INTIME ePOA Access

Instructions for Clients

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). If needed, more information on POA and ePOA, including frequently asked questions (FAQs), is available on DOR's website.

A tax practitioner will initiate an ePOA access request from their own account in INTIME. Here is what happens next:

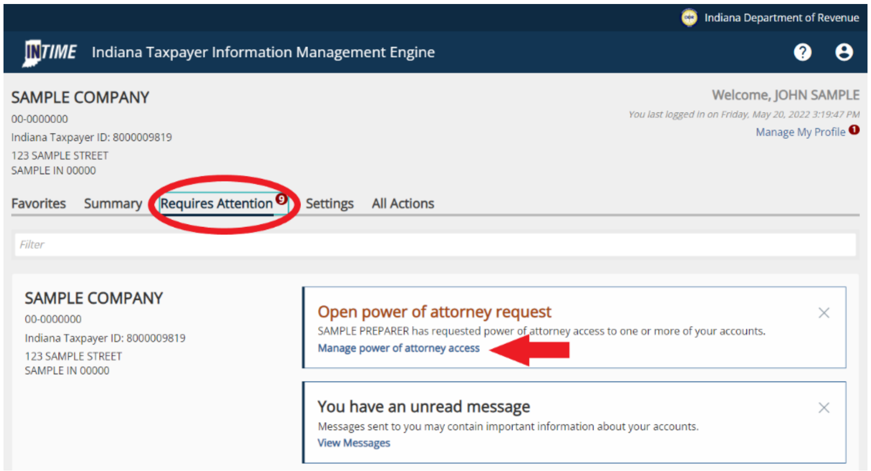
If the client has an INTIME account logon:
You will receive an email (to the email address you registered with) advising you to log in to INTIME to approve the ePOA and account access request from your tax practitioner. The approval process is quick and will provide immediate access to the tax practitioner.

If the client has not yet signed up for access to INTIME:
A letter will be mailed to your legal address on file with DOR that will include instructions on how to sign up and access your INTIME account to approve the tax practitioner's ePOA request. Several INTIME guides and step-by-step instructions (for Individual Income tax or Business tax customers) are available on DOR's INTIME Tax Center page, if needed.

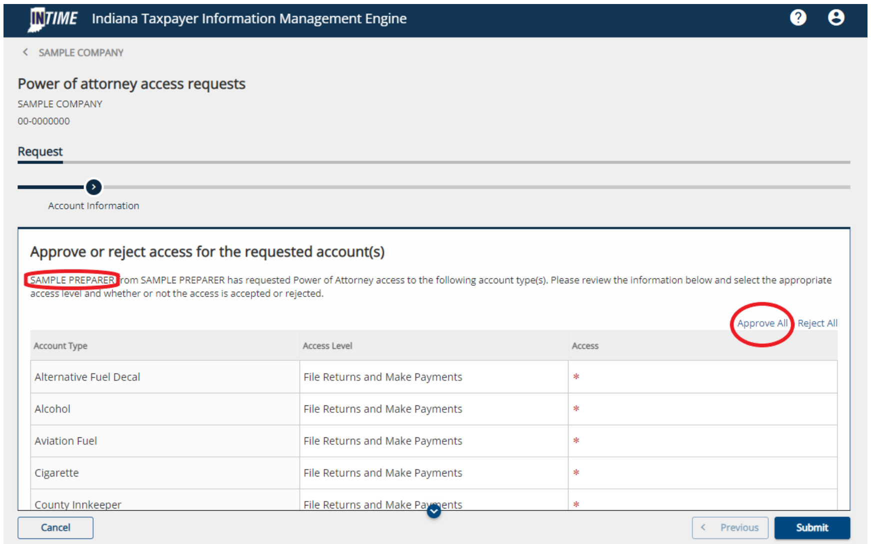
If the client doesn't have online access to approve the ePOA request:
A letter will be mailed to your legal address on file with DOR. It will provide additional information and instructions on how to complete, sign, and return the enclosed form by mail to authorize the tax practitioner's access request.

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

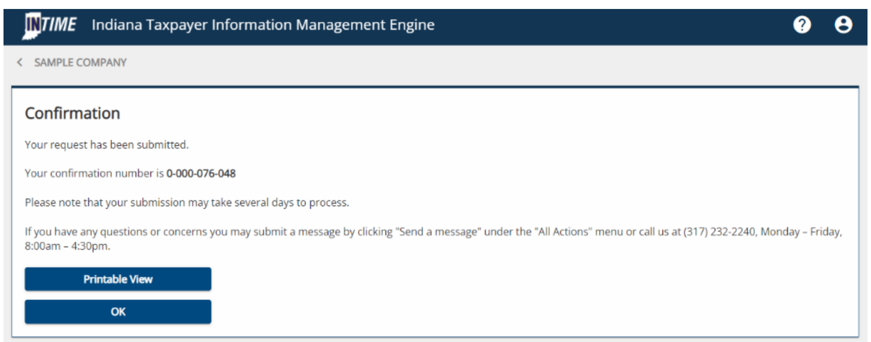
Step 1: The client/taxpayer will log in to their own INTIME account and go to the "Requires Attention" (tab) page where they will see the "Open power of attorney request" panel. Click on the "Manage power of attorney access" hyperlink.



Step 2: The name of the tax practitioner (and the preparer's company name) and a list of business tax accounts (or tax account(s) for Individual income tax customers) will appear with the options to approve access to all accounts, reject access to all accounts, or provide access to select accounts.

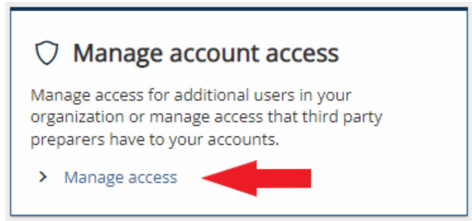


Step 3: Confirmation that access has been granted to a tax practitioner will be provided and can be printed (or saved as a PDF) for your records.

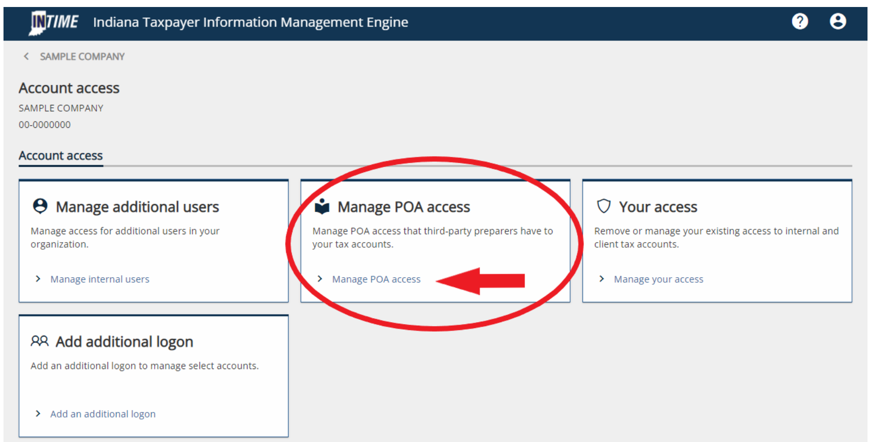


Managing INTIME Account POA Access

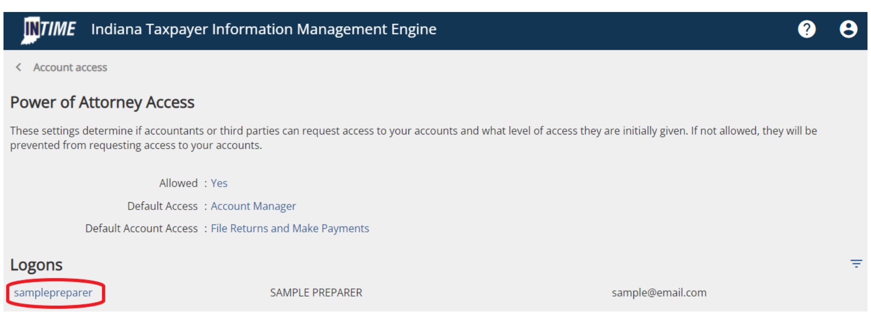
Step 1: To manage tax practitioner access to an INTIME account, go to the “All Actions” (tab) page, locate the “Manage account access” panel, and click on the “Manage access” hyperlink.



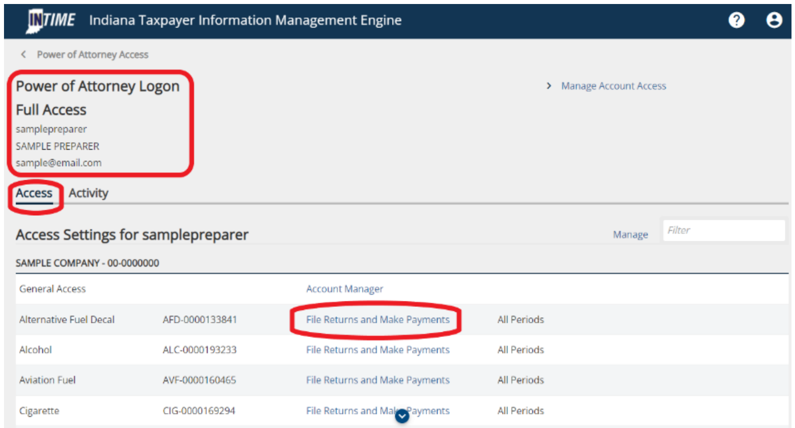
Step 2: To verify, make changes, or revoke ePOA, go to the “Manage POA access” panel and click on the “Manage POA access” hyperlink.



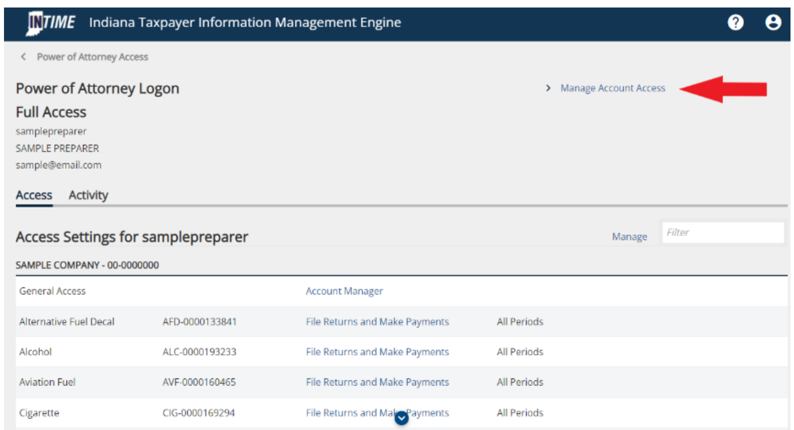
Step 3: This page provides information to verify who has access to your account and what level of access they have. By selecting the tax preparer’s name (hyperlinked on the left) you can manage their access to your account on the following screen.



Step 4: This screen will display information about the tax practitioner's access to your account and the level of access they have to each account.

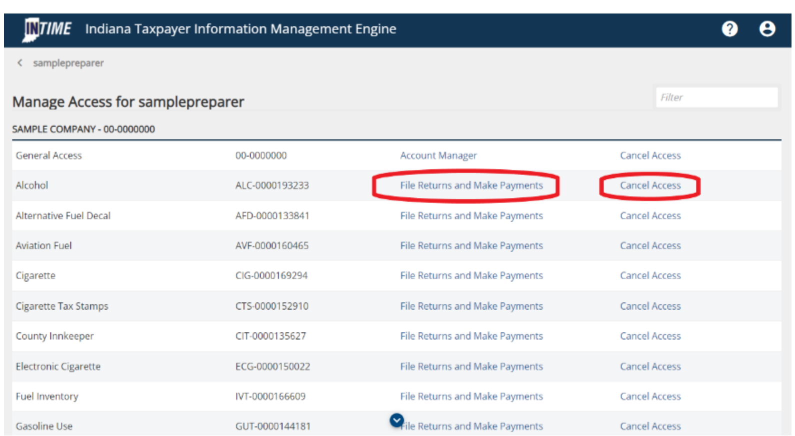


To manage the degree of access to a tax account, click on the "Manage Account Access" hyperlink.



Step 5: On this screen, a client can change the level of access they provide to their tax practitioner for a specific tax account by clicking on the associated (third column) hyperlink.

Level of access options: Information only, File Returns only, Payments only, or File Returns and Make Payments. A client can also revoke access to a specific tax account by clicking the "Cancel Access" hyperlink for that account.



More information on POA and ePOA

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