

## 5 CHAPTER: VIEW TAX ACCOUNT PERIOD ENTRIES

A Tax Account Period (TAP) is the pre-defined time period for which a specific tax account has liability. The IRMS Web application allows you to view financial information from activities that occur within a Tax Account Period for business taxpayers in your locality or up to 20 adjacent localities, Sales Tax and Use Tax information for businesses regardless of their locality, and individual taxpayers regardless of their locality, provided your MOU allows you this access. The TAP information is displayed in the form of entries on the Tax Account Period Entries window.

TAP entries that display on the Tax Account Period Entries window include:

- Assessments
- Returns
- Refunds
- Adjustments
- Payments

Entries related to updates to the financial information, such as added charges (i.e., penalty, interest), offsets, and overpayment credits also display on the Tax Account Period Entries window.

In addition, you can also view detailed information for many of the entry types that display on the Tax Account Period Entries window by either double-clicking on the entry or by highlighting the entry and clicking **Open**. Specific information regarding entry details can be found in the following chapters in this guide:

- View Taxpayer Returns
- View Payment and Remittance Information
- View Refund and Overpayment Credit Information
- View Extension Information
- View Offset Information



Field	Field Type	Description
Filing Status	System Generated	Indicates if the filer has or has not filed a return for the period (i.e. Filed, Not Filed) Can also indicate if the return has been adjusted (i.e. Filed-Adjusted).
Total Resources	System Generated	The amount of credits applied, if any, that the taxpayer has for this period.
Due Date	System Generated	The date that the return is due for this period.
Balance	System Generated	The total amount of tax owed after any credits are applied for this period.
Ext. Due Date	System Generated	The date that the return is due when an extension has been granted. If an extension has not been granted, this field is blank.
TAP Status	System Generated	The current state of the TAP (i.e. Open, etc.).
Type	System Generated	The name of the TAP entry (i.e. Refund, Payment, Return, etc.).
Submitted Date	System Generated	The submission date associate with the TAP entry (The determination of this date varies with the type of entry).
Processed Date	System Generated	The date the specific entry was processed by IRMS.
Amount	System Generated	The amount associated with the TAP entry.
Status	System Generated	The status associated with the TAP entry.
Last Modified	System Generated	The date that any changes were made to the TAP entry.

### View Tax Account Period Entries

To view Tax Account Period Entries, 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 instructions on performing a customer search).

The screenshot shows a window titled "Customer" with a "Customer" header. The form contains the following fields and values:

- SSN: 222-22-2222
- Entity Type: Individual
- Name: JOHN DOE
- Street: 600 E. MAIN STREET
- City: RICHMOND (dropdown menu)
- State: VA (dropdown menu)
- Zip: 23238
- Undeliverable:
- Last Address Update: 08/15/2004 16:41:23

A "Close" button is located at the bottom right of the window.



IRMS

File Tax Account Period Help

Jan 2004 - Dec 2004

General Information		Tax Account Period	
Name:	Doe, John	Total Liabilities:	\$1200.00
SSN:	111-22-3333	Acct No:	33-111223333S-001
Tax Type:	Individual Income	Total Resources:	\$1200.00
		Balance:	\$0.00
		TAP Status:	Open
		Filing Status:	Filed
		Due Date:	05/01/2005
		Ext. Due Date:	00/00/0000

Entries

Type	Submitted Date	Processed Date	Amount	Status	Last Modified
Original Return	04/28/2005	04/30/2005	\$1200.00	Posted	04/30/2005
Payment-Local Estimated Payment	01/15/2005	01/17/2005	\$300.00	Posted	01/17/2005
Payment-Local Estimated Payment	09/15/2004	09/17/2004	\$300.00	Posted	09/17/2004
Payment-Local Estimated Payment	06/15/2004	06/17/2004	\$300.00	Posted	06/17/2004
Payment-Local Estimated Payment	05/01/2004	05/03/2004	\$300.00	Posted	05/03/2004

 Local

Open Close



**Note:** An **iLocal** icon displays at the bottom of the window when the customer files a tax return locally for that period.

**Step 4:** From the **File** menu, select **Close** to exit the window and return to the Tax Account window.



## 5.2 Print Tax Account Period Entries

There is a menu function on the Tax Account Period Entries window that enables you to print a copy of the Tax Account Period Entries.

### Print Tax Account Period Entries

To print a copy of the Tax Account Period entries, the following steps are performed:

**Step 1:** From the Tax Account Period Entries window, select **File: Print**. A copy of the Tax Account Period Entries prints to your local printer.

Type	Submitted Date	Processed Date	Amount	Status	Last Modified
Original Return	04/28/2005	04/30/2005	\$1200.00	Posted	04/30/2005
Payment-Local Estimated Payment	01/15/2005	01/17/2005	\$300.00	Posted	01/17/2005
Payment-Local Estimated Payment	09/15/2004	09/17/2004	\$300.00	Posted	09/17/2004
Payment-Local Estimated Payment	06/15/2004	06/17/2004	\$300.00	Posted	06/17/2004
Payment-Local Estimated Payment	05/01/2004	05/03/2004	\$300.00	Posted	05/03/2004

**Step 2:** From the **File** menu, select **Close** to exit the window and return to the Tax Account window.