

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.

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).

Field	Field Type	Description
Initial Balance	System Generated	The sum of all bills initially assessed to the taxpayer.
Penalty and Interest Accruals	System Generated	The additional penalty and interest assessed on outstanding bills (updated monthly until the bill is satisfied).
Resources Applied	System Generated	The sum of funds used to satisfy the outstanding bills.
Resources Unapplied	System Generated	The sum of funds available, but not yet applied toward outstanding bills.
Outstanding Balance	System Generated	The total unsatisfied balance of all bills assessed to a taxpayer.
Balance Less Contested/Appealed	System Generated	The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.
Individual Income	System Generated	The total balance due for all Individual income tax bills, if applicable.
Withholding	System Generated	The total balance due for all Withholding income tax bills, if applicable.
Corporate	System Generated	The total balance due for all Corporate income tax bills, if applicable.
Sales/Use	System Generated	The total balance due for all Sales/Use income tax bills, if applicable.
Other	System Generated	The total balance due for all Other income tax bills, if applicable.
Bill Number	System Generated	A five-digit number assigned to a bill for tracking and identification purposes.
Assessment Date	System Generated	The bill date.
Tax Type	System Generated	The type of customer (i.e. individual, corporate, etc.).
Tax Account Number	System Generated	Identifies the tax account to which the bill is assessed.
Tax Account Period	System Generated	Identifies the period in which the bill is assessed.
Initial Balance	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 or if the bill is abated).
Current Balance	System Generated	The balance on a specific bill, at a specific time, that is currently due (this changes if financial activity occurs).
Tap Filing Status	System Generated	The current state of the TAP that contains the bill, such as Filed Filed-Adjusted, or Not Filed.

IRMS

File Help

Bill Summary

Summary

FEIN: SSN: 333-44-5555 Customer Name: Doe, Jane
Current Date: 08/15/2005 Memorandum of Lien: No OCA Fee %: 00.00

Total Balance		Outstanding Balance	
Initial Balance:	\$633.65	Individual Income:	\$8.78
Penalty and Interest Accruals:	\$109.37	Withholding:	\$0.00
Resources Applied:	\$734.24	Corporate:	\$0.00
Resources Unapplied:	\$0.00	Sales/Use:	\$0.00
Outstanding Balance:	\$8.78	Other:	\$0.00
Balance Less Contested/Appealed:	\$8.78		

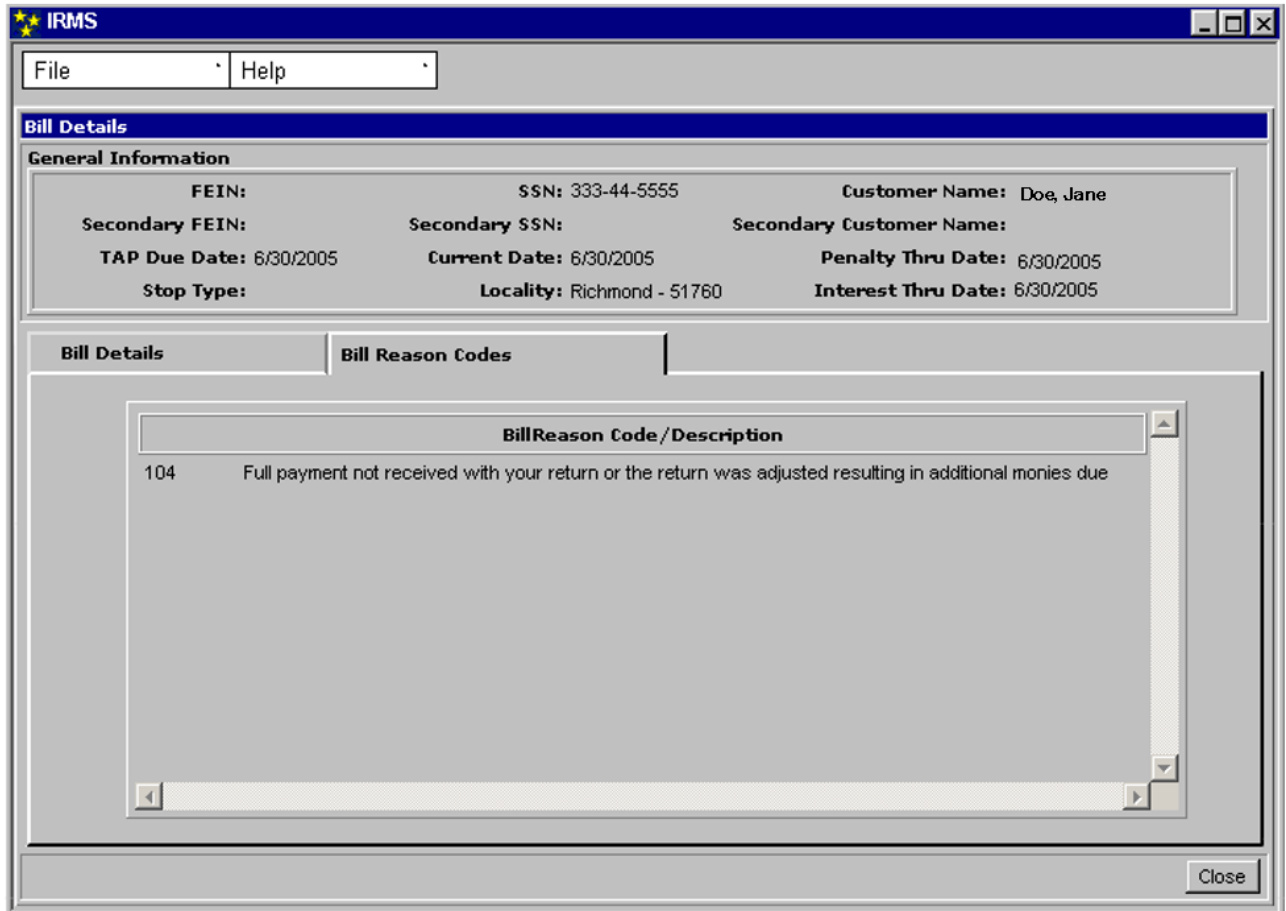
Bill Number	Assessment Date	Tax Type	Tax Account Number	Tax Account Period	Initial Balance	Current Balance
Tap Filing Status	Bill Status		Part Pay	Third Party Lien	Collection Agencies	TOPS Flag
03370	07/11/2004	Individual Income	33-333445555S-001	Jan 2003-Dec 2003	\$633.65	\$8.78
Filed	Open		No	\$0.00		No

View Bill Close

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

Bill Details Window – Bill Reason Codes Tab

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



Bill Details Window Fields – Bill Details Tab

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

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.
Tax Type	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 rd Party Lien	System Generated	The amount of a 3 rd Party Lien, if applicable.
Lien Date	System Generated	The date the 3 rd 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.

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.

