Iowa Department of **REVENUE**

New User ID Enhancement for eFile & Pay June 28, 2017

In an effort to increase security of your private tax information the requirements for the eFile & Pay User ID have been enhanced for your protection.

However, this will require some minor changes on your part.

Outlined in this reference guide are the new screens you will encounter when creating an updated User ID for eFile & Pay.

Iowa Department of REVENUE

Business eFile Number: 88771879 Legal Name: LEGALNM-1558

Log In ➤

Please enter your User ID and Password, then press LOG IN. If you accessed eFile & Pay system by telephone for the first-time, before you used the web, please enter your 8 digit telephone password to gain access.

User Authentication

Business eFile Number: 88771879

Legal Name: LEGALNM-1558

Enter User ID: 0001

Enter Web Password: ••••••••

EXIT   LOG IN

Forgot Web User ID?   Forgot Password?

Effective June 28, 2017 you will be required to update your User ID from the traditional four digit format to a unique User ID you create.

Enter your current four digit User ID and current Password and click Log In.

Create New Web User ID ➤

The Iowa Department of Revenue is phasing out the 4-digit Web User IDs in eFile & Pay. Please create a new, longer Web User ID to replace your existing 4-digit Web User ID. Think of one that is meaningful to you. It must be 6 to 50 characters long and may consist of letters, numbers and/or special characters. Also reset your password. You must use your new Web User ID and password next time you login to eFile & Pay.

Create Web User ID

Create Web User ID: [＿＿＿＿] (User ID must be at least 6 characters)

1) ➡ Confirm Web User ID: [＿＿＿＿]

Your Password must be at least 8 characters long and have no more than 2 consecutive repeating characters. It must contain at least 1 letter, 1 number, 1 special character @#$%^&?!+=. Letters are case sensitive, small b differs from capital B.

Web Password: [＿＿＿＿]

2) ➡ Confirm Web Password: [＿＿＿＿]

Email Address: Brenda.DiLeonardo@Iowa.gov

3) ➡ Confirm Email Address: [＿＿＿＿]

[EXIT]   [CONTINUE]

On the next screen you will be prompted to update your Web User ID and Web Password:

1) The User ID has to be at least six characters - can be lower case and upper case letters, numbers, and only the following special characters of _ . and @.

2) The Web Password has to be at least eight characters and <u>must</u> contain at least 1 letter, 1 number, and 1 special character (only @ # $ % ^ & ? ! + = characters will be accepted). Cannot have more than two repeating characters and letters are case sensitive.

3) The email from the Profile Screen will transfer over. Confirm email by entering it once again.

Click Continue.

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Business eFile Number: **88771879** Legal Name: **LEGALNM-1558**

Main Menu ➤

DEMO ON/OFF **Press this button to demo system.**

Select an Option

Select a tax type to file a return and make a payment.

- Sales
- Withholding

Select a report to submit.

- W-2 Wage Statement
- 1099 Information Return

Select an administrative function to perform.

- Add/Edit Users
- Change a Profile

- Make a Payment **(You must efile Return first)**
- Cancel a Payment

View "e" History

- View Returns "e" History
- View Payments "e" History

- View Cancelled Payments "e"History

EXIT

The next screen will be the eFile & Pay Main Menu and you will have normal functionality.

The next time you log into the eFile & Pay system you will use the new User ID and password you just created.

All users (0001, 0002, 0003 etc…) will have to update to the new Web User ID requirements and go thru the same initial steps to do so.

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Helpful hints:

- After choosing and confirming your new Web User ID and Web Password, ensure to note this as there is no interim screen allowing for printing.

- The Admin User (formerly known as User ID 0001 will still have to reset password for other sub users (ie...0002, 0003, etc).

- Every 60 days users will be prompted to create a new password. Choose passwords that can be easily updated every 60 days.

- Passwords cannot be reused within the last year.

- The User ID can be reused as long as it is for the same user.

- If sub users are locked out and if they do not know the User ID and Password they will have to contact the Admin User. If the Admin User is locked out and they do not know their User ID and Password they will have to contact Taxpayers Services at 515-281-3114 or 800-367-3388. If any user is locked out and the correct User ID and Password are known simply wait the 30 minutes and try again.

- Telephone filers are not affected by this enhancement.

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Business eFile Number: 88771879 Legal Name: LEGALNM-1558

Log In ➤

Please enter your User ID and Password, then press LOG IN. If you accessed eFile & Pay system by telephone for the first-time, before you used the web, please enter your 8 digit telephone password to gain access.

User Authentication

Business eFile Number: 88771879

Legal Name: LEGALNM-1558

Enter User ID: [_____]

Enter Web Password: [_____]

EXIT   LOG IN

Forgot Web User ID?   Forgot Password?

If the Admin User forgot their User ID, they will need to click the link on the Log In screen.

Note: this function is only for Admin User, sub users will have to go to the Admin User for resetting their User ID.

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Forgot Web User ID ➤

In order to recover your Web User ID, you must provide the email associated with your account. An email will be sent to your attention with your Web User ID. If you do not receive an email, please check your junk or spam folder. If you need further assistance, please contact the IA DOR Admin for assistance at 1-800-367-3388. Please note this functionality is only for USER ADMIN (primary user).

User Authentication

BEN: 88771879

Permit Number: 149054403   1)

Tax Type associated with Permit Number above: Sales   2)

E-mail: Brenda.DiLeonardo@iowa.gov   3)

(example: tester01@quality.com)

EXIT   CONTINUE

The Admin User will next be prompted to:

1) Enter a permit number correlating to the BEN.
2) Select the tax type of the permit just entered.
3) Enter in the same email address when you created your Profile or Web User ID.   Hit Continue.

Note: the recovery email will go to the email address entered.

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Log In ➤

Please enter your User ID and Password, then press LOG IN. If you accessed eFile & Pay system by telephone for the first-time, before you used the web, please enter your 8 digit telephone password to gain access.

Your Web User ID has been sent to the email address. You should receive it shortly.

User Authentication

Business eFile Number: 88771879

Legal Name: LEGALNM-1558

Enter User ID: _____

Enter Web Password: _____

EXIT		LOG IN

Forgot Web User ID?   Forgot Password?

On the next page the Admin User will get a blue message stating an email will be sent shortly.

Iowa eFile and Pay System: Web User ID Recovery Inbox x

? idrefile@iowa.gov
to me ▾

We have received a request to recover your "Web User ID" associated with your account.

Your account details are:
BEN: 88776947
Web User ID: **1986@DM**

If you have any questions or trouble logging in please contact the IA DOR Admin for assistance at 1-800-367-3388.

The Admin User will receive an email immediately providing their Web User ID.   Now the Admin User can go eFile & Pay just like normal.

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Business eFile Number: 88771879 Legal Name: LEGALNM-1558

FAQs | Help | IDR Home

Log In ➤

Please enter your User ID and Password, then press LOG IN. If you accessed eFile & Pay system by telephone for the first-time, before you used the web, please enter your 8 digit telephone password to gain access.

User Authentication

Business eFile Number: 88771879

Legal Name: LEGALNM-1558

Enter User ID: [   ]

Enter Web Password: [   ]

EXIT   LOG IN

Forgot Web User ID?   Forgot Password?

Both the Admin User and Sub Users may use the Forgot Password link by clicking on the Forgot Password link.

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Forgot Password? ➤

In order to recover your forgotten password, you must provide the Web User ID associated with your account on this page. System will ask the HINT questions on next page. Please note that is functionality is only for USER ADMIN (primary user).

Enter Web User ID

BEN: 88771879

Web User ID: 1986@DM

EXIT   CONTINUE

The user will next enter the appropriate User ID of the forgotten password and click Continue.

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Forgot Password? ➤

Please answer the hint questions, then press CONTINUE.

Answer Hint Questions

Hint Question 1: What was the name of your childhood pet?
Hint Answer 1: •••••
Hint Question 2: What color was your first car or truck?
Hint Answer 2: ••••

EXIT   CONTINUE

The user will answer the password hint questions and click Continue.

Note: If the Admin User cannot answer these questions the Admin User will have to call Taxpayer Services at 515-281-3114 to reset the password. If the Sub User cannot answer these questions they will contact the Admin User to reset the password.

Business eFile Number: 88771879 Legal Name: LEGALNM-1558   FAQs | Help | IDR Home

Change Password ➤

Password Requirements:
Password must be at least 8 characters long and have no more than 2 consecutive repeating characters. It must contain at least 1 letter, 1 number, and 1 special character !@#$%^&?!+=?. Letters are case sensitive; small b differs from capital B.

Password Information

New Password: ••••••••

Confirm New Password: •••••••

EXIT   CONTINUE

Once the user successfully answers the hint question from prior screen, they will see the Change Password screen and simply create a new password following the password parameters.

- The Web Password has to be at least eight characters and <u>must</u> contain at least 1 letter, 1 number, and 1 special character (only @ # $ % ^ & ? ! + = characters will be accepted). Cannot have more than two repeating characters and letters are case sensitive .

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Welcome ❯

All error and informational messages will display at the top of the screen, below the title.

Login

Business Taxes:

Enter your BEN, select Business Taxes, and press CONTINUE.

Business eFile Number (BEN): [88771879] (8 digit number mailed to you)

◉ **Business Taxes(Withholding, Sales, Use, LPG Fuel, and Motor Fuel)**

Individual Income/Corporation Income/ Consumer's Use (no permit) ePayments:

Not enrolled? Click here.

Enrolled? Enter your BEN, select Individual Income/Corporation Income ePayments, and press CONTINUE.

Business eFile Number (BEN): [   ] (8 digit number mailed to you)

○ **Individual Income/Corporation Income ePayments (IA1040/IA1040ES;IA1120/IA1120ES)**

[CONTINUE]

The user will be taken to the Log In screen for security purposes. Enter the BEN and hit Continue.

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Log In ➤

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User Authentication

Business eFile Number: 88771879

Legal Name: LEGALNM-1558

Enter User ID: 1986@DM

Enter Web Password: ••••••••

EXIT   LOG IN

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The user will enter their user ID and web password they just created. The next screen will be the eFile & Pay Main Menu.

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Main Menu ➤

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Next the user will see the Main Menu and they will have normal functionality.

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