderly”.
 - a. Review the eligibility information before continuing.
2. Input the Letter ID shown on the SC-40 letter that was mailed to you.
3. Follow the prompts to fill in the required information and submit the form.
4. Once the form has been submitted, a confirmation message will be displayed.
5. Make note of the email address displayed and confirmation code to retrieve your submission in the future.

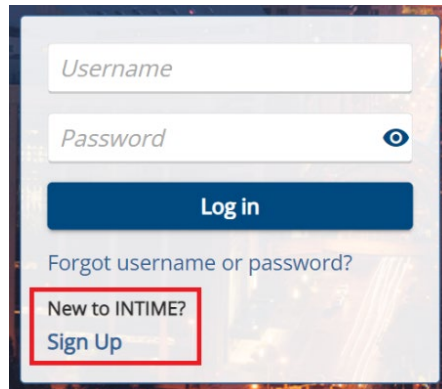


Create an INTIME login for full access

Instructions on how to [Create an INTIME Login](#) are available.

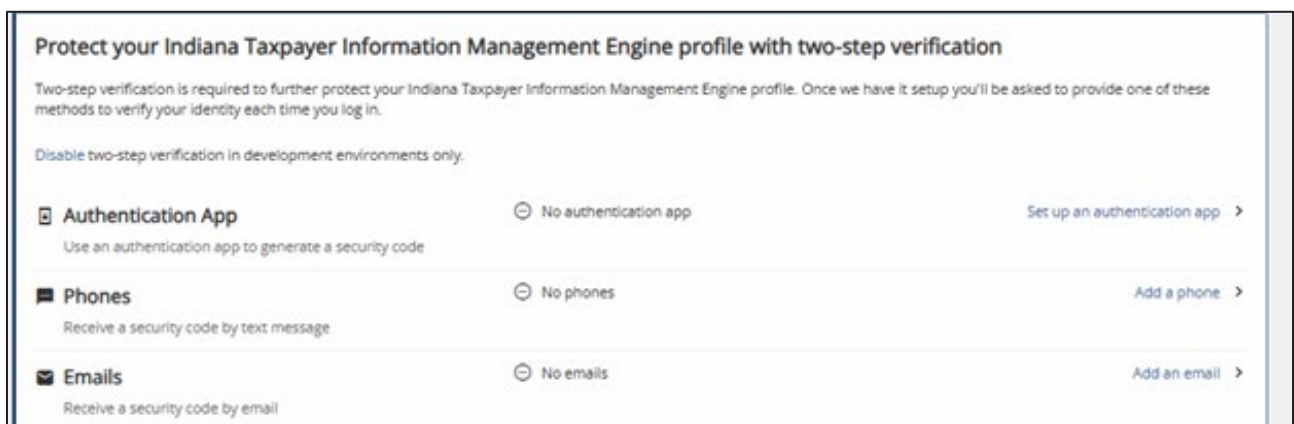
Individual Income tax customers need the following information to set up an INTIME account:

- Name and ID: Social Security Number (SSN) or Individual Tax Identification Number (ITIN) **and**
- Letter from DOR containing the unique Letter ID (upper-right hand corner) **or**
- Most recent return/refund amount **or**
- Most recent specific line-item amount



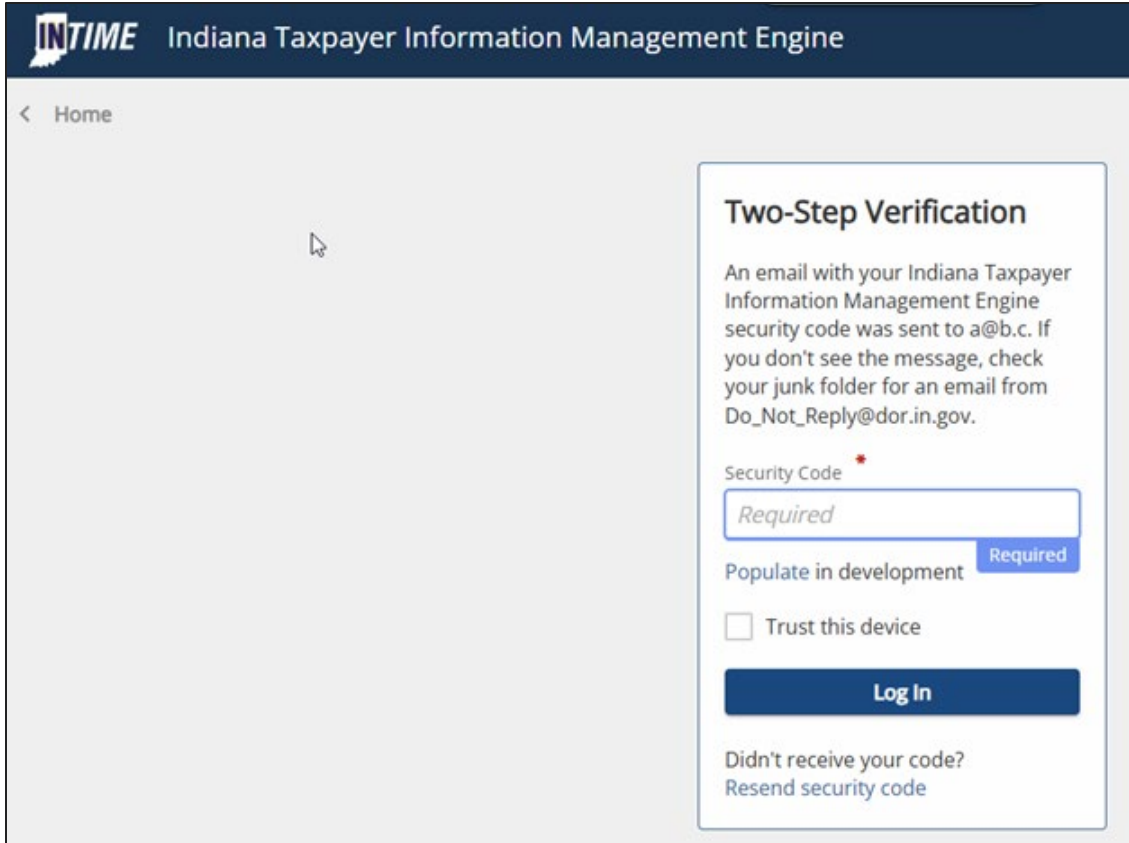
Two-step Verification

DOR knows the importance of customer account security and uses the two-step verification method for access to INTIME. Choose your preferred two-step verification method before proceeding. The three methods shown below include the use of an authentication app, the receipt of a text message, or the receipt of an email to get a one-time confirmation code. These unique security codes will be required for each INTIME login.

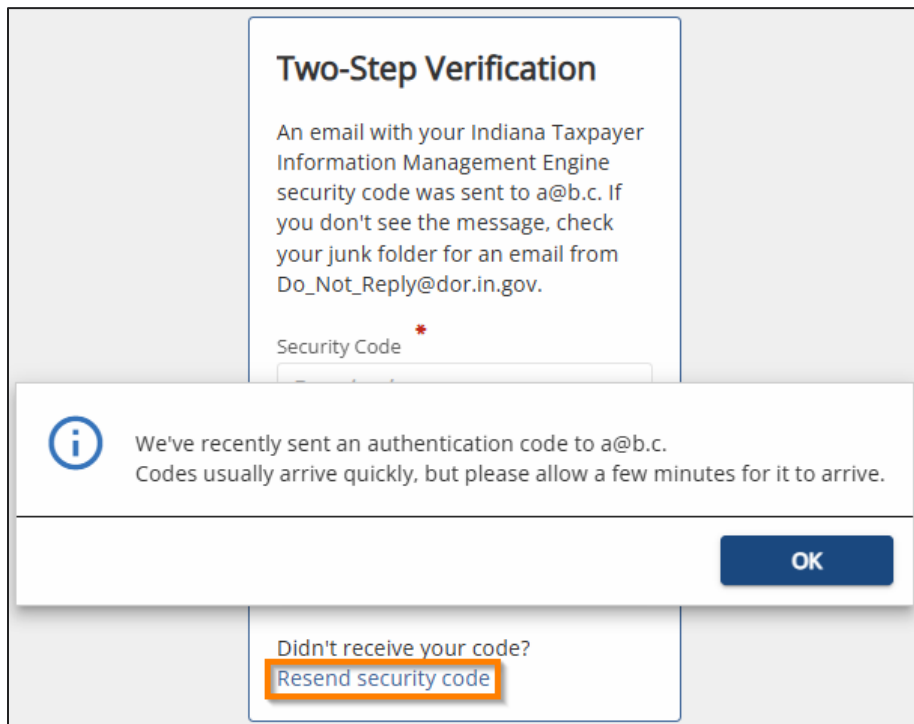


Entering Two-step Verification Security Code

When a customer chooses one of the three preferred two-step verification methods, they will be prompted to enter a security code.



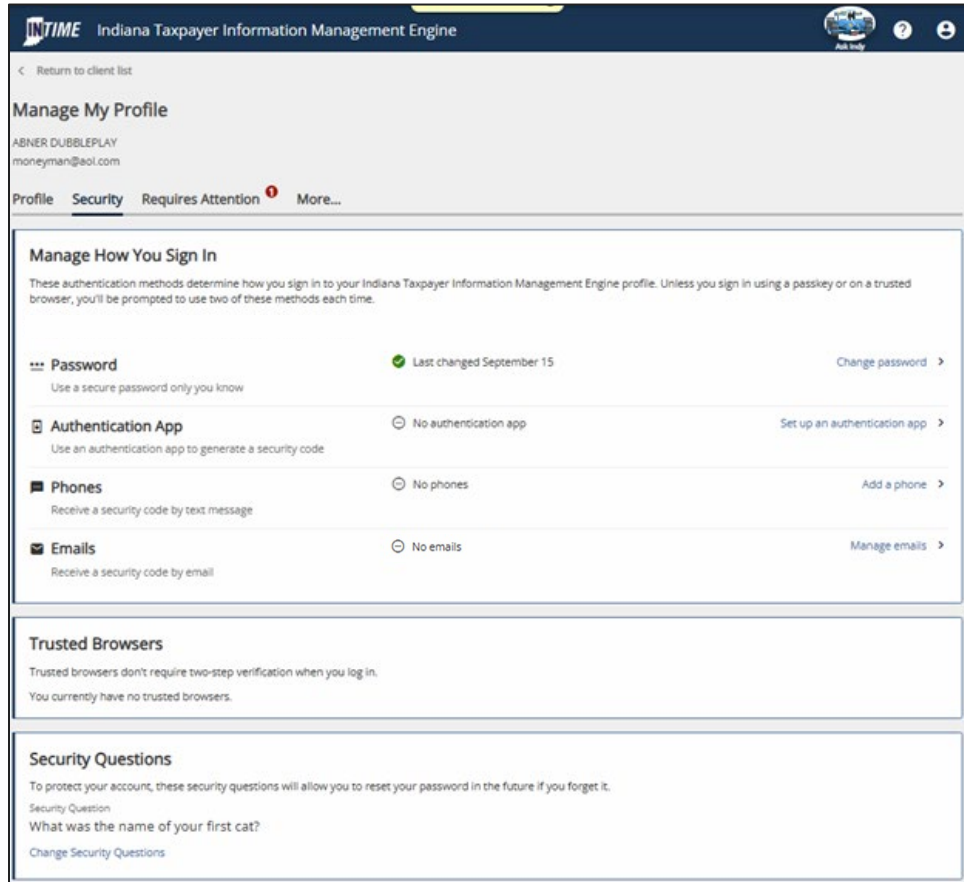
The page below will display shortly after an authentication code has been sent.



If the security code does not send to one of the selected methods, select “Resend security code”.

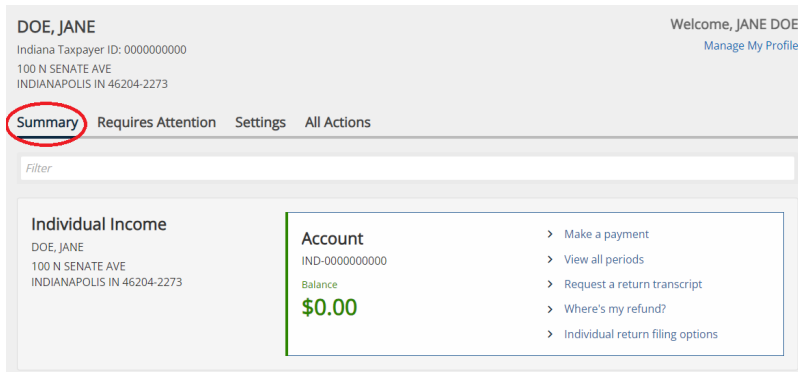
Manage My Profile

Under “Manage My Profile,” select the “Security” tab to see information regarding how you sign in, two-step verification, trusted browsers, security questions, and more.



Account summary

Log in to access account information from the “Summary” tab, which includes balance due and some key actions.



Make a payment

- Select “Make a payment” and then a payment method: bank (no fee) or credit/debit card (fee).
 - Credit card payment fee for individuals is \$1 plus 1.99% of the total payment (Discover, Mastercard, VISA)
 - Debit card payment fee is a flat rate of \$2.99 for payments less than \$100 or \$3.75 for payments greater than or equal to \$100
- Schedule estimated payment dates on or before the due date for the intended quarter.
- Select return payment period and payment date.
- Once payment is confirmed, you have the option to save or print.

Submit Form SC-40, the Unified Tax Credit

Seniors can submit Form SC-40 with an INTIME account.

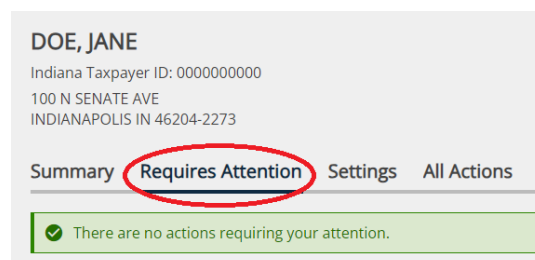
1. Locate the Individual Account panel and select “Seniors: Fill out the SC-40 for the Unified Tax Credit for the Elderly”.
 - a. Review the eligibility information before continuing.
2. Follow the prompts to fill in the required information and submit the form.
3. Once the form has been submitted, a confirmation message will be displayed.
 - a. If needed, you can review the submission on the “All Actions” tab and locate the “Submissions” panel.

Request a return transcript

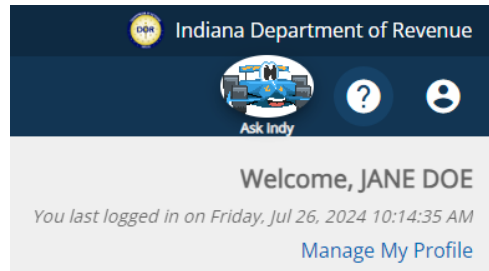
1. Select “Request a return transcript.”
2. Use the drop-down menu to choose a filing period.
3. Select “Next” to generate a PDF.
4. Select “Submit” to complete the request and receive submission confirmation.
5. Transcripts are accessed from the home screen by selecting "All Actions" and then "View letters." They can be accessed at any time.

Requires attention

When something requires your attention, it appears in the “Requires Attention” tab with a red circle and number indicating the quantity of notifications.

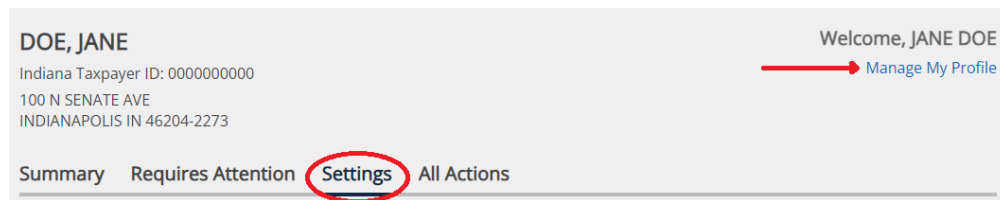


The question mark icon (“?”) in the top-right corner links to DOR contact information for getting help resolving issues. It also allows you to view Support IDs, which are referenced when contacting DOR with questions.



Settings

Both profile and account settings are available from the “Settings” tab.



To make changes to a profile, select “Manage My Profile” and then “Profile” or the “More...” tab. Options include:

Managing account access

Account security settings [grant and revoke access](#) to a tax practitioner or user to make payments and/or view an account for any period, from a specific date, or within a date range.

Mail delivery options (go paperless)

You can choose to receive only paperless correspondence from DOR or get physical mail in addition to electronic delivery to your INTIME account.

Email notifications

You can choose to turn INTIME email notifications on or off.

Default bank account

You can add multiple bank accounts and select a default bank account to make payments or receive direct deposit of refunds.

All Actions

You can perform a number of tasks that are located in the “All Actions” tab.

Summary	Requires Attention	Settings	All Actions
<input type="text" value="Search our online services"/>			
<p> Letters</p> <p>View all letters you've received from the agency.</p> <ul style="list-style-type: none"> > View letters > Respond to a letter, notice, or bill 	<p> Messages</p> <p>View messages I've received from the agency.</p> <ul style="list-style-type: none"> > View messages > Send a message 	<p> Payment plan</p> <p>Manage payment plans for all accounts.</p> <ul style="list-style-type: none"> > View all payment plans > Add a payment plan > Cancel a payment plan 	
<p>Where's my refund?</p> <p>Request the status of your individual income tax refund, verify your identity, or fill out the SC-40 for the Unified Tax Credit for the Elderly.</p> <ul style="list-style-type: none"> > Where's my refund? > Verify my identity > Seniors: Fill out the SC-40 for the Unified Tax Credit for the Elderly 	<p> Names & addresses</p> <p>View or update names and addresses associated to this customer.</p> <ul style="list-style-type: none"> > Manage names & addresses 	<p> Power of attorney</p> <p>Request power of attorney access.</p> <ul style="list-style-type: none"> > Request POA access 	
<p> Manage account access</p> <p>Manage access for additional users or manage access that third party preparers have to your account.</p> <ul style="list-style-type: none"> > Manage access 	<p> Submissions</p> <p>Check the status of a previous INTIME return, payment, or submission or view past submissions.</p> <ul style="list-style-type: none"> > Search submissions 	<p> Tax account registration</p> <p>Register, renew or close a location or tax account.</p> <ul style="list-style-type: none"> > Register or renew a tax account 	
<p> Refund for tax on purchases</p> <p>Request a refund for Indiana tax that you have paid on purchases.</p> <ul style="list-style-type: none"> > Submit a refund request on purchases > Submit a fuel tax refund claim 	<p> Applications</p> <p>Apply for either the Utility Sales Tax Exemption or the Physician Practice Ownership Tax Credit.</p> <ul style="list-style-type: none"> > Apply for Utility Sales Tax Exemption 	<p> Individual extension</p> <p>Request extension of time to file for individual income tax.</p> <ul style="list-style-type: none"> > Request extension 	
<p> How to file an individual return</p> <p>DOR is unable to accept and process your Indiana individual tax return through INTIME. Send your completed return, including all schedules and wage statements to the address at the bottom of your return.</p> <ul style="list-style-type: none"> > Instructions for individual return filing 	<p> Legal protests and abatements</p> <p>Protest a notice of proposed assessment or refund denial or request an abatement of a penalty.</p> <ul style="list-style-type: none"> > Submit penalty abatement request > Submit protest documentation 	<p> Submit WCE-1 Form</p> <p>Apply for your Worker's Compensation Exemption Certificate.</p> <ul style="list-style-type: none"> > Submit WCE-1 Form 	
<p> Buying/Selling Business Assets?</p> <p>File this form if you are the seller (transferor) or purchaser (transferee) that is transferring or receiving more than 50% of the tangible personal property of a business. This must be filed at least 45 days prior to the transfer or sale.</p> <ul style="list-style-type: none"> > Submit Notice of Transfer in Bulk 	<p> Taxpayer Advocate Office (TAO)</p> <p>Submit requests for assistance from the TAO.</p> <ul style="list-style-type: none"> > Submit a request for an offer-in-compromise > Submit a request for the Hardship Program > Submit a request for a tax warrant expungement > Submit a request for assistance from the TAO 	<p> Bill Payment</p> <p>Pay using Letter ID or Warrant number included on a bill.</p> <ul style="list-style-type: none"> > Bank payment (no fee) > Credit card (fee) 	

Letters

Letters, notices, and bills sent to you from DOR can be accessed from the “All Actions” tab by locating the “Letters” panel.

Respond to a letter, notice or bill

To respond to DOR, select “View letters.”

1. From the “Inbox” tab, select any item in the “Type” column to open it.
2. Enter the letter ID.
3. You can respond and upload supporting documentation, if needed
4. Follow the prompts to respond. Submission confirmation will be displayed.

You may also respond to a letter, notice, or bill as a [non-logged-in user in INTIME, using your letter ID](#).

A joint view has been created for period-level letters, notices, or bills for periods where the spouses live at the same address during the filing(s). The “secondary” spouse will be able to view and respond to these items on their own INTIME account.

Messages

You can read and respond to messages or send a new message to Customer Service in the “Messages” panel under the “All Actions” tab.

When creating a new message, INTIME will ask for specific information to get the message to the appropriate person. An email alert is sent when DOR responds to a message.

Customers have access to an inbox, outbox, archive, and search function.

Payment plans

Setting up a payment plan

DOR offers several ways to set up a payment plan, but the easiest and most efficient option is via INTIME. It offers the added convenience of scheduling automatic recurring payments, ensuring they are made on time, and eliminating the need for vouchers.

Detailed instructions for [setting up a payment plan using INTIME](#) are available.

Make a payment on your payment plan

You can schedule automatic recurring payments, ensuring that they are made on time and eliminating the need for vouchers.

Customers who establish a payment plan with a DOR customer service representative outside of INTIME receive payment plan vouchers to make payments. Voucher Letter IDs are used to make a payment via INTIME without needing an account or to be logged in.

Detailed instructions for [making a payment on a payment plan](#) are available.

Cancel a payment plan

You can cancel an existing payment plan by selecting the corresponding checkbox in the “Cancel Plan” column. Read the warning message before canceling your plan.

View all returns and periods

You can access your return and payment history from any period.

Where is my refund?

You can check the status of your refund without logging in or creating an account. Select “Where’s my Refund?” on the INTIME homepage to get started or log in and find the same option under “All Actions.”

Select and enter an ID type, the desired tax year, and the expected estimated refund amount. Then select “Search.”

The screenshot shows a web interface for checking refund status. At the top left, it says '< DOE, JANE'. Below that is a red circle icon followed by the text 'Where's my refund?'. The main content area is divided into two columns. The left column is titled 'Check the status of your refund' and contains three radio buttons for 'SSN *' and 'ITIN *', and a text input field for 'ID *' with the placeholder 'Required'. Below these are two more text input fields for 'Tax year *' and 'Refund amount *', both with the placeholder 'Required'. The right column is titled 'Additional information' and contains a paragraph: 'This interactive tool will help you find out the status of your refund. Information is available from 2017 to the current tax year. Some tax returns may take longer to process due to factors like return errors or incomplete information. Additionally, the Indiana Department of Revenue screens every return in order to protect taxpayer identities and refunds. We apologize for any delay but are processing your return and refund as quickly as possible while ensuring your information is accurate and safe.' Below this paragraph is a blue box with a white circle icon containing an 'i' and the text 'To request your refund status:'. This box contains three bullet points: 'Select SSN or ITIN and enter your corresponding ID.', 'Enter the tax year you are requesting the refund status for.', and 'Enter the refund amount from your individual tax return which can be found on either:'. The last bullet point has two sub-bullets: 'line 21 of your IT-40 Individual Income Tax Return Form.' and 'line 21 of your IT-40PNR Part-Year or Full-Year Nonresident Individual Income Tax Return Form.' and 'line 10 of your IT-40RNR Reciprocal Nonresident Individual Income Tax Return Form.'. At the bottom right of the form is a blue button with the text 'Search'.

Allow several weeks for your refund to be posted before contacting DOR.

If you believe you should have received your refund after several weeks and you requested direct deposit, review your return and INTIME account information to confirm your bank account information was entered correctly or contact your bank to rule out an issue on their end before reaching out to DOR.

Update names and addresses

Select “Manage names & addresses” and use the Names and Addresses tabs to make updates to your tax account(s). Legal name changes are for DOR only; supporting documentation is required.

Power of Attorney for tax practitioners

Detailed instructions are available for [Individual Income tax customers](#) and [tax practitioners](#).

A customer can grant access to their INTIME account to a tax practitioner by having them request access from their own account. The customer gets an email to log in to INTIME to review and approve the request.

Access is granted on a user-level basis, so if multiple tax preparers within a firm request access, the customer will need to approve the access for each requestor.

If the customer wishes to revoke a tax practitioner’s access to their account, this can be done in the “All Actions” tab by selecting the “Manage POA access” link.

Manage account access

Select “Manage account access” on the “All Actions” tab to find the following options:

Manage account access

You can manage your own access in the “Your access” panel to see the type and level of access you have for an account.

Manage additional users

You can choose to grant or revoke access to your account, determine the level of access, and create a login for an additional user(s) from the “Account access” section and follow the instructions. Select any added user to modify their access.

Manage ePOA access

You can allow a tax professional to request access to your account. Detailed instructions are available for [Individual Income tax customers](#) and [tax practitioners](#).

Client revocation of tax practitioner ePOA

You can revoke your tax practitioner’s access by going to the “All Actions” tab and then the “Manage account access” panel to select the link in the “Manage POA access” panel.

Tax practitioner revocation of ePOA

Tax practitioners can revoke their own access from the client's INTIME account from their own account in the "Your access" panel.

Tax account registration

Register another tax account in the "All Actions" tab and locate the "Tax account registration" panel.

Submissions

Go to the "All Actions" tab and select "Submissions." Submissions are items that have been entered in INTIME for processing, like a payment or request for a return transcript.

1. Submitted items that have not yet been processed can be found on the "Pending" tab.
2. Completed/processed payments and other items appear on the "Processed" tab listed by date.

Sole proprietor registration

1. From the home page, under "Registration," select "New tax registration."
2. Under "Business tax registration," select "Register a new business tax account."
3. Review the information, select next, and under Customer Type, select Sole Proprietor.
4. Enter the NAICS ([North American Industry Classification System](#)) code specific to the sole proprietor. Enter a key word in the "Search" to help locate a code.
5. Choose the tax type(s) to register. The hyperlink next to each tax type provides information for each of them. Select "Next" and continue to follow the prompts to enter information for each tax type selected.

If registering for retail sales tax, DOR will issue a Registered Retail Merchant Certificate (RRMC), which is valid for two years. The RRMC registration fee is \$25 per sales location registered.

Register an aircraft

- When registering an aircraft, a number of selections will be offered during the registration process, including the owner type, if the aircraft is owned by multiple owners and the mailing address that should be used for the account. Aircraft information, location, and usage should be entered on the following screen.
 - Enter aircraft purchase or transfer information. A tax calculation screen will appear next.

- Any attachments, bill of sale, Form AE-5, or other written evidence to support the purchase price of the aircraft should be uploaded by selecting “Add attachment.”
 - A fee summary will include the registration fee, excise, and sales tax due with the option to make a payment and the payment method. Continue to follow the prompts to complete the payment process.

Request a refund for tax purchases

1. Request a refund for tax on purchases from the “All Actions” tab and locate the “Request for tax on purchases” panel to select “Submit refund request.”
2. If you are exempt from paying sales tax and have the documentation proving sales tax has been paid on exempt purchases, continue to use the submission to request a refund. If a refund request is based on a prior sales tax filing, the prior return should be amended rather than submitting a request for a refund on purchases.
3. Enter claim information to explain why a refund is due and select the relevant tax type. Details must be entered about each period from which you wish to claim a refund.
4. Attach supporting documentation for the refund request before proceeding. Each document attached will appear in the list.
 - a. Disclosure (Confirmation): Select the check box indicating that what you are sending is true and accurate.
5. Once the request has been submitted, a confirmation message will be displayed.

ST-200 application

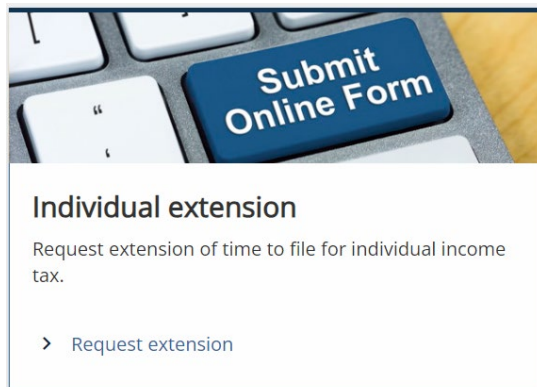
You can apply for a sales tax exception on a purchase of metered utilities or telecommunications services, if applicable, by going to the “All Actions” tab and locating the “ST-200 application” panel. Select the “Apply for an exemption” link and read the eligibility information before continuing. Follow the prompts to fill in the required information for mailing information, meter location information, customer information, and utility company information.

Extension of time to file

A request for an extension of time to file an Individual Income tax return can be done only between January 1 and April 15. The INTIME landing page will display the “Individual extension” panel only during that period. Detailed instructions for [Requesting an Extension of Time to File via INTIME](#) are available.

While extension requests cannot be filed outside of that period of time, ([estimated](#)) payments can still be made.

Filing for an extension does not extend the deadline for paying any tax due. If a customer expects to owe taxes after filing a return, they should pay at least 90% of the expected amount owed by the original return due date. Interest is due on all amounts paid after the original return due date.



Incorrect contact information

If you need to update your INTIME contact information, select the user icon in the top right corner and then edit the contact information available on the screen.

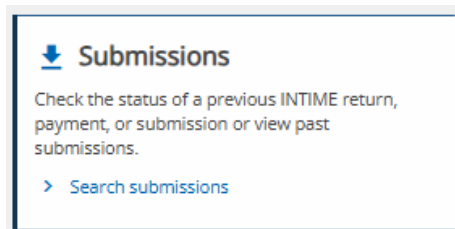
To update legal name and address, go to the “All Actions” tab and the “Updating Name and Addresses” panel.

Payment due date

If the Individual Income tax return due date of April 15 falls on a weekend or legal holiday, any payment owed is due on the next business day. Payment can be made via INTIME with or without logging in.

Payment history

1. To view payment history, go to the “All Actions” tab, locate the “Submissions” panel and select the “Search submissions” link. Submissions are items that have been entered in INTIME for processing. This includes returns and payments.



2. Payments or any items that have been submitted but that have not yet been processed can be viewed in the “Pending” tab.

3. Past payments or any items that have been completed or processed will appear in the “Processed” tab and listed by date. The “Search” function can help locate past items by entering a date range.

Making estimated payments

You have the option to make a logged-in or non-logged-in payment. To make an estimated payment without logging in to an INTIME account, follow the directions in the “Non-Logged-In” section of this guide under [“Non-Bill Payments.”](#)

To make an estimated payment while logged in to an INTIME account, go to the “Summary” tab and locate the “Make a payment” link in the “Account” panel. On the Payments page, in the “Make an estimated payment” tile, choose either to “Pay with a bank account” or “Pay with credit card.” Then follow the steps provided.

Individual Income tax returns

DOR is unable to accept and process Indiana Individual Income tax returns through INTIME. Completed returns, including all schedules and wage statements, should be sent to the address at the bottom of the return.

Taxpayer rights and responsibilities

All Hoosiers have certain [rights and responsibilities](#) that correspond to Indiana tax laws.

Contact us & news

News & Notices

[Subscribe to all agency and tax-related news shared by DOR.](#)

Tax Bulletin

[Subscribe to DOR's monthly newsletter](#) dedicated to tax practitioners and businesses.

Customer Service

[Message DOR through INTIME](#) or [contact Customer Service](#) Monday through Friday, 8 a.m. – 4:30 p.m. ET.

Stay connected

- [LinkedIn](#)
- [X \(Twitter\)](#)
- [Instagram](#)
- [Facebook](#)