# **Virginia Department of Taxation**



# External Entity Secure Messaging Center (EESMC) User Guide

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# **EXTERNAL ENTITY SECURE MESSAGING CENTER (EESMC)**

The External Entity Secure Messaging Center (EESMC) provides authorized users the ability to send messages and transfer files with the VA Department of Taxation (TAX) through a secure environment.

Typical EESMC users that interact with TAX include:

- Department of Lottery
- Local Commissioners of the Revenue
- Local Treasurers/Directors of Finance
- Set-off Agencies (State Agencies, Local Offices, Courts)
- Outside Collection Agencies (OCA's)

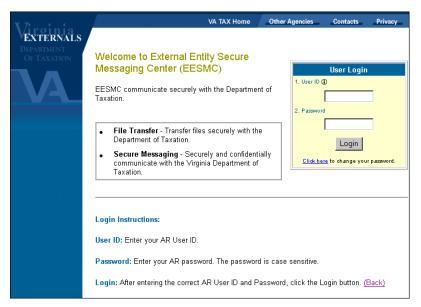
The purpose of this document is to assist you with accessing, navigating and using the EESMC. In addition to the general information contained in this User Guide, detailed instructions have also been built into each EESMC window to provide help online.

#### Logon to EESMC

To access the EESMC logon window:

- **Step 1.** Type <u>www.tax.virginia.gov/external</u> in the *Address* field of your Internet browser.
- Step 2. Select the Log on to EESMC link.

The Welcome to External Entity Secure Message Center (EESMC) window opens. The EESMC User ID and Password are the same as your IRMS User ID and Password.



Step 3. Enter your User ID and Password.

Step 4. Click Login.

## Change the Password

The logon provided by TAX consists of a User ID and *temporary* password, which allows you to logon to both the EESMC application and IRMS application. The first time you access either application, you will be prompted to change your temporary password to your own personal password. Once changed, you will be required to change your personal password every 60 days. This section provides the steps for:

- Creating a personal password from the temporary password provided by TAX
- Changing your personal password every 60 days



**IMPORTANT:** If you are an IRMS user, please see the <u>IRMS User Guide, Chapter 2: IRMS</u> <u>Introduction and Navigation</u> for the steps for changing your password. The following steps only apply to EESMC users that do not use the IRMS application.

To change your password:

Step 1. Open the Welcome to External Entity Secure Messaging Center (EESMC) page.

	VA TAX Home	ther Agencies	Contacts	Privacy
EXTERNALS DEPARTMENT OF TAXATION	<ul> <li>Welcome to External Entity Secure Messaging Center (EESMC)</li> <li>EESMC communicate securely with the Department of Taxation.</li> <li>File Transfer - Transfer files securely with the Department of Taxation.</li> <li>Secure Messaging - Securely and confidentially communicate with the Virginia Department of Taxation.</li> </ul>	1. User ID ( 2. Password	User Login )	

**Step 2.** Click the **Click here** link, located at the bottom of the User Login box.

The IRMS application launches and a login box appears.



**NOTE:** While you will not have access to any data in IRMS, you will need to access the IRMS system each time you change your EESMC password.

**Step 3.** Type your User ID and temporary/current personal into IRMS Login box.

**Step 4.** Click Change Password.

The IRMS Login box expands, allowing you to enter a new password and to verify it.

IRMS Login	
C C C C C C C C C C C C C C C C C C C	User ID: xxx1234 Password: xxxxxxxx
	New Password: Verify Password: Change Password Ok Cancel

Step 5. Type your new password into the New Password field.

Any password entered must be between 8 – 16 characters in length. Additionally:

- The first character of the password must be a letter.
- Password must contain at least one number. *Example: we8there*
- Passwords are case-sensitive.

Step 6. Re-type your new password into the Verify Password field.

#### Step 7. Click Ok.

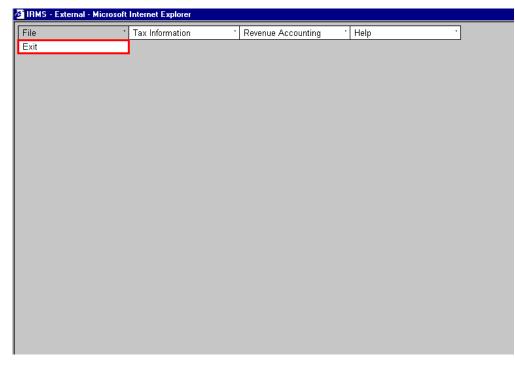
After you have changed your password, the IRMS application continues opening and a popup box appears:



### Step 8. Click OK.

The gray window that appears after the application opens is the IRMS Desktop. Since you will only access IRMS to change your password, your EESMC access will not allow you to access screens in this application.

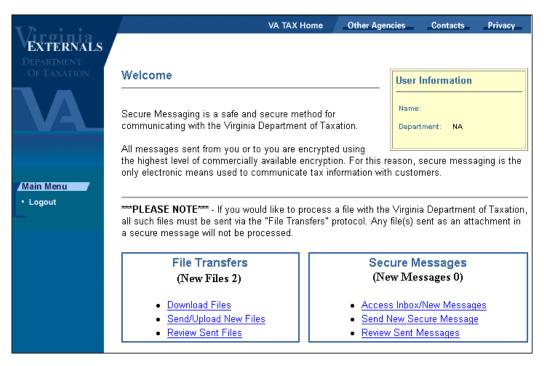
**Step 9.** Click the **File** > **Exit** menu option to close the application.



IRMS closes and the EESMC Welcome Page reappears.

### Navigate the Welcome Window

After successfully logging on to the EESMC application, the Welcome window opens.



The **Welcome** window is divided into two sections.

The File Transfers section consists of hyperlinks for transmitting and receiving secure files:

- *Download Files* link is used to receive secure files from TAX.
- Send/Upload New Files link allows you to send secure files to TAX.
- *Review Sent Files* link lets you view a list of files that your organization has sent to TAX in the past 30 days.

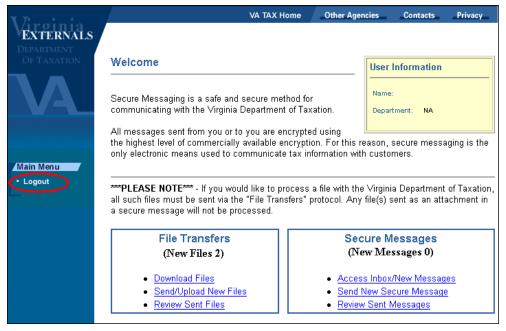
The **Secure Messages** section consists of hyperlinks used to send and review secure messages sent to TAX.

- Access Inbox/New Messages link allows you to view incoming secure messages from TAX.
- Send New Secure Message link is used to create secure messages to send to TAX.
- *Review Sent Messages* link lets you view a list of secure messages sent to TAX in the past 30 days.

Navigating the **Welcome** window consists of clicking the hyperlinks in the **File Transfers** and **Secure Message** sections.

## Logout of EESMC

After you have finished using the EESMC, you will need to logout of the application. Located in every window is a **Logout** button.



Step 1. Click Logout.

The Logout window opens.

* 7	VA TAX Home Other Agencies Contacts Privacy
EXTERNALS Department Of Taxation	Logout
	Are you sure you wish to logout of EESMC?
	Yes, Logout Now No, Return to My Homepage
	Yes, Logout Now No, Ketum to My Homepage

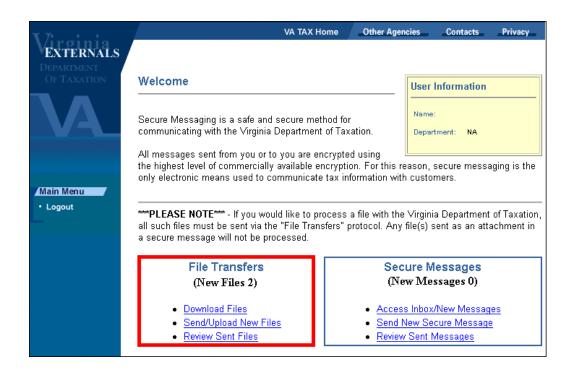
**Step 2.** Click the **Yes, Logout Now** button. A **Confirmation** window opens indicating you have successfully logged out of the EESMC. You can now close your web browser.

To cancel the logout function and return to the EESMC application, click **No**, **Return to My Homepage**.

# **SECURE FILES**

Located on the **Welcome** window is the **File Transfers** section. Use the hyperlinks found in this section to:

- Download secure files from TAX
- Transmit secure files to TAX
- Views files sent to TAX in the past 30 days



Note that all messages transmitted to and from TAX are kept for 30 calendar days from the date sent. We recommend developing in-house procedures for storing/archiving incoming and outgoing files should you need to reference files after 30 days.

## **Download Secure Files Sent from TAX**

In the **File Transfers** section, a *New Files* indicator displays how many incoming secure files you have received from TAX. To access these new files and download them:

Step 1.	Click Download Files.
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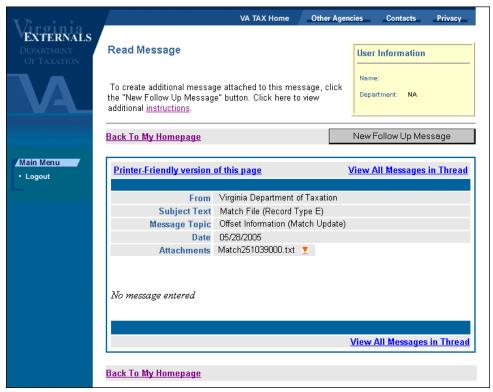
File Transfers (New Files 2)	
<ul> <li><u>Download Files</u></li> <li><u>Send/Upload New Files</u></li> <li><u>Review Sent Files</u></li> </ul>	

The **File Inbox** window opens to display a list of all incoming files sent from TAX in the past 30 days. Incoming files appear as hyperlinks under the **Subject** heading.

* 7 · · ·	VA TAX Home	Other Agenci	es Contact	s Privacy
EXTERNALS DEPARTMENT OF TAXATION	<b>IFP TOTE TOTE IFP IFP</b>		User Informat Name: Department: N	
Main Menu			<u>Back T</u>	o My Homepage
- Logout	Inbox (2 new	v)		Date
	#  Subject Claim Number Assignment File (Record Type)	pe C)		05/28/2005
	yperlinks <u>Match File (Record Type E)</u>			05/28/2005
			Back To	o My Homepage
	Instructions:			
	New messages are indicated by the " >" symbol.			
	The "⊞" symbol shows that there are additional mes clicking on this symbol, you may view the subjects respective sent date(s).			
	Message Expiration: All messages will remain in y recent date of activity. For example, if you first sent 05/31/2005, and then sent a follow up message atta messages would not be deleted until 07/15/2005.	a message to	the Departmer	nt on

Step 2. Click the Subject of an incoming file.

The **Read Message** window opens, allowing you to download the incoming file.



- *From* will always be Virginia Department of Taxation.
- *Subject Text* varies with the file sent, but will contain language that identifies the file.
- *Message Topic* identifies the file content. Examples include:
  - Federal Schedule C Information
  - Outbound Reports
  - OCA Information
  - Set-off Information
- *Date* represents the date the message was sent.
- *Attachments* list the file name.

From the **Read Message** window, you can:

- Click the red caret ∑in the *Attachments* field to open the incoming file. Once opened, you can save the incoming file from the application used to launch the file.
- Click **Back to My Homepage** to return to the **Welcome** window.

When downloading files, be sure that the workstation receiving incoming files has enough free disk space for the download. If you expect to receive large files from TAX, we recommended your hard drive have at least 20 GB of free disk space. A high-speed Internet connection (broadband, T1 etc.) is also recommended to speed up the file transfer process.

**When the Department of Taxation sends a file to your organization, it will** send an email to notify you that the file is available. To prevent your spam blocker from blocking these emails, please put

> External\_Entity\_Tax\_Communications@tax.virginia.gov into the "Safe List" of your email program.



# **Transmit Secure Files to TAX**

In the **File Transfers** section of the **Welcome** window, you also have the ability to send files to TAX. To send a file:

Step 1. Click Send/Upload New Files.



The Add/Delete Attachments window opens, which allows you to enter the filepath of the file to be transmitted to TAX.

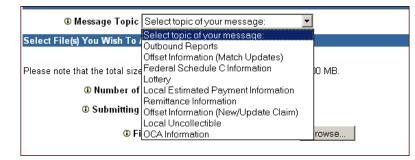
***	VA TAX Home Other Agencies Contacts Privacy	
EXTERNALS DEPARTMENT OF TAXATION	Add/Delete Attachments For other instructions, click the (a) icon.	
Main Menu	Back To My Homepage	1
Logout		
	Image:	
	Select File(s) You Wish To Attach	
	Please note that the total size of your uploaded file(s) must not exceed 300 MB.	
	Number of records:	
	© Submitting Agency: NA	
	Filename:     Browse	
	Attach File	
	File Name         Size         Record #         Delete           No Files Attached	
	Total Size: 0 bytes	
	Submit	

Step 2. Select a *Message Topic* from the list of drop-down options available.

When selecting a *Message Topic* from the dropdown:

**Department of Lottery** will select *Lottery* to send TAX your lottery payment file.

Local Commissioner of Revenue will not transmit files to TAX.



#### Local Treasurers:

- Select *Local Estimated Payment Information* to send TAX estimated tax payments collected in your local office.
- Select *Local Uncollectible* to send TAX your annual uncollectible receivables.

#### Set-off Agencies

- Select *Offset Information (Match Updates)* to send TAX your certifications, contest updates, and finalizations files (Record Type "F").
- Select *Offset Information (New/Update Claims)* to send TAX your new claims for submission or to update existing claims (Record Type "B" and "D").

**Collection Agencies** will select *OCA Information* to send TAX your collection/payment file.

Select File(s) You Wish To Attach
Please note that the total size of your uploaded file(s) must not exceed 300 MB.         Image: Ima
Filename: C:\My Files\test_file.xls     Browse
Attach File
File Name Size Record # Delete No Files Attached
Total Size: 10 bytes
Submit

- **Step 3.** Enter the number of records that are contained in the file you are about to send in the *Number of records* field.
- Step 4. Click Browse to locate the filepath of the first file to send.

Based on the version of your computer's operating system, a **Choose file** window similar to the one pictured below opens, which allows you to locate your file by browsing through the directories and folders on your workstation.

Choose file			? X
Look jn:	🗹 Desktop 💌	← 🛍 💣 🎟-	
History Desktop My Computer	Image: Computer       → 32 Floppy (A:)       → 12 Floppy (A:)       → 12 Floppy (A:)       → 10 Flop       → 10 Flop	]	
My Network P	•		Þ
	File name:	<u>▼</u> <u>0</u> ;	ben
	Files of type: All Files (*.*)	▼ Ca	ncel

- **Step 5.** Click the *Look in* drop-down to view a list of local and network directories accessible from your computer. Double-click the directory, folder, and any applicable sub-folders in the filepath of the file that you want to transmit.
- **Step 6.** Double-click the file after locating it. The **Choose file** window closes and the **Add/Delete Attachment** window re-opens with the *File name* populated the directory path of the selected file.

Select File(s) You Wish To Attach	
Please note that the total size of your up	ploaded file(s) must not exceed 300 MB.
O Number of records:	1
Submitting Agency:	NA
Total Claim Amount:	\$
③ Filename:	C:\My Files\test_file.xls Browse
	Attach File
File Name	Size Record # Delete
	No Files Attached
Total Size: 0 b	ntos
10(01 3)26.0 1	yes.
	Submit

Step 7. Click Attach File.

To attach additional files, repeat **Steps 3 –7**. After you have attached the last file to send to TAX, continue with **Step 8**.

**Step 8.** Click **Submit**. A **Confirmation** window opens indicating that your file was transmitted successfully.

**NOTE:** If the number of records entered does not match the number of records on the file an error message will appear and the file will not be accepted.

# View Files Sent to TAX

The EESMC also provides you the ability to view files that you have sent to TAX in the past thirty days. To view these files:

<b>Step 1.</b> Click <i>Review Sent F</i>	Files.
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The **Sent Box** window opens.

EXTERNALS		VA TAX Home	Other Ageno	iles con	tacts Privacy
DEPARTMENT OF TAXATION	Ser	nt Box		User Inform	nation
		ed below are the data files that you have sent us saging. Click on the subject to view additional d		Name: Department:	NA
				Back	< To My Homepag
lain Menu				Back	< To My Homepaç
		© Sent Data F	Files (4)	Bacl	< To My Homepaç
	#	③ Sent Data F Subject	Files (4) Cate		< To My Homepaç Date
	#	Subject		зогу	
	# 1 2	Subject File Upload from EESMC Lo	Cate	gory tible	Date
Logout	1	Subject           File Upload from EESMC         Lo           File Upload from EESMC         Re	Cate ocal Uncollec	gory tible prmation	Date 05/20/2005

**Step 2.** Click the Subject of a sent file that you want to view.

The Read Sent Message window opens.

		VA TAX Home	Other Agencies	Contacts	Privacy
EXTERNALS					
DEPARTMENT OF TAXATION	Read Sent Message		U	ser Information	1
			N	lame:	
VA			D	lepartment: NA	
	View Sent Messages				
Main Menu  • Logout					
	To Marini	- Devienturient of T	·		
	Subject Text File U	a Department of T aload from EESM			
	Message Topic Local		•		
	Date 05/20/				
	Attachments test.tx				
	No message entered	Ŭ			
	View Sent Messages				

- *To* will always be Virginia Department of Taxation.
- *Subject Text* varies with the file sent, but will contain language that is specific to the purpose of the message.
- *Message Topic* identifies the message content. Examples include:
  - Federal Schedule C Information
  - Outbound Reports
  - OCA Information
  - Set-off Information
- *Date* represents the date the message was sent. This message will be retained in your Inbox for 30 calendar days before it is purged.
- *Attachments* list the file name(s).

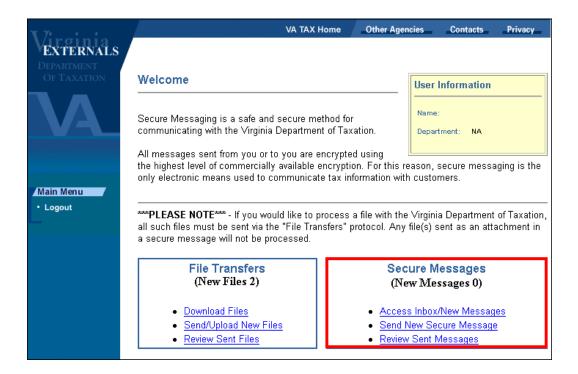
From the Read Sent Message window, you can:

- Click the red caret <sup>▼</sup> in the *Attachments* field to open the attachment that was sent to TAX.
- Click View Sent Message to return to the Sent Box window.

# SECURE MESSAGES

The **Secure Message** section of the **Welcome** window consists of a list of hyperlinks that allow you to:

- View incoming messages from TAX
- Send secure messages to TAX
- Review secure messages sent to TAX in the past 30 days



### Send Secure Messages to TAX

From the **Secure Message** section of the **Welcome** window, you can send secure messages to TAX. To send a message:

Step 1. Click Send New Secure Message.



The New Secure Message window opens.

* 7 · · ·	VA TAX Home	Other Agencies	Contacts	Privacy
EXTERNALS DEPARTMENT OF TAXATION	New Secure Message Please enter the necessary information below. Enter and select a topic for your message in the designate For instructions on a specific field, click the <sup>①</sup> icon.	r a subject ed fields.	r Information e: artment: NA	
Main Menu • Logout	Subject Text     O Message     Topic     Select topic of your message:     O Message Text			k
	-		[	Send
	Add/Delete Atta Back To My Ho		L	

Use the window to enter a *Subject, Message Topic*, and the text of your secure message. You can also use this window to attach any support documents that you want to send to TAX.

- *Subject Text* varies with the file sent, but will contain language that is specific to the purpose of the message.
- *Message Topic* identifies the message content. Examples include:
  - Federal Schedule C Information
  - Outbound Reports
  - OCA Information
  - Set-off Information
- *Text* is used for entering the content of your secure message..

Using the Secure Message window:

<b>X</b> 7•	VA TAX Home _ Othe	er Agencie	es Contacts	Privacy
EXTERNALS DEPARTMENT OF TAXATION	New Secure Message Please enter the necessary information below. Enter a sub and select a topic for your message in the designated field For instructions on a specific field, click the <b>O</b> icon.	oject	User Information Name: Department: NA	
Main Menu • Logout	Subject Text     Message     Topic     Select topic of your message:     O Message Text			×
				Send
	Add/Delete Attachme Back To My Homepa		J	

- **Step 2.** Type the subject of your message in the *Subject Text*. The *Subject Text* varies with the file sent, but will contain language that is specific to the purpose of the message.
- **Step 3.** Select a *Message Topic* from the list of drop-down options available.
- **Step 4.** Enter the content of your secure message in the *Message Text*. At this point, you have two options:
  - Click Add/Delete Attachments if you want to attach a support documentation file, like a word processing document or spreadsheet, that is related to you secure message.

**NOTE:** <u>Do not</u> attach the data files that you regularly transmit to TAX. Use the **Transmit Secure Files** to send these data files.

• Click **Send** without attaching a file. A **Confirmation** window opens to verify your secure message was successfully sent.

#### Send Attachments

If you opted to send an attachment, the Add/Delete Attachments window opens.

	VA TAX Home	Other Agencies	Contacts	Privacy
EXTERNALS DEPARTMENT OF TAXATION	Add/Delete Attachments For other instru icon.	ctions, click the	<mark>ser Informatio</mark> Name: Department: NA	n
Main Menu • Logout	Select File(s) You Wish To Attach Please note that the total size of your uploaded O Submitting Agency: NA O Filename: Attac	ile(s) must not excee Browse h File	d 300 MB.	
	Total Size: 0 bytes	Record # Attached	Delete	

Step 1. Click Browse to locate the filepath of the first file to send.

Based on the version of your computer's operating system, a **Choose file** window similar to the one pictured below opens, which allows you to locate your file by browsing through the directories and folders on your workstation.

Choose file			? ×
Look jn:	🗹 Desktop 💌	← 🕮 💣 🎟 -	
History Desktop My Computer	My Computer J& Floppy (A:) Cocal Disk (C:) Compact Disc (D:)		
My Network P	•		F
	File <u>n</u> ame:	<b>_</b>	<u>O</u> pen
	Files of type: All Files (*.*)	•	Cancel

- **Step 2.** Click the *Look in* drop-down to view a list of local and network directories accessible from your computer. Double-click the directory, folder, and any applicable sub-folders in the filepath of the file that you want to attach.
- **Step 3.** Double-click the file after locating it.

The **Choose file** window closes and the **Add/Delete Attachment** window shows the **Filename field** with the filepath of the selected file.

	VA TAX Home Other Agencies Contacts Privacy
EXTERNALS DEPARTMENT OF TAXATION	Add/Delete Attachments For other instructions, click the Department: NA
Main Menu (1997) • Logout	Select File(s) You Wish To Attach Please note that the total size of your uploaded file(s) must not exceed 300 MB.
	Submitting NA Agency: NA     If ilename: C:\My Files\test_filex\s Browse     Attach File
	File Name         Size         Record #         Delete           No Files Attached
	Total Size: 0 bytes Return To My New Secure Message

Step 4. Click Return to My New Secure Message.

The New Secure Message window reopens:

	VA TAX Home	Other Agend	ies Conta	acts Privacy
EXTERNALS DEPARTMENT OF TAXATION	New Secure Message Please enter the necessary information below. Ente and select a topic for your message in the designat For instructions on a specific field, click the @ icon.	ed fields.	User Inform Name: Department:	ation NA
Main Menu • Logout	Subject Text     O Message     Topic     Select topic of your message:     O Message Text			×
	Add/Delete Att Back To My H			Send

To attach additional files, click the **Add/Delete Attachments** button and repeat **Steps 5–9**. After you have attached the last file:

**Step 5.** Click **Send**. A **Confirmation** window opens indicating that your message and attachment(s) was transmitted successfully.

## **View Messages Sent to TAX**

The EESMC gives you the ability to view messages you have sent to TAX in the past thirty days. To view them:

Step 1. Click *Review Sent Messages*.



- Send New Secure Message
- Review Sent Messages

This opens the **Sent Box** window.

Virginia	VA TAX Home	Other Agencies	Contacts	Privacy
<b>EXTERNALS</b> Department Of Taxation	Sent Box	U	ser Informati	DN
<b>VA</b>	Listed below are the messages that you have sent of Secure Messaging. Click on the subject to view add details.	using	ame: epartment: NA	
Main Menu	© Sent Mess	ages	<u>Back To</u>	My Homepage
	© Sent Messe # Subject			My Homepage Date
	© Sent Messa # Subject 1 Test Message 1	ages Categor	у	

Step 2. Click the Subject of sent message that you want to view.

The **Read Sent Message** window opens, displaying the text of the message sent to TAX.

* 7	VA TAX Home	Other Agencies	Contacts	Privacy
EXTERNALS				
DEPARTMENT OF TAXATION	Read Sent Message	Use	r Information	
		Nam	e:	
		Depa	artment: NA	
	View Sent Messages			
Main Menu				
Logout				
	To Virginia Department of	Taxation		
	Subject Text Test Message 1			
	Message Topic			
	Date 05/20/2005			
	Attachments test.tx			
	test 1			
	View Sent Messages			

From the **Read Sent Message** window, you can:

- Click the red caret  $\underline{\nabla}$  in the *Attachments* field, if a document was attached to the secure message sent to TAX.
- Click View Sent Message to return to the Sent Box window.

## View Incoming Secure Messages from TAX

From the **Secure Message** section of the **Welcome** window, you can read incoming secure messages from TAX. To read a message:

Step 1.	Click Access	Inbox/New	Messages.
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The Inbox window opens displaying a list of all incoming messages within the past 60 days.

X7:inia	VA TAX Home Other Agencies	Contacts Privacy
EXTERNALS DEPARTMENT OF TAXATION	Message Inbox     Listed below are all the messages that have been sent to you     from the Virginia Department of Taxation.     Department	nformation
Main Menu		Back To My Homepage
Logout	Inbox (2 new)	
	# 🛨 🕨 Subject	Date
	1 Notification for account 01	08/25/2005
	2  Notification for account 02	08/29/2005
	3  Notification for account 03	08/29/2005
		Back To My Homepage

Step 2. Click the Subject of a message to open it.

The **Read Message** window opens.

<b>X7</b> · · ·	VA TAX Home	Other Agenc	ies Contact	s Privacy
EXTERNALS Department Of Taxation	Read Message		User Informat	ion
A	To create additional message attached to this messa the "New Follow Up Message" button. Click here to vi additional <u>instructions</u> .		Name: Department:	
	<u>Back To My Homepage</u>		New Follow Up	Message
Main Menu • Logout	Printer-Friendly version of this page From Virginia Department of Ta	axation		
	Subject Text Notification for account 01			
	Message Topic OCA Information			
	Date 08/25/2005 This is a test message.			
	Back To My Homepage		New Follow Up	Message

From the Read Message window, you can:

- Click **Back to Homepage** to return to the Welcome Page
- Click the **New Follow Up Message** button to send a secure message back to TAX.
- Click **Printer-Friendly version of this page** to print a hardcopy of the message.