

5 CHAPTER: VIEW CLAIM INFORMATION

In the IRMS web application, you can review your claims at various stages of the Set-Off process. Viewing either the Claims Summary or Claims Detail windows, you can see claim status, claim history, contested claims, and finalized claims.



Note: Set-Off Agency Representatives can only view claims that belong to their agency.

5.1 View Claim Summary Information

The Claims Summary window is used to review claims and claim activity for an individual or a business. The window displays a list of claims for a specific business debtor by Federal Employer Identification Number (FEIN), or for an individual debtor by Social Security Number (SSN).

The claims displayed include:

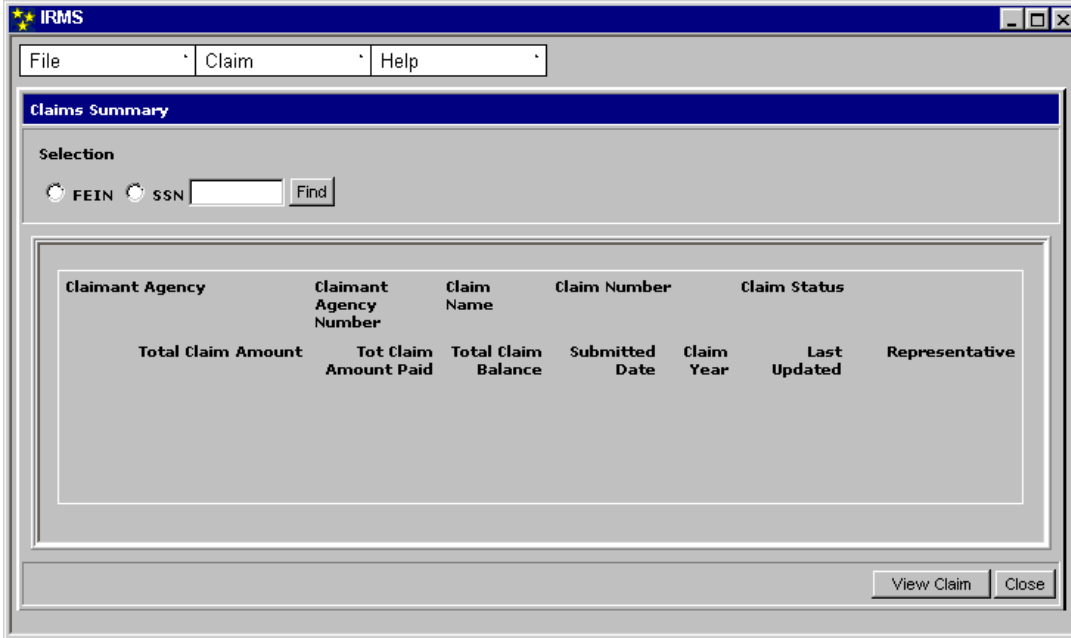
- All claims for the current year
- All claims with a “Matched” status that are carried over from the prior year to the current year
- All new claims submitted from November 1 - December 31 for the next year

Claims Summary Window

The illustration below is the Claims Summary window.

Field	Field Type	Description
Total Claim Balance	System Generated	Amount remaining to be paid.
Submitted Date	System Generated	Date the claim was submitted by the agency.
Claim Year	System Generated	The year the claim is submitted.
Last Updated	System Generated	The date of the last update to the claim.
Representative	System Generated	The name of the IRMS user who submitted the claim.





Step 2: Select the **FEIN** or **SSN** radio button.

Step 3: Enter a nine-digit **FEIN** or **SSN** (no hyphens).

Step 4: Click **Find**.

The Claim Summary window opens. It displays all of the claims for the debtor's FEIN/SSN for your agency.



Step 5: Click **Close** to exit the Claims summary window and return to the IRMS Main window.

Claim Detail Fields

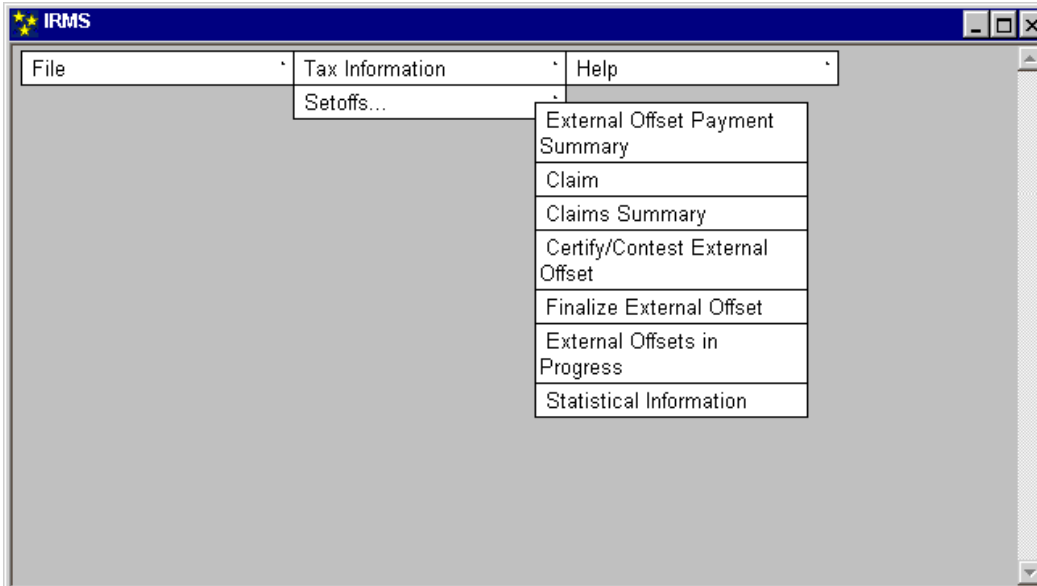
The table below lists the fields in the Claim Detail window and provides a brief description of each.

Field	Field Type	Description
FEIN:	Required	The FEIN (Federal Employer Identification Number) for the Business.
SSN:	Required	The Individual Social Security Number.
Claimant Agency	System Generated	The name of the set-off agency that owns the claim.
Claimant Agency Number	System Generated	Each set-off agency has an assigned number.
Claim Name	System Generated	The same name as the Debtor identified by the SSN or FEIN.
Claim Number	System Generated	The number of the claim that was assigned by the system when it was initially created.
Claim Status	System Generated	Current Status of the Claim in the process.
Total Claim Amount	System Generated	The original value of the claim.
Total Claim Amount Paid	System Generated	Amount already paid on the claim – if any.
Total Claim Balance	System Generated	Amount remaining to be paid – if any.
Matched Amount	System Generated	The total amount of money from all of the matches pending finalization.
Finalized Amount	System Generated	The total amount of money that has been applied to the claim.
Released Amount	System Generated	Released Amount: The total amount of money matched to the claim and released by the set-off agency.
Submitted Date	System Generated	Date the claim was submitted by the agency.
Claim Year	System Generated	The year for which the claim is submitted.
Last Update	System Generated	The date of the last update to the claim.
Representative	System Generated	The name of the IRMS User who submitted the claim.
Funding Source Type	System Generated	The resource that was matched to a claim (a Tax Overpayment, Lottery Payment, DOA Payment, or DCA Payment).
Tax Account Period	System Generated	The tax period of time against which the claim is made.

Field	Field Type	Description
Match Amount	System Generated	The amount of money that has been matched against this claim.
Match Status	System Generated	The current state of the match in IRMS (i.e. Active, Certified, Contested, Finalized, Withdrawn, or Defaulted).
Match Date	System Generated	The date a match was made to the claim.
Match ID	System Generated	A nine (9)-digit number that uniquely identifies the match.
Certified Date	System Generated	Date the Set-off agency notified the debtor that the match occurred.
Initial Contested Date	System Generated	The date the claim was first contested (if applicable).
Finalized Amount	System Generated	The amount the Set-Off agency agreed to accept (all, partial, or none).
Finalized Date	System Generated	Date the amount was finalized.
Last Update	System Generated	Date of last update of the claim.

View Claim Detail Information

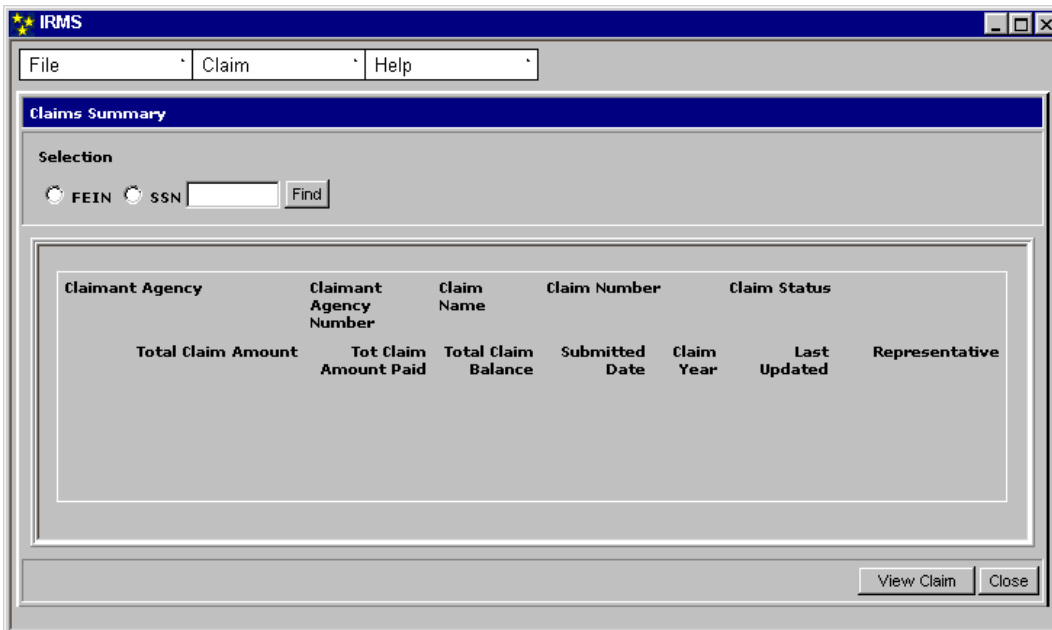
To view the Claim Detail window, the following steps are performed:



Step 1: Select: **Tax Information: Setoffs: Claims Summary**.
The Claims Summary window opens.



Note: In the Claims Summary window, claims are displayed in priority matching order with the highest priority claim listed first. The claims are sorted by claim number, and list the current status and money allotments.



Step 2: Select the **FEIN** or **SSN** radio button.

Step 3: Enter a 9-digit **FEIN** or **SSN**.

Step 4: Click **Find**. The Claim Summary window opens. It displays all of the claims for the debtor's FEIN/SSN for your agency.

Claims Summary

Selection

FEIN SSN 111-22-333 Find

Claimant Agency	Claimant Agency Number	Claim Name	Claim Number	Claim Status	Total Claim Amount	Tot Claim Amount Paid	Total Claim Balance	Submitted Date	Claim Year	Last Updated	Representative
Henrico County	251087000	Jane Doe	3763	Paid	\$250.00	\$250.00	\$0.00	03/20/2005	2004	03/20/2005	John Doe

View Claim Close

Step 5: From the Claims Summary window, **click once** on the desired claim to highlight it.

Step 6: Click **View Claim**.
The Claim Detail window opens.

Claim Detail

Customer

FEIN/SSN: 111-22-3333

Claim

Claimant Agency: Henrico County Claimant Agency Number: 251087000

Claim Name: Jane Doe

Claim Number: 3763 Claim Status: Paid

Total Claim Amount: \$250.00 Total Claim Amount Paid: \$250.00 Total Claim Balance: \$0.00

Matched Amount: \$250.00 Finalized Amount: \$250.00 Released Amount: \$0.00

Submitted Date: 03/20/2005 Last Update: 05/01/2005 Representative: John Doe

Funding Source Type	Tax Account Period	Match Amount	Match Status	Match Date	Match ID	Certified Date	Initial Contested Date	Finalized Amount	Finalized Date	Last Update
Tax Overpayment	2005	\$250.00	Finalized	04/08/2005	000024733	04/09/2005		\$250.00	05/01/2005	05/01/2005

Close

Step 7: Click **Close** to exit the Claim Detail window and return to the Claims Summary window.

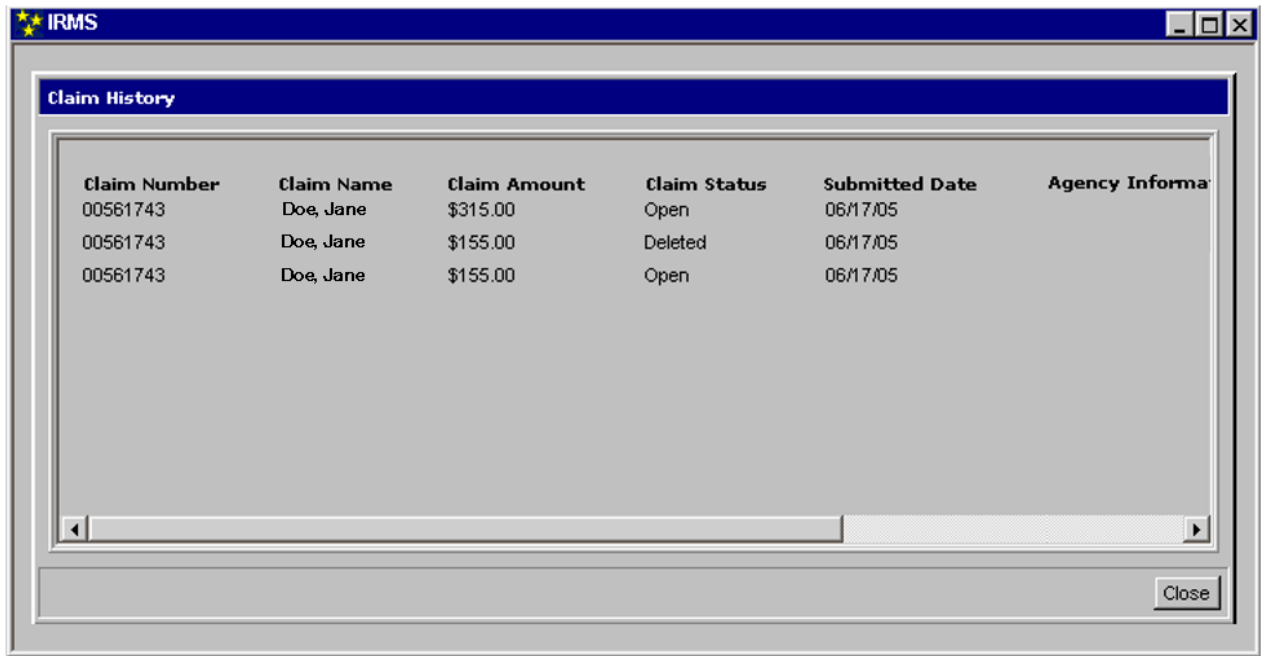


5.3 View Claim History

The Maintain Claim Information window displays the history of all actions taken on a claim. Both those actions initiated by an Agency Representative and by IRMS are recorded.

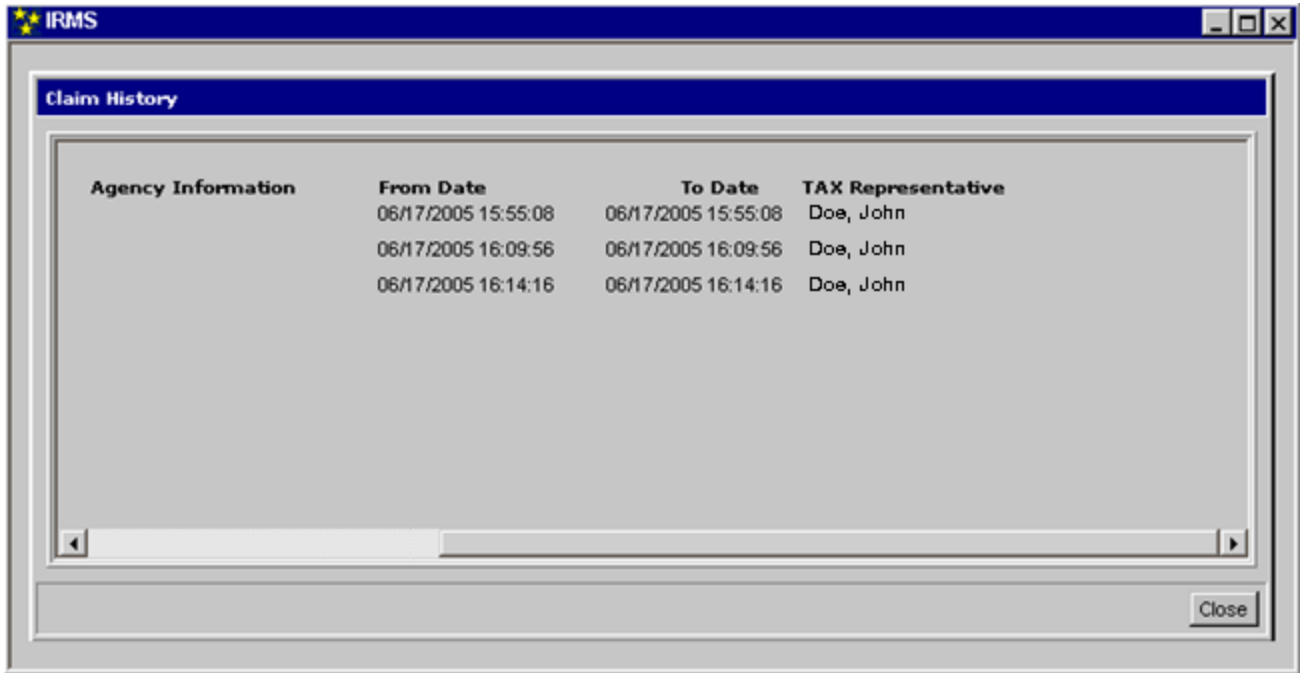
Claim History Window

The illustration below is the Claim History window-left portion of window.



Note: This window is larger than the display area. You must use the horizontal scroll bar to see the remainder of the information.

The illustration below is the Claim History window-right portion of window.



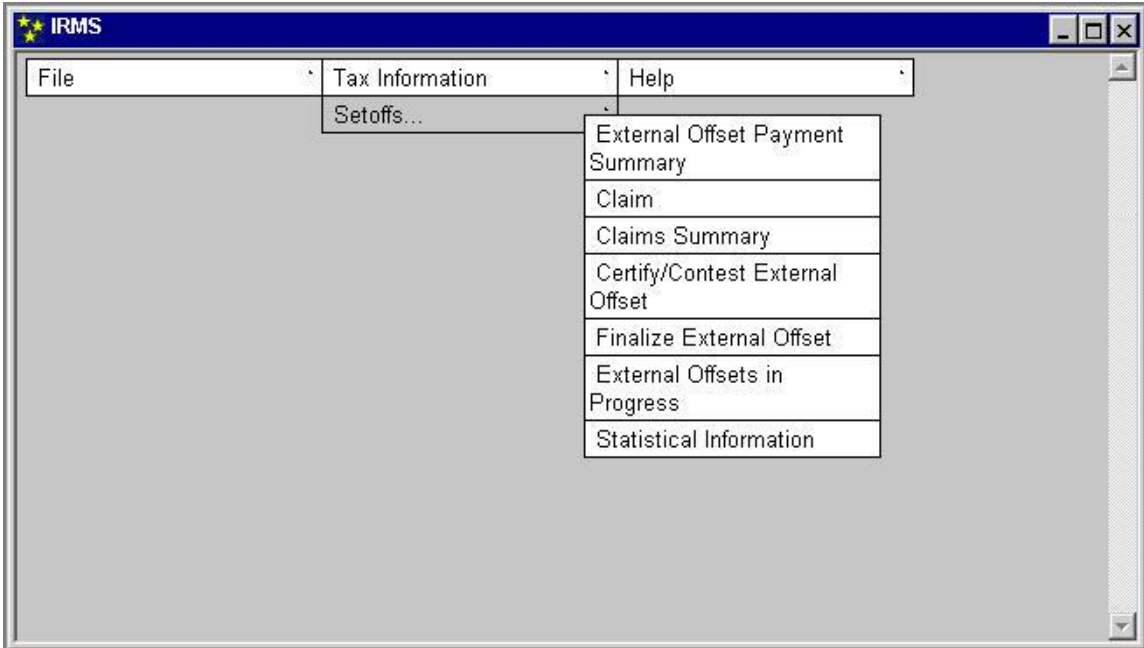
Claim History Fields

The table below lists the fields in the Claim History window and provides a brief description of each.

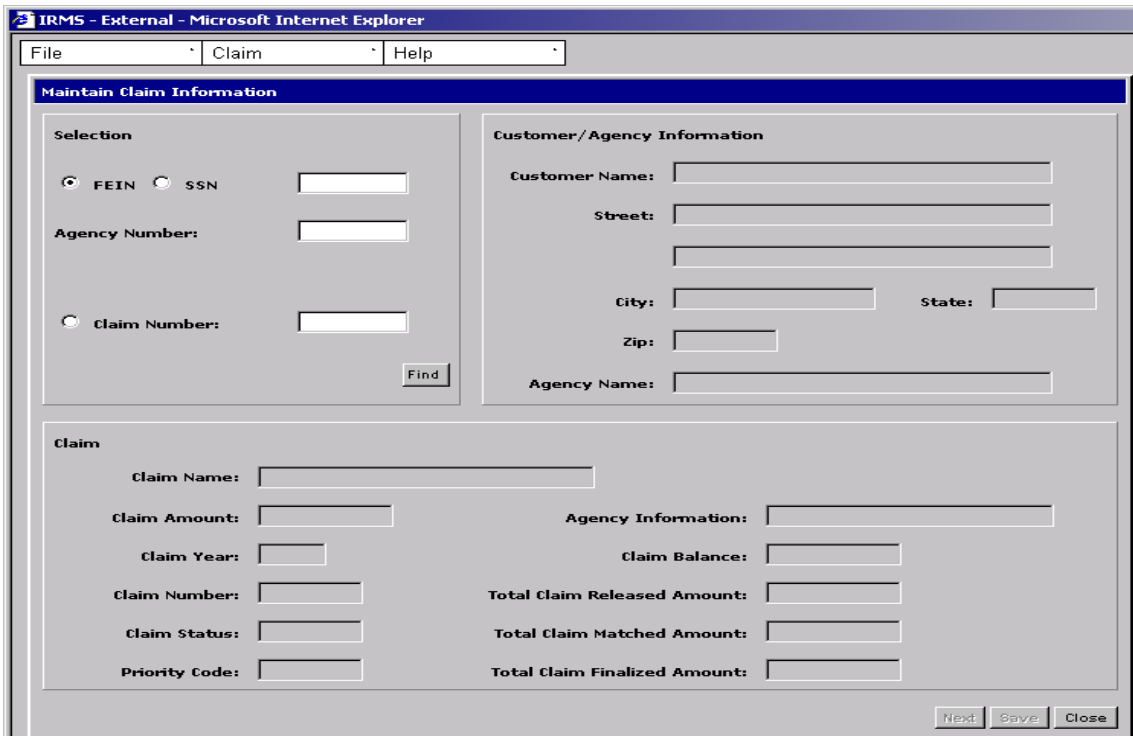
Field	Field Type	Description
Claim Number	Display	The number assigned to the claim.
Claim Name	Display	The name of the Debtor identified by the SSN or FEIN.
Claim Amount	Display	The dollar amount of the claim.
Claim Status	Display	The current state of the claim (i.e. Valid, invalid, Open, Matched, Deleted, Paid).
Submitted Date	Display	The date the claim was submitted to IRMS, or the date the action was taken.
Agency Information	Display	A description entered by the Set-off Agency to provide more information about the debt.
From Date	Display	The effective date of the claim status listed for this history line.
To Date	Display	The date the claim status for this history line changed.
TAX Representative	Display	The individual at TAX or at the Set-off Agency who performed the action.

View Claim History

To view claim history, the following steps are performed:



Step 1: From the IRMS Main window, select **Tax Information: Setoffs: Claim**. The Maintain Claim Information window opens.

A screenshot of the "Maintain Claim Information" window, which is displayed within a Microsoft Internet Explorer browser. The browser title is "IRMS - External - Microsoft Internet Explorer". The window has a menu bar with "File", "Claim", and "Help". The main content area is titled "Maintain Claim Information" and is divided into several sections:

- Selection:** Contains radio buttons for "FEIN" (selected) and "SSN", followed by a text input field. Below this is "Agency Number:" with a text input field. At the bottom of this section is a "Find" button.
- Customer/Agency Information:** Contains text input fields for "Customer Name:", "Street:" (with two stacked fields), "City:", "State:", "Zip:", and "Agency Name:".
- Claim:** Contains text input fields for "Claim Name:", "Claim Amount:", "Claim Year:", "Claim Number:", "Claim Status:", "Priority Code:", "Agency Information:", "Claim Balance:", "Total Claim Released Amount:", "Total Claim Matched Amount:", and "Total Claim Finalized Amount:".

At the bottom right of the window are three buttons: "Next", "Save", and "Close".

Step 2: Select the **Claim Number**.

Step 3: Type the **Claim Number**.

Step 4: Click **Find**.

The results of the search are displayed in the Debtor/Agency Information area of the window.

IRMS - External - Microsoft Internet Explorer

File Claim Help

Maintain Claim

Reinstate

Delete

History

Selection

FEIN SSN

Agency Number:

Claim Number:

Find

Customer/Agency Information

Customer Name:

Street:

City: State:

Zip:

Agency Name:

Claim

Claim Name:

Claim Amount: Agency Information:

Claim Year: Claim Balance:

Claim Number: Total Claim Released Amount:

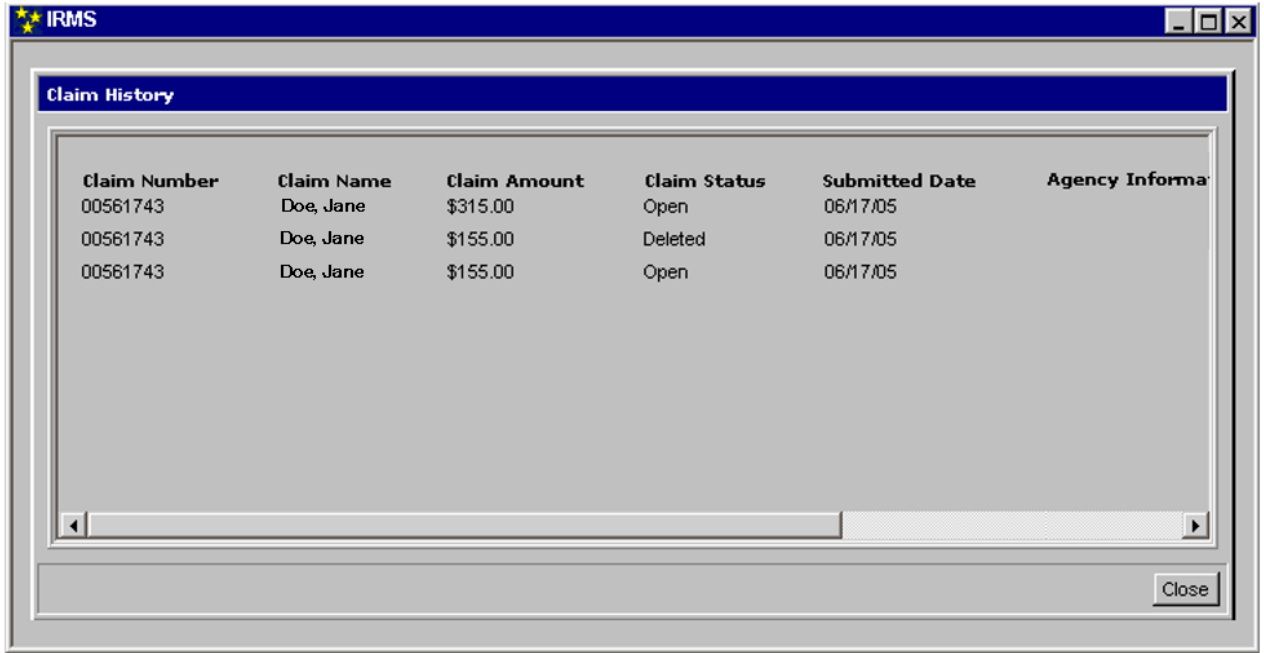
Claim Status: Total Claim Matched Amount:

Priority Code: Total Claim Finalized Amount:

Next Save Close

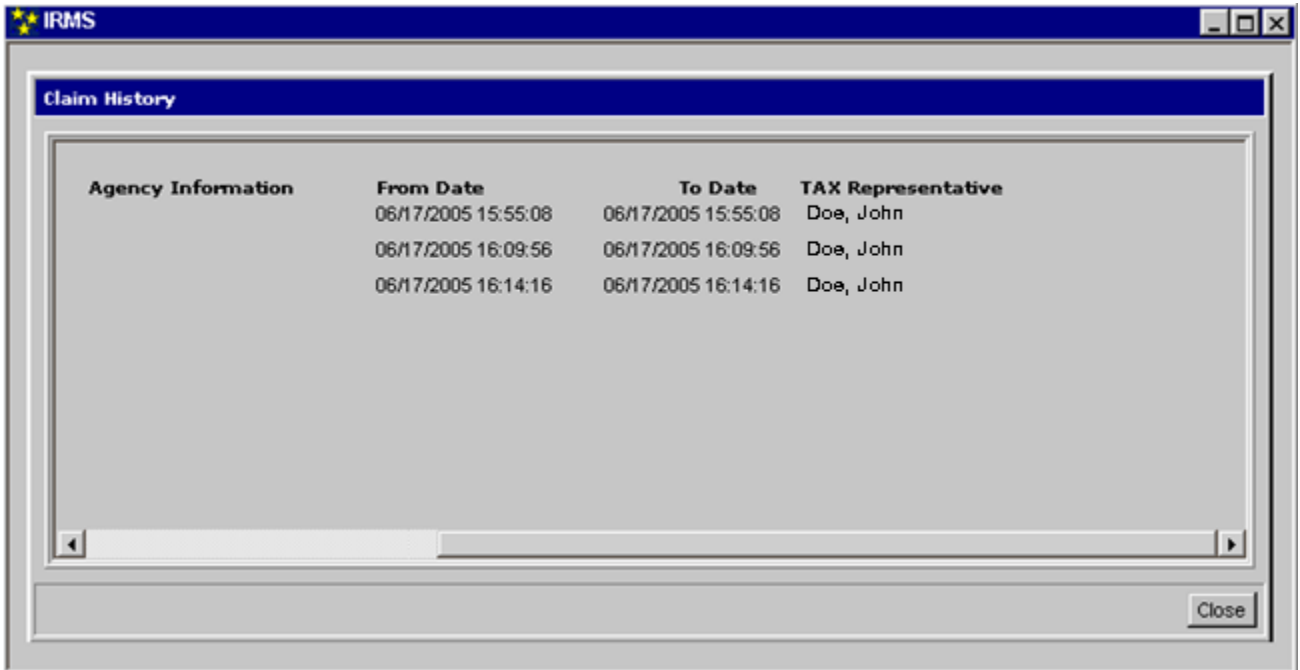
Step 5: Select **Claim: History**.

The Claim History window opens. This window displays the history of actions taken on a claim by an Agency Representative or by IRMS.



Note: This window is larger than the display area. You must use the horizontal scroll bar to see the remainder of the information.

Step 6: **Scroll Right** to see the remaining fields on the right side of the window.



Step 7: Click **Close** to exit this window and return to the IRMS Main window.