

ANNUAL CERTIFICATION FOR EXTERNAL IRMS USERS

OVERVIEW

- Using the [ARWeb](#) application -- Primary Setoff Coordinators / Administrators / Supervisors are required to **annually** certify the AR Web access for users within their locality offices and/or setoff agencies.
- The annual **certification** season occurs only **from June 1 to June 30**.
- **Failure** to complete certification for a user will result in Virginia Tax **suspending** their access.
- Certification is not complete until each user listed has their access either Certified or Revoked.
- Per important and required security protocols, no user can certify their own access (i.e. self-certify).
 - This especially impacts the Primary Setoff Coordinator doing the IRMS access work in AR Web.
 - They cannot certify their own access and their name is not displayed on the screen.
- Two option exists to ensure the Primary Coordinator is certified. Details are provided in this job aid.
 - Option 1 - Offices with an **Alternate Setoff Coordinator** will be able to certify the Primary Setoff Coordinator from their own AR Web account. They login and perform the same action but only certify one user --> the Primary Coordinator.
 - Option 2 - **External Certification Request Form** – available if your office needs to submit a request to be manually approved. (Example - your office does not have an Alternate Coordinator to do a certification.)

RESOURCES – when you have questions after reviewing this job aid

- For Local Office / Locality questions – SpecialTaxesLocalitySupport@tax.virginia.gov
- For Setoff Agency questions – Tax-SetoffCertification@tax.virginia.gov
- For IRMS System related questions – IRMS.Support@tax.virginia.gov

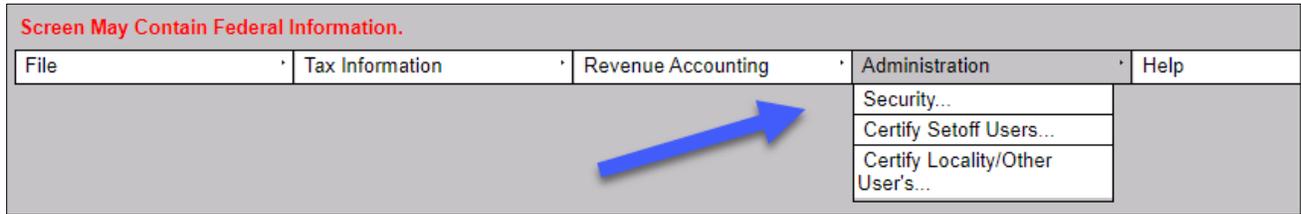
Follow these steps to complete the Certification process for your local office / agency.

CERTIFICATION STEPS FOR YOUR STAFF

1. Open the [AR Web](#) application and log into your account.



2. Click the **Administration** menu option.



3. Select the applicable menu option.

NOTE: A window will then open to display staff that currently has AR access.

- **Security** - this menu option is for Security Admin users to complete their actions
- **Certify Setoff Users** - this menu option is for setoff agencies to certify their users
- **Certify Locality / Other User's** - this menu option is for local offices to certify their users
NOTE: Local offices that also setoff agencies will see **both** roles as menu options. These local offices must visit **both menu options** to certify their Setoff users, and also their Locality/Other users.

4. Review the first person displayed in your staff list.

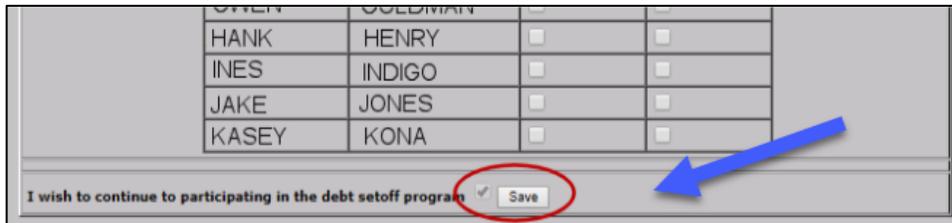
First Name	Last Name	Certify	Revoke
ANGELA	AIMS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BOB	BAKER	<input type="checkbox"/>	<input type="checkbox"/>
CINDY	CARNS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAVID	DOBBS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ERICA	ERICKSON	<input type="checkbox"/>	<input type="checkbox"/>
FRANK	FARMER	<input type="checkbox"/>	<input type="checkbox"/>
GWEN	GOLDMAN	<input type="checkbox"/>	<input type="checkbox"/>
HANK	HENRY	<input type="checkbox"/>	<input type="checkbox"/>
INES	INDIGO	<input type="checkbox"/>	<input type="checkbox"/>
JAKE	JONES	<input type="checkbox"/>	<input type="checkbox"/>
KASEY	KONA	<input type="checkbox"/>	<input type="checkbox"/>

5. Determine if AR access is still required for this person.

NOTE: We understand that the decision to certify or revoke a user may be made at a different level. This tool communicates that decision to Virginia Tax.

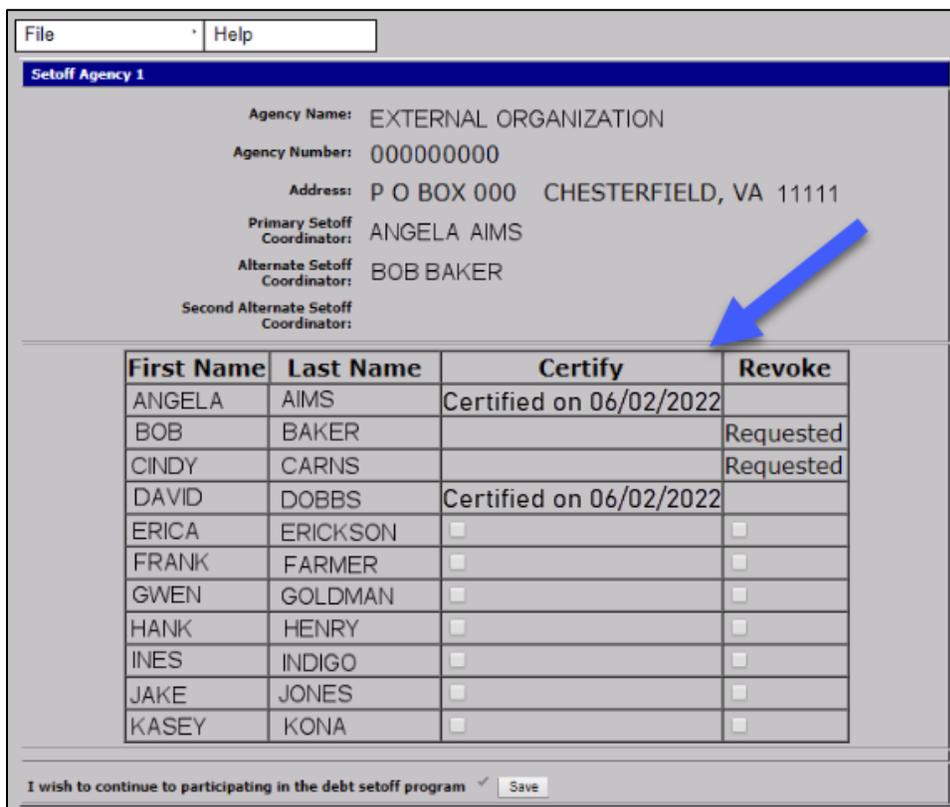
- A. If access is still required, click the **Certify** box.
- B. If access is no longer required, click the **Revoke** box.
- C. Repeat Steps 5A – 5B until all displayed users have been certified or revoked.

- If you are a **Setoff Agency** AND will continue with the setoff program, click the setoff program participation checkbox (located next to the Save button).
- Click the **Save** button (at the bottom of the window) to save and **transmit** your entries to Virginia Tax.



NOTE: The best approach is to complete the certification process before leaving the screen. However, if you did not certify **ALL** of the users listed, you can return to the screen to finish, but only until June 30th.

- Users you have previously certified will have a certification date, as in the example below.
- Revoked users will either have Requested indicators, or their names will have been removed completely from the listing once the revoke request is processed.



- Click the **File** menu option and then **Close** to return the AR Web desktop.



To **finish** the Certification Process – Continue to Page 4 to address the Primary Coordinator Account.

CERTIFICATION STEPS FOR THE PRIMARY COORDINATOR

As described in the Overview, there are **two options** to ensure the Primary Coordinator is certified. Their name was not displayed in the staff list for certification as they are not allowed to approve themselves.

- Option 1 – Use the **Alternate Setoff Coordinator** to certify the Primary Setoff Coordinator in AR Web
- Option 2 – Use the **External Certification Request Form** to submit a request to be manually approved

OPTION 1 -- ALTERNATE SETOFF COORDINATOR STEPS

1. Log into AR Web for your **Alternate Setoff Coordinator** account.
NOTE: Offices with an existing Alternate Setoff Coordinator may use this method.
2. Click on the same **Administration** window described in the previous section
3. Select **Certify Setoff Users** to see the Primary Coordinator's name displayed.
NOTE: The Alternate Setoff Coordinator only has access to do the certification for the Primary Coordinator.
4. Click **Certify** or **Revoke** next to the Primary Coordinator's name.
5. Click the **Save** button to transmit the entry for the Primary Coordinator to Virginia Tax
6. Click the **File** menu option and then **Close** to return the AR Web desktop.

OPTION 2 -- EXTERNAL CERTIFICATION REQUEST FORM SUBMISSION STEPS

- [External Certification Request Form](#) – active beginning June 1.
- Full URL - <https://app.smartsheet.com/b/form/ada08fc71bce4f8db10f852574c87e04>

Request Form Details

- **Category** – Select Setoff Agency or Locality as your option
 - Only one category can be selected per request form
 - Some organizations have both user types and must submit a separate form for each category.
- **Setoff Agency or Locality Name**
 - The dropdown list will display after you select the appropriate category
 - Select your actual office name from the dropdown list.
 - Only the office names for one category at a time will display in the dropdown list.

The screenshot shows a form with the following sections:

- Category ***: A heading followed by the instruction "Select the appropriate category from the choices below." and two radio button options: "Locality" and "Setoff Agency".
- Contact Information**: A section header.
- Approver First Name ***: A heading followed by the instruction "Enter the first name of the contact who is confirming the user identified below should still have IRMS (AR Web) access." and a text input field.
- Approver Last Name ***: A heading followed by the instruction "Enter the last name of the contact who is confirming the user identified below should still have IRMS (AR Web) access." and a text input field.

The bottom of the form features a decorative wavy border.

- **Contact Information** for the **Approver** (Supervisor) and for the **Primary Coordinator / Administrator**
 - Approver – Name / Phone Number / Email Address / Title
 - Primary Coordinator – Name / Email Address
 - This contact information **CANNOT** be the same person in both fields.
 - Virginia Tax will **reject** request forms with the same name in each field.
- **Debt Setoff Participation Question**
 - Applicable only for Setoff Agencies
 - Answer YES or NO to indicate if your office will participate in the setoff program
- **Submission Certification** – Mark the checkbox to certify accuracy of details to be submitted
- **Copy of Form Details**
 - If you want a copy for your records, mark the "Send Me a Copy" checkbox.
 - The copy will come from this email address:
forms@smartsheet.tax.virginia.gov

Debt Setoff Participation *
My organization wishes to continue participating in the debt setoff program.

Yes No

Certify and Submit

Submission Certification *
By checking this box, I am certifying that, to the best of my knowledge, the information I have provided in this form submission is complete and accurate.

Send me a copy of my responses

[Privacy Notice](#) | [Report Abuse](#)

Confirmation Messages

- **Submission Message** – It will display on the screen after the form is successfully submitted
- **Confirmation Email**
 - Your confirmation will come from this email address: automation@smartsheet.tax.virginia.gov
 - We appreciate your patience as we work through all of the submission requests.

RESOURCES – when you have questions after reviewing this job aid

- For Local Office / Locality questions – SpecialTaxesLocalitySupport@tax.virginia.gov
- For Setoff Agency questions – Tax-SetoffCertification@tax.virginia.gov
- For IRMS System related questions – IRMS.Support@tax.virginia.gov