Disclaimer

This presentation is intended for general educational purposes only, nothing should be construed as legal advice. The Iowa Department of Revenue could take a contrary position in the future to one stated in this presentation.

Any oral or written opinion by Department personnel not pursuant to a Petition for Declaratory Order under Iowa Administrative Code rule 701—7.24 is not binding upon the Department.
Agenda

• Program Timeline + Important Dates
• What’s New
• Creating a GovConnectIowa Logon
• Navigating GovConnectIowa
• Security and Verification Features
• Upcoming Webinars
• Live Q&A
Program Timeline

Business Case
2019

Program Kick-Off
November 2020

Rollout 1: Business Filers
November 2021

Rollout 2: Corporate Filers
November 2022

Rollout 3: Individual Filers
November 2023

Rollout 4: Misc. Fees & Taxes
November 2024

Continuous Improvement

- Complete
- In Progress
- Future

Iowa Department of Revenue

tax.iowa.gov/modernization
Important Dates

**November 1-12, 2023:** Individual income, fiduciary, and inheritance payments must be sent via physical mail or made in person

**November 8-13, 2023:** GovConnectIowa is unavailable for system updates

**November 13, 2023 at 12:00 PM:** GovConnectIowa is live!
What’s New?
Non-Logged In Online Services

- **Register a Special Event**
  - Allows event sponsors to register and identify all vendors at the event.

- **Verify My Identity**
  - Allows individuals to verify their identity to continue processing of returns and tax refunds.

- **Where’s My Refund?**
  - Allows individual income or fiduciary taxpayers to check the status of their tax refund.
Non-Logged In Online Services

- **Request Innocent Spouse Relief**
  - Allows individuals that file a joint return to request relief from a tax liability - verification is required.

- **Report Fraud or Identity Theft**
  - Allows an individual to report suspicious activity or identity theft.

- **View Qualifying Debt for Setoffs**
  - Allows an individual to see if they owe debt to a public agency that may result in a future setoff.

**Not available while logged in to GovConnectIowa**
New Logged-In Services

- Send a Message
  - Allows all GovConnectIowa users connected to a tax account(s) to directly communicate with Revenue staff.
- Apply for Extension of Time to File Inheritance Tax
- Apply for a Deferral of Inheritance Tax
- Request Consent and Waiver of Lien for Inheritance Tax
- Apply for Release of Inheritance Tax Liens

Online filing options will be available soon!
## Send a Message

### Select Message Type

<table>
<thead>
<tr>
<th>Account</th>
<th>Question about registration, address updates, ownership changes, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Services Assistance</td>
<td>Question about GovConnectIowa or need assistance navigating the website</td>
</tr>
<tr>
<td>Returns</td>
<td>Question about a return</td>
</tr>
<tr>
<td>Payments</td>
<td>Question about a payment</td>
</tr>
<tr>
<td>Bill or Notice Questions</td>
<td>Question about a bill or notice I've received</td>
</tr>
<tr>
<td>Collections &amp; Payment Agreements</td>
<td>Question about a balance due, payment agreement, collections, lien, levy, or garnishment</td>
</tr>
<tr>
<td>Report an Issue</td>
<td>I wish to report an issue or concern</td>
</tr>
<tr>
<td>Other</td>
<td>Question that doesn't fit any other category</td>
</tr>
</tbody>
</table>

**IMPORTANT:**
- Messages are addressed in the order received.
- Please allow 2-3 business days for a response.
Can I view letters the Department sends online?

- Yes! Once you’re connected to the tax accounts, you can view most correspondence electronically.

Fiduciary and Inheritance Taxpayers:

- Opt-in to paperless mail delivery via the Settings tab.
Acquittances and Clearances

What's New?
Starting November 13, 2023, when you connect to the tax account, you can view Inheritance Clearances and Fiduciary Acquittances electronically.

What do I do?
1. File the Fiduciary or Inheritance return.
2. Request access to the tax account.
3. Receive and enter the access code.
4. Wait for an email that tells you a letter is available.
Understanding Your Notice or Letter

Your notice or letter will explain the reason for the contact and give you instructions on how to handle the issue.

The Iowa Department of Revenue sends letters for the following reasons:

- You have a balance due.
- You are due a refund.
- We have a question about your tax return.
- We need to verify your identity.
- We need additional information.
- We changed your return.
- We need to notify you of a change or update.
Understanding Your Notice or Letter

What are the next steps?
1. Read the letter
2. Respond to the letter (if needed)
3. Pay as much as you can

How to Know Your Notice or Letter is Real
1. Enter the letter information into Respond to a Letter on GovConnectIowa.
2. Contact the official IDR phone number at 515-281-3114.
Respond to a Letter

You can respond to or upload documents electronically on GovConnectIowa.

Not all letters are eligible for online response.

**Important for Logged In:** You must view the letter via the View Letters link before you can respond. On-screen instructions are available!
Returns - What to Expect

• No changes to return filing requirements
  – Including how or when they’re filed
• Individual Income, fiduciary, and inheritance tax returns **cannot** be filed via GovConnectIowa
• The anticipated time frame for individual income refund processing is 30 days
• Return and refund status viewable on GovConnectIowa
Payments - What to Expect

Payments…

• Can be sent electronically on GovConnectIowa
• Can be processed via bank account or credit card
• Can be scheduled for up to one year in advance
• May be subject to a one time prenote authorization
  – Can take 3-5 business days
  – May display as a “$0.00” authorization
Returns & Payments Dashboard

- Logged in only
- Allows you to view or manage balances by tax period
- Can be sorted by tax type
<table>
<thead>
<tr>
<th>Summary</th>
<th>Amount</th>
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<tr>
<td>Tax</td>
<td>$941.00</td>
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<tr>
<td>Payments</td>
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<tr>
<td>Other</td>
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<tr>
<td>Credit</td>
<td>-$851.00</td>
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<tr>
<td>Balance</td>
<td>$0.00</td>
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</table>

<table>
<thead>
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<th>Period Activity</th>
<th>Description</th>
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<tbody>
<tr>
<td>15-Mar-2024</td>
<td>Letter</td>
</tr>
<tr>
<td>22-Nov-2023</td>
<td>Letter</td>
</tr>
<tr>
<td>13-Feb-2023</td>
<td>Filed</td>
</tr>
<tr>
<td>30-Apr-2022</td>
<td>Payment posted</td>
</tr>
</tbody>
</table>

- Notice of Setoff to Debtor
- Notice of Setoff to Debtor
- Individual Income Tax Return
- Payment for $91.00
Address Updates - Partnership with USPS

What’s new?

The Iowa Department of Revenue is partnering with the United States Postal Service (USPS) to maintain consistent and accurate address records.

What this means for you:

- **For individuals**: Update your address on GovConnectIowa or with the USPS and we’ll take care of the rest
- **For businesses**: Update your address on GovConnectIowa, with the USPS, or submit an Iowa Business Tax Change Form
GovConnectIowa Help - Website Update

9 new topics!
- Accessing Tax Accounts
- Managing GovConnectIowa Logons
- Registration
- Navigation
- Returns
- Payments
- Correspondence
- User Settings
- Technical

Increased Online Support for Tax Professionals
- Managing My GovConnectIowa Access
- Managing Employee Logons
- Accountant Center

Welcome to GovConnectIowa!
The Iowa Department of Revenue's e-Services portal, GovConnectIowa, enables customers to manage business taxes, withholding, corporate income tax, individual income tax, in one convenient location, 24/7.

Customers can log in to GovConnectIowa to access various online services, including:
- Electronic delivery of correspondence from the Department of Revenue
- Making payments using a bank account or credit card
- Online customer service support through secure messaging
- Updating contact and mailing information
- Uploading bulk file submissions directly through GovConnectIowa
- Viewing and responding to correspondence from the Department of Revenue

Need help? Click one of the topics below to get started.

Secure Messaging with Taxpayer Services via GovConnectIowa
If assistance is needed with an individual income tax, business or corporate tax account, contact the Department using GovConnectIowa to submit a question or get your issue resolved easily and efficiently. Once you are logged in, get started by selecting the I Want To... tab and click Send a Message under the Correspondence section.

Request Access to Tax Accounts via GovConnectIowa
To access all available online features, including viewing payment history, filing various tax returns, or managing third parties, you must be connected to your tax accounts.

Common Questions

Accessing Tax Accounts on GovConnectIowa
tax.iowa.gov/govconnectiowa-help
Create a GovConnectIowa Logon
Why should I create a GovConnectIowa logon?

**Access Control:** Allows you to authorize third party access and manage who has access to your tax information.

**View Account Information:** View letters, payment history, status of tax returns, and address information.

**Communication:** Communicate directly with Department staff, learn about important updates, view letters, and receive notifications.

**Access to Additional Features:** You can file for and manage appeals, view collection actions, and manage tax credits.
Create a Logon Process

1. Go to govconnect.iowa.gov
2. Select Create a Logon
Create a Logon Process

**IMPORTANT:**

- Each person should have their own GovConnectIowa logon.
- Do not share your password with others!
Create a Logon Process

Need assistance? Look for these icons!

Create a GovConnectIowa Logon

About You
- First Name
- Last Name
- ID
- Date of Birth

Primary Home Address
- Country
- Street
- Street 2
- Unit Type
- City
- Zip

Secondary Phone (Optional)
- Country
- Phone Type
- Phone Number

Why does the Department need my personal information?

Verify Address
Create a Logon Process

Most individuals, inheritance, or fiduciary tax customers are not bulk filers.
Create a Logon Process

All of these actions may be completed after the GovConnectIowa logon has been created.
Create a Logon Process

Access Type

Select the access type that applies:

- **Individual Income Access**
  Select this option if you need online access to your own individual income tax information.

- **Business Access (Business Owner, Employee, etc.)**
  Select this option to manage your business accounts or your employer’s accounts.

- **Other Party Access (CPA, Tax Preparer, Family Member, Third Party, etc.)**
  Select this option if you are a third party acting on behalf of someone else.

Need to request access to an Inheritance account? Select this option!
What do I need to request access?

<table>
<thead>
<tr>
<th>Identification Number (i.e. FEIN, SSN, ITIN, Permit Number, etc.)</th>
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<table>
<thead>
<tr>
<th>One of the following:</th>
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<tbody>
<tr>
<td>• Prior year return or payment information or</td>
</tr>
<tr>
<td>• IDR ID or</td>
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<tr>
<td>• eFile &amp; Pay BEN</td>
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</tbody>
</table>
Access Codes - What to Expect

• Codes are mailed to the taxpayer’s primary mailing address
  – Can take 7-10 business days to receive
• Codes can only be used by the individual that requested it
• Codes expire after 90 days

What if I don’t receive an access code?
1. Check with the taxpayer and verify the mail wasn’t received
2. Verify the address is updated by logging in to a GovConnectIowa account already connected or by calling Taxpayer Services
Navigating GovConnectIowa
What’s an IDR ID?
The IDR ID is a unique 10-digit identification number assigned to taxpayers by the Iowa Department of Revenue. This number can be viewed on GovConnectIowa or on correspondence sent by the Department after November 15, 2021.

Why is it important?
Privacy, security, and ease of use.
Navigation Bar aka “Tabs”

**Accounts** = The most important information all in one place

**Action Center** = Lists the current actions that GovConnectIowa expects the user needs to take

**Settings** = Lists customer settings, including mail delivery preferences and security levels

**I Want To...** = Contains many different actions separated into sections
Manage My Profile

Manage My Profile = Allows the user to see their GovConnectIowa profile settings
Account Number

Individual Income
1 R AVE
BOONE IA 50036-7358

Account
IIT-10060-09102
Balance
$0.00

› Make a Payment
› View Returns Filed
› Where’s My Refund?
View Support ID

What is it?
View Support ID is a click-by-click snapshot feature that allows the IDR customer service representative to view your GovConnectIowa session remotely.

Can the customer service representative see my other windows or screen?
Nope! The only screen the IDR employee can view is your GovConnectIowa session.
Security and Verification
Verify My Identity

What’s new?
You may receive a letter from the Iowa Department of Revenue asking you to verify your identity.

How do I respond?
Respond via GovConnectIowa without having to create a logon!

Why is the Iowa Department of Revenue sending me a letter?
We want to protect you and your identity. This is a safeguard to prevent someone from using your identity to file a false tax return.
Logon Verification

What’s new?
We are verifying the authenticity of GovConnectIowa logons by asking for your personal information.

What do I need to do?
Provide your information when creating a new GovConnectIowa account or requesting access and we’ll take it from there.

Why do I need to provide my information?
We want to protect you and taxpayers you may be supporting. This is a safeguard to prevent fraudsters from accessing sensitive tax information.

For security reasons, remember that your GovConnectIowa profile and password should be kept confidential. Never share your password with anyone else.
Reporting Fraud or Identity Theft

Report Fraud or Identity Theft

**Reporting Fraud**
Tax fraud occurs when false information is willfully and intentionally reported or omitted on a tax return to limit the amount of tax owed.

- Report Fraud

**Identity Theft**
Identity theft happens when someone uses your personal or financial information without your permission.

- Report Identity Theft
- Taxpayer Guide to Identity Theft
Subscribe to Updates

Stay informed, subscribe to receive updates.

Subscribe to Updates

About  Contact Us  Taxpayer Rights  Website Policies  Intern Program
Subscribe to Updates

Topics Include:

- Newsroom
- Tax Information
- GovConnectIowa
- Due Date Reminders
- Electronic Filing
- Economic, Fiscal, and Statistical Information
# IDR Webinars

Register at: tax.iowa.gov/webinars

View Past Webinars at: iasourcelink.com/iowa-tax-webinars

<table>
<thead>
<tr>
<th>Webinar Title</th>
<th>Date</th>
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<tbody>
<tr>
<td>Property Tax Assessment Protests &amp; Appeals</td>
<td>April 12, 2023</td>
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<tr>
<td>Using GovConnectIowa for Business Owners and Tax Professionals</td>
<td>Jun 14, 2023</td>
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<tr>
<td>Iowa Sales/Use Tax Basics</td>
<td>Jul 12, 2023</td>
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<tr>
<td>Iowa Tax Law Legislative Update</td>
<td>Aug 9, 2023</td>
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<tr>
<td>Individual Income Tax Update / Common Filing Issues</td>
<td>Sept 13, 2023</td>
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<tr>
<td>Iowa Pass-Through Entity Tax (PTET)</td>
<td>Sept 19, 2023</td>
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<td>Third Party Access and Authorization</td>
<td>Oct 11, 2023</td>
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<tr>
<td>New &amp; Updated GovConnectIowa Features</td>
<td>Nov 1, 2023</td>
</tr>
<tr>
<td>Electronic Submission of W-2s &amp; 1099s for Tax Year 2023</td>
<td>Dec 13, 2023</td>
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Contact Us

tax.iowa.gov/contact-us

**Taxpayer Services Information**
Monday - Friday: 8:00 a.m. - 4:30 p.m. CT

✉️ idr@iowa.gov

📞 515-281-3114 or 800-367-3388
Questions