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Mission Statement:

The statutory mission of the Iowa Department of Revenue is to serve Iowans and support state government by collecting all taxes required by law, but no more.

Tips for Filing Your 2017 Iowa Income Taxes





What can I expect this filing season?

Let's face it, for many of us filing our tax return can be stressful. We understand that. But it doesn't have to be. Take a few minutes to better understand the Iowa filing process—and maybe doing your taxes will drop from your 2018 “most stressful things” list.

Let's start by boiling it down to three simple—but important—steps. The more you understand about providing correct information, the more efficiently we are able to serve you. So, let's work together for a good outcome.

Step 1: File your return

You can file through a tax preparer, on paper or through a [3rd-party software vendor](#). If filing yourself, a good place to start is our [Income Tax Filing and Refund](#) link. For most Iowans, the information in this link contains all you need. You also can use our [Find Answers Fast](#) link, which contains filing tips.

Step 2: We look at your information (and keep it safe)

It's our job to collect the right amount of tax and provide you the correct refund, if it is due. How we do that has become increasingly complex because of the emergence of tax refund fraud. Cyber criminals attempt to file fraudulent tax returns using stolen personal information from honest Iowa taxpayers. The good news is we take your security seriously. We have to. It's our job.

Tax returns are reviewed for accuracy to ensure refunds go to the right taxpayer in the correct amount—and stay out of the hands of criminals. This includes a combination of automated and manual reviews. Getting it right matters. Here are the questions central to our review process:

- ⇒ **Is it complete?** Remember to answer all questions and sign the form, if you are filing by paper. If filing jointly, make sure you both sign the form.
- ⇒ **Is it accurate?** Since we need to make sure it's really you who is filing, double-check your personal information (name, address, and social security number), as well as your tax calculations.
- ⇒ **Is there more to it?** We may find our calculations are different than yours. Or that you have an outstanding balance owed to another public agency. Or we simply have a question.

If we have a question, we will contact you by letter asking for more information. If you get a letter from us, respond with the requested information so we can complete the review. **Unless you receive a letter from us, there is no action you need to take in order for your refund to be processed.**

While our initial review process is thorough, there are instances when an even more comprehensive review needs to be done. Sometimes this occurs even after a refund has been issued.

Fast tax fact: In 2017, the Department identified \$44 million in fraudulent or erroneous refund claims. This included \$27 million in mistakes found on returns.

Step 3: Get your refund

You can check on the status of your refund at: [Where's my Refund](#) which is updated in real-time.

- ⇒ The Return Receipt Date confirms the day we received your tax return.
- ⇒ The Refund Issue Date is the date your refund check was mailed or direct deposit was initiated.

This is the same information that is available to our phone representatives—so there is no need to call unless the message directs you to do so.

Fast tax fact: Choosing direct deposit can be the most convenient way to receive your refund. The direct deposit option is available to most—whether you file electronically or on paper. If you have an outstanding balance owed to another public agency, [your refund may be used to pay](#) the amount due before you receive any remaining refund.

When can I file my return?

Iowa uses the federal Modernized e-File platform (MeF). The Iowa Department of Revenue (IDR) will begin processing returns at the same time as the IRS—January 29, 2018. There is no advantage to filing tax returns on paper in early January instead of waiting until the 29th.

The calendar year 2017 Iowa income tax returns are due on Monday, April 30th, 2018.

Iowa income tax filing also differs from federal income tax in that no extension is required to file your return late. However, **amounts due are subject to a 10% penalty if 90% of the tax due is not paid by the return due date.**

How do I file my Iowa Income Tax return?

IDR strongly encourages taxpayers to file returns electronically. There are many reasons this method is preferable.

- ⇒ **It's more accurate.** Electronic filing software does the calculations for you. It also may provide prompts which help ensure you claim all the deductions and exemptions to which you are entitled.
- ⇒ **It might be free.** It is estimated that up to 70% of Americans are eligible to file their returns for free depending upon factors including age, income level, and veteran status. Through Iowa's participation in the Freefile Alliance, you can access multiple software providers at the touch of a button. IDR's e-file portal can be found at <https://tax.iowa.gov/individual-income-tax-electronic-filing-options>.
- ⇒ **It's safe.** IDR partners with the IRS, tax software providers, and other Departments of Revenue to combat fraud and identity theft.
- ⇒ **It's faster.** When you file electronically you don't spend time hand-writing on forms, doing calculations, and getting your return to the post office. IDR in turn doesn't spend time opening your envelope and data-entering your return information. **That means you will get your refund more quickly by filing electronically.**
- ⇒ **It's direct.** If you file electronically you are eligible to have your refund direct deposited into your bank account. **The direct deposit option is now available for paper returns.**



How can I pay?

The fastest, easiest way to pay is online using our eFile and Pay portal. **You can even schedule a payment in advance.** Remember, you must pay at least 90% of the tax due by the return due date in order to avoid a penalty. You can also mail or bring a check or money order to IDR, but we strongly encourage electronic payment. Although it is rare, checks have gotten lost in the mail. Electronic payments are reliable and you will receive immediate confirmation that the payment was received.

Where can I get help?

- ⇒ IDR's website provides a wealth of information and has an easy-to-use Google search engine. <https://tax.iowa.gov>.
- ⇒ Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) offer free tax help to people who qualify. Go to IRS.gov and enter "free tax prep" in the search box to learn more and find a nearby VITA or TCE site, or download the IRS2Go smartphone app to find a free tax prep provider.
- ⇒ A trusted tax professional can provide helpful information and advice about the ever-changing tax code. [Tips for choosing a return preparer](#) and details about [national tax professional groups](#) are available on IRS.gov.

Are you a victim of identity theft?

If your personal information has been stolen and used to file a fraudulent tax return, you will probably hear about it from the IRS first. If you learn from the IRS or another government agency that your social security number or other identifying information has been stolen, **contact us immediately; do not assume that someone will contact us on your behalf.** The best way to report the theft to us is on our website at <https://tax.iowa.gov/webform/report-fraud>. The IRS also has a comprehensive web page with information and resources for preventing and handling identity theft at <https://www.irs.gov/individuals/identity-protection>.

Vision Statement

Iowa will be a state where it is easy to understand and
comply with tax obligations.

<https://tax.iowa.gov>



Answering Iowans' questions about state tax refunds

When it comes to filing your Iowa tax return, we understand you may have questions. Three of the more common questions we receive are below. And our [website](#) is a great resource for both individual filers and tax professionals. Whether you are a first-time filer or just need some helpful hints, our new [2017 Filing Made Easy](#) page is a good place to start.



Once I file my return, what happens before I receive my refund?

It's the Iowa Department of Revenue's job to collect the right amount of tax and provide you the correct refund, if it is due. How we do that has become increasingly complex because of the emergence of tax refund fraud. Cyber criminals attempt to file fraudulent tax returns using stolen personal information from honest Iowa taxpayers. We take your security seriously. But our job takes time. Tax returns are reviewed for accuracy to ensure refunds go to the right taxpayer in the correct amount -- and stay out of the hands of criminals. This includes a combination of automated and manual reviews.



When will I get my refund?

The Department does not provide estimated time frames for refund processing because every return takes individual attention. You can check on the status of your refund at: [Where's my Refund](#) which is updated in real-time.

- The Return Receipt Date confirms the day we received your tax return.
- The Refund Issue Date is the date your refund check was mailed or direct deposit was initiated.

This is the same information that is available to our phone representatives – so there is no need to call unless the screen message directs you to do so.



What can I do to receive my refund sooner?

In some cases, the Department may contact you via letter requesting more information in order to process your return. If you get a letter from the Iowa Department of Revenue, respond with the requested information so they can complete the review and send out your refund. Unless you receive a letter from the Department, there is no action you need to take in order for your refund to be processed.