



New & Updated GovConnectIowa Features

Jerika Pellington - GovConnectIowa Specialist

November 1, 2023

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.

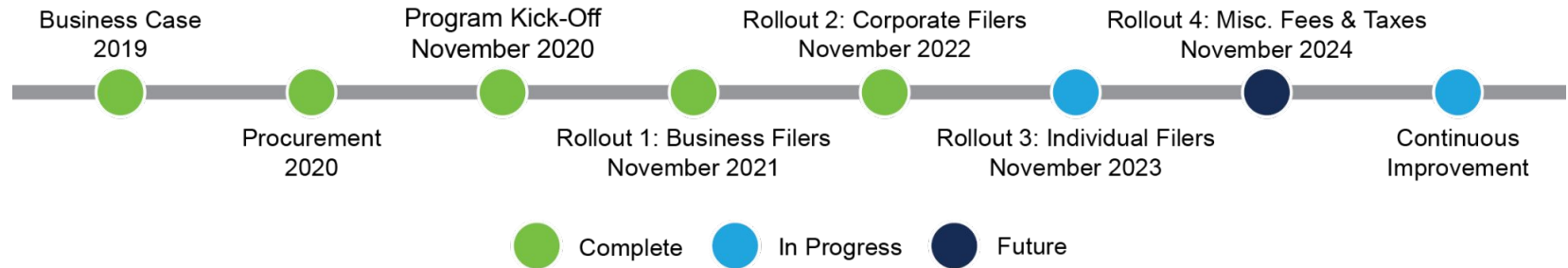
Any oral or written opinion by Department personnel not pursuant to a Petition for Declaratory Order under Iowa Administrative Code rule 701—7.24 is not binding upon the Department.

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

Program Timeline



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!



Iowa Department of
REVENUE

What's New?

GovConnectIowa Home Page



Businesses

- > File a Return
- > Make a Payment
- > Register a New Business
- > Register a Special Event
- > Manage State of Iowa Licenses



Individuals

- > Where's My Refund?
- > Verify My Identity
- > Make a Payment
- > Request Innocent Spouse Relief



Third Party Services

- > Register as a Bulk Filer
- > Request an Iowa Account Number (IAN)
- > Submit an Income Tax Preparer Continuing Education Form
- > Manage Authorized Employees



Refunds & Returns

- > Where's My Refund?
- > Submit an IA 843 Refund Return
- > Request Refund Check Replacement (Warrant)
- > Request Copy of Tax Return
- > Submit a Voluntary Disclosure Proposal



Additional Services

- > Search Drafts & Submissions
- > Respond to a Letter
- > View Qualifying Debt for Setoffs
- > Report Fraud or Identity Theft
- > Request a Penalty Waiver
- > Petition the Department



Resources

- > GovConnectIowa Help
- > Common Iowa Tax Questions
- > Tax Law & Policy Information
- > Request a Public Record

Non-Logged In Online Services

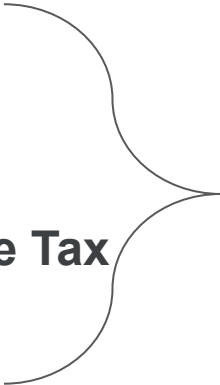
- **Register a Special Event**
 - Allows event sponsors to register and identify all vendors at the event.
- **Verify My Identity**
 - Allows individuals to verify their identity to continue processing of returns and tax refunds.
- **Where's My Refund?**
 - Allows individual income or fiduciary taxpayers 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.

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 Account



Select Type

Select Message Type

Filter

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

IMPORTANT:

- Messages are addressed in the order received.
- Please allow 2-3 business days for a response.

View Letters + Mail Delivery Preferences

Can I view letters the Department sends (or receives)?

- Yes! Once you're connected to the tax system electronically.

Fiduciary and Inheritance Taxpayers:

- Opt-in to paperless mail delivery via the

Correspondence

- > Respond to a Letter
- > Send a Message
- > **View Letters**
- > View Messages

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.

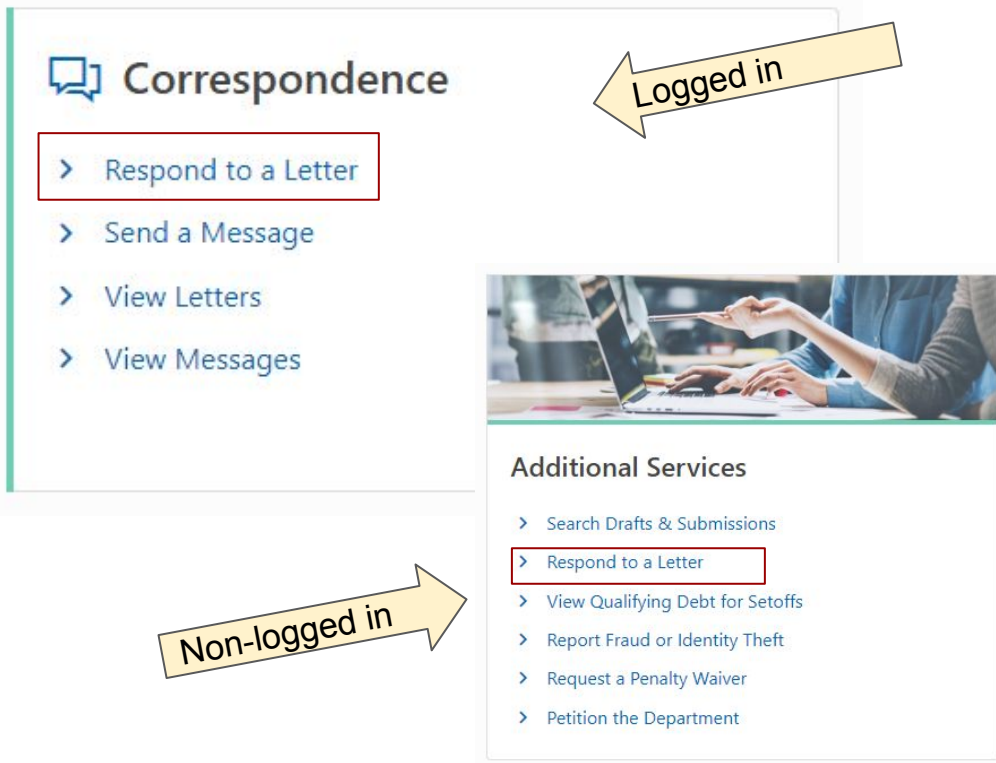
Respond to a Letter

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!



The screenshot displays the 'Correspondence' section of the GovConnectIowa website. A yellow arrow labeled 'Logged in' points to the 'Respond to a Letter' link, which is highlighted with a red border. Below this, a list of other correspondence options is shown: 'Send a Message', 'View Letters', and 'View Messages'. To the right, the 'Additional Services' section is visible, featuring a list of links including 'Search Drafts & Submissions', 'Respond to a Letter' (highlighted with a red border), 'View Qualifying Debt for Setoffs', 'Report Fraud or Identity Theft', 'Request a Penalty Waiver', and 'Petition the Department'. A yellow arrow labeled 'Non-logged in' points to the 'Respond to a Letter' link in the 'Additional Services' section. The background of the screenshot shows a person's hands typing on a laptop.

Correspondence

- > Respond to a Letter
- > Send a Message
- > View Letters
- > View Messages

Additional Services

- > Search Drafts & Submissions
- > Respond to a Letter
- > View Qualifying Debt for Setoffs
- > Report Fraud or Identity Theft
- > Request a Penalty Waiver
- > Petition the Department

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

Quick Links

- > [Where's My Refund?](#)
- > [Returns & Payments Dashboard](#)
- > [Search Drafts & Submissions](#)

Returns & Payments Dashboard



< SMITH, JOHN A

Manage Payments and Returns

SMITH, JOHN A

1234567890

Manage Payments and Returns

Accounts

All



Show

Payments



Balances

Payments

Returns

For Periods

All



Returns & Payments Dashboard - Period Summary



< Manage Payments and Returns

2021

Individual Income

IIT-12345-67890

SMITH, JOHN A

Balance

\$0.00

> [Make a Payment](#)

> [Where's My Refund?](#)

Period

Summary

Tax	\$941.00
Payments	-\$182.00
Other	\$92.00
Credit	-\$851.00
Balance	\$0.00

Period Activity

15-Mar-2024	Letter	Notice of Setoff to Debtor
22-Nov-2023	Letter	Notice of Setoff to Debtor
13-Feb-2023	Filed	Individual Income Tax Return
30-Apr-2022	Payment posted	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](#)






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.

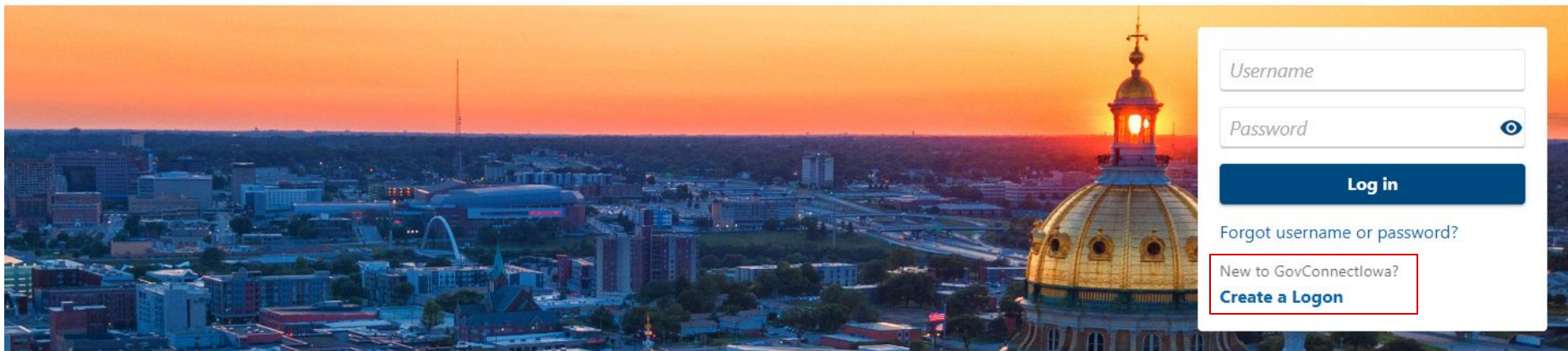
 **Communication:** Communicate directly with Department staff, learn about important updates, view letters, and receive notifications.

 **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**

GovConnectIowa is built in partnership with several State of Iowa agencies. [Learn more.](#)



Create a Logon Process

Create a GovConnectIowa Logon

✓

Welcome

➤

Logon Information

Logon Information

Username (Must be at least 6 characters) *

Required

Email Address *

Required

Confirm Email Address *

Required

Password & Security

Password *

Required

Confirm Password *

Required

Secret Question *

Required


Secret Answer *

Required

Confirm Secret Answer *

Required

* ☐ I'm not a robot

 reCAPTCHA
[Privacy](#) • [Terms](#)

Password Must Contain:

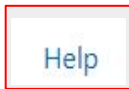
- 8-16 characters
- Uppercase letter
- Lowercase letter
- Number
- Special character (!@#\$\$%)

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

✓

✓

✓

➔

WelcomeLogon InformationEmail ValidationAbout You

About You

First Name *

Required

Last Name *

Required

ID Type *

Required

ID

Date of Birth *

Required

Why does the Department need my personal information?

Primary Phone

Country

USA

Phone Type *

Required

Phone Number

Extension

Secondary Phone (Optional)

Country

USA

Phone Type

Phone Number

Extension

Primary Home Address

Country

USA

Street *

Required

Street 2

Unit Type

Unit

City *

Required

State

IOWA

Zip *

Required

County

Address must be verified *

Verify Address

Create a Logon Process



Most individuals, inheritance, or fiduciary tax customers are not bulk filers.

Create a GovConnectIowa Logon



Are you a bulk filer?

Do you file returns for multiple clients by uploading a bulk file?

Yes

No

[Am I a bulk filer?](#)

Create a Logon Process

Create a GovConnectIowa Logon



Let's get you to the right place

[Help](#)

Do you need to renew a license?

☐ Yes

☒ No

Do you need to register a new business?

☐ Yes

☒ No

Are you applying for or transferring tax credits?

☐ Yes

☒ No

Do you need to request access to existing tax accounts?

☒ Yes

☐ No

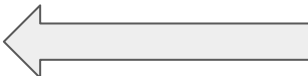
All of these actions may be completed after the GovConnectIowa logon has been created.

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?

Identification Number (i.e. FEIN, SSN, ITIN, Permit Number, etc.)

+

One of the following:

- Prior year return or payment information or
- IDR ID or
- eFile & Pay BEN

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

GovConnectIowa - Logged In

GovConnectIowa is built in partnership with several State of Iowa agencies. [Learn more.](#)

GovConnectIowa 

 [Can I help?](#)  

KIWI, LOLANI

1 IDR ID: 1006007102
1 R AVE
BOONE IA 50036-7358

Welcome, **JERIKA PELLINGTON**
You last logged in on Tuesday, Oct 17, 2023 4:12:09 PM

3 [Manage My Profile](#) **1**

2 [Accounts](#) [Action Center](#) **1** [Settings](#) [I Want To...](#)

Filter

Individual Income
1 R AVE
BOONE IA 50036-7358

4 **Account**
IIT-10060-09102
Balance
\$0.00

- > Make a Payment
- > View Returns Filed
- > Where's My Refund?

IDR ID



KIWI, LOLANI

IDR ID: 1006007102

1 R AVE

BOONE IA 50036-7358

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



Welcome, JERIKA PELLINGTON

You last logged in on Tuesday, Oct 17, 2023 4:12:09 PM

[Manage My Profile](#) ¹

Manage My Profile

JERIKA PELLINGTON

jerika.pellington@iowa.gov

[Profile](#)

[Action Center](#) ¹

[I Want To...](#)

Profile

Username

jerika01

Name

JERIKA PELLINGTON

[Update Name](#)

My Email

jerika.pellington@iowa.gov

[Change Email](#)

My Phone Number

No phone number

[Edit Phone Number](#)

Other Options

[Change Username](#)

Security

Password

Last changed October 17

[Change Password](#)

Secret Question

What was your favorite childhood toy?

[Update Your Secret Question](#)

Two-Step Verification Settings

Codes are sent via authentication app

[Change Two-Step 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?](#)

I Want To... tab




Can I help?


KIWI, LOLANI
IDR ID: 1006007102
1 R AVE
BOONE IA 50036-7358

Welcome, JERIKA PELLINGTON
You last logged in on Tuesday, Oct 17, 2023 4:12:09 PM
[Manage My Profile](#) ¹


[Accounts](#) [Action Center](#) ¹ [Settings](#) [I Want To...](#)

**Quick Links**

- > Where's My Refund?
- > Returns & Payments Dashboard
- > Search Drafts & Submissions

**Correspondence**

- > Respond to a Letter
- > Send a Message
- > View Letters
- > View Messages

**Returns & Payments**

- > Returns & Payments Dashboard
- > Manage Saved Payment Methods
- > Request Copy of Tax Return
- > File an Iowa Non-Permit Use Tax Return
- > Pay an Invoice

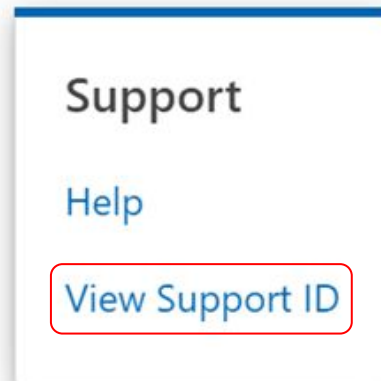
View Support ID

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 login!

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.



Individuals

- > [Where's My Refund?](#)
- > [Verify My Identity](#)
- > [Make a Payment](#)
- > [Request Innocent Spouse Relief](#)
- > [View Qualifying Debt for Setoffs](#)

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.



Reporting Fraud or Identity Theft



< Home

Report 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](#)



Additional Information

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Email Address *

SUBMIT

CANCEL

Topics Include:

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

IDR Webinars

Webinar Title

Property Tax Assessment Protests & Appeals

Using GovConnectIowa for Business Owners and Tax Professionals

Iowa Sales/Use Tax Basics

Iowa Tax Law Legislative Update

Individual Income Tax Update / Common Filing Issues

Iowa Pass-Through Entity Tax (PTET)

Third Party Access and Authorization

New & Updated GovConnectIowa Features

Electronic Submission of W-2s & 1099s for Tax Year 2023

Date

April 12, 2023

Jun 14, 2023

Jul 12, 2023

Aug 9, 2023

Sept 13, 2023

Sept 19, 2023

Oct 11, 2023

Nov 1, 2023

Dec 13, 2023

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Monday - Friday: 8:00 a.m. - 4:30 p.m. CT

 idr@iowa.gov

 515-281-3114 or 800-367-3388

Questions

