



Department of
Taxation and Finance

Enhanced STAR

Income Verification Program (IVP) Tool

User Guide

Table of Contents

1. Introduction.....	3
2. Access the IVP Tool.....	3
3. Property Search.....	7
4. Create A New Enrollment.....	9
5. Additional Actions	11
A. Edit an enrollment.....	11
B. Merge two parcels.....	12
C. Split a parcel into multiple parcels.....	12
D. Close an enrollment.....	12
E. Reactivate an enrollment.....	13
6. IVP Tool Reports	14
7. Download Reports.....	15
8. Logout	15

1. Introduction

The Enhanced STAR Income Verification Program (IVP) Tool is for use by ORPTS and authorized users of the assessment community for sharing information related to Enhanced STAR exemption recipients.

Beginning with 2019 assessment rolls, all Enhanced STAR exemption recipients must participate in the IVP. After receiving Form RP-425-IVP, *Supplement to Form RP-425-E* from a property owner, the assessor has the option to enter the data into the IVP Tool or to transmit the form to the Tax Department for data entry. (See [How to transmit IVP forms to the Tax Department.](#))

Assessors will also use the IVP Tool to update records where there have been primary residence or ownership changes.

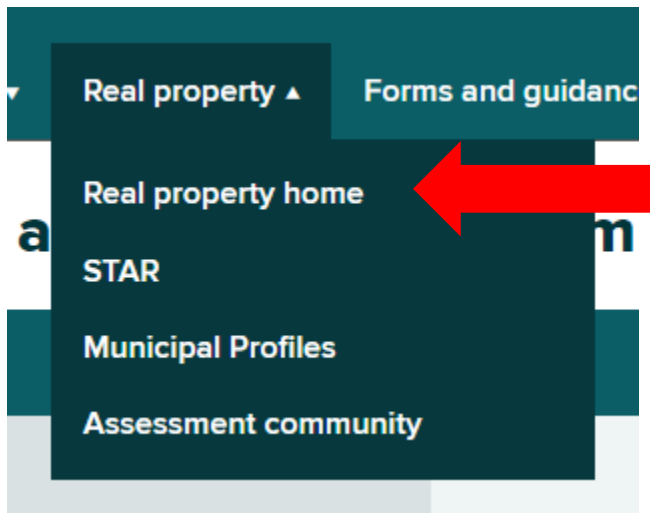
The IVP Tool is highly secure. The Tax Department is charged with processing and guarding the personal information of millions of taxpayers. Those standards and practices are in place for the IVP Tool and the data it contains.

2. Access the IVP Tool

1. Begin at the Department of Taxation and Finance website: www.tax.ny.gov.
2. Select *Real Property* in the green menu bar.



3. Select *Real property home* from the drop-down menu.



- From the *Real Property* landing page, scroll down to *Real Property Resources* and in the *Local assessment officials* box, select *Online Assessment Community*.

Resources

Property owners
See *Property owners* for information about assessments, property tax relief, and more; whether your property is residential, commercial, agricultural, or vacant, you'll find everything you need to know.
Only looking for STAR information? See [STAR resource center](#).
▶ SEE PROPERTY OWNERS

Local assessment officials
See *Property tax and assessment administration* for important updates and access to New York State resources for assessors, county real property tax directors, and their staff.
Or, log in to [Online Assessment Community](#).
▶ SEE ASSESSMENT ADMINISTRATION

Real estate professionals and county clerks
Selling or buying real estate? You'll find the sales transfer form (RP-5217) and other helpful information at *Real property report and sales reporting*.
Or, search our database of property sales with [SalesWeb](#).
▶ SEE TRANSFER AND SALES REPORTING

- From the *Online Assessment Community* landing page, select the **ONLINE ASSESSMENT COMMUNITY LOG IN** button.

Online Assessment Community: Secure site for assessors, county directors and their staff

The Online Assessment Community (OAC) is a secure site that the Office of Real Property Tax Services makes available to county directors, assessors, and their staff. The OAC includes tools and data resources necessary for local assessment administration. Users must have an assigned account to use the site and accounts can be programmed with either *Basic* or *Elevated* access.

Already have an account?

Enter your username and password to access the OAC or the training portal.

ONLINE ASSESSMENT COMMUNITY LOG IN

TRAINING PORTAL LOG IN

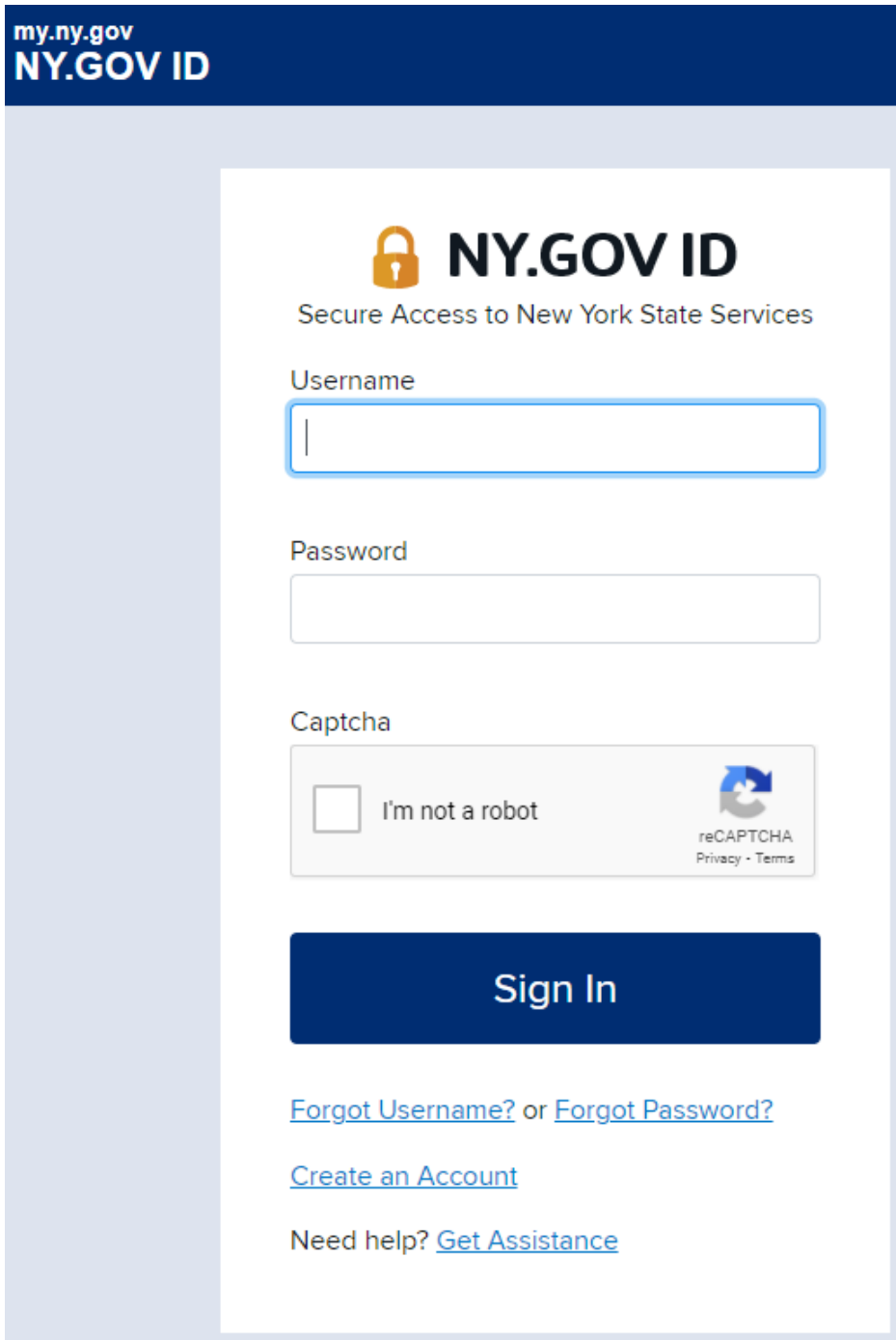
Forgot [username](#) or [password](#)

(Note: To obtain an Online Assessment Community account, select *I need to request an account*. To make changes to an existing account, select *I need to make changes to or deactivate an account*.)

Troubleshooting

If you have technical difficulties signing into your account, it may help to clear your cookies, temporary files, and history from your browser. To learn how, see [Browser requirements and troubleshooting tips](#).

6. On the NY.GOV ID sign in page, enter your username and password and complete the Captcha security test. Select *Sign In*.



The screenshot shows the NY.GOV ID sign-in page. At the top left, there is a dark blue header with the text "my.ny.gov" and "NY.GOV ID" in white. The main content area is white and contains the following elements:

- A lock icon followed by the text "NY.GOV ID" and "Secure Access to New York State Services".
- A "Username" label above a text input field.
- A "Password" label above a text input field.
- A "Captcha" label above a reCAPTCHA widget. The widget includes a checkbox labeled "I'm not a robot" and the reCAPTCHA logo with "reCAPTCHA Privacy - Terms" text.
- A large dark blue button with the text "Sign In" in white.
- Below the button, there are three links: "[Forgot Username?](#) or [Forgot Password?](#)", "[Create an Account](#)", and "Need help? [Get Assistance](#)".

7. Read and agree to the terms of the security contract and select *Continue*.

NEW YORK STATE Department of Taxation and Finance

Online Assessment Community

New York State Department of Taxation and Finance Security Contract

* Required field

Security contract

The New York State Department of Taxation and Finance makes the applications in the Online Assessment Community available only to registered users who are local assessors, county real property tax (RPT) directors, or their authorized designees. In order to gain access to this system, you must agree that you will:

- protect the confidentiality of taxpayer information,
- use such information only for its intended purposes, and
- not use or disclose such information for any other purpose.

Any unauthorized disclosure of confidential STAR eligibility information shall be deemed a violation of section 805-A of the General Municipal Law.

In addition, any assessor or county real property tax director who has access to this application-or who has approved access for their staff or representatives-must agree to immediately notify the Office of Real Property Tax Services at real.property@tax.ny.gov when a registered user no longer has a need for access or is no longer approved to use the Online Assessment Community.

Finally, to ensure the security of this information if you leave your workstation, you agree to log off of the application you are using.

I have read and agree to the terms set forth above.

Continue

8. Select *Menu**, then select *IVP Tool* from the drop-down.

NEW YORK STATE

Services News Government Local

NEW YORK STATE Department of Taxation and Finance

Menu Online Assessment Community

Filter

- Assessor
 - Star Reports
 - IVP Tool**
 - IVP Tool Reports
- RPSV4 Updates
- Sales Reports
- State Owned Land Reports
- Data Warehouse Query
- Valuation Guidelines
- Public Tools

Visit the [Assessment Community Weekly archive](#) to search newsletters fr

*Your menu may have different options than what is shown in the example above depending on your title and security access.

Additionally, if you are not seeing all the SWIS codes you've been granted access to in the dropdown menu, it may be because you are assigned a different role for the missing municipality—for example, you are assessor in Town A and staff in Town B. To see the missing SWIS code, you'll need to switch your role by selecting menu, select your current role and under *Change role*, choose the role for the municipality you'd like to access. You will need to take these steps when switching back and forth between municipalities.

3. Property Search

Once you enter the tool, you'll begin by searching for a property on the **Property Search** screen. If the property is already enrolled in the IVP, your search will return the enrollment record. If the property is not enrolled in the IVP, your search will return a record from the latest assessment roll on file with the Tax Department.

Note: Any edits you perform in the IVP Tool will **not** directly impact your assessment roll — they will *only* be reflected in the Tax Department's IVP enrollment database.

To search, you must enter the following information:

1. *SWIS code*,
2. *Levy year*, and
3. one of the following combinations as it appears on the assessment roll:
 - *Print key (must be at least six characters)*, or
 - *Street number, Street name, and ZIP/Postal Code*, or
 - *Owner's last name*, or
 - *Owner's last name and ZIP/Postal code*

If your search doesn't return the property you were searching for, check your search criteria and try again.

If your search yields more than 50 results, you will be prompted to refine your search. You can add *Unit number* to any search to improve your results.

The *View field* options are: *All*, *Closed*, *Open*

- Selecting *All* will display all roll records and registrations regardless of status.
- Selecting *Closed* will display only closed registrations.
- Selecting *Open* will display only open enrollments.

Property information

SWIS code: ?

Levy year:

Print key:

Unit number:

Street number:

Street name:

ZIP/Postal code:

Owner's last name:

View:

Print key	Street address	Unit number	Owner names	Mobile home or co-op	Levy year	Source	Closed date
There is no data to display.							

The results will appear in the table at the bottom of the screen. The user will have the following action options to choose from:

- If the source is from a **roll record**: *New Enrollment, Merge, or Split.*

Print key	Street address	Unit number	Owner names	Mobile home or co-op	Levy year	Source	Closed date	Actions
160.63-3-11	4 OAK ST BINGHAMTON, NY 13905-4640	19	DUANE SPILDE MARY SPIDE	Co-op		Roll Rec		<ul style="list-style-type: none"> New Enrollment Merge Split

- If the source is from an **IVP Enrollment**: *Merge, Split, Close Enrollment, or Edit Enrollment.*

Print key	Street address	Unit number	Owner names	Mobile home or co-op	Levy year	Source	Closed date	Actions
143.74-1-24	61 CLEVELAND BINGHAMTON, NY 13905-3223		Carol Tuesday		2020	IVP Enrol		<ul style="list-style-type: none"> Merge Split Close Enrollment Edit Enrollment

Accessibility Disclaimer Privacy Security Copyright Email/Phishing

- *Reactivate* will only be available on a registration that was closed within the last five business days.

Print key	Street address	Unit number	Owner names	Mobile home or co-op	Levy year	Source	Closed date	Actions
160.62-3-16	13 CHAPIN BINGHAMTON, NY 13905-4404		TOM CHAPIN		2020	IVP Enroll		<ul style="list-style-type: none"> Reactivate
160.62-3-16	13 CHAPIN BINGHAMTON, NY 13905-4404		TOM CHAPIN		2020	IVP Enrollment		<ul style="list-style-type: none"> Reactivate

Select *Clear* to erase all data entered in the search fields and return all drop downs to their defaults.

4. Create A New Enrollment

1. On the **Property Search** screen results, select *New Enrollment* from the Actions dropdown list.

Print key	Street address	Unit number	Owner names	Mobile home or co-op	Levy year	Source	Closed date	
160.63-3-11	4 OAK ST BINGHAMTON, NY 13905-4640	19	DUANE SPILDE MARY SPIDE	Co-op		Roll Rec		Actions ▾

New Enrollment
Merge
Split

You'll be brought to the **Property Details >> New Enrollment** screen.

2. Complete the information under *New property registration information* and *Mailing address information* then select *Add owner* on the *Owner summary* screen.

New property registration information	
SWIS code: 030200	
Print key: 160.63-3-11	
Unit number: 19	
Property address: 4 OAK ST BINGHAMTON, NY 13905-4640	
Is this a mobile home or co-op? <input type="radio"/> Yes <input type="radio"/> No	
Is this property held in a trust or life estate? <input type="radio"/> Yes <input type="radio"/> No ?	
Mailing address information	
PO Box:	<input type="text"/>
Street number:	<input type="text"/>
Street name:	<input type="text"/>
Unit/Apt:	<input type="text"/>
City:	<input type="text"/>
U.S. state/Canadian province:	New York ▾
ZIP/Postal code:	<input type="text"/>
Country:	UNITED STATES ▾

Owner summary				
Name	Social Security number (SSN)	Owner/spouse	Date of birth	Relationships
There is no data to display.				
<input type="button" value="Add Owner"/>				

- You'll be brought to the **Owner/non-Owner Details** screen.
- Complete the information under *Owner/non-owner resident spouse information*. If there are any owners who are not age-eligible (65+), add the age-eligible owner first. **Remember**—where a trust or life estate is in place, only the beneficiary(ies) or life tenant(s) are considered owners for STAR purposes and only those owners should have an IVP enrollment. Do not enter trustees, remaindermen, or executors—they are not the current owner(s).

Owner/non-owner resident spouse information	
SWIS code:	030200
Print key:	160.63-3-11
Property address:	4 OAK ST BINGHAMTON, NY 13905-4640
First name:	<input type="text"/>
Middle initial:	<input type="text"/>
Last name:	<input type="text"/>
Suffix:	Select one <input type="button" value="v"/>
Social Security number (SSN):	<input type="text"/> <input type="button" value="Show"/>
Confirm Social Security number (SSN):	<input type="text"/> <input type="button" value="Show"/>
Date of birth:	<input type="text"/> <input type="button" value="Calendar"/>
Owner type:	Select one <input type="button" value="v"/>

- Complete the information on the *Income information* screen. For the definition of income, select the question mark in the blue circle.

The *Income amount* is the federal adjusted gross income (AGI) minus the taxable amount of total distributions from IRAs. If the applicant reports a negative income, **do not** enter the negative amount. Instead, enter zero.

If the individual filed a joint income tax return, use the actual AGI from the return to determine the amount; do not split the AGI between two partners.

Income information	
When you add a new owner or non-owner you must enter their income in this section.	
Income amount (\$):	<input type="text"/> <input type="button" value="Help"/>
Income tax return year:	2018 <input type="button" value="v"/>
Income source:	Select one <input type="button" value="v"/>

Generally, the income tax return year will be two years prior to the school levy year. However, **if the property owner is a surviving spouse**, and the death of their spouse would result in them becoming income-eligible for the Enhanced STAR exemption, you can select one year prior as the income tax year.

6. If there are additional owners, select *Add Another Owner*. For each additional owner, follow steps 5 – 7; you will be required to select the relationship between that owner and each of the other owners.

Relationships	
Other owner and non-owner resident spouse	Relationships
Duane Spilde	Select a relationship ▼

7. When all owners have been added, select *Continue*.
8. You will be brought back to the **Property Details – New Enrollment** screen. Review the information you entered. To review an individual owner’s information, select their name under *Owner summary*.

Owner summary					
<input type="checkbox"/>	Name	Social Security number (SSN)	Owner/spouse	Date of birth	Relationships
<input type="checkbox"/>	Spilde, Duane	XXX-XX-2468	Owner	01/01/1940	

Reason for removing owner(s):

You will be brought back to the **Owner/Non-Owner Details** screen.

9. When ready, select *Continue*. You will be brought back to the **Property Details – New Enrollment screen**.
10. When all of the data for the property and the owners is entered, select *Add Enrollment*. The enrollment will be added, and you will be brought back to the **Property Search** screen, where you can search for a new property.

5. Additional Actions

A. Edit an enrollment.

1. Search for the property on the **Property Search** screen.
2. Select *Edit enrollment* in the *Actions* dropdown. You’ll be brought to the **Property Details** screen, where you can make edits.
3. To edit an owner’s information, select the owner.
4. To remove an owner, check the box next to the owner’s name and provide a reason for removing the owner. If all eligible property owners move but still own the property, update each of the owners to be non-resident owners
5. When you’ve finished editing owners, select *Continue*.
6. Select *Update Enrollment* when you have completed your edits.

B. Merge two parcels. If a property has split and it is already enrolled in the IVP or it needs to be enrolled:

1. Search for the property on the **Property Search** screen.
2. Select *Merge* in the *Actions* dropdown. You'll be brought to the **Property Details – Split/Merge** screen.
3. Enter the new Print key for the property that you are enrolling in the IVP program, as well any other new information about the property.*
4. If the property was already enrolled in the IVP and the owners have changed, check the box next to each owner's name that needs to be removed and provide a reason for removing them.
5. Select *Add Owner* to add new owners to the property.
6. When you have finished adding the information for the new parcel, select *Update Enrollment* on the **Property Details – Merge** screen.

Note: When merging parcels, the original IVP enrollment will close. The newly merged parcel will not appear in the IVP Tool until the tentative or final roll (whichever comes first) is submitted to ORPTS, and ORPTS loads the roll into the system.

C. Split a parcel into multiple parcels. If a property has split and it is already enrolled in the IVP or it needs to be enrolled:

1. Search for the property on the **Property Search** screen
2. Select *Split* in the *Actions* dropdown. You'll be brought to the **Property Details – Split/Merge** screen.
3. Enter the new Print key for the property that you are enrolling in the IVP program, as well any other new information about the property.*
4. If the property was already enrolled in the IVP and the owners have changed, check the box next to each owner's name that needs to be removed and provide a reason for removing them.
5. Select *Add Owner* to add new owners to the property.
6. When you have finished adding the information for the new parcel, select *Update Enrollment* on the **Property Details – Split/Merge** screen.

Note: When splitting parcels, the original IVP enrollment will close. The newly split parcels will not appear in the IVP Tool until the tentative or final roll (whichever comes first) is submitted to ORPTS, and ORPTS loads the roll into the system.

D. Close an enrollment for the following reasons:

- all of the Enhanced STAR recipients are deceased,
- the property has sold, or
- the IVP enrollment was created in error.

Note: If all eligible property owners move but still own the property, don't

close the enrollment. Instead, update each of the owners to be non-resident owners. See instructions under ***Edit an enrollment***. The eligibility reports issued in the spring will indicate that they are not eligible for the Basic or Enhanced STAR exemption.

Follow these steps to close the enrollment:

1. Search for the property on the Property Search screen,
2. Select *Close Enrollment* in the *Actions* dropdown. You'll be brought to the **Close Enrollment** screen,
3. Select the reason for closing the enrollment:
 - i. **Deceased.** All of the owners who are eligible for the Enhanced STAR exemption were deceased before the taxable status date for the current assessment roll.
 - ii. **Property Sold.** All of the owners who are eligible for the Enhanced STAR exemption moved before the taxable status date for the current assessment roll.
 - iii. **Created in Error.** The IVP enrollment was created in error.
 - iv. **Post Taxable Status Date.** All of the eligible owners are deceased or the property sold after the taxable status date for the current roll.
4. Select *Close Enrollment*.

E. Reactivate an enrollment. If you closed an enrollment in error, you have five days to reactivate the enrollment.

1. Search for the property on the Property Search screen,
2. Select *Reactivate* in the *Actions* dropdown,
3. Review the property information and make any necessary changes,
4. Select *Reactivate enrollment*.

Note: If it has been more than five days since you closed the enrollment, email real.property@tax.ny.gov with the IVP enrollment details and ORPTS will reactivate it.

6. IVP Tool Reports

There are three IVP Tool Reports that can be viewed in the tool or downloaded.

Enhanced STAR Summary IVP Edit Report. Includes all properties enrolled in IVP for the selected Municipal Code.

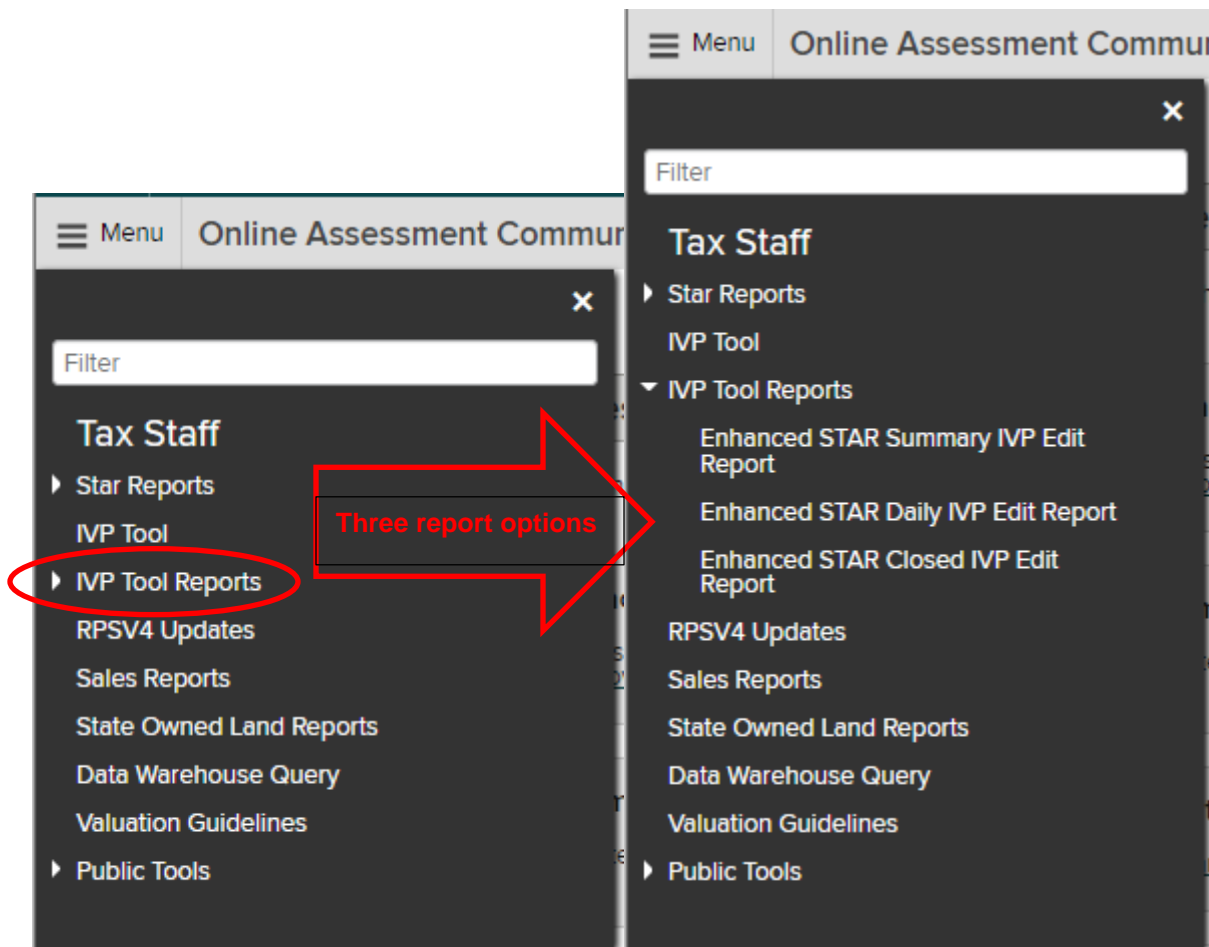
Enhanced STAR Daily IVP Edit Report. This report displays updates made by the assessor or local staff. (Changes made by the Tax Department will not display.) It includes records where the assessor or staff has made additions, deletions, updates, reactivations, splits, and merges. It displays real-time updates in both the view and download versions. A maximum of four owners are displayed.

Note: You can select edits up to 30 days in the past.

Enhanced STAR Closed IVP Edit Report. This report includes records that have been closed by the assessor or the Tax Department. Records closed by an assessor will show as *AEDIT* in the *Last updated by* field. Records closed by the Tax Department will show the user's 5-digit employee ID number.

Note: You can select edits up to 365 days in the past.

To access the reports from the *Menu*, select *IVP Tool Reports* which will expand and show the three reports. Select the desired report.



7. Download Reports

To learn how to download reports, see [How to Access and Download STAR Reports](#).

8. Logout

When you are finished with your work in the tool, always log out promptly to keep the data secure. Never walk away from your work area while the tool is open. To logout, click on your user profile in the upper right corner and select *Logout*.

