

3 CHAPTER: PERFORM SEARCHES IN IRMS

3.1 Overview

IRMS houses demographic data about each taxpayer, such as name, address, and Social Security Number (SSN) or Federal Employer Identification Number (FEIN). You can view this information on the Customer Profile window in the IRMS Web application.



Note: The windows containing customer information are display only. The information cannot be modified without contacting TAX.

3.2 Customer Search

A Customer Search is performed to access the Customer Profile window in IRMS. Customer information can be obtained by entering search criteria for **one** of the following Search By options:

- **External ID** - searches on FEIN or SSN
- **Name** – searches on customer name
- **Address** – searches on domestic or international address
- **Name and Address** – searches on name and domestic or international address

The default Customer Search option is External ID.

3.2.1 Customer Search By External ID

The External ID option in the Search By area performs a search based on the FEIN (Federal Employer Identification Number) for a business customer or SSN (Social Security Number) for an individual customer.

Search Criteria By External ID Window

The window below shows the Search Criteria window with the External ID option selected in the Search By area.

Individual Customer Profile Window

The illustration below is the individual Customer Profile window.

Individual Customer Profile Window - Fields

The table below lists the fields in the individual Customer Profile window and provides a brief description of each.

Field	Field Type	Description
SSN	System Generated	The taxpayer's Social Security Number.
Entity Type	System Generated	The type of taxpayer (i.e., Individual Income).
Name	System Generated	The name of the taxpayer associated with the Social Security Number.
Street	System Generated	The street address on which the customer resides.
City	System Generated	The city in which the customer resides.
State	System Generated	The state in which the customer resides.
Zip	System Generated	The zip code in which the customer resides.
Undeliverable	System Generated	When checked, indicates past attempts to deliver mail to this address have failed and no newer address is available.
Last Address Update	System Generated	The last date on which the address saved in IRMS for the customer was updated.

Business Customer Profile Window

The illustration below is the Customer Profile window for a C Corporation. The Customer Profile window may vary slightly depending on the business type.

Business Customer Profile Window – Fields

The table below lists the fields in the Customer Profile window for a business and provides a brief description of each.

Field	Field Type	Description
FEIN	System Generated	The Federal Employer Identification Number of the business.
SSN	System Generated	The Social Security Number if the business owner is an individual and does not have an FEIN.
Entity Type	System Generated	The type of taxpayer, (i.e., Partnership, Corporation, etc.).
Legal Business Name	System Generated	The name under which the business is legally registered.
Primary NAICS	System Generated	(North American Industry Classification System) - a 6-digit code classifying establishments by the type of activity in which they are primarily engaged.
Street	System Generated	The street address on which the customer resides.
City	System Generated	The city in which the customer resides.
State	System Generated	The state in which the customer resides.
Zip	System Generated	The zip code in which the customer resides.
Undeliverable	System Generated	When checked, indicates past attempts to deliver mail to this address have failed and no newer address is available.
Last Address Update	System Generated	The last date on which the address saved in IRMS for the customer was updated.

3.2.2 Customer Search by Name

The Name option in the Search By area performs a search based on the business customer’s Legal Business Name or Trading As Name, or the individual’s full name.

Search Criteria By Name Window

The window below shows the Search Criteria window with the Name option selected in the Search By area.

Search Criteria By Name Fields


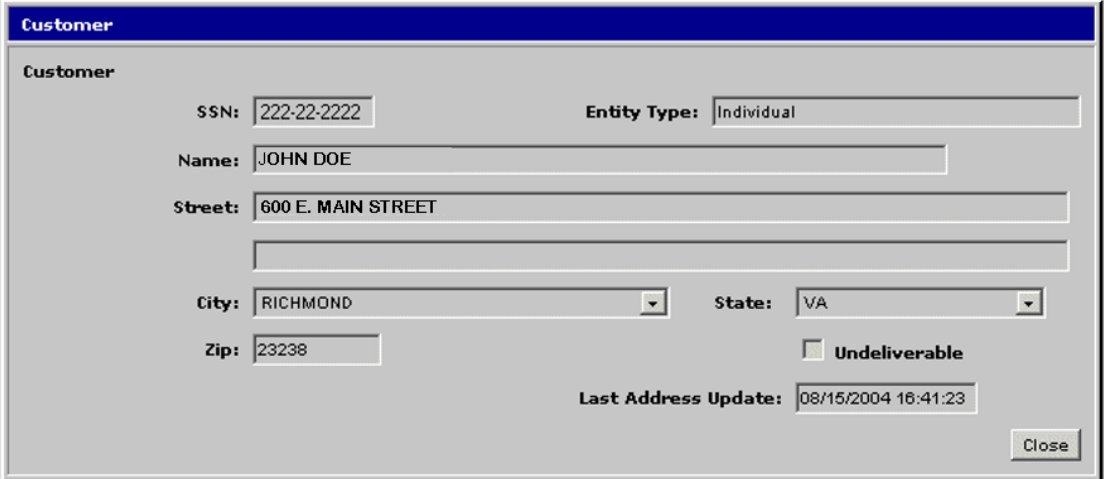
The table below identifies the fields on the Customer Search Window when Name is indicated in the Search By Group Box.

Field	Field Type	Description
Legal Business Name	Required for business customer (when not entering a Trading As Name)	The Legal Business Name of the business customer.
Trading As Name	Required for business customer (when not entering a Legal Business Name)	The Trading As Name of the business customer.
Last Name	Required for individual customer	Last Name of the individual customer.
First Name	Optional	First Name of the individual customer.
MI	Optional	Middle Initial of the individual customer.

Search for a Customer By Name

To execute a Customer Search using the customer’s name, the following steps are performed:

Step 1: From the IRMS desktop, select **Tax Information: Customer Search**. The Search Criteria window opens and displays the External ID search option by default.

Result	Action
	
2. One match found	IRMS displays the Customer Profile.
	
3. Multiple matches found	<p>The Customer List Window opens and displays all customers matching the search information you entered.</p> <p>Select the appropriate customer in the list and click OK to open the Customer Profile.</p>

Result	Action
--------	--------

<p>3. Multiple matches found</p>	<p>The Customer List Window opens and displays all customers matching the search information you entered.</p> <p>Select the appropriate customer in the list and click OK to open the Customer Profile.</p>
---	--

Customer List			
Customer		Street	
FEIN	SSN	City, State, ZIP Code	Locality
DOE, JOHN	111-22-3333	600 MAIN STREET FAIRFAX, VA 23226	FAIRFAX COUNTY - 51059
DOE, JOSEPHINE	222-33-4444	500 MAIN STREET FAIRFAX, VA 23226	FAIRFAX COUNTY - 51059
DOE, JANE	333-44-5555	300 MAIN STREET FAIRFAX, VA 23226	FAIRFAX COUNTY - 51059

3.2.4 Customer Search by Name and Address

The Name and Address option in the Search By area performs a search based on the customer's name and domestic or international address.


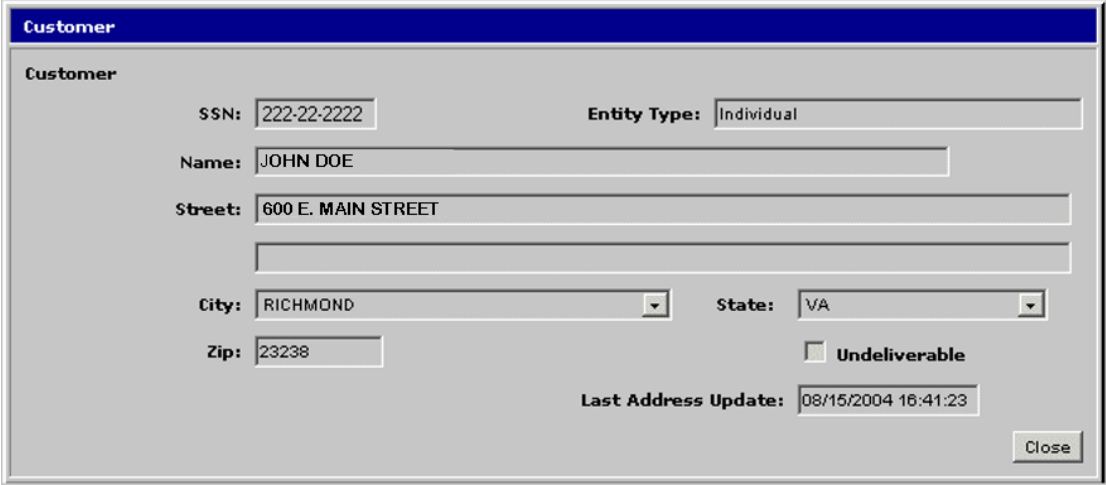
Field	Field Type	Description
State	Required	State in which the customer resides.
Zip Code	Optional	Zip code in which the customer resides.
FIPS	Optional	Name and code of the locality in which the customer resides.
International	Optional (for international address only)	Indicator that, when checked, displays the fields necessary to search for an international address.
Country	Required (for international address only)	Country associated with the international address.
Province	Optional (for international address only)	Province associated with the international address.
Postal Code	Optional (for international address only)	Postal Code associated with the international address.

Search for a Customer By Name and Address

To execute a Customer Search using the customer's name and address, the following steps are performed:

Step 1: From the IRMS desktop, select **Tax Information: Customer Search**. The Search Criteria window opens and displays the External ID search option by default.

Step 2: Select the **Name and Address** option in the Search By area. The fields on the Search Criteria window change to allow for the entry of the customer's name and address.

Result	Action
1. No matches found	<p>IRMS displays the message “No matching records were found.”</p> <p>Click OK to return to the Search Criteria window and enter different search information.</p>
	
2. One match found	<p>IRMS displays the Customer Profile.</p>
	
3. Multiple matches found	<p>The Customer List Window opens and displays all customers matching the search information you entered.</p> <p>Select the appropriate customer in the list and click OK to open the Customer Profile.</p>

