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 windows.
Create and Maintain Claims	Provides information on creating, modifying, deleting and reinstating deleted claims in IRMS.
View Set-Off Claim Information	Provides information in viewing Set-Off claims summary, details and history.
Certify and Contest External Set-Offs	Provides information on how to certify or context a set-off match in IRMS.
Finalize and Correct External Offsets	Provides information on how to finalize and correct external offsets in IRMS.
View External Offsets in Progress	Provides information on viewing matches in progress.
View External Offset Payment Information	Provides information on viewing payment summary and details for an external offset in IRMS
Reports	Provides information on the various types of reports available and how to access them.
Reset Set-Off Rep Password	Provides steps for the Security Administrator to use to reset Set-off Representatives' passwords when they get locked out of IRMS.
View Vendor Payment Information	Provides information on accessing vendor (DOA and DCA) payment summary and detail information

1.1.2 Typographical Conventions

The following typographical conventions are used in this User Guide:

Format	Type of Information
Bold, Underline	Identifies Menu selections.
Bold	Highlights commands, buttons, fields in the task steps (i.e. **click close**).
Bold, Italic	Identifies Informational Notes in the User Guide and field selections chosen in an earlier step or options available in the step. *Notes* are also preceded by 📝 .
Headings	Identifies Section titles.
Step 1:	Identifies steps (instructions) on how to perform the desired task.

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.

1.1.4 Field Definition Tables

The field definition tables provide information for each field on a window. This includes field name, field type, and field description.

There are four field types listed in the field definition tables in each section of the User Guide:

- **Required** - you must complete the field on that window.

- **Optional** – you may complete the field if needed and/or if you have the information necessary.

- **Conditionally Required** - means you must complete the field if a certain condition has been met. These conditions are discussed in the field definitions table.

- **System Generated** - the system automatically completes the field for you.

If you attempt to save the information in a window before you have completed all the required fields, an error window appears and you must provide the remaining information before you can save your work. For example, **Street** is a required field as part of the Primary Address for new customers.

There are three basic ways data is entered and displayed in fields.

- Free form
- Formatted
- Drop-down list

The following table explains each of these field types:

Data Displayed or Entered	How It Works
Free form	You can enter anything (for example, numbers, letters, apostrophes, dashes) into a free form field.
Formatted	When you type into a formatted field you must use a specific format, such as nine digits for an SSN. Formatted fields usually use hyphens or slashes to show the field format such as 00/00/0000 to indicate the date should be entered as mm/dd/yyyy for the month, day, and year.
Drop-down list	Drop-down lists contain pre-defined choices from which to choose. Some drop-down lists will automatically complete your entry based on the first few letters you enter. For example, if you enter **Richmond** as a city, IRMS will complete the entry for Richmond. *Note:* For some drop-down lists, you cannot enter a word if the word is not contained in the drop-down list. For example, if the drop-down list only contains the words **active** and **inactive**, you cannot enter **suspended** in that field.

The Finalize External Offset window contains examples of each kind of entry field.

Formatted Field   **Free Form Field**   **Drop Down List**

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.