

IT-8879 Instructions

Purpose of this form

Complete Form IT-8879 when the Practitioner PIN method is used or when the taxpayer(s) authorizes the Electronic Return Originator (ERO) to enter or generate the taxpayer's Personal Identification Number (PIN) on his or her electronically filed Indiana individual income tax return.

The ERO will:

1. Enter the taxpayer's (and spouse's if filing a joint return) name, address, Social Security number, and daytime telephone number where indicated at the top of the form.
2. Complete Part I, using the amounts from the taxpayer's Indiana individual income tax return.
3. Complete Part II, if the taxpayer(s) elects to have their refund direct deposited into their financial institution savings, checking or Hoosier Works MC[®] account.
4. Enter or generate, if authorized by the taxpayer(s), the taxpayer's PIN in the boxes provided in Part III. If the taxpayer(s) does not authorize the ERO to enter or generate the PIN, the taxpayer(s) must enter their own PIN in Part III.
5. Enter on the Authorization Line in Part III, the ERO firm name (not the name of the individual preparing the return) if the ERO is authorized to enter the PIN for the taxpayer(s).
6. The ERO will then enter their Practitioner PIN, sign and date on Part IV only if using the Practitioner PIN method.
7. Keep the submission ID on file. It is not necessary to fill in the submission ID unless the form is requested by the department. Before providing the form to the department, this field should be completed.

NOTE: The ERO must receive the completed and signed Form IT-8879 from the taxpayer(s) before the electronic return is transmitted.

Important Notes for the ERO

- Do not send Form IT-8879 to the Indiana Department of Revenue (DOR) unless requested to do so by a DOR representative.
- Keep the original IT-8879, signed by the taxpayer(s) along with any wage or tax statements, forms requiring signatures, or any other documentation that is used to verify Indiana deductions and credits in your files for three (3) years from December 31st of the year the return was signed.
- Provide the taxpayer(s) with a signed copy of the IT-8879.
- For direct deposit purposes, the ERO must verify the taxpayer's financial institution's Routing Transit Number, Account Number and Account Type.
- The ERO must use only use the Practitioner PIN Program for any "State Only" electronically filed return.
- If the taxpayer(s) enters his or her own PIN and the return is filed using the Self-Select PIN method, Form IT-8879 does not need to be completed.

IT-8879 Part I Instructions

Line 1: Federal Adjusted Gross Income from Forms IT-40 (Line 1), IT-40PNR Schedule A (Line 36A). Leave blank if filing Form IT-40RNR.

Line 2: Indiana Adjusted Gross Income from Forms IT-40 (Line 7), IT-40PNR (Line 7) or IT-40RNR (Lines 3A + 3B).

Line 3: Total Indiana Tax from Forms IT-40 (Line 11), IT-40PNR (Line 11) or IT-40RNR (Line 6).

Line 4: Total State Tax Withheld from Forms IT-40 Schedule 5 (Line 1), IT-40PNR Schedule F (Line 1) or IT-40RNR (Line 7).

Line 5: Total County Tax Withheld from Forms IT-40 Schedule 5 (Line 2), IT-40PNR (Schedule F Line 2), or IT-40RNR (Line 8).

Line 6: Total Indiana Credits from Forms IT-40 (Line 14), IT-40PNR (Line 14) or IT-40RNR (Line 9).

Line 7: Refund from Forms IT-40 (Line 21), IT-40PNR (Line 21) or IT-40RNR (Line 10).

Line 8: Amount You Owe from Forms IT-40 (Line 26), IT-40PNR (Line 26) or IT-40RNR (Line 15).

Lines 10, 11: Hoosier Works MasterCard[®] - To directly deposit a refund in a Hoosier Works MasterCard[®] account, enter the 12-digit account number on line 10. You can find the 12-digit account number in the upper right-hand corner of the account monthly statement. DO NOT use the MasterCard[®] 16-digit number. Make sure to check the "Hoosier Works MC" box on line 11.

ERO must retain this form. Do Not Submit this form to DOR unless requested to do so.