

1 CHAPTER: INTRODUCTION TO THE IRMS USER GUIDE

1.1 Overview

The IRMS User Guide provides you with an introduction to the Integrated Revenue Management System (IRMS). Also included are illustrations of the windows that you will use, descriptions of the fields on those IRMS windows, and the steps that you need to complete to perform the identified tasks.

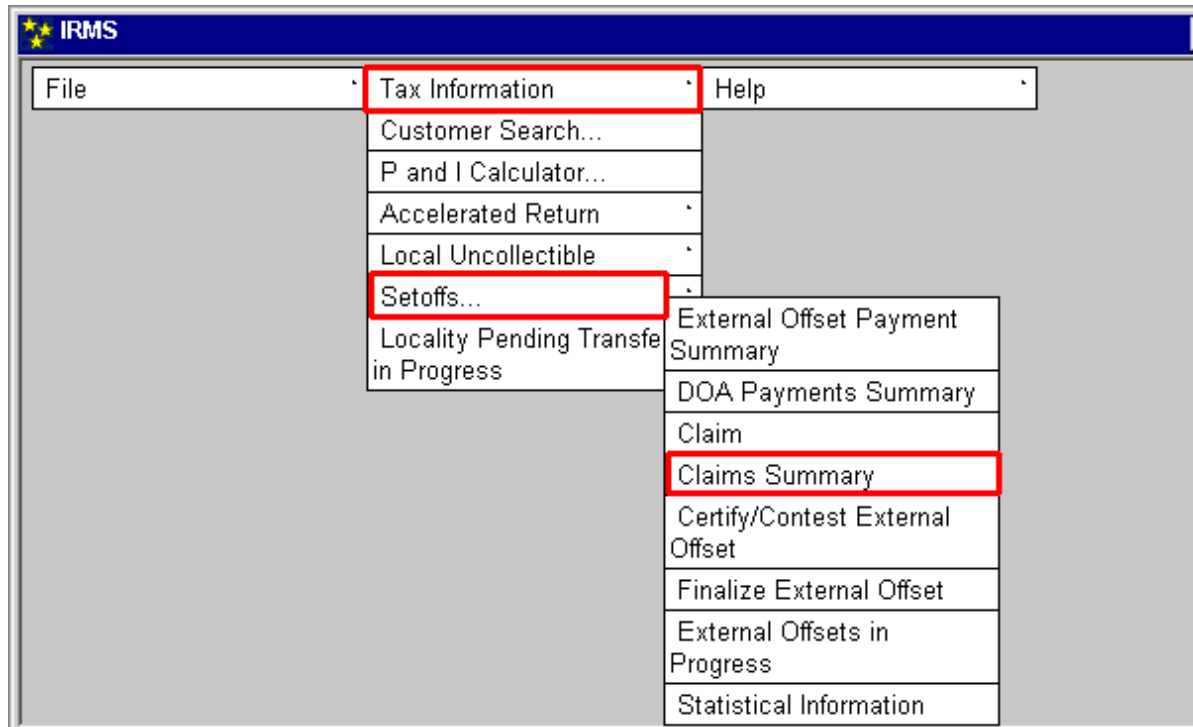
1.1.1 Contents of the User Guide

The IRMS User Guide is divided into several chapters:

Chapter	Description
Introduction to the IRMS User Guide	Provides an overview of the IRMS User Guide
IRMS Introduction and Navigation	Provides an overview of IRMS, and explains navigation through the IRMS Web Version windows.
View Customer Profile Information	Provides information on accessing customer profiles for individual taxpayers and businesses. Also provides information on accessing bank account information.
View Tax Account Information	Provides information on accessing tax accounts for individuals and businesses.
View Tax Account Period Entries	Provides information on accessing tax account period entries for a taxpayer's tax account.
View Payment and Remittance Information	Provides information on viewing detailed payment and remittance information in a tax account period.
View Refund and Overpayment Credit Information	Provides information on viewing detailed information on refunds and overpayment credits in a tax account period.
View Extension Information	Provides information on accessing details related to filing extensions.
View Offset Information	Provides information on accessing details related to internal and external offsets in a tax account period.
View Bill Information	Provides information on accessing bill summary and bill details for a taxpayer.

1.1.3 Menu and Illustration Conventions

Menus and menu options are indicated by the menu name followed by the menu options to be selected, separated by a colon. For example, the menu convention for the illustration below is **Tax Information: Setoffs: Claims Summary**.



- Menu options are displayed before the step to demonstrate their use.
- Windows are displayed to provide an illustration of what you will see as you complete the steps.
- Illustrations of IRMS windows are found at the beginning of a section. After each window, a field definition table provides detail about the fields on the window.

Formatted Field

Free Form Field

Drop Down List

Finalize External Offset

External Offset Match

Match ID: 432154321 Find

External Offset Information

Claim Number: 001

Claim Name: Jline Doe

Agency Name: Henrico County

Match Status: Finalized

Match Date: 03/20/2004

Initial Contested Date: 04/01/2004

Contested Date: 04/01/2004

Match Amount: \$250.00

Finalized Action: Finalize

SSN/FEIN: 111223333

Agency Number: 35108700

Source Type:

Certification Date: 03/31/2004

Finalized Amount: \$250.00

Save

Window – Fields

IRMS will determine if information is required or optional for each field. Required fields mean that information must be entered for that field before a task can be completed. In addition, some fields are system generated and cannot be edited manually.