2 CHAPTER: IRMS INTRODUCTION AND NAVIGATION

2.1 Overview of IRMS

To enhance its ability to work effectively and provide the best possible service to taxpayers, the Virginia Department of Taxation (TAX) uses an Integrated Tax and Revenue Management System (IRMS). IRMS is a software suite for tax and revenue management that supports taxpayer registration, tax return processing, and taxpayer and revenue accounting to provide an integrated processing solution for all major tax types. You will be using a Web version of IRMS to access taxpayer and tax return information.

2.1.1 How IRMS Organizes Information

Once you are successfully logged into IRMS, you can begin to view information about taxpayers. Some of the information you will have access to include:

- Customer Profile listing demographic information about the taxpayer.

- Bank Account information to include bank account, routing and transit numbers.

- Tax Account information for Individual, Fiduciary, Corporate Income, Withholding, and Sales and Use tax types.

- Business Location information to include demographic, locality, and associated tax account information.

- Tax Account Period information for each tax account. Returns are associated with a Tax Account Period.

- Tax returns, which include return type, return status, Submitted/Processed dates, amount, line item entries, and adjustments.

- History information for all available years in the system.

Note: Not everyone will be able to see exactly the same information. The details of your agency's MOU determine what taxpayer information you can access. Some kinds of information are secured. This means you need special levels of authorization to view or change it, but the information you need for your daily work is readily available to you.

Note: Based on your agency's MOU, you can access individual taxpayer information regardless of locality, and you can view information (such as Corporate Income or Withholding Tax Account entries) about business taxpayers in your locality and up to 20 adjacent localities. In addition, if a business taxpayer has a Sales Tax or Use Tax account, you can view Customer Profile, bank account, business location, and Sales or Use tax account information for that customer regardless of locality, provided your MOU allows it.

2.2 Getting Started

2.2.1 Starting a Session – First Login

IRMS is an online application, which is accessible by navigating to the External Web Applications page on the TAX web site and logging into the application. After entering your login information, the Duo Security (Duo) application validates your credentials before IRMS opens.

Step 1: Enter the following web address into your browser, or click the link below:
www.tax.virginia.gov/external

The **Virginia Department of Taxation External Web Applications** page opens.

Step 2: Click the *Log on to IRMSWeb* link on the page.

After clicking the IRMSWeb link on the web site, the IRMS Login window opens.

Step 3: Enter your *User ID* and *Password* into the applicable window fields.

Step 4: Click **OK**.

Password Change

The first time you log into IRMS, or whenever your password is reset, the application prompts you to change your password.

When creating a new password, the following criteria must be met:

1. Passwords need to be 8 to 16 characters long.

2. Passwords must contain at least three of the following four items:

    - Alphabetical characters

    - Numeric characters

    - Special characters

    - Combination of upper case and lower case letters

3. Passwords with spaces are not allowed.

4. A previous password can be reused after using 24 additional passwords.

After entering and verifying the new password, click **OK**.

In addition to the first-time login, you can also choose to change your password at any time. *See **Change Password** for the steps for creating a new password.*

### 2.2.2 Duo Login Credentials Authentication

Each time you enter your User ID and Password into IRMS, the Duo application launches and generates a call to your registered telephone number.
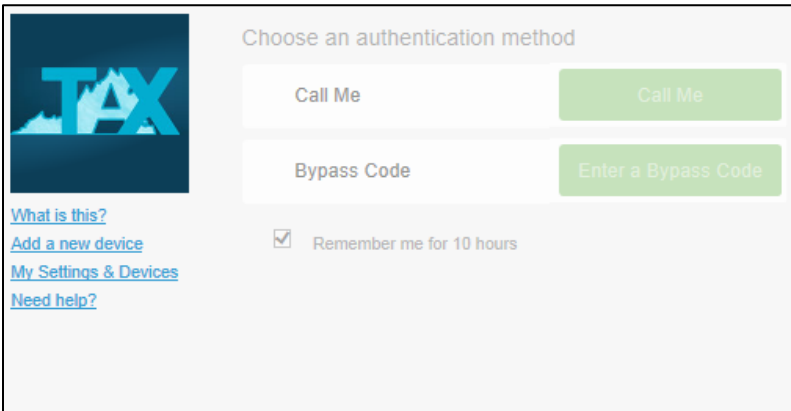
Step 1: Perform one of the following options when you receive a call from Duo:

- **Press any number on your phone** to authenticate your credentials.

- **Hang up** if you did not attempt to login to IRMS, preventing any unauthorized access.

When authenticated, the IRMS Desktop opens and the following pop-up windows appear sequentially.
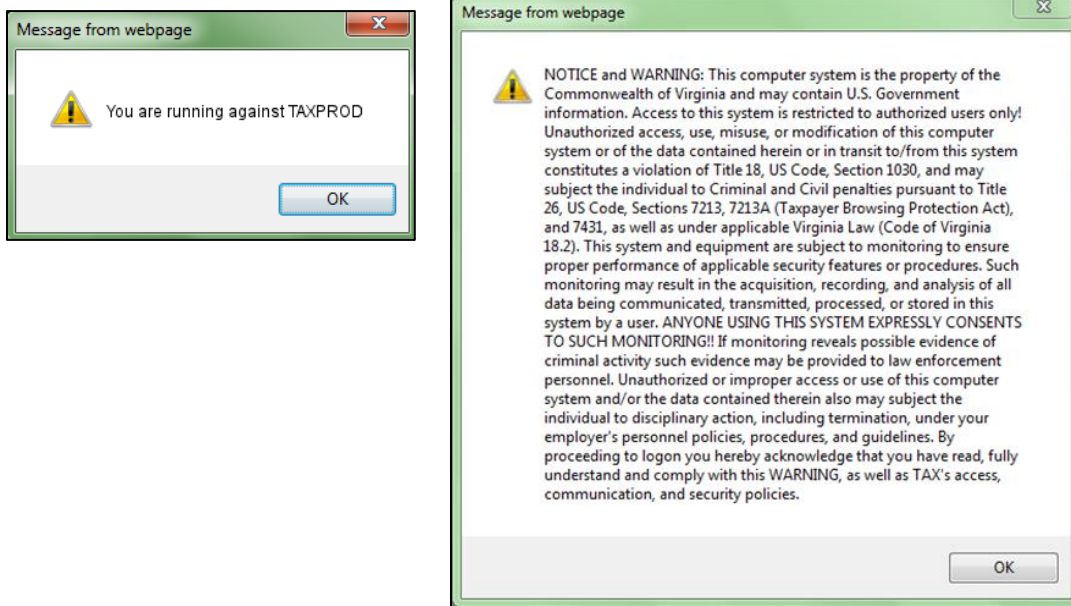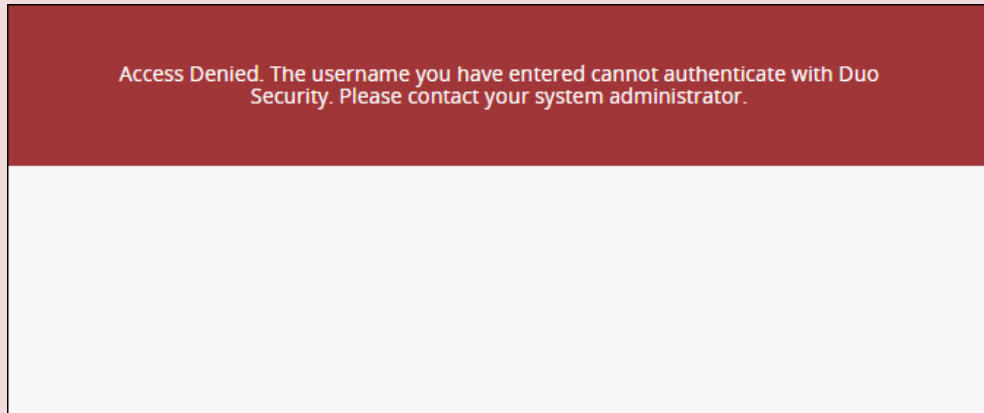

Step 2: Click **OK** to close each pop-up and to begin using the IRMS Desktop.

UPDATING DUO

If your telephone number changes, you will need to submit an IRMS Authorization Request Form (SA-IRMS-E) to Virginia Tax to have your user profile updated with the new telephone number. The SA-IRMS-E form can be downloaded from the Virginia Tax web site and includes instructions for submitting the form to Virginia Tax.

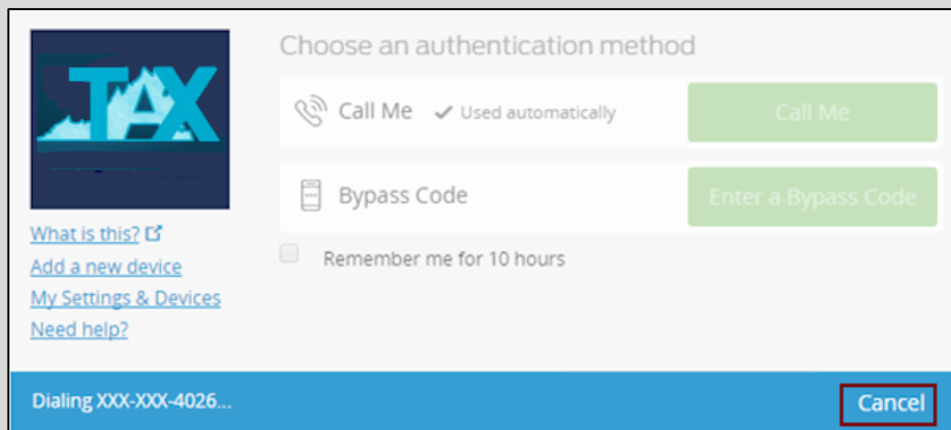*If Duo is unable to authenticate your credentials, the window below appears.*

Access Denied. The username you have entered cannot authenticate with Duo Security. Please contact your system administrator.

*Call the VITA Customer Care Center (VCCC) at **866-637-8482** to resolve any access issues, or any Duo login problems you may have.*

Additional Information

If you didn't select the R*emember me for 10 hours* checkbox during enrollment and decide later that you do want to use this feature, follow the steps below:

**Step 1:**   Login to IRMS. After login, Duo launches.

Choose an authentication method

Call Me ✓ Used automatically   Call Me

Bypass Code   Enter a Bypass Code

What is this?
Add a new device
My Settings & Devices
Need help?

☐ Remember me for 10 hours

Dialing XXX-XXX-4026...   Cancel

Step 2:   Click the **Cancel** button at the bottom of the window.

Step 3: Click the Remember me for 10 hours indicator.

Step 4: Click Call Me to resume authenticating your credentials.

2.2.3 IRMS Main Window

After you have successfully logged into IRMS, you will see the IRMS Main window. All of your work in IRMS will originate from this window.

The contents of this window include:

- ■ **Title Bar** identifies which window you have accessed and includes the standard windows resizing buttons.

- ■ **Menu Bar** lists the pull down menus that are used to access IRMS windows. The menus displayed on the Menu Bar may change depending on which IRMS window is active. You can display the contents of each window by clicking on the menu and choosing an item from the pull-down boxes.

- ■ **Display Area** contains the specific window you have accessed. The illustration below is the IRMS Main window.
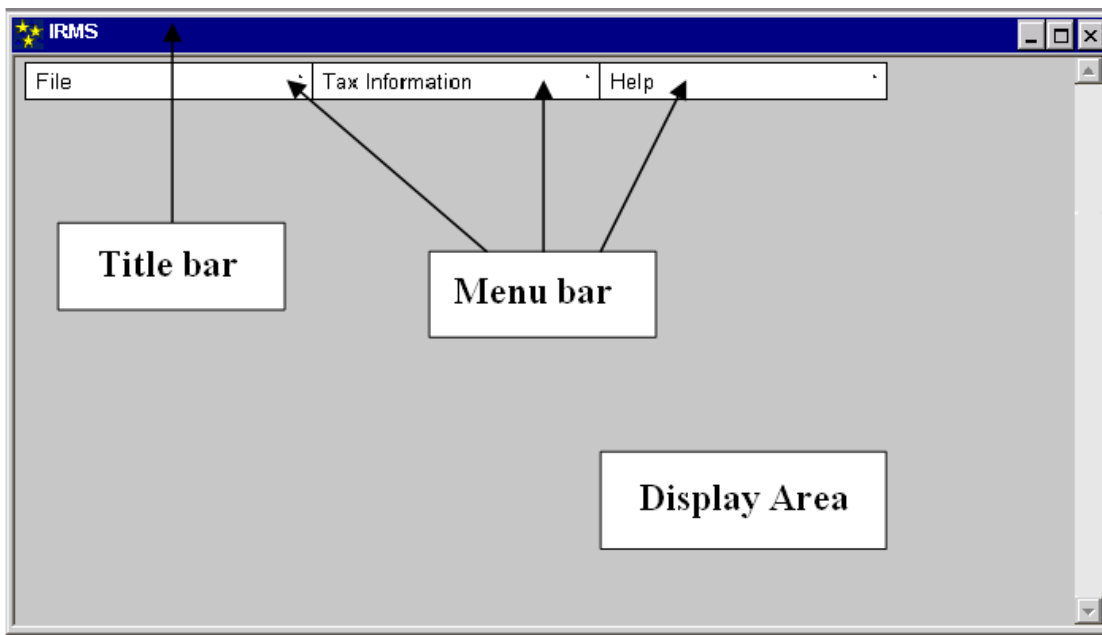

The IRMS Main Menu Bar

The Menu Bar contains three menus: **File**, **Tax Information**, and **Hel**p. To access the information in IRMS, you must choose an activity from one of these menus.

Note: Depending on your role, the menus shown in the illustration above may vary.

The illustration below is the IRMS Main window – **File** menu. The File menu provides you the ability to print or close the current window, and to exit IRMS.

The illustration below is the IRMS Main window – **Tax Information** menu.

Note: Depending on your role, you may not have all of the menu selections shown in the illustrations below.

This is the menu that you will use most often to navigate in IRMS and access information.

The illustration below is the IRMS Main window – **Help** menu. The Help menu provides on-line help on IRMS topics.
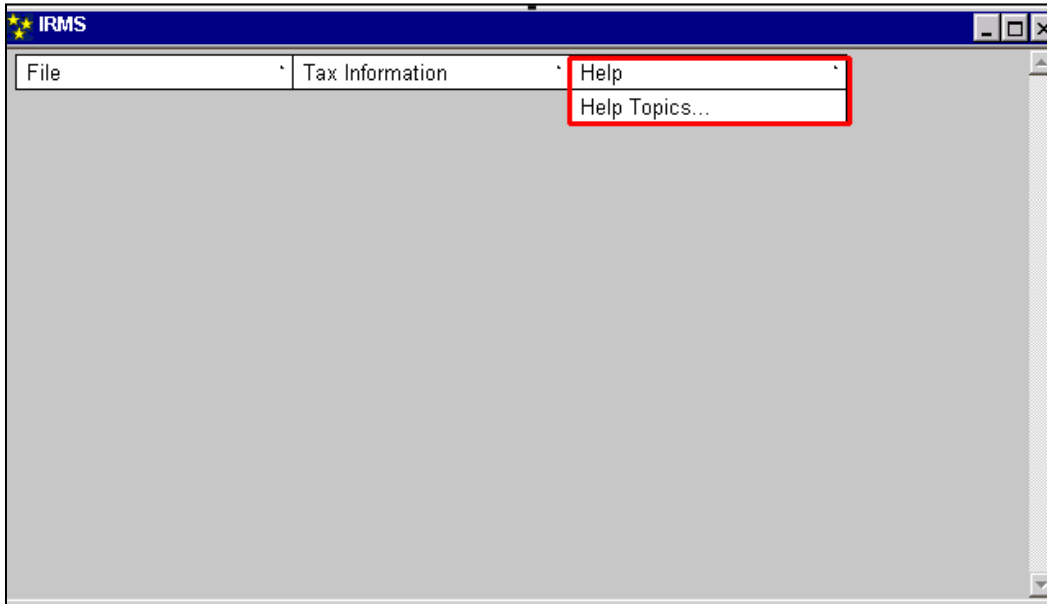
2.2.4 IRMS Windows

After you have selected an item from one of the menus on the Main window, you will view an IRMS window displaying the information you selected. There are several different types of windows in IRMS. The types of windows include:

■ **List** - These windows display lists of items that you can select to view additional information. You highlight an item on the list to view a Detail window.

■ **Detail** - These windows contain fields for you to view, enter, or change information.

■ **Pop-up** - These windows are intended to make you aware of the consequences of your actions. Most often, they either remind you of what you have done, or ask for a confirmation that you have done what you intended. These message boxes and error messages are discussed in the appropriate chapter(s).

The illustration below is an example of a **List** window:
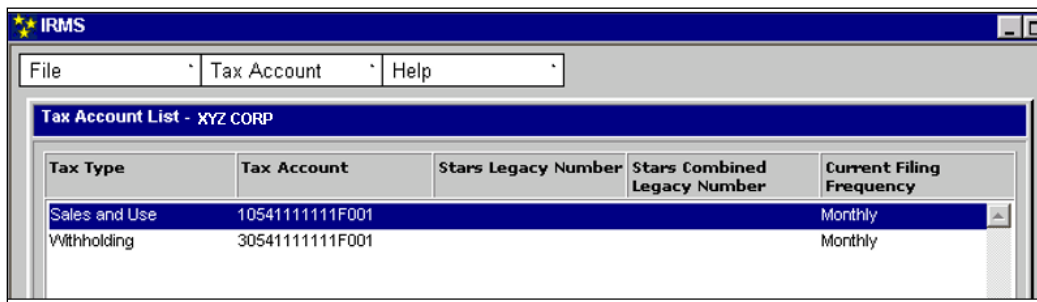
The illustration below is an example of a **Detail** window:

The illustration below is an example of a **Pop-up** window.

2.3 Ending a Session

To end an IRMS session, you must return to the IRMS Main Window.

Step 1:   From the **File** menu, select the **Exit** option. You receive a system prompt pop-up window asking you to confirm the exit.

A pop-up window asks you to confirm the exit.

Step 2:   Click **OK** to exit IRMS.