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


2. Select Real Property in the green menu bar.

3. Select Real property home from the drop-down menu.
4. From the Real Property landing page, scroll down to Real Property Resources and in the Local assessment officials box, select Online Assessment Community.

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

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

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

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

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

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.
3. You’ll be brought to the **Owner/non-Owner Details** screen.

4. 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).

5. 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.
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.

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.

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](mailto: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*.