9 CHAPTER: VIEW OFF-SET INFORMATION

9.1 Overview

Internal and External Offset information is available in the IRMS Web application. You can view this information for business taxpayers in your locality or up to 20 adjacent localities, for Sales Tax and Use Tax accounts for business taxpayers regardless of their locality, and individual taxpayers regardless of their locality, if your Memorandum of Understanding (MOU) allows this access.

9.2 View Internal Offset Information

Overpayment allocation begins with Internal Offsets, which are created when available funds are used to satisfy a taxpayer's outstanding TAX liabilities.

When outstanding liabilities exist, IRMS applies the overpaid funds by:

- Determining if the corresponding Tax Account Periods (TAPs) are eligible for internal offset
- Determining the total amount of available funds including the sum of the overpaid balance plus any refund interest earned
- Allocating funds to the outstanding bill in the order of newest to oldest in all of the taxpayer's Tax Account Periods

IRMS continues this process of allocating funds to any outstanding bills until there are no more funds or outstanding bills.

9.2.1 View Internal Offset Details

IRMS creates an Internal Offset entry in the TAP that contains the overpaid funds. You can view detailed information related to the Internal Offset entry on the Internal offset Status window in the IRMS Web application.

Internal Offset Status Window

The illustration below is the Internal Offset Status window.

IRMS					_ [
File 'Hel	р .				
nternal Offset Status					
General Information			Tax Account Period		
Name: Doe, John SSN: 111-22-3333 Tax Type: Individual	Acct No: 33-111223	1333 8-001	Total Liabilities: \$-150 Total Resources: \$-150 Balance: \$0.00 TAP Status: Open	0.00 Filing Status: 0.00 Due Date: Ext. Due Date:	Filed 05/02/2005 00/00/0000
J			<u>,</u>		
Source Entry Type	Received Date	Submitted Date	Processed Date	Applied Amount	Status -
•					
nternal Offset Informat	ion				
Amou	nt: \$500.00		Su	bmitted Date: 04/11	/2005
Stati	s: Posted		Pr	ocessed Date: 04/11	/2005 05:25:16
Cancel/Reverse Reaso	on:				
ntemal Offset Destinati	on				
Tax Account Number: Bill Number:	33-111223333 5-001 04003		Tax Account Period: Assessment Date:	Jan 2003-Dec 2003 08/18/2004	
					Close

Internal Offset Status Window Fields

The table below lists the fields in the Internal Offset Status window and provides a brief description of each.

Field	Field Type	Description
Name	System Generated	If an individual, the name(s) of the account holder(s). If a business, the name under which the business is legally registered.
SSN/FEIN	System Generated	If an individual, the SSN(s) of the account holder(s). If a business, the FEIN (Federal Employer Identification Number) for the Business. If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays.
Account No	System Generated	The number assigned to the Tax Account.
Тах Туре	System Generated	The type of customer (i.e. individual, corporate, etc.).
Total Liabilities	System Generated	The total amount of tax owed for this period.

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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.).	
Source Entry Type	System Generated	The funding source using for the offset.	
Received Date	System Generated	The date the funding source was received.	
Submitted Date	System Generated	The date the funding source was submitted.	
Processed Date	System Generated	The date the funding source was processed by IRMS.	
Applied Amount	System Generated	The amount of the funding source that was applied to the internal offset.	
Status	System Generated	The status of the funding source entry.	
Amount	System Generated	The funding used to satisfy the bill.	
Submitted Date	System Generated	The due date of the period or the submitted date of the source of funding, whichever is greater.	
Status	System Generated	The status of the offset entry (i.e. proposed, posted, reversed).	
Processed Date	System Generated	The date IRMS created the offset entry.	
Cancel/Reverse Reason	System Generated	The explanation as to why the internal offset entry was cancelled or reversed, if applicable.	
Tax Account Number	System Generated	Identifies the tax account to which the offset amount is going.	
Tax Account Period	System Generated	Identifies the TAP to which the offset amount is posted.	
Bill Number	System Generated	Identifies the bill to which the offset amount is applied.	
Assessment Date	System Generated	The creation date of the bill.	

View Internal Offset Details

To view internal offset details, 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 `	Cust	omer *	Help	•			
1	Customer	Тах	Account					
L	fustoper	Bank	Account					
L	Customer	SSN:	333-33-3333	J	Entity Type:	Individua		
L	N	ame:	JOHN DOE					
L	St	reet:	600 E. MAIN 8	STREET				
		City:	RICHMOND		•	State:	VIRGINIA	•
L		Zip:	23235		_		Undeliverable	
L					Last Address	Update:	08/15/2004 16:41:23	-
							,	Close

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

Tax Account						
ile	* Tax Account	• Help	•			
Tax Account - D	OE, JOHN					
Tax Account						
	Tax Type:	Individual Income		-		
т	ax Account Number:	33-222222225-001				
	Street:	600 E. MAIN STREE	T			
	City:	FAIRFAX		State: VA		
	Zip:	22033				
L	ast Address Update:	08/15/2004 16:41:23	🔲 Undeliv	verable		
Tax Account Per	iode					
Tax Account Per	riod Balance				Filing Status	
Jan 2005-Dec 2008	5 J			\$3	00.00 Not Filed	A
•						
						open crose

Step 3: Double-click on the desired Tax Account Period entry. The Tax Account Period Entries window opens.

View Offset Information Version 1.0

n 2004 - Dec 2004 eneral Information Name: Doe, John SSN: 111-22-3333 Tax Type: Individual	Tax Account Period Acct No: 33-1112233338-001	 Help Tax Account Per Total Liabilitie Total Resource Balance TAP Statu 	riod 25: \$-1500.0 25: \$-1500.0 25: \$0.00 25: \$0.00	, 0 Filir 10 I Ext. 1	ng Status: Filed Due Date: 05/02/2005 Due Date: 00/00/0000
Entries	Submitted Date P	ncessed Date	Amount	Status	Last Modified
Internal Offset	04/11/2005 04	/11/2005	\$-500.00	Posted	04/11/2005
Refund	04/11/2005 04	/11/2005	\$-1000.00	Posted	04/11/2005
Original Return	03/10/2005 03	/25/2005	\$-1500.00	Posted	03/25/2005

Step 4: Double-click on the Internal Offset entry. The Internal Offset Status window opens.

🔆 IRMS					_ D ×		
File 'Hel	р ,						
Internal Offset Status							
General Information			Tax Account Perio	d			
Name: Doe, John SSN: 111-22-3333 Tax Type: Individual	Acct No: 33-11122	33338-001	Total Liabilities: Total Resources: Balance: TAP Status:	\$-1500.00 Filing Status: \$-1500.00 Due Date: \$0.00 Ext. Due Date: Open	Filed 05/02/2005 00/00/0000		
Source Entry Type	Received Date	Submitted Date	Processed Date	Applied Amount	Status 🖻		
Original Return	03/10/2005	03/25/2005	03/25/2005 13:43:53	\$500.00	Posted		
•					▼		
Internal Offset Informat Amour	ion nt: \$500.00			Submitted Date: 04/11	/2005		
Statu	s: Posted			Processed Date: 04/11	/2005 05:25:16		
Cancel/Reverse Reaso	n:						
Internal Offset Destination	Internal Offset Destination						
Tax Account Number:	33-111223333 8-001		Tax Account Pe	riod: Jan 2003-Dec 2003			
Bill Number:	04003		Assessment [Date: 08/18/2004			
					Close		

Step 5: From the **File** menu, select **Close** to exit this window and return to the Tax Account Period Entries window.

9.2.2 View Applied Internal Offset Details

IRMS creates an Internal Offset Applied entry in the TAP that is the destination for the overpaid funds. You can view detailed information related to the Internal Offset Applied entry on the Internal Offset Applied window in the IRMS Web application.

Internal Offset Applied Window

The illustration below is the Internal Offset Applied window.

🔆 IRMS					
File ' H	lelp '				
Internal Offset Applie	d				
General Information			Tax Account Period		
			Total Liabilities: \$500.00	Filing Status:	Not Filed
Name: Doe, John SSN: 111-22-3333	Acct No: 33-1112	233335-001	Total Resources: \$500.00	Due Date:	05/01/2004
Tax Type: Individual			Balance: \$0.00	Ext. Due Date:	00/00/0000
			TAP Status: Open		
Tax Account M Bill M Internal Offset Applie A Cancel/Reverse M	Number: 33-1112233336 Number: 04003 Information Amount: \$500.00 Status: Posted Reason:	÷001	Tax Account Assessmen Submitted Date: Processed Date:	Period: Jan 2004-0 t Date: 08/18/2004 04/11/2005 04/11/2005 13:43:5	Dec 2004
Applied To	Received Date	Submitted Date	Processed Date	Applied Amount	Status -
Tax Assessment	03/10/2005	03/25/2005	03/25/2005	\$500.00	Posted

Internal Offset Applied Window Fields

The table below lists the fields on the Internal Offset Applied window and provides a brief description of each.

Field	Field Type	Description
Name	System Generated	The name of the account holder (If an individual, the name(s) of the account holder(s). If a business, the name under which the business is legally registered).

Field	Field Type	Description
SSN/FEIN	System Generated	The social security number (SSN) of the account holder(s) if an individual. 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).
Account No	System Generated	The number assigned to the Tax Account.
Тах Туре	System Generated	The type of customer (i.e. individual, corporate, etc.).
Total Liabilities	System Generated	The total amount of tax owed for this period.
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.).
Tax Account Number	System Generated	Identifies the tax account that was the source of the funding for the internal offset.
Tax Account Period	System Generated	Identifies the tax account period that was the source of the funding for the internal offset.
Bill Number	System Generated	Identifies the bill to which the internal offset funds were applied.
Assessment Date	System Generated	The creation date of the bill to which the internal offset funds were applied.
Amount	System Generated	The funding used to satisfy the bill.
Submitted Date	System Generated	The greater of the due date of the period or the submitted date of the source of funding.
Status	System Generated	The status of the applied internal offset entry (i.e. proposed, posted, reversed).
Processed Date	System Generated	The date the applied internal offset entry was created by IRMS.
Cancel/Reverse Reason	System Generated	The explanation as to why the internal offset applied entry was cancelled or reversed, if applicable.
Applied To	System Generated	The name of the liability to which the funds were applied (i.e. tax assessment, return).
Received Date	System Generated	The date the Applied To entry was received.

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Field	Field Type	Description
Submitted Date	System Generated	The date the Applied To entry was submitted.
Processed Date	System Generated	The date IRMS processed the Applied to entry.
Applied Amount	System Generated	The amount of the Applied To entry.
Status	System Generated	The current state of the Applied To entry.

View Internal Offset Applied Details

To view detailed information about the applied internal offset, 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 Customer	Tax Account Bank Account Bill Summary		
	N 51	lame: JOHN DOE	STREET	
		City: RICHMOND	•	State: VIRGINIA
		. ,	Last Address	Update: 08/15/2004 16:41:23

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

File Tax Account Help Tax Account Help Tax Account DOE, JOHN Tax Account Tax Type: Individual Income Tax Account Number: 33:22222225:001 Street: 600 E. MAIN STREET Gity: FAIRFAX Tip: 22033 Last Address Update: 08/15/2004 18:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account										_ []
Tax Account > DDE, JOHN Tax Account Tax Type: Individual Income Tax Account Number: 33:222222225:001 Street: 600 E. MAIN STREET City: FAIRFAX Zip: 22033 Last Address Update: 08/16/2004 18:41:23 Undeliverable Tax Account Period Jan 2005-Dec 2005 J \$3300.00 Not Filed	File	• Tax Ac	count	• Help	•						
Tax Account Tax Type: Individual Income Tax Account Number: 33-22222225-001 Street: 600 E. MAIN STREET City: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account -	DOE, JOHN									
Tax Type: Individual Income Tax Account Number: 33-222222225-001 Street: 600 E. MAIN STREET Gity: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Periods Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account										
Tax Account Number: 33:222222226:001 Street: 600 E. MAIN STREET City: FAIRFAX State: VA City: FAIRFAX State: VA Zip: 22033 Last Address Update: 08/16/2004 18:41:23 Undeliverable Tax Account Periods Tax Account Period Balance Filing Status \$300.00 Not Filed Y			Tax Type:	Individual Ir	ncome						
Street: 600 E. MAIN STREET		Tax Accoun	t Number:	33-222222222	25-001						
City: FAIRFAX State: VA Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed			Street:	600 E. MAIN	STREET						
City: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed											
Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed			City:	FAIRFAX			State: VA				
Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Jan 2005-Dec 2005 J \$300.00 Not Filed			Zip:	22033							
Tax Account Periods Tax Account Period Balance Jan 2005-Dec 2005 J \$300.00 Not Filed		Last Addres	s Update:	08/15/2004 16	:41:23	🔲 Undeliv	verable				
Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed Image: Status Image: Status st	Tax Account P	eriods									
Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account F	Period	Balance						Filing Status	•	
V 1	Jan 2005-Dec 2	005 J						\$300.00	Not Filed		<u> </u>
	•										ŕ
Open Close										Open Cl	ose

Step 3: Double-click on the desired Tax Account Period entry. The Tax Account Period Entries window opens.

• Tax . 2003 - Dec 2003	Account Period	• Help		•	
eral Information Ime: Doe, John IN: 111-22-3333 Acct No: 3 X Type: Individual	33-111223333 5-001	Tax Account Pe Total Liabiliti Total Resourc Balan TAP Stat	es: \$500.00 es: \$500.00 ce: \$0.00 us: Open) Filing) D Ext. D	g Status: Not Filed ue Date: 05/01/2004 ue Date: 00/00/0000
Entries					
Type	Submitted Date I	Processed Date	Amount	Status	Last Modified
Internal Onset- Applied	04/11/2005	94/11/2005	\$500.00	Posted	04/11/2005
Dill Tay Assessment	07/07/2004 0	7070004	\$500.00	Posted	07/07/2004

Step 4: Double-click on the Internal Offset-Applied entry. The Internal Offset Applied window opens.

e IRMS					_ [
File .	Help .				
Internal Offset Appli	ed				
General Information	1		Tax Account Period		
Namer Dec John			Total Liabilities: \$500.00	Filing Status:	Not Filed
SSN: 111-22-3333	Acct No: 33-11122	333 5-00 1	Total Resources: \$500.00	Due Date:	05/01/2004
Tax Type: Individual			Balance: \$0.00	Ext. Due Date:	00/00/0000
			TAP Status: Open		
Tax Account Bill Internal Offset Appli Cancel/Reverse	Number: 33-1112233338 Number: 04003 ied Information Amount: \$500.00 Status: Posted Reason:		Tax Account Assessmen Submitted Date: Processed Date:	Period: Jan 2004-C t Date: 08/18/2004 04/11/2005 04/11/2005 13:43:5	Dec 2004
Applied To	Received Date	Submitted Date	Processed Date	Applied Amount	Status
Tax Assessment	03/10/2005	03/25/2005	03/25/2005	\$500.00	Posted

Step 5: From the **File** menu, select **Close** to exit this window and return to the Tax Account Period Entries window.

9.3 View External Offset Information

IRMS creates external offsets once all internal offsets have been satisfied. External Offset processing uses overpaid funds to satisfy a taxpayer's outstanding claims from Set-off agencies. To process external offsets, IRMS:

- Determines if there is an open set-off claim for the taxpayer
- Allocates funds to claims based on highest priority
- Continues allocating funds to claims until all set-off claims are satisfied or funds are exhausted

If the liability or claim is greater than the amount of funds available, the claim is partially satisfied. This reduces, but does not eliminate the liability or claim. A letter is sent to the taxpayer explaining that the overpayment has been applied to their existing TAX liability or claim.

External Offset Status Window

The illustration below is the External Offset Status window.

eneral Information			Tax Account Period				
Name: Doe, John SSN: 111-22-3333 Tax Type: Individual	Acct No: 33-11122	3333 5-001	Total Liabilities:\$-935.00Filing Status: FiledTotal Resources:\$-935.00Due Date: 05/01/200Balance:\$0.00Ext. Due Date: 00/00/000TAP Status:Open				
Source Entry Type	Received Date	Submitted Date	Processed Date	Applied Amount	Status		
Original Return	04/28/2005	04/30/2005	04/30/2005 13:43:53	\$50.29	Posted		
(xtemal Offset Informat	ion		Claim Information				
Amount: \$50.29	 Match	ID: 000080308	Number: 19215587	Amount:	\$50.29		
Status: Posted			Year: 2005	Date:	03/16/2003		
Status: Posted Match Status: Finalized	l Match D	ate: 05/18/2005	Year: 2005 Agency Information Number: 25160000	Date:	03/16/2003 FAX		
Status: Posted Match Status: Finalized Processed Date: 05/18/20 Reason:	Match D	ate: 05/18/2005	Year: 2005 Agency Information Number: 25160000 Address: 600 E. MAIN	Date: Name: CITY OF FAIR STREET	03/16/2003 FAX		
Status: Posted Match Status: Finalized Processed Date: 05/18/20 Reason:	Match D	ate: 05/18/2005	Year: 2005 Agency Information Number: 25160000 Address: 600 E. MAIN	Date: Name: CITY OF FAIR STREET	FAX		

External Offset Status Window Fields

The table below lists the fields in the External Offset Status window and provides a brief description of each.

Field	Field Type	Description
Name	System Generated	If an individual, the name(s) of the account holder(s). If a business, the name under which the business is legally registered.
SSN/FEIN	System Generated	If an individual, the SSN(s) of the account holder(s). If a business, the FEIN (Federal Employer Identification Number) for the Business. If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays.
Account No	System Generated	The number assigned to the Tax Account.
Тах Туре	System Generated	The type of customer (i.e. individual, corporate, etc.).
Total Liabilities	System Generated	The total amount of tax owed for this period.
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.).
Source Entry Type	System Generated	The name of the source of the overpayment that funded the external offset.
Received Date	System Generated	The date the source of the overpayment was received.
Submitted Date	System Generated	The date the source of the overpayment was submitted.
Processed Date	System Generated	The date the source of the overpayment was processed by IRMS.
Applied Amount	System Generated	The amount of the source of the overpayment.
Status	System Generated	The current state of the source of the overpayment in IRMS.
Amount	System Generated	The amount applied to the claim.
Match ID	System Generated	A unique identifier that IRMS assigns to the claim.
Status	System Generated	Indicates the state of the External Offset entry (posted, pending payment, proposed, cancelled).
Match Status	System Generated	Indicates the state of the Match (finalized, active, or withdrawn).

Field	Field Type	Description
Match Date	System Generated	The date an available resource is matched to a claim.
Processed Date	System Generated	The date IRMS processes the claim.
Reason	System Generated	When populated, indicates why the offset was cancelled or reversed.
Number	System Generated	A unique identifier assigned by IRMS for this claim.
Amount	System Generated	The claim amount owed to the Set-off Agency.
Year	System Generated	The year in which the claim was initiated.
Date	System Generated	The date the claim was initiated.
Number	System Generated	The unique identifier for the Set-off agency.
Name	System Generated	The name of the Set-off agency making the claim.
Address	System Generated	The address of the Set-off agency making the claim.
SODC	System Generated	The Set-off Debt Coordinator's name.
Phone	System Generated	The contact number for the Set-off Debt Coordinator (SODC).

View External Offset Information

To view detailed information about the external offset, 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).

¢	Customer Profile -			
١	File `	Customer *	Help *	
[fustomer	Tax Account		
		Bank Account	-	
	Lustomer	Bill Summary		le di di ci
		35N: [333-33-3333]	Endty Type:	Individual
	N	ame: JOHN DOE		
	st	breet: 600 E. MAIN	STREET	
		city: RICHMOND	•	State: VIRGINIA 🔹
		Zip: 23235		Undeliverable
			Last Address	Update: 08/15/2004 16:41:23
				Close
	1			

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

File Tax Account Help Tax Account Help Tax Account DOE, JOHN Tax Account Tax Type: Individual Income Tax Account Number: 33:22222225:001 Street: 600 E. MAIN STREET Gity: FAIRFAX Tip: 22033 Last Address Update: 08/15/2004 18:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account										_ []
Tax Account > DDE, JOHN Tax Account Tax Type: Individual Income Tax Account Number: 33:222222225:001 Street: 600 E. MAIN STREET City: FAIRFAX Zip: 22033 Last Address Update: 08/16/2004 18:41:23 Undeliverable Tax Account Period Jan 2005-Dec 2005 J \$3300.00 Not Filed	File	• Tax Ac	count	• Help	•						
Tax Account Tax Type: Individual Income Tax Account Number: 33-22222225-001 Street: 600 E. MAIN STREET City: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account -	DOE, JOHN									
Tax Type: Individual Income Tax Account Number: 33-222222225-001 Street: 600 E. MAIN STREET Gity: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Periods Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account										
Tax Account Number: 33:222222226:001 Street: 600 E. MAIN STREET City: FAIRFAX State: VA City: FAIRFAX State: VA Zip: 22033 Last Address Update: 08/16/2004 18:41:23 Undeliverable Tax Account Periods Tax Account Period Balance Filing Status \$300.00 Not Filed Y			Tax Type:	Individual Ir	ncome						
Street: 600 E. MAIN STREET		Tax Accoun	t Number:	33-222222222	25-001						
City: FAIRFAX State: VA Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed			Street:	600 E. MAIN	STREET						
City: FAIRFAX Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed											
Zip: 22033 Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed			City:	FAIRFAX			State: VA				
Last Address Update: 08/15/2004 16:41:23 Undeliverable Tax Account Period Balance Jan 2005-Dec 2005 J \$300.00 Not Filed			Zip:	22033							
Tax Account Periods Tax Account Period Balance Jan 2005-Dec 2005 J \$300.00 Not Filed		Last Addres	s Update:	08/15/2004 16	:41:23	🔲 Undeliv	verable				
Tax Account Period Balance Filing Status Jan 2005-Dec 2005 J \$300.00 Not Filed Image: Status Image: Status st	Tax Account P	eriods									
Jan 2005-Dec 2005 J \$300.00 Not Filed	Tax Account F	Period	Balance						Filing Status	•	
V 1	Jan 2005-Dec 2	005 J						\$300.00	Not Filed		<u> </u>
	•										ŕ
Open Close										Open Cl	ose

Step 3: Double-click on the desired Tax Account Period entry. The Tax Account Period Entries window opens.

IRMS								_ [
File		• т	ax Account Period	• Help		•		
lan 2004	- Dec 2004							
General	Information			Tax Account Po	eriod			
Name:	Doe, John			Total Liabilit	ies: \$-935.00) Fili	ng Status: Filed	
SSN:	111-22-3333	Acct N	o: 33-1112233338-001	Total Resource	es: \$-935.00		- Due Date: 05/01/2005	
	pe. mamada			Balan	ce:\$0.00	Ext.	Due Date: 00/00/0000	
				TAP Stat	us: Open			
Ente	ries		1					
								_
	Туре		Submitted Date	Processed Date	Amount	Status	Last Modified	
	External Offset		05/14/2005	05/18/2005	\$-50.29	Posted	05/18/2005	
	Refund		05/14/2005	05/18/2005	\$-884.71	Posted	05/18/2005	
	Original Return		04/28/2005	04/30/2005	\$-935.00	Posted	04/30/2005	
<u> </u>							Open	Close

Step 4: Double-click on the External Offset entry. The External Offset Status window opens.

utainal Officet Status							
eneral Information			Tax Account Period				
Name: Doe, John SSN: 111-22-3333 Tax Type: Individual	Acct No: 33-11122	3333 5-001	Total Liabilities: \$-935.00 Filing Status: Filed Total Resources: \$-935.00 Due Date: 05/01/2005 Balance: \$0.00 Ext. Due Date: 00/00/0000 TAP Status: Open Diagonal Status: St				
Source Entry Type	Received Date	Submitted Date	Processed Date	Applied Amount	Status		
Original Return	04/28/2005	04/30/2005	04/30/2005 13:43:53	\$50.29	Posted		
(xternal Offset Informat	tion		Claim Information				
Amount: \$50.29	Match	ID: 000080308	Number: 19215587	Amount:	\$50.29		
Status: Posted			Year: 2005	Date:	03/16/2003		
Match Status: Finalize	d Match D	ate: 05/18/2005	Agency Information				
rocessed Date: 05/18/20	005		Number: 25160000 N	lame: JULY OF FAIR			
Reason:			Address: 600 E. MAIN				
			FAIRFAX	VA 2	2030		
			sape	Phases [

Step 5: Click **Close** to exit this window and return to the Tax Account Period Entries window.