# 10 CHAPTER: VIEW BILL INFORMATION

## 10.1 Overview

You can view bills issued by the Department of Taxation in the IRMS Web application. Bills issued by localities do not display in the IRMS Web application. Bill information is available to you only if your MOU allows your locality this access.

All bill information is view only and cannot be modified.

**Note:** A bill entry displays in the Tax Account Period Entries window with a status of "informational."

## 10.2 View Bill Summary Information

You can view all of the bills that have been issued to a taxpayer from the Department of Taxation from the Bill Summary window.

### **Bill Summary Window**

The illustration below is the Bill Summary window.

🔅 IRMS						_ 0	
File	• Help	•					
Bill Summary							
Summary							
FEI	N:	\$\$N: 333-4	4-5555	Customer N	ame: Doe, Jane		
Current Dat	te: 08/15/2005			Memorandum of	Lien: No	OCA Fee %: 00.0	00
Total Balance				Outstanding Bala			
		Initial Balance:	•	Indiv	idual Income: \$8.78		
		iterest Accruals: sources Applied:			Withholding: \$0.00 Corporate: \$0.00		
		urces Unapplied:			Sales/Use: \$0.00		
		tanding Balance:			Other: \$0.00		
Ba	lance Less Conte	ested/Appealed:	\$8.78				
Bill Number	Assessment Date	Тах Туре	Tax Account Number	Tax Account Period	Initial Balance	Cu <del>rr</del> ent Balance	4
Tap Filing Status	Bill Status		Part Pay	Third Party Lien	Collection Agencies	TOPS Flag	
03370	07/11/2004	Individual Income	33-3334455555	-001 Jan 2003-Dec	2003 \$633.0	65 \$8.78	
Filed	Open		No	\$0.00	i	No	
							-
4						Þ	
						View Bill Close	<u>.</u>

### **Bill Summary Window Fields**

The table below lists the fields in the Bill Summary window and provides a brief description of each.

Field	Field Type	Description
FEIN	System Generated	The FEIN (Federal Employer Identification Number) of the account holder(s) if a Business (If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays).
SSN	System Generated	The SSN (social security number) of the account holder(s) if an individual.
Customer Name	System Generated	The name of the account holder, if an individual. If a business, the name under which the business is legally registered.
Current Date	System Generated	The IRMS system date.
Memorandum of Lien	System Generated	(MOL) indicates if TAX has issued a judgment attaching the taxpayer's real property.
OCA Fee %	System Generated	The fee paid to an Outside Collection Agency (OCA).

Penalty and Interest Accruals Resources Applied Resources Applied Outstanding Balance Balance Less Contested/Appealed Individual Income Withholding Corporate Sales/Use Other Bill Number Assessment Date	System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated	<ul> <li>The sum of all bills initially assessed to the taxpayer.</li> <li>The additional penalty and interest assessed on outstanding bills (updated monthly until the bill is satisfied).</li> <li>The sum of funds used to satisfy the outstanding bills.</li> <li>The sum of funds available, but not yet applied toward outstanding bills.</li> <li>The total unsatisfied balance of all bills assessed to a taxpayer.</li> <li>The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if applicable.</li> </ul>
AccrualsAccrualsResources AppliedSResourcesSUnappliedOOutstanding BalanceSBalance LessSContested/AppealedOIndividual IncomeSWithholdingSCorporateSSales/UseSOtherSBill NumberSAssessment DateSTax TypeS	Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System	<ul> <li>bills (updated monthly until the bill is satisfied).</li> <li>The sum of funds used to satisfy the outstanding bills.</li> <li>The sum of funds available, but not yet applied toward outstanding bills.</li> <li>The total unsatisfied balance of all bills assessed to a taxpayer.</li> <li>The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Resources S Unapplied G Outstanding Balance S Balance Less S Contested/Appealed G Individual Income S Withholding S Corporate S Sales/Use S Other S Bill Number S Assessment Date S G Tax Type S	Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System	<ul> <li>The sum of funds available, but not yet applied toward outstanding bills.</li> <li>The total unsatisfied balance of all bills assessed to a taxpayer.</li> <li>The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Unapplied       Outstanding Balance       S         Outstanding Balance       S         Balance Less       S         Contested/Appealed       S         Individual Income       S         Withholding       S         Corporate       S         Sales/Use       S         Other       S         Bill Number       S         Assessment Date       S         Tax Type       S	Generated System Generated System Generated System Generated System Generated System Generated System Generated System Generated System	<ul> <li>outstanding bills.</li> <li>The total unsatisfied balance of all bills assessed to a taxpayer.</li> <li>The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Balance Less       S         Contested/Appealed       G         Individual Income       S         Withholding       S         Corporate       G         Sales/Use       S         Other       S         Bill Number       S         Assessment Date       S         Tax Type       S	Generated System Generated System Generated System Generated System Generated System Generated System Generated	<ul> <li>The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Contested/Appealed ( Individual Income S Withholding S Corporate S Sales/Use S Other S Bill Number S Assessment Date S Tax Type S	Generated System Generated System Generated System Generated System Generated System	<ul> <li>outstanding balances of any bills that are being contested or appealed.</li> <li>The total balance due for all Individual income tax bills, if applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Withholding S Corporate S Sales/Use S Other S Bill Number S Assessment Date S Tax Type S	Generated System Generated System Generated System Generated System	<ul> <li>applicable.</li> <li>The total balance due for all Withholding income tax bills, if applicable.</li> <li>The total balance due for all Corporate income tax bills, if applicable.</li> <li>The total balance due for all Sales/Use income tax bills, if applicable.</li> <li>The total balance due for all Other income tax bills, if</li> </ul>
Corporate S Sales/Use S Other S Bill Number S Assessment Date S Tax Type S	Generated System Generated System Generated System	<ul><li>applicable.</li><li>The total balance due for all Corporate income tax bills, if applicable.</li><li>The total balance due for all Sales/Use income tax bills, if applicable.</li><li>The total balance due for all Other income tax bills, if</li></ul>
Sales/Use Sales/	Generated System Generated System	applicable. The total balance due for all Sales/Use income tax bills, if applicable. The total balance due for all Other income tax bills, if
Other S Bill Number S Assessment Date S Tax Type S	Generated System	applicable. The total balance due for all Other income tax bills, if
Bill Number S Assessment Date S Tax Type S	•	
Assessment Date S Tax Type S		
G Tax Type	System Generated	A five-digit number assigned to a bill for tracking and identification purposes.
	System Generated	The bill date.
	System Generated	The type of customer (i.e. individual, corporate, etc.).
	System Generated	Identifies the tax account to which the bill is assessed.
	System Generated	Identifies the period in which the bill is assessed.
	System Generated	The amount of the liability that is unpaid when a bill is created (this does not change even if adjustments are made to the bill o if the bill is abated).
	System Generated	The balance on a specific bill, at a specific time, that is currently due (this changes if financial activity occurs).
	System Generated	The current state of the TAP that contains the bill, such as Filed Filed-Adjusted, or Not Filed.

Field	Field Type	Description
Bill Status	System Generated	The current state of the bill (i.e. new, open, paid, stop, abatement, write-off, discharge).
Part Pay	System Generated	Indicates if the tax bill was included in a Partial Payment Agreement (populates with Yes or No).
Third Party Lien	System Generated	Indicates if the tax bill was included in a Third-Party Lien (populates with Yes or No).
Collection Agencies	System Generated	Indicates the fee paid to an Outside Collection Agency (OCA) if the bill was referred to an OCA.
TOPS Flag	System Generated	Indicates if funds have been offset by the Treasury Offset Program (TOPS).

### **View Bill Summary Information**

To view bill summary information, the following steps are performed:

**Step 1:** Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

ø	Customer Profile -		
Г	File `	Customer	Help
	Customer	Tax Account	
	customer	Bank Account	
	Customer	Bill Summary	
		\$\$N: 333-33-3333	Entity Type: Individual
E	И	ame: JOHN DOE	
	st	treet: 600 E. MAIN	STREET
		1	
		City: RICHMOND	🔹 State: VIRGINIA 💌
		Zip: 23235	Undeliverable
			Last Address Update: 08/15/2004 16:41:23
			Close

**Step 2:** From the Customer Profile window, select <u>Customer: Bill Summary</u>. The Bill Summary window opens.

Summary FE	IN:	\$\$N: 333-4	4-5555	Customer N	lame: Doe, Jane	
	te: 08/15/2005	00.11 000-4		Memorandum of		<b>OCA Fee</b> %: 00,
otal Balance				Outstanding Bala	nce	
		Initial Balance:			idual Income: \$8.78	
	Penalty and Ir	terest Accruals:	\$109.37		Withholding: \$0.00	
		sources Applied:			Corporate: \$0.00	
		urces Unapplied:			Sales/Use: \$0.00	
Ba	alance Less Conte	tanding Balance: ested/Appealed:			<b>Other:</b> \$0.00	
Bill Number	Assessment Date	Тах Туре	Tax Account Number	Tax Account Period	Initial Balance	Current Balance
Tap Filing Status	Bill Status		Part Pay	Third Party Lien	Collection Agencies	TOPS Flag
03370	07/11/2004	Individual Income	33-3334455555	001 Jan 2003-Dec	2003 \$633.6	55 \$8.78
Filed	Open		No	\$0.00	)	No

Step 3: From the File menu, select Close to exit this window and return to the Customer Profile window.

## 10.3 View Bill Detail Information

You can view detailed information related to a specific bill from the Bill Details window in the IRMS Web application. This window has two tabs, the Bill Details tab and the Bill Reason Codes tab.

### Bill Details Window – Bill Details Tab

The illustration below is the Bill Details tab on the Bill Details window.

IRMS				
File Help .				
ll Details				
eneral Information				
FEIN:	\$\$N: 333-44-55	555	Customer Name: D	ioe, Jane
Secondary FEIN: Secon	dary SSN:	Secondary	Customer Name:	
TAP Due Date: 05/01/2004 Curr	<b>rent Date:</b> 08/15/200	15 Pe	enalty Thru Date: 0	8/01/2004
Stop Type:	Locality: Richmond	- 51760 In	terest Thru Date: 0	5/01/2005
Bill Details Bill Reason Co		1		
Bill Details Bill Reason Co	des			
Bill Details Bill Number: 03370	Assessment Date	: 07/11/2004	Assessment Age	<b>:</b> 401
	Assessment Date ax Account Number		-	
Bill Number: 03370	ax Account Number		-	
Bill Number: 03370 Tax Type: Individual Income Ta	ax Account Number	: 33-3334455555-001	Tax AccountPeriod	I: Jan 2003-Dec 2003
Bill Number: 03370 Tax Type: Individual Income Ta	ax Account Number D Lien Date	: 33-333445555S-001 : 11/18/2004	Tax AccountPeriod Part Pay: No	I: Jan 2003-Dec 2003 TOPS Flag: No
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: (	ax Account Number D Lien Date Tax	: 33-333445555S-001 : 11/18/2004 Penalty	Tax AccountPeriod Part Pay: No Interest	l: Jan 2003-Dec 2003 TOPS Flag: No Total
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial	Ax Account Number D Lien Date Tax \$562.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76	Tax AccountPeriod Part Pay: No Interest \$5.89	l: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial Accruals	Ax Account Number D Lien Date Tax \$562.00 \$0.00	• 33-333445555S-001 • 11/18/2004 Penalty \$65.76 \$86.64	Tax AccountPeriod Part Pay: No Interest \$5.89 \$22.73	I: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial Accruals Adjust/Abate/Write-offs/Discharges	Tax Count Number Lien Date Tax 5562.00 \$0.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$86.64 \$0.00	Tax AccountPeriod           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00	I: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37 \$0.00
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial Accruals Adjust/Abate/Write-offs/Discharges Internal Offsets Applied	Tax         Step           Tax         1           \$562.00         1           \$0.00         1           \$0.00         1           \$0.00         1	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$86.64 \$86.64 \$0.00 \$16.92	Tax AccountPeriod           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00           \$0.00	I: Jan 2003-Dec 2003 TOPS Flag: No \$633.65 \$109.37 \$0.00 \$16.92
Bill Number: 03370       Tax Type: Individual Income       Ta         Compliance Code:       3rd Party Lien: 0       Initial         Initial       Accruals       Accruals         Adjust/Abate/Write-offs/Discharges       Internal Offsets Applied       Payments Applied	Ax Account Number 0 Lien Date Tax 5562.00 \$0.00 \$0.00 \$562.00	233-333445555S-001 211/18/2004 Penalty \$65.76 \$86.64 \$0.00 \$16.92 \$126.70	Tax AccountPeriod           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00           \$0.00           \$28.62	I: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37 \$0.00 \$16.92 \$717.32
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial Adjust/Abate/Write-offs/Discharges Internal Offsets Applied Payments Applied Payments Unapplied	Account Number           Lien Date           Tax           \$562.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00	33-333445555S-001     11/18/2004  Penalty      \$65.76     \$86.64     \$0.00     \$16.92     \$126.70     \$0.00	Tax AccountPerior           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00           \$0.00           \$0.00           \$28.62           \$0.00	I: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37 \$0.00 \$16.92 \$717.32 \$0.00
Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: ( Initial Adjust/Abate/Write-offs/Discharges Internal Offsets Applied Payments Applied Payments Unapplied	Account Number           Lien Date           Tax           \$562.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00           \$0.00	33-333445555S-001     11/18/2004  Penalty      \$65.76     \$86.64     \$0.00     \$16.92     \$126.70     \$0.00	Tax AccountPerior           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00           \$0.00           \$0.00           \$28.62           \$0.00	I: Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37 \$0.00 \$16.92 \$717.32 \$0.00

### Bill Details Window – Bill Reason Codes Tab

The illustration below is the Bill Reason Codes tab on the Bill Details window.

	EIN:	\$\$N: 333-44-5555	Customer Name: Doe, Jane
Secondary F	EIN:	Secondary SSN:	Secondary Customer Name:
TAP Due D	ate: 6/30/2005	Current Date: 6/30/2005	Penalty Thru Date: 6/30/2005
Stop T	ype:	Locality: Richmond - 51760	) Interest Thru Date: 6/30/2005
ill Details	1		
li Detalis		Bill Reason Codes	
			1
		BillReason Code/Desc	ription
104	Full paymen	t not received with your return or the return v	was adjusted resulting in additional monies due

### **Bill Details Window Fields – Bill Details Tab**

System Generated	The FEIN (Federal Employer Identification Number) of the primary account holder if a Business.
System Generated	The social security number (SSN) of the primary account holder if an individual.
System Generated	The name of the primary account holder if an individual. If a business, the name under which the business is legally registered.
System Generated	The FEIN (Federal Employer Identification Number) of the secondary account holder(s) if a Business.
System Generated	The social security number (SSN) of the secondary account holder if an individual.
	Generated System Generated System Generated System System

The table below lists the fields in the Bill Details window on the Bill Details Tab and provides a brief description of each.

Field	Field Type	Description
Secondary Customer Name	System Generated	The name of the secondary account holder if an individual. If a business, the name under which the business is legally registered.
TAP Due Date	System Generated	The date the taxpayer is due to file a tax return and provide payment information covering the taxes for the period.
Current Date	System Generated	The current IRMS system date.
Penalty Thru Date	System Generated	The date on which IRMS calculated penalty for the TAP (updates occur every 30 days on the outstanding liability).
Stop Type	System Generated	The type of stop (if bill is not on stop, nothing displays).
Locality	System Generated	The locality associated to the bill (if more than one, "Multiple" displays).
Interest Thru Date	System Generated	Date on which IRMS calculated interest for the TAP (updates occur every 30 days on the outstanding liability).
Bill Number	System Generated	The unique identifier assigned to the bill by IRMS.
Assessment Date	System Generated	The date the bill was created by IRMS.
Assessment Age	System Generated	The number of calendar days a bill is outstanding.
Тах Туре	System Generated	The type of customer (i.e. individual, corporate, etc.).
Tax Account Number	System Generated	The unique ID assigned to the Tax Account by IRMS.
Tax Account Period	System Generated	The predefined period of time for which a specific tax account has liability.
Compliance Code	System Generated	A three-digit code used to identify and measure Compliance Revenue (Only displays if the bill is associated with a compliance code, such as non-filer, amnesty non-filer, etc.).
3 <sup>rd</sup> Party Lien	System Generated	The amount of a 3 <sup>rd</sup> Party Lien, if applicable.
Lien Date	System Generated	The date the t3rd Party lien was initiated.
Part Pay	System Generated	Indicates if the tax bill was included in a Partial Payment Agreement (populates with Yes or No).
TOPS Flag	System Generated	Indicates if funds have been offset by the Treasury Offset Program (TOPS).
Initial (Tax)	System Generated	The amount of tax included in the initial assessment.

View Bill Information Version 1.0

Field	Field Type	Description
Initial (Penalty)	System Generated	The amount of penalty applied in the initial assessment.
Initial (Interest)	System Generated	The amount interest applied in the initial assessment.
Initial (Total)	System Generated	The total amount of tax, penalty, and interest included in the initial assessment.
Accruals (Tax)	System Generated	The additional amount of tax assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Penalty)	System Generated	The additional amount of penalty assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Interest)	System Generated	The additional amount of interest assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Total)	System Generated	The total additional amount of tax, penalty, and interest assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Adjust/Abate/Write- offs/Discharges (Tax)	System Generated	The amount of reduction in tax due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write- offs/Discharges (Penalty)	System Generated	The amount of reduction in penalty due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write- offs/Discharges (Interest)	System Generated	The amount of reduction in interest due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write- offs/Discharges (Total)	System Generated	The total amount of reduction in tax, penalty, and interest due to any adjustments, abatements, write-offs, or discharges.
Internal Offsets Applied (Tax)	System Generated	The amount of internal offsets applied or matched to tax.
Internal Offsets (Penalty)	System Generated	The amount of internal offsets applied or matched to penalty.
Internal Offsets (Interest)	System Generated	The amount of internal offsets applied or matched to interest.
Internal Offsets (Total)	System Generated	The total amount of internal offsets applied or matched to tax penalty, and interest.
Payments Applied (Tax)	System Generated	The amount of payments applied to tax for the bill.

View Bill Summary Information Version 1.0

Field	Field Type	Description
Payments Applied (Penalty)	System Generated	The amount of payments applied to penalty for the bill.
Payments Applied (Interest)	System Generated	The amount of payments applied to interest for the bill.
Payments Applied (Total)	System Generated	The total amount of payments applied to tax, penalty and interest for the bill.
Payments Unapplied (Tax)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Penalty)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Interest)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Total)	System Generated	The total amount of bill or lien payments that have not been applied to this bill (this amount only displays in the Total column).
Balance (Tax)	System Generated	The current amount of tax due for this bill.
Balance (Penalty)	System Generated	The current amount of penalty due for this bill.
Balance (Interest)	System Generated	The current amount of interest due for this bill.
Balance (Total)	System Generated	The total amount of tax, penalty, and interest due for this bill.

### Bill Details Window Fields – Bill Reason Codes Tab

The table below lists the fields in the Bill Details window on the Bill Reason Codes Tab and provides a brief description of each.

Field	Field Type	Description
Bill Reason Code/Description	System Generated	Lists up to three reasons why the bill was created. Up to three reasons can display.

#### **View Bill Details Information**

To view bill detail information, the following steps are performed:

**Step 1:** Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

ł	Customer Profile -			
	File `	Customer *	Help `	
	Customer	Tax Account Bank Account	-	
	Customer	Bill Summary	Entity Type:	Individual
		lame: JOHN DOE breet: 600 E. MAIN S		
		city: RICHMOND	<b>.</b>	State: VIRGINIA  Undeliverable
			Last Address	Update: 08/15/2004 16:41:23

Step 2: From the Customer Profile window, select <u>Customer: Bill Summary</u>. The Bill Summary window opens.

🔅 IRMS						_	
File	• Help	•					
Bill Summa <del>ry</del>							
Summa <del>ry</del>	IN:	\$\$N: 333-4	4.5555	Customer	Name: Doe Jane		
	te: 08/15/2005	00111 00014	4-0000	Memorandum o		OCA Fee %: 00	0.00
Total Balance Ba	Re	Initial Balance: hterest Accruals: sources Applied: urces Unapplied: tanding Balance: ested/Appealed:	\$109.37 \$734.24 \$0.00 \$8.78	Outstanding Bala Indiv	ance vidual Income: \$8.78 Withholding: \$0.00 Corporate: \$0.00 Sales/Use: \$0.00 Other: \$0.00		
Bill Number	Assessment Date	Tax Type	Tax Account Number	Tax Account Period	Initial Balance	Current Balance	
Tap Filing Status	Bill Status		Part Pay	Third Party Lien	Collection Agencies	TOPS Flag	
03370	07/11/2004	Individual Income	33-3334455555	-001 Jan 2003-De	c 2003 \$633.6	65 \$8.78	;
Filed	Open		No	\$0.0	0	No	
<u> </u>						View Bill Clos	▼ se

**Step 3: Double-click** on the bill for which you want to view details. The Bill Details window opens. *Note:* You can also access the details of a bill by clicking on the bill that you want to view to highlight it and then clicking the **View Bill** button.

ile <sup>•</sup> Help •					
l Details					
eneral Information					
FEIN:	\$\$N: 333-44-55	555	Customer Name: Do	e, Jane	
Seconda <del>ry</del> FEIN: Secon	ndary SSN:	Secondary	Customer Name:		
TAP Due Date: 05/01/2004 Cur	rent Date: 08/15/200	)5 <b>₽</b> €	enalty Thru Date: 08	/01/2004	
Stop Type:	Locality: Richmond	- 51760 Int	erest Thru Date: 05.	/01/2005	
Bill Details   Bill Reason Co	odec	1			
	Jues				
Bill Details Bill Number: 03370 Tax Type: Individual Income Ta			Assessment Age: Tax AccountPeriod: Part Pay: No		
Bill Details Bill Number: 03370 Tax Type: Individual Income Ta	ax Account Number	: 33-33344555555-001	Tax AccountPeriod:	Jan 2003-Dec 2003	
Bill Details Bill Number: 03370 Tax Type: Individual Income Ta	ax Account Number 0 Lien Date	* 33-333445555S-001 * 11/18/2004	Tax AccountPeriod: Part Pay: No	Jan 2003-Dec 2003 TOPS Flag: No	12
Sill Details Bill Number: 03370 Tax Type: Individual Income T Compliance Code: 3rd Party Lien:	ax Account Number 0 Lien Date Tax	• 33-3334455558-001 • 11/18/2004 Penalty	Tax AccountPeriod: Part Pay: No Interest	Jan 2003-Dec 2003 TOPS Flag: No Total	
Sill Details Bill Number: 03370 Tax Type: Individual Income T. Compliance Code: 3rd Party Lien: Initial Accruals	ax Account Number 0 Lien Date Tax \$562.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76	Tax AccountPeriod: Part Pay: No Interest \$5.89	Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65	
Sill Details Bill Number: 03370 Tax Type: Individual Income T. Compliance Code: 3rd Party Lien: Initial Accruals	ax Account Number 0 Lien Date Tax \$562.00 \$0.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$86.64	Tax AccountPeriod: Part Pay: No Interest 5.89 \$22.73	Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37	
Sill Details Bill Number: 03370 Tax Type: Individual Income Ta Compliance Code: 3rd Party Lien: Initial Adjust/Abate/Write-offs/Discharges	ax Account Number 0 Lien Date Tax \$562.00 \$0.00 \$0.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$86.64 \$0.00	Tax AccountPeriod           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00	Jan 2003-Dec 2003 <b>TOPS Flag:</b> No <b>Total</b> \$633.65 \$109.37 \$0.00	
Bill Details Bill Number: 03370 Tax Type: Individual Income Tr Compliance Code: 3rd Party Lien: Initial Accruals Adjust/Abate/Write-offs/Discharges Internal Offsets Applied	Tax         State           0         Lien Date           7         \$562.00           \$0.00         \$0.00           \$0.00         \$0.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$86.64 \$0.00 \$16.92	Tax AccountPeriod           Part Pay: No           Interest           \$5.89           \$22.73           \$0.00           \$0.00	Jan 2003-Dec 2003 <b>TOPS Flag:</b> No <b>Total</b> \$633.65 \$109.37 \$0.00 \$16.92	
Bill Number: 03370 Tax Type: Individual Income T. Compliance Code: 3rd Party Lien: Initial Accruals Adjust/Abate/Write-offs/Discharges Internal Offsets Applied Payments Applied	ax Account Number 0 Lien Date Tax 5562.00 \$0.00 \$0.00 \$0.00 \$562.00	* 33-333445555S-001 * 11/18/2004 Penalty \$65.76 \$66.64 \$0.00 \$16.92 \$126.70	Tax AccountPeriod           Part Pay: No           Interest           \$22.73           \$22.73           \$0.00           \$0.00           \$28.62	Jan 2003-Dec 2003 TOPS Flag: No Total \$633.65 \$109.37 \$0.00 \$16.92 \$717.32	

**Step 4:** Click **Close** to exit this window and return to the Bill Summary window.