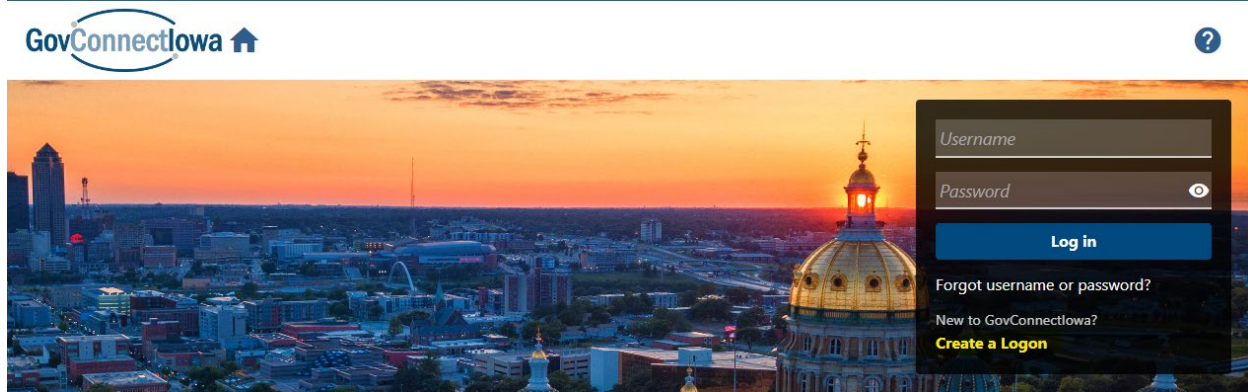


Instructions for Transferring Tax Credit Certificates in GovConnectIowa

1. Go to [GovConnectIowa](#)

2. If you have not created a logon in GovConnectIowa you will need to do so by clicking on the “Create a Logon” link that is highlighted in the image below. Any previous CACTAS logons will not work.






Creating the Logon Instructions

- You will need to complete all required information on the Logon Information page and select next when that has been completed.
- Complete the Email Validation
- Answer No on the Bulk Filer page
- Answer No on the Account Access page
- Submit your request

3. You should then be able to enter your username and password. You will then need to set up your two-step verification.

4. Once you are logged in you will be taken to the homepage where you can select the “Apply for a Tax Credit Transfer” hyperlink (highlighted below)

GovConnectIowa   

BOB TESTER Welcome, BOB TESTER
bt@email.com You last logged in on Tuesday, Jan 17, 2023 2:04:51 PM
+1 (555) 555-5555 Manage My Profile

Available Options

🔍 What would you like to do today?

| | | |
|--|---|--|
| Registration I've never filed with the Iowa Department of Revenue before and need to register my new business. > Register a New Business | Access I've filed or have existing tax accounts with the Iowa Department of Revenue and need access to all available GovConnectIowa features. > Request Access to an Account > Enter Access Code to Connect to an Account | Returns & Payments Make a payment or request a copy of a tax return. > Make a Payment > Request Copy of Tax Return |
| Tax Credits Apply, transfer, or view tax credits. > Apply for a Tax Credit > Apply for a Tax Credit Transfer > Self-Employment Tax | Manage State of Iowa Licenses Apply or renew licenses with various State of Iowa agencies. > Iowa Alcoholic Beverages Division Licenses > Iowa Department of Inspections and Appeals | Drafts & Submissions Search for drafts and previous submissions. > Search Drafts & Submissions |

5. Answer the question regarding whether you are transferring a Tax Credit.
6. On the General Information page, enter your information in the Authorized Transfer Contact section. This will be the information used if there are any questions regarding this particular transfer request.
7. In the Certificate Mailing Information section enter and validate the address of where the completed tax credit certificate(s) should be mailed. Note: all certificates will be mailed to the same address.
8. Enter the information from the tax credit certificate on the Certificate to be Transferred Information page. All fields are required. If you receive any errors, please contact angela.gullickson@iowa.gov and provide a copy of the certificate that you are attempting to transfer.

Add Transferor Certificate

| | | |
|---|-----------------|---|
| Certificate Number * | <i>Required</i> | |
| Type of Taxpayer * | <i>Required</i> | ▼ |
| Taxpayer Name * | <i>Required</i> | |
| Last 4 of TIN * | <i>Required</i> | |
| Amount of Tax Credit * | <i>Required</i> | |
| Original Date Certificate Issued * | <i>Required</i> | 📅 |
| Date Certificate Transferred Between Parties * | <i>Required</i> | 📅 |
| Can be Claimed in Tax Years Beginning On or After * | <i>Required</i> | 📅 |

9. Select the “+ Add Transferree” on the Certificate Allocation page.

✓
Introduction

✓
General Information

✓
Certificate to be Transferred Information

▶
Certificate Allocation

Certificate Allocation

| Certificate Number | Transferee |
|--|------------|
| + Add Transferree | |

10. Selecting the “+ Add Transferree” will bring up the request for information regarding the entity the credit is being transferred to and then you will need to scroll down in that box to add the certificate allocation before you select the Add button.

Add Transferee

Tax Type of Transferee * *Required* Required

Name of Business * *Required*

Taxpayer ID Type * FEIN SSN

ID

Filing Period End Month * *Required*

Country USA

Street * *Required*

Unit Type Unit

City * *Required* State IOWA

Zip * *Required* County

[Verify Address](#) ⚠ Address must be verified

Scroll down for allocation section

Add Certificate Allocation

Required

Certificate Number 782020110501

Transferee * *Required*

Available Amount of Tax Credit 63,677.00

Amount of Tax Credit being Transferred * *Required*

Tax Credit Certificate Type Refundable Non Refundable

Was there any consideration provided in exchange for the Tax Credit * Yes No

Cash 0.00

Discharge of Debt 0.00

Other (Describe)

[Cancel](#) [Add](#)

Note: If you are transferring more than one Tax Credit you will only be able to enter one transferee. For all other requests you can enter more than one transferee by selecting the “+ Add Transferee” hyperlink for each transferee that needs to be added.

11. You are required to attach a copy of the issued certificate. You may also attach any additional documentation that you feel is pertinent to the request.

12. Review the information provided and Submit the request.

13. You can verify that your request has been submitted by selecting the “Search Drafts & Submissions” hyperlink on the homepage.

The screenshot shows three navigation cards on a homepage. The first card is titled 'Tax Credits' with a speech bubble icon and the text 'Apply, transfer, or view tax credits.' It contains four links: 'Apply for a Tax Credit', 'Apply for a Tax Credit Transfer', 'Certify Fund or Business', and 'Notice of intent to Claim Sales and Use Tax Refund'. The second card is titled 'Manage State of Iowa Licenses' with a document icon and the text 'Apply or renew licenses with various State of Iowa agencies.' It contains three links: 'Iowa Alcoholic Beverages Division Licenses', 'Iowa Department of Inspections and Appeals Licenses (food and lodging)', and 'Iowa Lottery Authority Licenses'. The third card is titled 'Drafts & Submissions' with a download icon and the text 'Search for drafts and previous submissions.' It contains one link: 'Search Drafts & Submissions', which is highlighted in yellow.

Selecting that link after submission will show you the status of your request.

Requests that are pending will show up on the Pending tab. Requests that have been completed will show up under the Processed tab.

The screenshot shows the 'Submitted' tab selected in the 'Drafts & Submissions' section. At the top, there are two tabs: 'Pending' and 'Processed'. Below the tabs is a 'Submissions' header with a 'Filter' input field on the right. A table with the following columns is displayed: 'Stat', 'Date', 'Title', 'Name', 'Account', 'Account ID', and 'Period'. The table contains one row with the following data: 'Submitted', '17-Jan-2023', 'Tax Credit Transfer Application', and empty cells for the remaining columns.

Questions can be emailed to angela.gullickson@iowa.gov