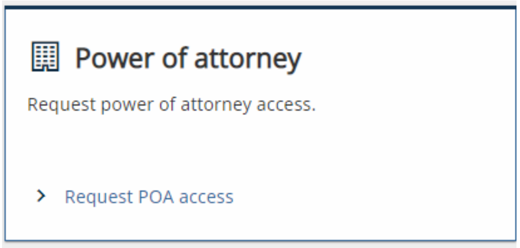
INTIME ePOA Process

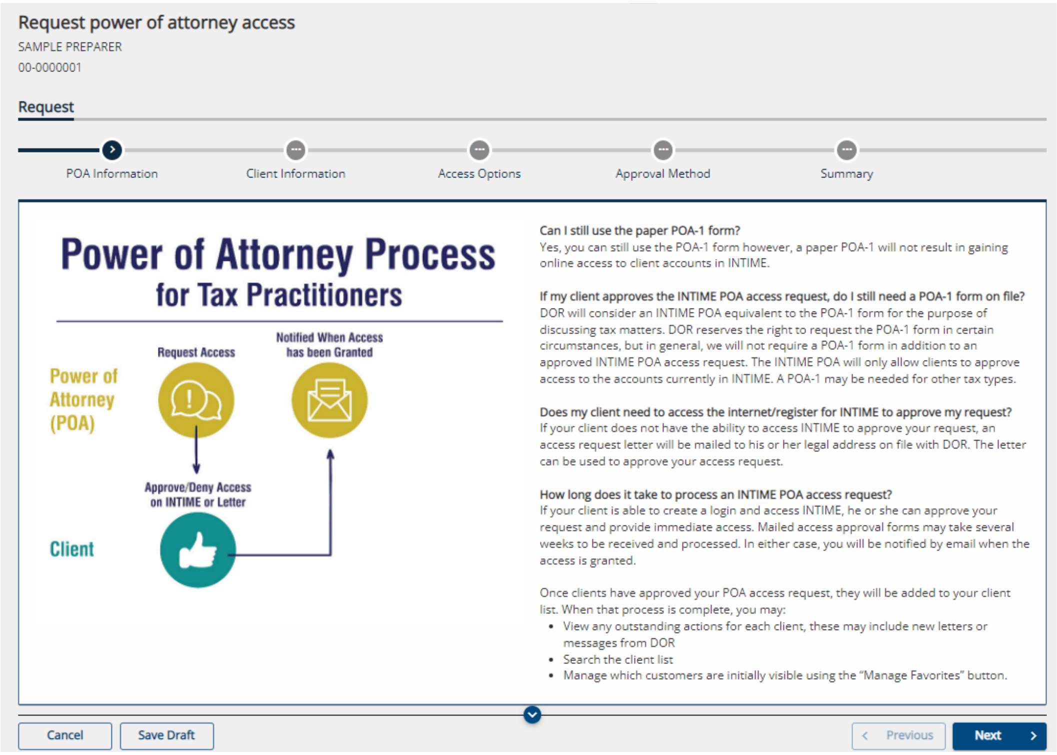
Instructions for Tax Practitioners

A client (Business tax or Individual income tax customer) can grant a tax practitioner access to their INTIME account with an electronic Power of Attorney (ePOA). Here is how a tax practitioner can initiate an ePOA access request in INTIME:

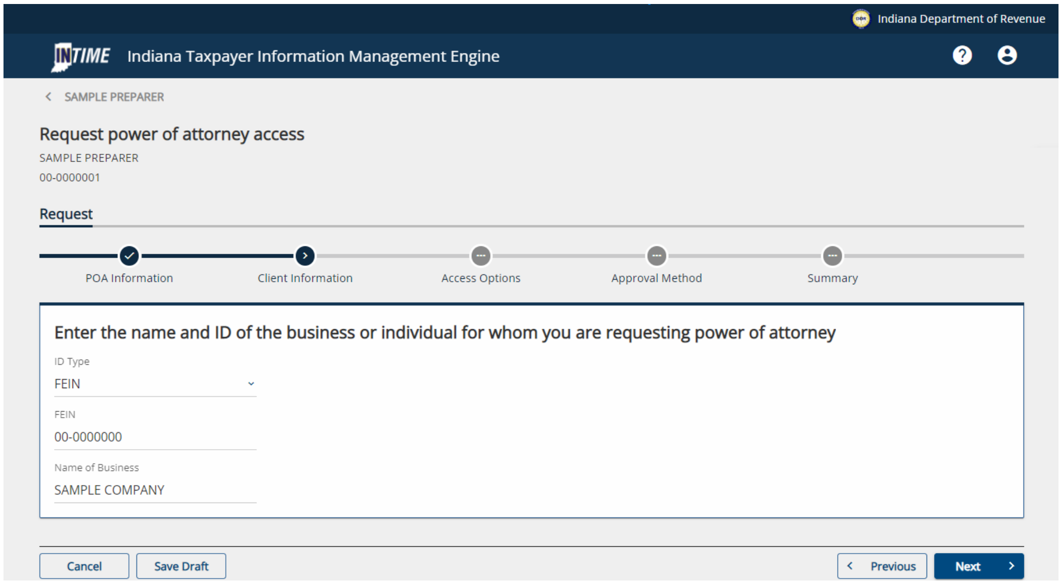
Step 1: The tax practitioner will log in to their own INTIME account, go to the "All Actions" or "Preparer Actions" (tab) page, locate the "Power of attorney" panel, then click on the "Request POA Access" hyperlink and follow the prompts.



Step 2: The first screen will provide some answers to frequently asked questions (FAQs) about the Power of Attorney (POA) process. (More information is also available on DOR's POA website.) Select "Next" to continue to the next step.

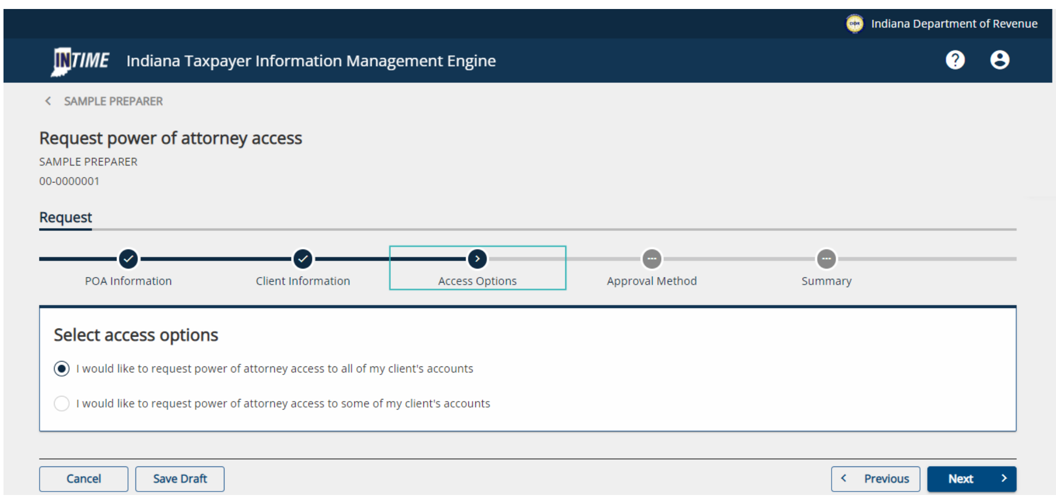


Step 3: Select the ID type and number, along with the name of the business or individual from whom you are requesting an ePOA.



Step 4: Select the option to request an ePOA to _all_ the client's tax accounts or only select tax accounts.

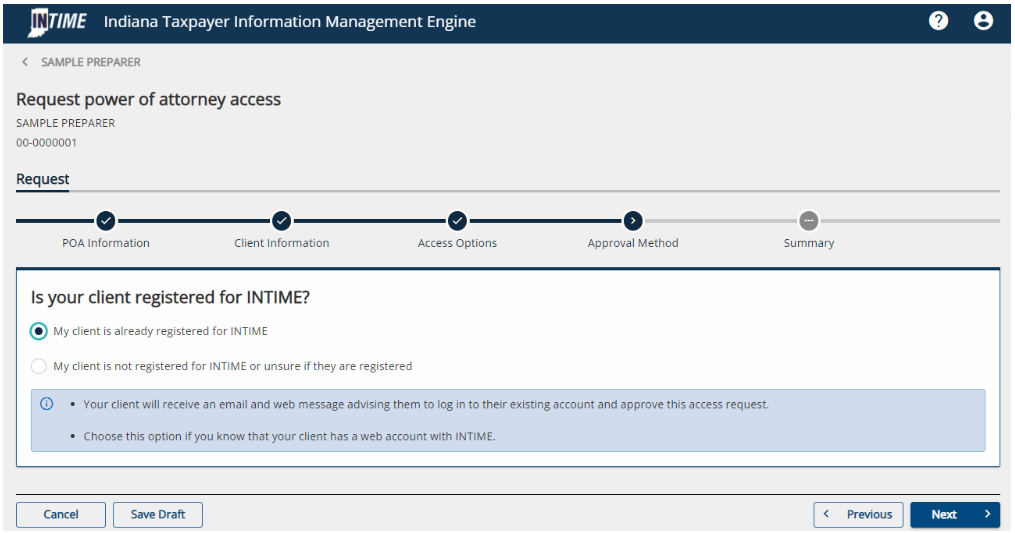
Note: *If requesting access to only select accounts, the client will have the option to select which accounts to allow the tax practitioner to access. The tax practitioner will see these accounts only once the ePOA is approved.*



Step 5: Select an approval method that best represents your client's situation:

a. **If the client is registered for INTIME, select the option for online approval.**

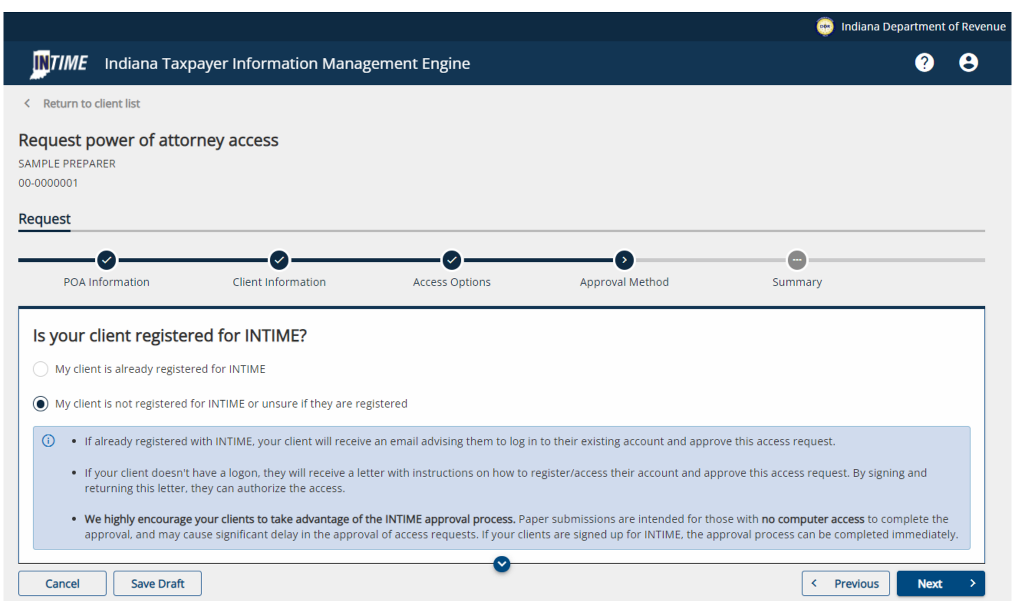
The client will receive an email advising them to log in to their account to approve the ePOA and account access request from their tax practitioner. The approval process is quick and will provide immediate access to the tax practitioner.



a. **If the client is not yet registered or unsure if they are registered (or does not have online access), select that option.**

If registered, the client will receive an email about signing in to INTIME to approve the access.

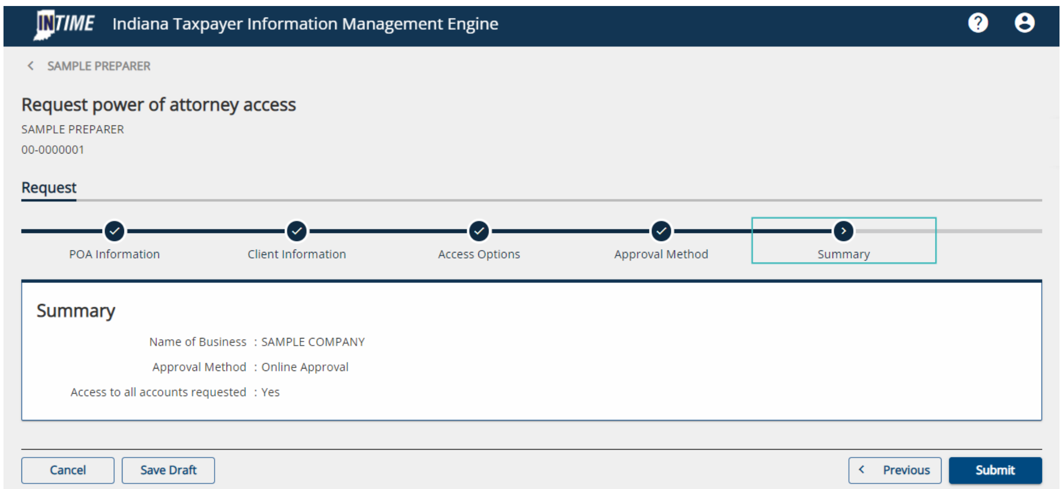
If **not** registered, they will receive a letter by mail at the legal address on file with DOR that will include instructions on how to sign up and access their INTIME account to approve the ePOA request.



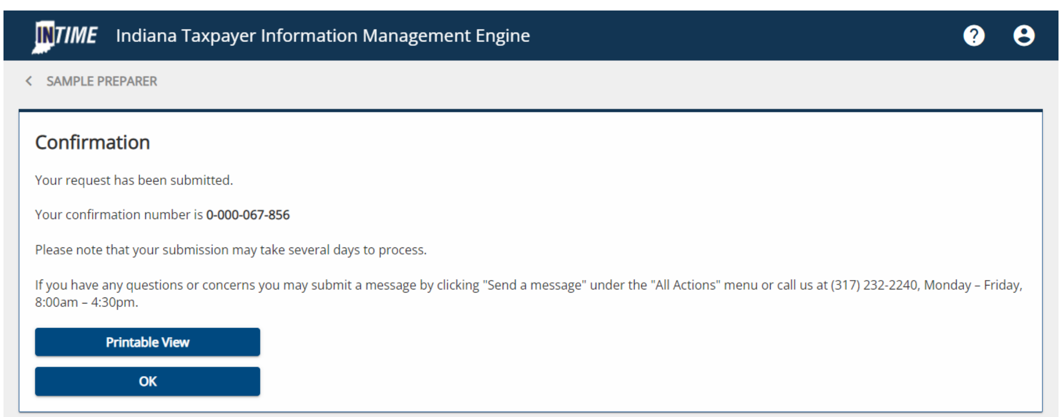
If the client doesn't have online access to approve the ePOA request, they will receive a letter by mail at the legal address on file with DOR. It will provide information and instructions on how to complete, sign, and return the enclosed form by mail to authorize the tax practitioner's access request.

Note: *When using this method, make sure the client checks the boxes on the form to approve what ePOA access is approved for specific tax accounts.*

Step 6: Review the request and then "Submit."



Step 7: A confirmation of the submission will be provided. Note the confirmation number or print a copy (or save a pdf version) of the confirmation for your records.



Managing Security and Access to Accounts

Security and access to a client's account is handled independently for each user. A "Master Logon" may create additional usernames for your organization and manage the level of access allowed to your own tax records. Keep in mind that additional users will perform work as themselves and may have access to clients and tax accounts that a "Master Logon" does not have access to, as each user will have their own set of INTIME ePOAs.

Revoking Access to Client Accounts

Practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA):

Step 1: Enter the client's INTIME account and go to the "Settings" (tab) page.

Step 2: Cancel access to the client or tax accounts you no longer wish to have. If you cancel access to the client, access to all of their accounts will automatically be removed. When cancelling access to a specific tax account, access to the customer and any remaining tax accounts will be maintained.

Client Revocation

Clients have the ability to enter their own "Manage ePOA Access" tab and modify a tax practitioner's level of access, including revoking practitioner ePOA access.

More information on POA and ePOA:

Power of Attorney Options
Business Tax Customers
Individual Tax Customers
Tax Practitioners
INTIME Resources