



INtax Tax Professionals Guide

August 2020



Indiana Department of Revenue

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Introduction

Welcome to INtax, Indiana's free online tool to manage business tax obligations for Indiana retail sales tax, withholding tax, out-of-state sales tax, gasoline use tax, metered pump sales tax, tire fees, fuel tax, wireless prepaid fees, type II gaming fees, food and beverage tax, county innkeeper's tax, alcohol excise tax, other tobacco products excise tax, and heavy equipment rental tax.

INtax supports the following tax forms: ST-103, ST-103MP, ST-103P, ST-103CAR, WH-1, WH-3, TF-103, SF-900, SF-401, MF-360, WPC-103, TTG-103, GT-103DR, FAB-103, CIT-103, ALC-W, ALC-FW, ALC-DWS, ALC-M, ALC-PS, (OTP) CT-19, OTP-M, OTP-PACT, and HRT-103.

INtax enables tax professionals, also known as service providers, to file and pay taxes on behalf of their clients.

Registering as an INtax service provider allows you to:

- Manage all client accounts using one convenient login
- View filing and payment histories submitted on behalf of your clients
- Communicate securely with the department regarding your clients' accounts

Register as a service provider

NOTE: If you previously registered for INtax with your own Tax ID Number as a regular INtax user, you must contact the Indiana Department of Revenue. Use the INtax message center to request your account be converted to a service provider account or call (317) 232-2240 for more information. Upon conversion, no information in your account will be effected. Service provider functionality will be added to your account.

If your organization is not registered with the department for a tax type supported in INtax, you must complete a Non-Registered Service Provider Application. Call (317) 232-5500 if you have questions about being a non-registered service provider.

The following instructions guide you through the process of registering in INtax as a service provider.

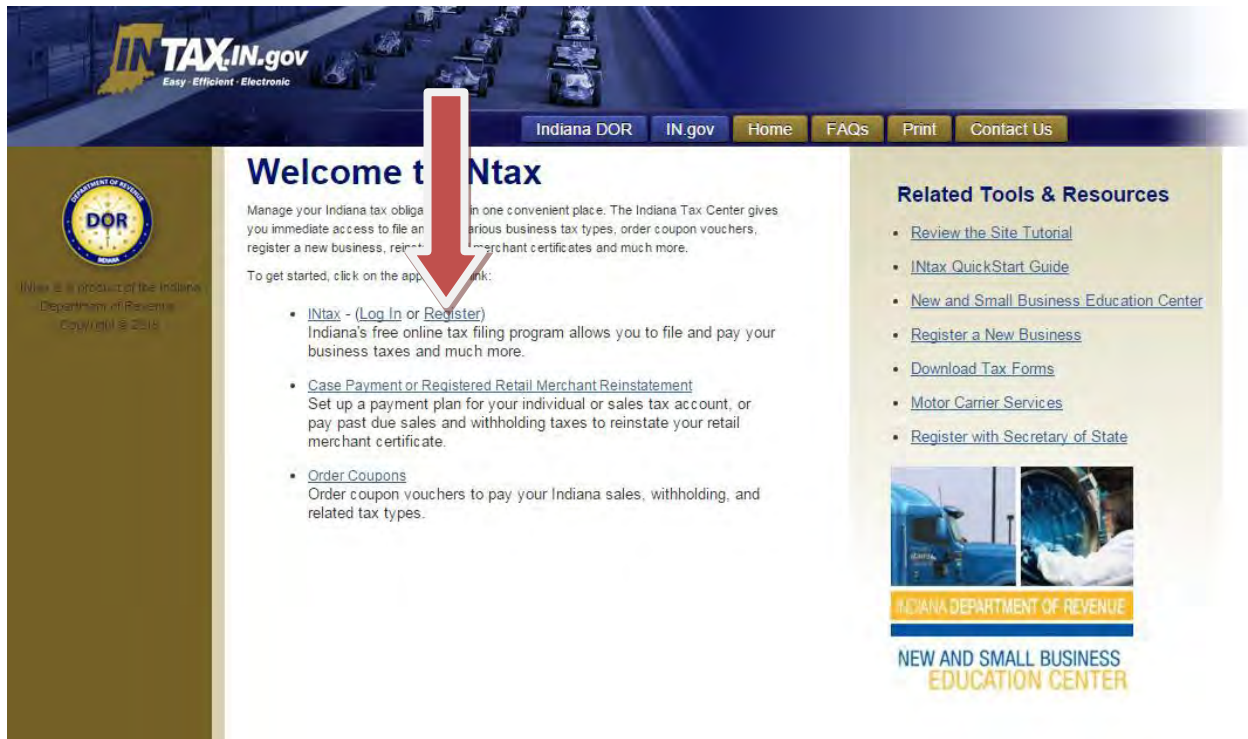
Before you begin the INtax registration process, you'll need a couple items:

1. Your Indiana Tax Identification Number (TID). You received this when you registered your business with the state on the business tax application.
2. Your previous tax return, payment information, or an INtax Access Code.

Note: Using your INtax Access Code is the preferred method to verify your business.

Note: If you are registering to use INtax for Alcohol (ALC) or Other Tobacco Products (OTP) taxes, you must have an Indiana TID and the Access Code provided by the department. You are not able to register for ALC or OTP taxes using the previous tax return amount due or previous payment amount. Those options are provided for other tax types only. If you are an ALC/OTP taxpayer and do not have a TID, please call (317) 232-2240 to obtain both your TID and Access Code. If you already have a TID, you can request your Access Code by calling (317) 232-2240. You also can request your Access Code be sent to you via the US Postal Service during the INtax registration process.

To begin your registration, go to www.INtax.in.gov. Select **Register** in the center of the page.



IN TAX.IN.gov
Easy · Efficient · Electronic

Indiana DOR | IN.gov | Home | FAQs | Print | Contact Us

Welcome to INtax

Manage your Indiana tax obligations in one convenient place. The Indiana Tax Center gives you immediate access to file and pay various business tax types, order coupon vouchers, register a new business, reinstate your retail merchant certificates and much more.

To get started, click on the appropriate link:

- [INtax - \(Log In or Register\)](#)
Indiana's free online tax filing program allows you to file and pay your business taxes and much more.
- [Case Payment or Registered Retail Merchant Reinstatement](#)
Set up a payment plan for your individual or sales tax account, or pay past due sales and withholding taxes to reinstate your retail merchant certificate.
- [Order Coupons](#)
Order coupon vouchers to pay your Indiana sales, withholding, and related tax types.

Related Tools & Resources

- [Review the Site Tutorial](#)
- [INtax QuickStart Guide](#)
- [New and Small Business Education Center](#)
- [Register a New Business](#)
- [Download Tax Forms](#)
- [Motor Carrier Services](#)
- [Register with Secretary of State](#)

INDIANA DEPARTMENT OF REVENUE

NEW AND SMALL BUSINESS
EDUCATION CENTER

When asked “Is your business a tax preparation service that will file and pay taxes on behalf of business clients?” select “Yes” (see arrow #1 below) to register as a service provider.

Answer the next two questions, and then select **Next** (see arrow #2 below).

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Register Your Business

Welcome to INtax. This is where you'll begin the INtax registration process. INtax supports the following tax types:

- Alcohol Excise Taxes
- County Inkeepers
- Food & Beverage
- Fuel Tax
- Gasoline Use Tax
- Other Tobacco Product Taxes
- Prepaid Sales Tax
- Retail Sales Tax
- Tire Fee Tax
- Type II Gaming
- Wireless Prepaid
- Withholding Tax

We'll need to ask a few questions about your business to get started.

Is your business a tax preparation service that will file and pay taxes on behalf of business clients?

☒ Yes

☐ No

Does your business need to file and pay its own Indiana taxes?

☒ Yes, we have Indiana business tax obligations.

☐ No, we do not have Indiana business tax obligations.

Has your business already registered for Indiana taxes?

☒ Yes, this business has already completed our registration form(s).

☐ No, what do we need to do?

Thank you! Please click Next to continue your registration for INtax.

Next

Creating your username

This page begins your registration. Complete all applicable fields to create your User Profile.

Create a unique username. You will use this to access your INtax User Account. Pay close attention to the requirements for creating your username. Once created, make sure you remember it for future reference.

In the User Information section, enter your name and contact information, including phone number and email address.

Then, in the Business Information section, enter your specific business information, including the business name and the state tax ID (TID).

Once you have completed each field, select **Next**.

Register to Use INtax

[Instructions](#)

Filing and Paying

When using INtax for filing taxes, you must make associated payments electronically so that the correct return period will be credited with the payment. It is essential to file a return for each period regardless of whether tax is due. Failure to do so will result in estimated billings being issued for the missing returns.

Items Needed

When completing the registration process, you must have an Indiana taxpayer identification number (TID) and one of the following:

- Total amount due on a recently filed return
- Amount of a recently submitted payment
- Access code provided by the department

If you are registering to use INtax for Alcohol (ALC) or Other Tobacco Products (OTP) taxes, you must have an Indiana TID and the access code provided by the department. You are not able to register for ALC or OTP taxes using the total amount due on a recently filed return or the amount of a recently submitted payment. Those options are provided for other tax types only. If you are an ALC/OTP taxpayer and do not have a TID, please call (317) 233-8729 to obtain both your TID and access code. If you already have a TID, you can request your access code by calling (317) 233-8729. You also can request your access code be sent to you via the US Postal Service during the INtax registration process.

User Information

Create your INtax username below. Usernames must begin with a letter, be 6-25 letters and numbers in length and include no special characters, except an underscore or a period.

Username

First Name

Middle Initial

Last Name

Suffix

Phone Number

Phone Ext.

Email Address

[Click here to test delivery](#)

Re-enter Email

Business Information

Please enter the required business information to continue the registration process. You can add additional businesses to your user profile after your original registration is processed.

Business Name

State Tax ID (TID)

Note: You can add additional businesses to your User Profile after your original registration is processed.

Verifying your business

Now you must verify your business. You have four verification options from which to choose:

- Previous tax return amount due
- Previous payment amount
- INtax Access Code found on your Registered Retail Merchant Certificate or department letter
- Request an INtax Access Code be sent to you via USPS

When you select one of the options, additional information appears on the page.

Note: Using your INtax Access Code is the preferred method to verify your business. If you are a non-registered service provider, your INtax Access Code will be emailed to you after your Non-Registered Service Provider Application has been processed.

Note: If you are registering to use INtax for Alcohol (ALC) or Other Tobacco Products (OTP) taxes, you must have an Indiana TID and the Access Code provided by the department. You are not able to register for ALC or OTP taxes using the previous tax return amount due or previous payment amount. Those options are provided for other tax types only. If you are an ALC/OTP taxpayer and do not have a TID, please call (317) 232-2240 to obtain both your TID and Access Code. If you already have a TID, you can request your Access Code by calling (317) 232-2240. You also can request your Access Code be sent to you via the US Postal Service during the INtax registration process.

Previous tax return amount due

Select the first option (see arrow #1 below) if you would like to use a previous tax return amount due to verify your business. (You must know the exact amount.) After selecting this option, a field will appear where you can enter the amount.

In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INTax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).

The screenshot shows the "Register to Use INTax" page. At the top is the "IN TAX IN.gov" logo with the tagline "Easy · Efficient · Electronic". Navigation links include "Indiana DOR", "IN.gov", "Home", "FAQs", "Print", and "Contact Us".

The main content area is titled "Register to Use INTax". It begins with the instruction "Select your desired method to verify the business." and lists four radio button options. A red arrow labeled "1" points to the first option, "Previous tax return amount due".

Below the options is a section titled "Enter amount due for quick access to INTax." with a warning: "Verify an amount due for a return submitted more than 30 days in the past. If the department has not had adequate time to process your return containing the information supplied, your registration could fail." There is a text input field labeled "Enter an amount greater than zero".

The next section is "Legal Disclaimer", which contains two paragraphs of text. Below the text are two radio button options. A red arrow labeled "2" points to the first option, "I agree".

At the bottom right are three buttons: "Cancel", "Previous", and "Submit". A red arrow labeled "3" points to the "Submit" button.

On the left side of the page, there is a vertical banner with the Indiana Department of Revenue logo and the text: "INTax is a product of the Indiana Department of Revenue Copyright © 2015".

Previous payment amount

Select the second option (see arrow #1 below) if you would like to use a previous payment amount to verify your business. (You must know the exact amount.) This cannot be an amount submitted to the department in the last 30 days. After selecting this option, a field appears where you can enter the amount.

In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INTax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).

The screenshot shows the 'Register to Use INTax' page on the Indiana Department of Revenue's website. The page has a blue header with the 'INTAX.IN.gov' logo and navigation links for 'Indiana DOR', 'IN.gov', 'Home', 'FAQs', 'Print', and 'Contact Us'. On the left, there is a vertical gold bar with the Indiana DOR seal and text stating 'INTax is a product of the Indiana Department of Revenue Copyright © 2015'.

The main content area is titled 'Register to Use INTax' and includes the following sections:

- Select your desired method to verify the business.** This section contains four radio button options:
 - ☐ Previous tax return amount due
 - ☒ Previous payment amount (indicated by a red arrow labeled '1')
 - ☐ Enter your preapproved INTax Access Code for quick access to INTax.
 - ☐ Request a new or replacement INTax Access Code via the US Postal Service.
- Enter payment amount for quick access to INTax.** This section includes a text box for entering a payment amount, with a note: 'Verify a payment amount for a return submitted more than 30 days in the past. If the department has not had adequate time to process your payment containing the information supplied, your registration could fail.'
- Legal Disclaimer** This section contains two paragraphs of text and two radio button options:
 - ☐ I agree. (indicated by a red arrow labeled '2')
 - ☐ I am registering to use INTax only at this time.

At the bottom of the form, there are three buttons: 'Cancel', 'Previous', and 'Submit' (indicated by a red arrow labeled '3').

Preapproved INtax Access Code

Select the third option (see arrow #1 below) if you have an INtax Access Code, which can be found on your Registered Retail Merchant Certificate or a department issued letter, and would like to use this Access Code to verify your business. Using an Access Code is the preferred method of verifying your business. After selecting this option, a field for the Access Code appears. Enter your Access Code.

In the Legal Disclaimer section, select “I agree” to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).

The screenshot shows the 'Register to Use INtax' page. At the top, there is a navigation bar with links for 'Indiana DOR', 'IN.gov', 'Home', 'FAQs', 'Print', and 'Contact Us'. The main heading is 'Register to Use INtax'. Below this, a section titled 'Select your desired method to verify the business.' contains four radio button options. A red arrow labeled '1' points to the third option, 'Enter your preapproved INtax Access Code for quick access to INtax.', which is selected. Below the options, there is a text input field for the 'Preapproved INtax Access Code'. A second section, 'Legal Disclaimer', contains two paragraphs of text. A red arrow labeled '2' points to the 'I agree.' radio button option. A third red arrow labeled '3' points to the 'Submit' button at the bottom right of the page. Other buttons visible include 'Cancel', 'Previous', and 'Submit'.

Register to Use INtax

Select your desired method to verify the business.

- ☐ Previous tax return amount due
- ☐ Previous payment amount
- ☒ Enter your preapproved INtax Access Code for quick access to INtax.
- ☐ Request a new or replacement INtax Access Code via the US Postal Service.

Enter your preapproved INtax Access Code for quick access to INtax.

If you have recently received a Retail Merchant Certificate after filing a BT-1 application, your preapproved access code will be printed at the bottom of the certificate. For other tax types, a separate letter was mailed that contains the access code. Please enter this access code as a combination of the characters 0-9 and A-F only. If you do not have your access code, please select another option.

Preapproved INtax Access Code

Legal Disclaimer

I certify that the business for which I am registering to use INtax has granted me the authority to perform this action. I certify that information and statements supplied on this application are true and correct.

I also agree to file tax returns and make payments electronically for the tax accounts managed on this site.

- ☒ I agree.
- ☐ I am registering as a WH-3s only at this time.

Request a replacement INtax Access Code

Select the fourth option (see arrow #1 below) if you need to have a new or replacement INtax Access Code sent to you via the United States Postal Service and would like to use this Access Code to verify your business. This option takes the longest and requires you to pause your registration until you receive your code.

Note: The INtax Access Code will be mailed within three to seven days to the address the department has on file, so be sure we have your most current address.

After you receive your Access Code, follow the instructions in the letter to complete your registration process.

In the Legal Disclaimer section, select “I agree” to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).

The screenshot shows the 'Register to Use INtax' page on the Indiana Department of Revenue's website. The page has a blue header with the 'IN TAX IN.gov' logo and navigation links: 'Indiana DOR', 'IN.gov', 'Home', 'FAQs', 'Print', and 'Contact Us'. On the left is a vertical gold sidebar with the DOR logo and text: 'INtax is a product of the Indiana Department of Revenue. Copyright © 2010'. The main content area is titled 'Register to Use INtax' and contains the following sections:

- Select your desired method to verify the business.** This section has four radio button options:
 - ☐ Previous tax return amount due
 - ☐ Previous payment amount
 - ☐ Enter your preapproved INtax Access Code for quick access to INtax.
 - ☒ Request a new or replacement INtax Access Code via the US Postal Service. (Indicated by a red arrow labeled '1')
- Request a new or replacement INtax Access Code via the US Postal Service.** This section contains explanatory text. (Indicated by a red arrow labeled '3')
- Legal Disclaimer** This section contains two paragraphs of text and two radio button options:
 - ☐ I agree. (Indicated by a red arrow labeled '2')
 - ☐ I am registering to use WH-3s only at this time.

At the bottom of the form are three buttons: 'Cancel', 'Previous', and 'Submit'. The 'Submit' button is highlighted with a red arrow labeled '3'.

Completing the registration

Your registration is now complete. You're almost done!

If you chose to verify your business using a previous tax return amount due, a previous payment amount, or an INtax Access Code, you are almost finished. Once the department verifies the submitted information, you will receive two emails:

- The first email confirms that your INtax registration was successful. This email also contains the username you created for your records.
- The second email contains a temporary password to access your account.

If the department cannot verify your submitted information and it is your first attempt, you will receive an email stating your registration was not successful. Following your second attempt, if the department cannot verify your submitted information, you will receive a second email and a letter indicating your registration was not successful.

If you requested a new or replacement Access Code or have had two or more failed registration attempts, the department will mail you an Access Code with specific instructions. Once you receive the Access Code, you have 30 days to complete your registration.

Log in to INtax

After you receive the confirmation emails with your username and temporary password, you can log in to INtax. Go to www.INtax.in.gov and select **Log In**.



Enter your username and temporary password, and select **Login**.



Change your temporary password

The first time you log in to INtax, the Change Password page automatically displays.

For security reasons, you need to change the temporary password provided by the department to a new password only you know. Remember your new password for future reference.

To change your password, first enter the temporary password in the Old Password field.

In the New Password field, enter the new password you would like to use. Pay close attention to the password requirements in the blue box.

Next, you have to confirm your new password by typing it again.

Once you've completed these steps, select **Save**.

Change Password

- Passwords may not include the characters '<', '>', '"', '&', and '"', must be 6 to 16 characters long, and must contain at least 1 letter.
- Letters in password are case-sensitive.
- For security reasons, your password is not allowed to be your email address, INtax username, or any combination of your first and last name.

Change Password

Username:

Old Password:

New Password:

Confirm New Password:

The next page confirms your password change is successful.

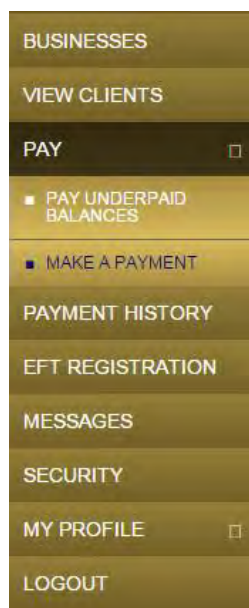
Change Password

Your password has been changed successfully.

Navigate INtax

Left navigation menu

The left navigation menu contains links important to filing and paying taxes.



Businesses

The Businesses Details page is the default landing page when you log in to INtax. On this page, you can manage your own business account. If you have multiple businesses in your account, you must select the business account you want to manage to show the details for that business.

View Clients

The View Clients page is the homepage for managing client accounts. If you have multiple businesses of your own, you must select your service provider business from the Business Details page to display the View Clients link.

Pay

The Pay page is applicable only to your own businesses, not your clients' businesses. Pay Underpaid Account Balances lets you see all the underpaid balances for your organization regardless of whether a bill has been issued by the department. Make A Payment lets you make payment in INtax.

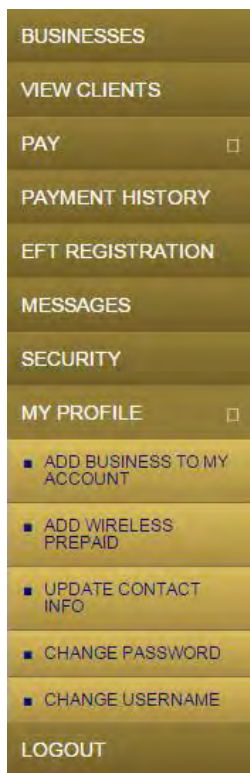
Payment History

The Payment History page is applicable only to your own businesses, not your clients' businesses. On this page, you can view previous payments and cancel or edit payments that have not been processed.

To view the payment history for your clients, you must go to the client interface by selecting View Clients.

EFT Registration

The EFT Registration page is applicable only to your own businesses, not your clients' businesses. On this page, you edit your own EFT banking information.



Messages

The Messages page is used to send and receive secure communication. You may send messages both on behalf of your own businesses and your clients' businesses.

Note: Be sure to specify in the message which account you are referencing.

Security

The Security page enables you to add users and control user access to both your own business accounts and your clients' business accounts.

Security scenarios are covered in detail on page 17 of this guide.

My Profile

INtax accounts are specific to a user rather than a business, so the My Profile page lets you control the settings for your own INtax account (the one associated with your username and password).

CAUTION: Do not select Add a Business to My Account to add a client account. If you do, the account will be added to your login permanently and listed as if it were your own business. Instead, to add a client, follow the procedure on page 24 of this guide.

Top navigation menu

The top navigation menu is the same from page-to-page and has links to helpful resources:

- **Indiana DOR** takes you to the Department of Revenue homepage.
- **IN.gov** takes you to the state of Indiana homepage.
- **Home** takes you to the INtax homepage, also called the Business Details or Business List page depending on the specifics of your INtax account.
- **FAQs** takes you to the Frequently Asked Questions page, which can help answer any questions you may have.
- **Print** creates a printer friendly version of the page you are viewing.
- **Contact Us** displays the various ways to contact the department.



Manage security

Many service providers need to add users and control the level of access for each user. From the Security page, you can add and delete users and manage their security rights to an account.

Add a user

To add a user, follow these steps:

Step 1: From any page in INTax, select **Security**.

The screenshot shows the INTax IN.gov website interface. The top navigation bar includes links for Indiana DOR, IN.gov, Home, FAQs, Print, and Contact Us. The left sidebar contains a menu with items: BUSINESSES, VIEW CLIENTS, PAY, PAYMENT HISTORY, EFT REGISTRATION, MESSAGES, SECURITY, MY PROFILE, and LOGOUT. The main content area is titled "Business Details" and includes fields for State Tax ID and Primary Address. Below these fields is a light blue box with instructions: "To view the account financial details by tax period, click on the underlined account tax type in the list below.", "To make a payment for an account, select Pay from the menu or select Pay in the list below.", and "To file a return for an account, select File in the list below." Below the instructions are input fields for State Tax & Location ID (0002247623), Zip, and Tax Type, along with a Filter button. At the bottom, there is a table with columns: Account, Address, Registered for EFT, Currently Consolidated, Status, Filing Frequency, and Actions. The table contains two rows of data, one for Sales and one for Withholding, both with a Loc of 001. A red arrow points to the SECURITY menu item in the left sidebar.

Account	Address	Registered for EFT	Currently Consolidated	Status	Filing Frequency	Actions
Sales Loc: 001		No	Yes	Open	Early Filer	File Pay
Withholding Loc: 001		Yes	No	Open	Early Filer	File Pay

Step 2: Select Add User.

The screenshot shows the IN TAX.IN.gov website interface. The header includes the logo and navigation links: Indiana DOR, IN.gov, Home, FAQs, Print, and Contact Us. The left sidebar contains a menu with options: BUSINESSES, VIEW CLIENTS, PAY, PAYMENT HISTORY, EFT REGISTRATION, MESSAGES, SECURITY, MY PROFILE, and LOGOUT. The main content area is titled "Security Details" and includes fields for "State Tax ID:" and "Primary Address:". Below these fields is a light blue box with instructions: "To modify a user's privileges/access to your business, click on Privileges.", "To add a new user to the business, click the Add User button to set up their profile and privileges.", and "To view the service providers that have access to your account, click the View Service Providers button." A table lists users with columns for Username, Email Address, Phone Number, Last Login, and Action. The Action column contains links labeled "Privileges". A red arrow points to the "Add User" button at the bottom right of the page.

Security Details

State Tax ID: Primary Address:

- To modify a user's privileges/access to your business, click on Privileges.
- To add a new user to the business, click the Add User button to set up their profile and privileges.
- To view the service providers that have access to your account, click the View Service Providers button.

Username	Email Address	Phone Number	Last Login	Action
				Privileges
			03/06/2015	Privileges
			02/24/2012	Privileges
			03/06/2015	Privileges

Page 1 of 1

View Service Providers

Add User

Step 3: Enter the first name, last name, email address, and contact phone number of the user you wish to add. Select **Continue**.

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BUSINESSES
VIEW CLIENTS
PAY <
PAYMENT HISTORY
EFT REGISTRATION
MESSAGES
SECURITY
MY PROFILE <
LOGOUT

DEPARTMENT OF REVENUE
DOR
INDIANA
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Edit User Details

State Tax ID: _____ Primary Address: _____

- Update the contact information using the fields below.
- Please note that First Name, Last Name, Phone Number, and Email address fields are required to successfully submit the form.

User Details	
First Name:	<input type="text"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text"/>
Email Address:	<input type="text"/>
Phone Number:	<input type="text"/>
Ext:	<input type="text"/>

You are able to set specific business level privileges for each user. The following pages of this guide will explore how to assign users different levels of access.

Assign user access

Step 4: After you select **Continue** on the Edit User Details page (see page 19 of this guide), the User Business Privileges page displays.

Allow a user complete access

Select administrative to grant the user complete access. Administrative level privileges include the ability to use INtax as if the user is the business owner, which allows the user to change access for other users. A user granted administrative level privileges will have access to both your business account and those of your clients.

Allow a user access to all accounts but not to security settings

Users assigned the right to file a return, make a payment, or adjust EFT registration also are assigned the right to look up account periods for your business account. This user would not have access to look up account periods for clients.

Allow a user access to client accounts only

Select Manage Clients to allow the user to file and pay on behalf of clients' businesses. The user will not be able to access information for your own business account (the service provider account).

Once you have assigned the appropriate business level privileges to the user, select **Submit**.

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Businesses
VIEW CLIENTS
PAY
PAYMENT HISTORY
EFT REGISTRATION
MESSAGES
SECURITY
MY PROFILE
LOGOUT

User Business Privileges

State Tax ID: Primary Address:

This page allows the administrator to apply business level privileges to the chosen user. These privileges will apply to all accounts within the business. You may adjust the rights at the account level by clicking on the Edit Account Privileges button.

To assign a right to a person for all accounts in this business, check the appropriate boxes by the business and click submit to proceed.

You are currently making changes to:

Business	Administrative	Look Up Account Periods	File A Return*	Make A Payment*	Adjust EFT Registration Information*	Manage Clients
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

*Users given the right to File a Return, Make a Payment, and/or Adjust Registration, will be given the Look Up Account Periods privilege for business.

Edit Account Privileges Cancel **Submit**

Step 5: The next page confirms the user has been added with the selected user privileges.

INtax sends an email to the newly added user. This email contains a link, which allows the new user to create his own username and password to log in to INtax.

Select **Return to My Businesses** to add an additional user.

The screenshot displays the INtax.IN.gov website interface. The header features the INtax.IN.gov logo with the tagline "Easy · Efficient · Electronic" and a navigation bar with links for "Indiana DOR", "IN.gov", "Home", "FAQs", "Print", and "Contact Us". A left-hand sidebar contains a menu with options: "BUSINESSES", "VIEW CLIENTS", "PAY", "PAYMENT HISTORY", "EFT REGISTRATION", "MESSAGES", "SECURITY", "MY PROFILE", and "LOGOUT". The main content area is titled "User Privileges Updated Successfully". Below this title, there are fields for "State Tax ID:" and "Primary Address:". A green message box contains the following text: "The access privileges for this user have been successfully added. In order for this user to access this site, he/she must first have a valid username and password. An email has been sent to the user who was added. In this e-mail, there is an internet link for the user to select his/her username and password and verify that the profile information is correct. Please note that we have temporarily assigned the user's email address as the username. The user will be able to login to any accounts with the temporary username. The user must follow the link sent and select username and password. You cannot assign the username for the users." A large red arrow points from this message box to a blue link labeled "Return To My Businesses". At the bottom of the sidebar, there is a circular logo for the Indiana Department of Revenue (DOR) and text stating "INtax is a product of the Indiana Department of Revenue Copyright © 2015".

Add a client

Note: To access the Client List page, select View Clients from the left navigation menu.

To add a client, follow these steps:

Step 1: Select Add Client.

ClientList

This screen lists the client businesses you are registered to service.

- Click on a Client Business Name to access the registered tax accounts for that business.
- Click on an action link next to the client information to edit/maintain or delete that client registration within INtax.
- To view a printable list of your clients' accounts with their associated filing frequencies, click the Client Report button below.

Client Name: State Tax ID:

Client Business Name	State Tax ID	Primary Address	Actions
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete
			Edit Delete

Page 1 of 4 View 1-10 of 39

Step 2: Enter the client's business name and State Tax ID (TID) number. Select **Add Tax Account** to add a tax account to the client business. You must add at least one tax account when adding a new client.

Add Client Business

Business Information

Please enter the required business information to continue the registration process. You can add additional businesses to your user profile after your original registration is processed.

Business Name

State Tax ID (TID)

Tax Accounts

Click on the Add Tax Account button to add tax accounts for this business. Click on the Submit button once you have added the tax accounts.

No tax accounts have been added for this client.

Step 3: Some clients may have multiple locations. You can assign a different Electronic Funds Transfer (EFT) profile to each location. The “Manage all locations” radio button will apply the indicated tax type and related EFT profile to all locations. By selecting the “Enter a specific location number” radio button, you can assign the indicated tax type and EFT profile to that specific location. (You will be asked to enter the location number.)

Note: If you select “Manage all locations” for a tax type when adding a client and later decided to assign information for different locations, you first must delete the existing client registration.

Select the EFT Profile Name you would like to use for this tax account on behalf of the client. If you need to create a new EFT profile, select **+ ADD EFT PROFILE** from the dropdown menu. If you are using a previously registered EFT profile, skip to Step 7.

Once you have selected the appropriate location, tax type, and EFT Profile Name, select **Save**.

Tax Information

- Choose the radio button to signify if this is for all locations or a specific location.
- Select the tax type from the drop-down menu.
- Select an EFT Profile Name. Click the ? below for additional information.

☒ Manage all locations
☐ Enter a specific location number

Tax Type

EFT Profile Name ?

+ ADD EFT PROFILE
Rogers Group

Step 4: If you selected **+ ADD EFT PROFILE** from the dropdown menu, the Add EFT Profile page appears. Enter the required bank and contact information and select **Add**. Don't forget to check the box at the bottom to authorize the department to debit the bank account.

Note: Name each EFT Profile so it describes the bank account it represents. Avoid choosing generic names like EFT Profile 1. Doing so can increase the likelihood of accidentally debiting the wrong client account.


Add EFT Profile


State Tax ID:

Primary Address:


Complete the EFT Profile. Enter the banking information for the account from which the payment will be debited.

EFT Profile

EFT Profile Name 

Profile Type: 
☐ Client
☐ Service Provider

Bank Information

Payment Source:
☒ ACH Debit
☐ ACH Credit 

Bank Account Type:

Bank Routing Number:

Bank Account Number:

Confirm Bank Account Number:

Contact Information

EFT Contact Name:

Contact's Business Name:

Email:

Address:

Address Line 2:

City:

State:

IN


Zip:

Country:

United States

Phone:

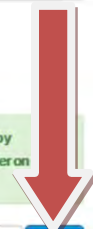
Phone Extension:

Will the funds from this transaction originate from a source outside the United States?
☐ Yes ☐ No 

☒ I hereby authorize the Indiana Department of Revenue to present debit entries into the bank account referenced above by Indiana Law. These debits will pertain to Electronic Funds Transfer requests that the taxpayer (or designated service provider on behalf of the taxpayer) has initiated.

Cancel

Add



Step 5: You may add more tax type accounts to this client. You may assign a different EFT profile for each tax type. Once you are finished, select **Submit** to add the new client. A page confirming the client is added to your profile will appear once the department has verified the business information.

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MY BUSINESS
EFT PROFILE
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
BULK FILE/PAY
LOGOUT

Add Client Business

Business Information

Please enter the required business information to continue the registration process. You can add additional businesses to your user profile after your original registration is processed.

Business Name

State Tax ID (TID)

Tax Accounts

Click on the Add Tax Account button to add tax accounts for this business. Click on the Submit button once all tax accounts have been added for this client.

No tax accounts have been added for this client.

Cancel + Add Tax Account Submit

Once a client has been added, you can add additional tax accounts to the existing client account. See page 26 of this guide for step-by-step instructions.

Add a tax account to an existing client

Note: To access the Client List page, select View Clients from the left navigation menu.

You can add a tax account to an existing client. To add a tax account, follow these steps:

Step 1: For the appropriate Client Business Name row, select **Edit** in the Actions column.

Client List

This screen lists the client businesses you are registered to service.

- Click on a Client Business Name to access the registered tax accounts for that business.
- Click on an action link next to the client information to edit/maintain or delete that client registration within INtax.
- To view a printable list of your clients' accounts with their associated filing frequencies, click the Client Report button below.

Client Business Name	State Tax ID	Primary Address	Actions
			Edit Delete
			Edit Delete
			Edit Delete

Page 1 of 1 10 View 1 - 3 of 3

[Client Report](#) [Add Client](#)

Step 2: Select + Add Tax Account.

Edit Client Business

Tax Accounts	EFT Profile Name	Actions
Withholding All Locations		Select/A EFT Profile Delete Tax Accounts

Page 1 of 1 10 View 1 - 1 of 1

[+ Add Tax Account](#) [Back to Client List](#)

Step 3: Follow the steps beginning on page 23 of this guide to add the tax type account.

Edit EFT profile for existing client

To access the Client List page, select View Clients from the left navigation menu.

You can edit the EFT profile information for an existing client. To edit the EFT profile information, follow these steps:

Step 1: For the appropriate Client Business Name row, select **Edit** in the Actions column.

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MY BUSINESS
EFT PROFILE
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
BULK FILE/PAY
LOGOUT

DEPARTMENT OF REVENUE
DOR
INDIANA

Client List

This screen lists the client businesses you are registered to service.

- Click on a Client Business Name to access the registered tax accounts for that business.
- Click on an action link next to the client information to edit/maintain or delete that client registration within INtax.
- To view a printable list of your clients' accounts with their associated filing frequencies, click the Client Report button below.

Client Business Name	State Tax ID	Primary Address	Actions
			Edit Delete
			Edit Delete
			Edit Delete

Page 1 of 1 10 View 1 - 3 of 3

Client Report Add Client

Step 2: Select **Select/Add New EFT Profile** in the Actions column of the row that corresponds to the location and tax account you wish to edit.

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MY BUSINESS
EFT PROFILE
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
MAINTAIN CLIENT
CLIENT HISTORY
LOGOUT

Edit Client Business

Tax Accounts	EFT Profile Name	Actions
Withholding All Locations	Rogers Group	Select/Add New EFT Profile Delete Tax Accounts

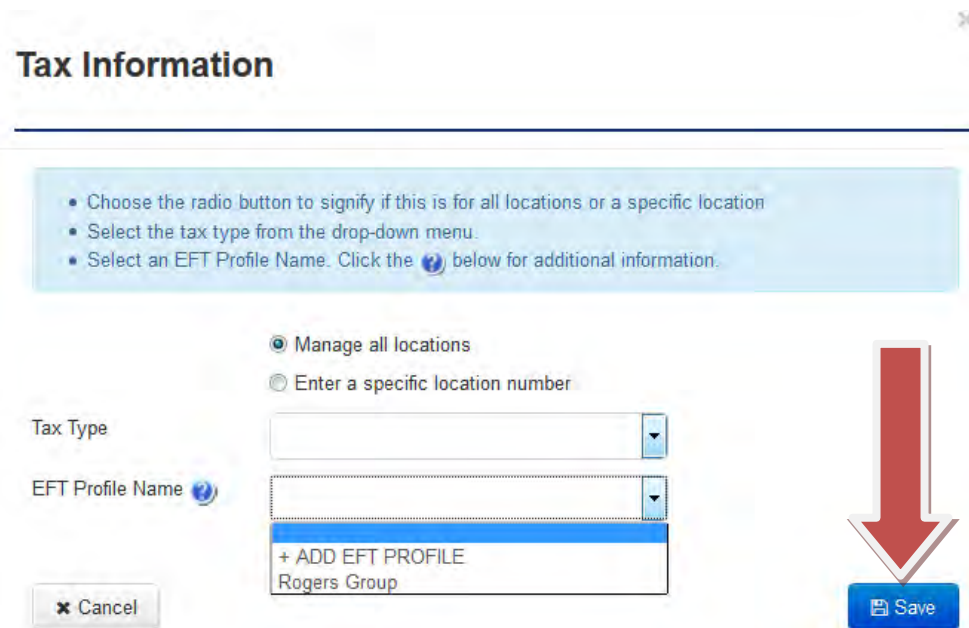
Page 1 of 1 10 View 1 - 1 of 1

+ Add Tax Account Back to Client List

Step 3: From the Tax Information page, choose the EFT Profile Name you wish to edit. Select **Save**.

Note: Changing the EFT profile information will affect all accounts using this EFT profile. If you need to make changes for a single client, make sure that same EFT profile is not assigned to other clients.

If a payment is scheduled before you make a change to an EFT profile, that payment still will be presented to the bank with the information on file at the time the payment was scheduled. If the payment needs to be made with the updated information, you should cancel the previously scheduled payment and reinitiate the payment.



The screenshot shows a web form titled "Tax Information" with a close button (X) in the top right corner. Below the title is a light blue instruction box containing three bullet points: "Choose the radio button to signify if this is for all locations or a specific location", "Select the tax type from the drop-down menu.", and "Select an EFT Profile Name. Click the ⓘ below for additional information." Below the instructions are two radio buttons: "Manage all locations" (selected) and "Enter a specific location number". To the left of these are labels for "Tax Type" and "EFT Profile Name ⓘ". The "Tax Type" field is an empty dropdown menu. The "EFT Profile Name" field is a dropdown menu with a blue highlight on the option "+ ADD EFT PROFILE" and the text "Rogers Group" visible below it. To the left of the "EFT Profile Name" field is a "Cancel" button with an X icon. To the right of the form is a large red arrow pointing down to a blue "Save" button with a floppy disk icon.

Tax Information

- Choose the radio button to signify if this is for all locations or a specific location
- Select the tax type from the drop-down menu.
- Select an EFT Profile Name. Click the ⓘ below for additional information.

☒ Manage all locations
☐ Enter a specific location number

Tax Type

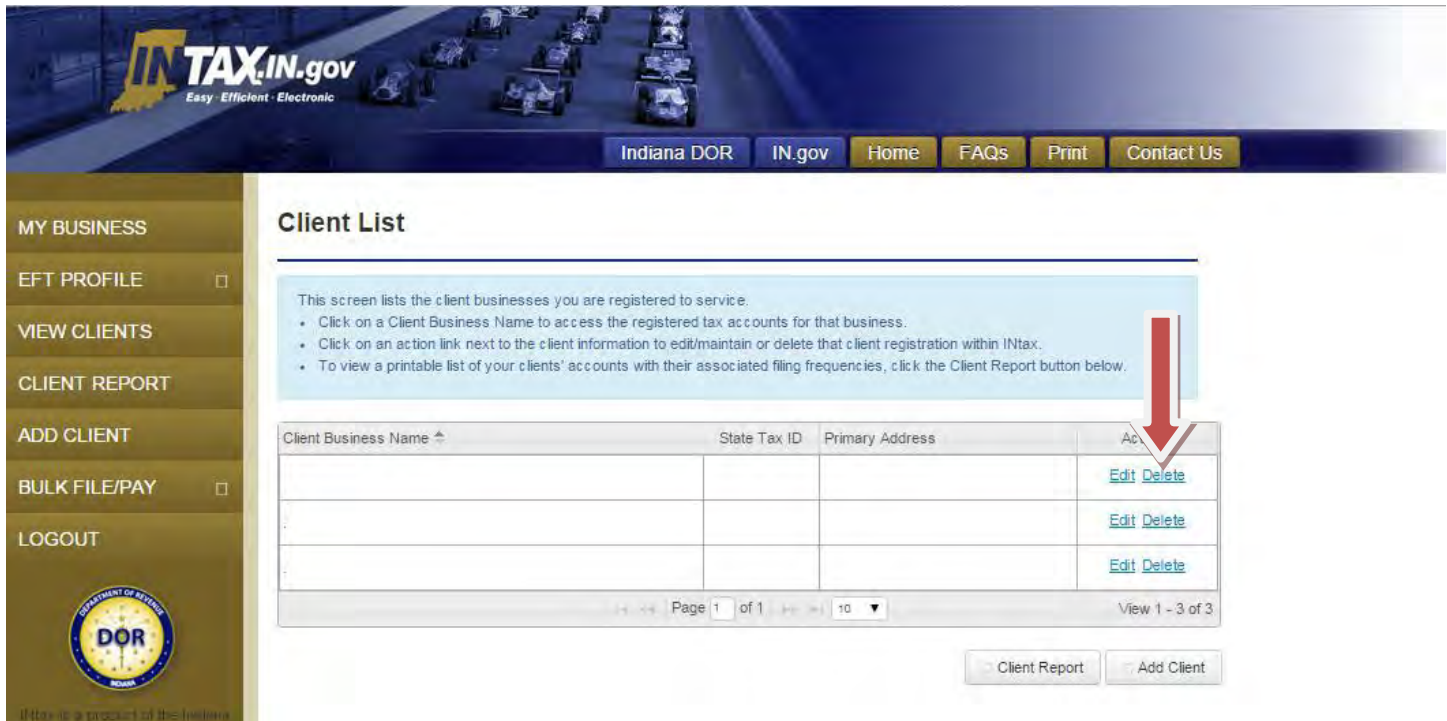
EFT Profile Name ⓘ
+ ADD EFT PROFILE
Rogers Group

Delete a client

To access the Client List page, select **View Clients** from the left navigation menu.

For the appropriate Client Business Name row, select **Delete** in the Actions column. You will receive a pop-up window after selecting **Delete**. Select **OK** to proceed.

Note: Make sure you want to delete this client. Deleting the client removes the client completely.



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MY BUSINESS
EFT PROFILE
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
BULK FILE/PAY
LOGOUT

Client List

This screen lists the client businesses you are registered to service.

- Click on a Client Business Name to access the registered tax accounts for that business.
- Click on an action link next to the client information to edit/maintain or delete that client registration within INtax.
- To view a printable list of your clients' accounts with their associated filing frequencies, click the Client Report button below.

Client Business Name	State Tax ID	Primary Address	Actions
			Edit Delete
			Edit Delete
			Edit Delete

Page 1 of 1 | 10 | View 1 - 3 of 3

[Client Report](#) [Add Client](#)

File a return

To access the Client List page, select View Clients from the left navigation menu.

Step 1: Select the name of the business for which you are filing a return.

The screenshot shows the INtax.IN.gov interface. The left navigation menu includes: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, BULK FILE/PAY, and LOGOUT. The main content area is titled 'Client List'. It contains a table with columns: Client Business Name, State Tax ID, Primary Address, and Actions. The first row is 'Sample Business' with links for 'Edit' and 'Delete'. Below the table are pagination controls showing 'Page 1 of 1' and 'View 1 - 3 of 3'. At the bottom right are buttons for 'Client Report' and 'Add Client'.

Step 2: The Client Details page will populate. For the appropriate Account row, select **File** in the Actions column.

The screenshot shows the INtax.IN.gov 'Client Details' page. It displays fields for 'State Tax ID' and 'Primary Address'. Below these is a table with columns: Account, Address, Currently Consolidated, Status, and Actions. The first row shows 'No' for 'Currently Consolidated' and 'Open' for 'Status', with 'File' and 'Pay' links in the 'Actions' column. A red arrow points to the 'File' link. Below the table are pagination controls showing 'Page 1 of 1' and 'View 1 - 1 of 1'. At the bottom right is a 'Back' button.

Step 3: The following pages may vary depending on the type of return you are filing.

For some tax type accounts, you will be asked for additional information to determine which form you want to file. Select **Continue** to proceed.

Enter a valid period end date. Select **Next** to proceed. *Note: This is the last day of the month/year for which you have collected tax, not the due date of the return being filed.*

Enter all return information, and then select **Submit**. Don't forget to check the box at the bottom to declare the amounts displayed on the page are true, correct, and complete.

A Return Confirmation page displays after the return has been submitted successfully. If you are using INtax to remit payments, select **Make a Payment** from the Return Confirmation page. If you are not using INtax to remit payments, your transaction is complete.

Make a payment

To access the Client List page, select View Clients from the left navigation menu.

Step 1: From the Client List page, select the name of the business for which you are making a payment.

The screenshot shows the IN TAX.IN.gov website. The left navigation menu includes: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, BULK FILE/PAY, and LOGOUT. The main content area is titled 'Client List'. It contains a table with columns: Client Business Name, State Tax ID, Primary Address, and Actions. The first row is 'Sample Business' with links 'Edit' and 'Delete' in the Actions column. A red arrow points to the 'Sample Business' link. Below the table is a pagination bar showing 'Page 1 of 1' and 'View 1 - 3 of 3'. There are also buttons for 'Client Report' and 'Add Client'.

Step 2: For the appropriate Account row, select **Pay** in the Actions column.

The screenshot shows the IN TAX.IN.gov website. The left navigation menu includes: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, MAINTAIN CLIENT, CLIENT HISTORY, and LOGOUT. The main content area is titled 'Client Details'. It shows fields for 'State Tax ID:' and 'Primary Address:'. Below these is a table with columns: Account, Address, Currently Consolidated, Status, and Actions. The first row shows 'No' for 'Currently Consolidated' and 'Open' for 'Status', with a 'File Pay' link in the Actions column. A red arrow points to the 'File Pay' link. Below the table is a pagination bar showing 'Page 1 of 1' and 'View 1 - 1 of 1'. There is a 'Back' button at the bottom right.

Step 3: Enter the payment information. Select **Continue**.

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Make a Payment

Tax Type: Withholding ([View Due Dates](#)) Location Address:

State Tax ID: Current Filing Frequency: Early Filer

• Select Pay Now for the payment to be submitted immediately for processing, or select Schedule a Payment, to enter the date you would like the payment to be withdrawn.
• Payments may not be scheduled more than 30 days in advance.
• If you need to make a payment for a period not listed in the Period Dates field, please contact the department at [\(317\) 233-8729](#) for assistance.

Period Dates:

Payment Amount:

Withdrawal Date

☒ Pay Now
☐ Schedule a payment for: (MM/DD/YYYY)

Payment Option

☒ ACH Debit (EFT)

Please check with your bank to make sure you do not have a debit block on your account! For more information about how to remove a debit block, please [click here](#).

To cancel or modify a scheduled ACH Debit payment after it has been submitted, select Payment History from the left menu and use the action links provided. The transaction must be modified or canceled by 3:45 p.m. Eastern Time the business day before the date you requested the funds be debited from your account. NOTE: Credit card transactions may not be modified or canceled after they have been submitted.

Continue

Step 4: Review the Confirm Payment page. If the payment information is correct, select **Submit**. If changes need to be made to the payment, select **Previous**.

Confirm Payment

Tax Type: Sales ([View Due Dates](#)) Location Address:

State Tax ID: Current Filing Frequency: ☒ Monthly

You have selected ACH Debit as your payment option. The following account will be debited. If your bank account is no longer valid, please select EFT Registration from the menu and update your bank information.

All ACH Debits made before 4:00 p.m. Eastern Time will be processed the next business day.

To process this transaction you must click the Submit button. If you have not already filed a return for this period, you must do so after you submit your payment.

Account	Period	Payment	Bank Account	ABA Number	Date
Sales Loc: 001	08/01/2015-08/31/2015	\$3.00			07/16/2015

Page 1 of 1 10 View 1 of 1

[Previous](#) [Submit](#)

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A Payment Confirmation page displays after the payment has been submitted successfully. If you have not filed the return, select **File Return** from the Payment Confirmation page. Depending on the tax type, INtax may populate the form with information or you may have to choose the form type.

Bulk filing options

Bulk filing is a popular method used by service providers to ease the filing and paying process for withholding tax. Before continuing, it is important to determine which method fits your needs best.

If your software creates a properly formatted file with all of your client information, you can upload the file in INtax. All clients included in the file must be listed as clients in INtax. If you have a client in the file that you have not added to INtax, you will receive a message stating that the taxpayer was not found.

Form WH-3

- Form WH-3 can be bulk filed in INtax if there are fewer than 3,500 employee withholding records in the file.
Note: This does not mean fewer than 3,500 employees but fewer than 3,500 records. The file likely will contain other records for federal filing and perhaps other states, so the total number of employees in the file typically will be far fewer than 3,500. The maximum file size allowed is 2MB.
- If your file contains more than 3,500 records and is larger than 2MB, you must use the FTP method to bulk file. For more information on submitting bulk files via FTP, see the bulk upload guide at www.in.gov/dor/business-tax/bulk-filing-your-indiana-business-taxes.

Form WH-1

- If you have fewer than 25 clients, INtax is the most convenient filing method for Form WH-1. You still can submit a bulk payment through INtax, which will allow you to avoid the FTP setup and certification requirement.
- If you have more than 25 clients, bulk upload offers a convenient way to file Form WH-1. Bulk upload filing requires your file to be in XML format and submitted via FTP. For more information on submitting bulk files via FTP, see the bulk upload guide at <http://www.in.gov/dor/business-tax/bulk-filing-your-indiana-business-taxes>.

Bulk filing Form WH-3 in INtax

To access the Client List page, select View Clients from the left navigation menu.

Step 1: Select the name of the business for which you are bulk filing.

The screenshot shows the INtax IN.gov interface. The left navigation menu includes: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, BULK FILE/PAY, and LOGOUT. The main content area is titled 'Client List'. It contains a table with columns: Client Business Name, State Tax ID, Primary Address, and Actions. The first row is 'Sample Business' with links for 'Edit' and 'Delete'. Below the table are pagination controls showing 'Page 1 of 1' and 'View 1 - 3 of 3'. At the bottom right are buttons for 'Client Report' and 'Add Client'.

Step 2: From the Client Details page, select File.

The screenshot shows the INtax IN.gov interface. The left navigation menu includes: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, MAINTAIN CLIENT, CLIENT HISTORY, and LOGOUT. The main content area is titled 'Client Details'. It shows fields for 'State Tax ID' and 'Primary Address'. Below these is a table with columns: Account, Address, Currently Consolidated, Status, and Actions. The first row shows 'No' for 'Currently Consolidated' and 'Open' for 'Status', with a 'File Pay' link in the 'Actions' column. Below the table are pagination controls showing 'Page 1 of 1' and 'View 1 - 1 of 1'. At the bottom right is a 'Back' button.

Step 3: Select “File a WH-3 (W-2/1099R) return” (see arrow #1 below), then select **Continue** (see arrow #2 below).

The screenshot shows the INtaxIN.gov website interface. The header includes the logo and navigation links: Indiana DOR, IN.gov, Home, FAQs, Print, and Contact Us. A left sidebar contains menu items: MY BUSINESS, EFT PROFILE, VIEW CLIENTS, CLIENT REPORT, ADD CLIENT, MAINTAIN CLIENT, and LOGOUT. The main content area is titled 'Select a Form Type' and contains fields for Tax Type (Withholding), Location Address, State Tax ID, and Current Filing Frequency (Annual). Below these fields is a message: 'Please select one of the options below to continue.' Two radio button options are listed: 'File a WH-1 return.' and 'File a WH-3 (W-2/1099R) return.' The second option is selected. At the bottom of the form are 'Back' and 'Continue' buttons. A red arrow labeled '1' points to the 'File a WH-3 (W-2/1099R) return.' option, and another red arrow labeled '2' points to the 'Continue' button.

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MY BUSINESS
EFT PROFILE
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
MAINTAIN CLIENT
LOGOUT

1

2

Select a Form Type

Tax Type: Withholding ([View Due Dates](#)) Location Address:
State Tax ID: Current Filing Frequency: Annual

• Please select one of the options below to continue.

☐ File a WH-1 return.
☒ File a WH-3 (W-2/1099R) return.

Back Continue

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Step 4: Using the drop-down calendar, select a valid period end date. Select **Next**.

Note: This is the last day of the month/year for which you have collected tax, not the date of the return being filed.

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File a WH-3 Return

Tax Type: Withholding ([View Due Dates](#)) | Location Address: | State Tax ID: | Current Filing Frequency: Annual

• Provide the period end date and click Next to continue. The due date based on the period end date entered will automatically calculate. If you would like to see a list of past and anticipated future due dates for this account, click the View Due Dates link above.

Tax Period

Enter the tax period end date of the return (MM/DD/YYYY):

In accordance with department rules, a business tax closure form (form BC-100) must be submitted along with appropriate documentation to close a tax account. If you are filing your final return for this tax account, download and complete form [BC-100](#) and submit the requested documentation. Refer to form BC-100 for complete instructions.

Cancel | **Next**

Step 5: In the Filing Method box, select **Upload Withholding Information from File**.

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MY BUSINESS
EFT PROFILE <
VIEW CLIENTS
CLIENT REPORT
ADD CLIENT
MAINTAIN CLIENT
CLIENT HISTORY <
LOGOUT

File a WH-3 Return

Tax Type: Withholding ([View Due Dates](#)) Location Address:
State Tax ID: Current Filing Frequency: Annual
Tax Period: Return Due Date:

Select the Upload or Manual method to add withholding wage statements and verify the accuracy of each entry.

Filing Method

- [Upload Withholding Information From File](#)
- [Manually Add/Edit Withholding Information](#)

You have already reported \$0.00 on WH-1s this tax year (total may not reflect transactions made in the past 24-48 hours). If you have submitted all withholding wage statements and the Total Tax Withheld does not equal WH-1 totals reported, please enter the difference in either the Total Amount Due or Refund Claimed.
Total W-2, 1099R, WH-18, and W2G's attached: 0

Summary Information

1. Total Amount of Indiana State Tax Withheld Add/Edit	\$0.00
2. Total Amount County Tax Withheld Add/Edit	\$0.00
3. Total Tax Withheld	\$0.00
WH-1 totals reported	\$0.00

Refund/Amount

4. Refund Claimed	\$0.00
5. Total Amount Due	\$0.00

☐ I declare under penalties and perjury that the amounts displayed on this page are true, correct, and complete. If there is a balance due, I understand that I am expected to submit payments electronically.

[Save](#) [Preview PDF](#) [Cancel](#) [Submit](#)

Step 6: Select the type of file you are uploading from the dropdown box. Select **Browse** (see arrow #1) to select the file from your computer you would like to upload. Then, select **Upload** (see arrow #2).

×

WH-3 File Upload

- Review the current specifications before uploading content.

The **1** current W-2 book and file specifications for other withholding forms can be found at www.irs.gov/dor/3779.htm.
Click the following to view sample files:
[Sample W2/WH18 file](#)
[Sample 099R/W2G file](#)

Select the file type you are uploading:

Enter the location of the file:
 No file selected.

2

Step 7: Each entry in the file is displayed. If a record is not valid, the status will be marked Invalid in red. All records must be corrected or deleted before the returns can be submitted. In the Actions column, select **Edit** (see arrow #1 below) for the record you need to correct. The data for the selected record will display in the Employee Information, State and County sections. Make any necessary corrections and select **Update** (see arrow #2 below) to save the corrected information to the record.

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MY BUSINESS

EFT PROFILE

VIEW CLIENTS


CLIENT REPORT

ADD CLIENT

MAINTAIN CLIENT

CLIENT HISTORY

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Wage Statement Entry Form

TaxType: Withholding [\(View Due Dates\)](#)

Location Address:

State Tax ID:

Current Filing Frequency: Monthly

Tax Period:

Return Due Date:

The following is the withholding information required for an employee in order to file a WH-3 return.

Employee Information

Formtype: W-2

First Name

Middle Name

Last Name

Suffix

JOHN

N

DOE

SSN (Digits Only)

Country

City

State

Zip Code

999999999

United States

CITY

IN

99999

Address

99999 XXXXXXXXXXXXX

State

State Wages

State Income Tax

\$33,600.00

\$1,087.52

County

County

County Wages

County Tax

29-Hamilton

\$33,600.00

76

Update

Cancel

Type	Full Name	State Tax Withheld	County Tax Withheld	Status	Actions
W-2	DOE,JOHN	\$1,087.52	\$319.76	Valid	Edit
W-2	DOE,JANE	\$1,372.17	\$403.86	Valid	Edit Delete

Page 1 of 1

View 1-2 of 2

Save

Back To Summary

1

2

Step 8: Once all return records are valid, select **Back to Summary**.

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Wage Statement Entry Form

Tax Type: Withholding ([View Due Dates](#)) | Location Address: | State Tax ID: | Current Filing Frequency: Monthly | Tax Period: | Return Due Date:

The following is the withholding information required for an employee in order to file a WH-3 return.

Employee Information Form type: W-2

First Name: JOHN | Middle Name: N | Last Name: DOE | Suffix: | SSN (Digits Only): 999999999 | Country: United States | City: CITY | State: IN | Zip Code: 99999 | Address: 99999 XXXXXXXXXXXXXXX |

State

State Wages: \$33,600.00 | State Income Tax: \$1,087.52

County

County: 29-Hamilton | County Wages: \$33,600.00 | County Tax: \$319.76

Update **Cancel**

Type	Full Name	State Tax Withheld	County Tax Withheld	Status
W-2	DOE, JOHN	\$1,087.52	\$319.76	Valid
W-2	DOE, JANE	\$1,372.17	\$403.86	Valid

Page 1 of 1

Save **Back To Summary**

Step 9: Enter the Refund Claimed and Total Amount Due. Select the box verifying that the information is correct, and then select **Submit** to complete the bulk filing.

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File a WH-3 Return

Tax Type: Withholding ([View Due Dates](#)) **Location Address:**
State Tax ID: **Current Filing Frequency:** Annual
Tax Period: **Return Due Date:**

Select the Upload or Manual Filing Method to add withholding wage statements and verify the accuracy of each entry.

Filing Method

- [Upload Withholding information From File](#)
- [Manually Add/Edit Withholding Information](#)

You have already reported \$0.00 on WH-1s this tax year (total may not reflect transactions made in the past 24-48 hours). If you have submitted all withholding wage statements and the Total Tax Withheld does not equal WH-1 totals reported, please enter the difference in either the Total Amount Due or Refund Claimed.
Total W-2, 1099R, WH-18, and W2G's attached: 0

Summary Information

1. Total Amount of Indiana State Tax Withheld Add/Edit	\$0.00
2. Total Amount County Tax Withheld Add/Edit	\$0.00
3. Total Tax Withheld	\$0.00
WH-1 totals reported	\$0.00

Refund/Amount

4. Refund Claimed	\$0.00
5. Total Amount Due	\$0.00

☐ I declare under penalties and perjury that the amounts displayed on this page are true, correct, and complete. If there is a balance due, I understand that I am expected to submit payments electronically.

[Save](#) [Preview PDF](#) [Cancel](#) [Submit](#)

Additional resources

Online resources for tax professionals

- FAQs: www.in.gov/dor/tax-professionals/frequently-asked-questions-tax-professionals
- Tax Library: www.in.gov/dor/legal-resources/tax-library
- *Tax Bulletin* (the department's tax professional newsletter): www.in.gov/dor/news-media-and-publications/indiana-tax-bulletin-e-newsletter
- Inquiry Center: www.in.gov/dor/tax-professionals/tax-professionals-inquiry
- Webpage: www.in.gov/dor/tax-professionals

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Contact the department on the tax professional hotline

But if you have a question, contact the department's tax professional hotline at (317) 232-2240.

To maintain prompt response times, we ask that you not share the tax professional hotline number with your clients. If your clients have questions about using INtax, please have them call (317) 232-2240.