

Correct a Set-off Finalized Amount

Process

[SET-OFF PROCESSING](#)

Effective Date

08/16/2005

Purpose

The Correct a Set-off Finalized Amount task describes how to correct the amount of your set-off entry that has already been finalized. An External Offset Entry is created when resources such as tax overpayment, lottery payment, or Department of Accounts(DOA) vendor payment are matched to a claim. The "Finalized Amount" may be corrected if an error occurred in keying. Set-off Agencies correct the "Finalized Amount" for their own claims on-line. The following Special Notes and Procedure will assist you in correcting a set-off claim that has been finalized.

Special Notes

- Only Set-off Agency Representatives can perform this task.
- A **Finalized Amount** is the total amount of resources that was authorized by your Set-off Agency to be applied to the claim.

Procedure

Responsibility

Set-off Agency Representative

Steps

1. Access the [Finalize External Offset](#) window in IRMS by selecting "Tax Information: Setoffs: Finalize External Offset" from the Main window.
2. Enter the Match ID in the Match ID field.
3. Open the Match by clicking FIND.
4. Verify that the claim status is "Pending Payment".
 - A. If the status is "Pending Payment", go to Step 5.
 - B. If the status is "Posted", end this task as you cannot correct the finalized amount.
5. Correct the Finalized amount.
 - A. Select FINALIZE from the "Finalized Action" field.
 - B. Enter the new "Finalized Amount".
 - C. Save the entry by clicking SAVE.

NOTE: Once the new finalized amount is posted, the status remains "Pending Payment" and the "Processed Date" is changed to the current date. If the amount is finalized for "0", the status

becomes "Cancelled".

NOTE: IRMS sends a new Finalization Letter to the debtor notifying them of the revised amount.

6. Follow your agency's Policies and Procedures for documenting for future reference.

Published Date

12/10/2015