

Review Set-off Match in Progress

Process

[SET-OFF PROCESSING](#)

Effective Date

08/16/2005

Purpose

The Review Set-off Match in Progress task provides specific instructions for reviewing a set-off match that has not been finalized for a particular Set-off Agency. The Special Notes and Procedure will assist you in the manual process of reviewing a set-off match in progress, and also initiating the process to certify, contest, or finalize a set-off match.

Special Notes

- Only Set-off Agency Representatives can perform this task.
- A **Set-off Agency** is an entity that participates in the Set-off Program and provides claims to TAX.
- IRMS does not display any matches that have already been finalized, defaulted, withdrawn or deleted.
- IRMS displays set-off match entries with the following Match Statuses:
 - Active
 - Certified
 - Contested

Procedure

Responsibility

Set-off Agency Representative

Steps

1. Access IRMS and your agency's set-off matches.
 - A. Select "Tax Information: Setoffs: External Offsets in Progress" from the Main window.
NOTE: The External Offsets in Progress window opens.
 - B. Enter your Agency Number.
 - C. Select FIND to search for the set-off matches associated with the agency number.
2. View the information displayed in the External Offsets in Progress window.
NOTE: You may sort on SSN, Status or Detail to locate the match.
NOTE: IRMS does not display set-off matches that have been finalized and prompts you if there are no set-off matches found for your agency.
3. Review the displayed set-off matches and take any necessary actions.
4. Determine what course of action must be taken, if any.
 - Certify

- Contest
 - Finalize
 - A. If you must **certify** a set-off match entry, select Certify.
Please refer to TASK: [Certify a Set-off Match](#)
 - B. If you must **contest** a set-off match entry, select Contest.
Please refer to TASK: [Contest a Set-off Match](#)
 - C. If you must **finalize** a set-off match entry, select Finalize.
Please refer to [TASK: Finalize a Set-off Match](#)
5. Document the claims processed and file the work papers for future reference following your agency's Policy and Procedures.

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