



Information provided by  
State Representative

## Sue Errington



A yellow telephone keypad is visible in the top right corner.

**Payments**

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax
65	2006 estimated tax
66a	Earned income credit
b	Nontaxable combat pay
67	Excess social security
68	Additional child tax credit
69	Amount paid with respect to
70	Payments from: a <input type="checkbox"/> Foreign country
71	Credit for federal telephone excise tax
72	Add lines 64, 65, 66a, and 67 through 71

**Refund**

Direct deposit? See page 61 and fill in 74b, 74c, and 74d, or Form 2020.

► b Routing number  
► d Account number

If line 72 is more than line 63, subtract line 63 from line 72.

Amount of line 73 you want refunded to you. If Foreign country, add lines 64, 65, 66a, and 67 through 71.

## A GUIDE TO INDIANA'S **AUTOMATIC TAX REFUND**

### What is it?

Indiana Law provides for an Automatic Tax Refund (ATR) to Indiana individual income tax payers when state revenues meet or exceed 12.5% of state budget general fund appropriations for the next fiscal year. This determination is made in odd-numbered years at budget close-out. (IC 4-10-22-4)

The 2022 tax season will be the second time that an ATR has been provided to Hoosier taxpayers. The first ATR was triggered during the Daniels Administration in 2012. It provided a fixed amount of \$111 to every individual tax filer and \$222 to joint filers.

### How do taxpayers receive it?

Receipt of the Automatic Tax Refund will be in the form of a tax credit that will be provided to Indiana taxpayers when they file their 2021 tax returns during the 2022 tax season. It is important to note that the ATR will not be provided as a separate check/direct deposit payment like the federal stimulus payments, but will instead be part of the reconciliation of the taxpayer's tax return.

### What amount will taxpayers receive?

Approximately 50% (or \$545 million) of the excess revenue is the total amount that will be divided amongst Indiana taxpayers. The Indiana Department of Revenue will need to substantiate and verify the total number of tax filers for tax year 2021 (for taxes incurred in 2020) in order to calculate the amount each taxpayer will receive. It is anticipated that the verified counts will be completed no later than November/December 2021 when late filers submit their state tax returns.

The remaining 50% (or \$545 million) of the excess revenue will be used to support teacher pensions. It will be deposited into the Pension Stabilization Fund to offset the unfunded accrued actuarial liability of the Pre-1996 Teacher Retirement Fund (TRF).

### Rep. Errington's Contact Information

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