

## 8 CHAPTER: VIEW EXTERNAL OFFSETS IN PROGRESS

From the IRMS main window, you can view External Offsets (Matches) in Progress using the External Offsets in Progress window. The External Offsets in Progress window displays a list of only the claims where money has been offered, but the match has NOT been finalized.

To be displayed on this window, the matched claim status must be one of the following:

- Pending Default
- Active
- Certified
- Contested



**Note:** Once the claim is finalized, it is removed from the External Claims in Progress window, and the match history is recorded on the Claim Detail window.

You can also use the External Offsets in Progress window to access the Certify-Contest External Offset and the Finalize External Offset windows. Once you enter data in this window, you can select the Certify, Contest, or Finalize buttons. The information will carry over to these windows and does not have to be re-entered.



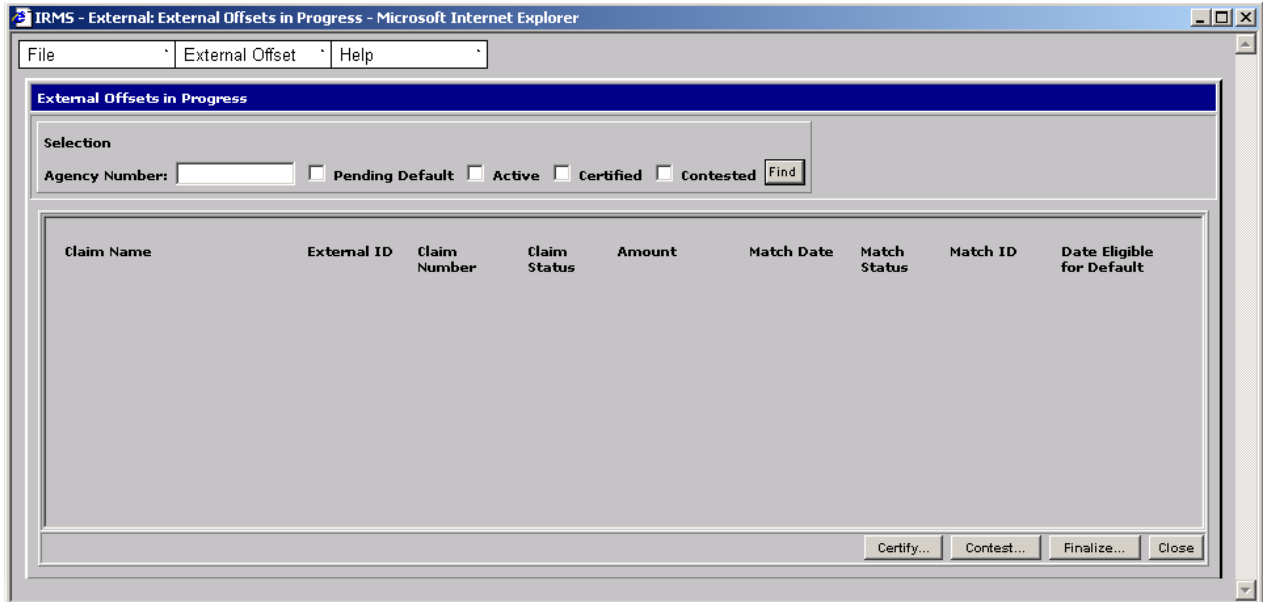
**Note:** The Virginia Department of Taxation will attempt to notify your agency's Set-Off Debt Coordinator (SODC) when a claim is matched, and when a default date is approaching. However, there is no guarantee the email will be delivered, or that your SODC is available to work on the claim at that time.

**It is very important for someone at your agency to check the External Offsets In Progress window at least once a week to make sure there are no matches in danger of default.**

**Once a match has defaulted, the money is returned to the customer or applied to another claim. It is no longer available to settle the debt to your agency.**

## External Offsets in Progress Window

The illustration below is the External Offsets in Progress window.



## External Offsets in Progress Fields

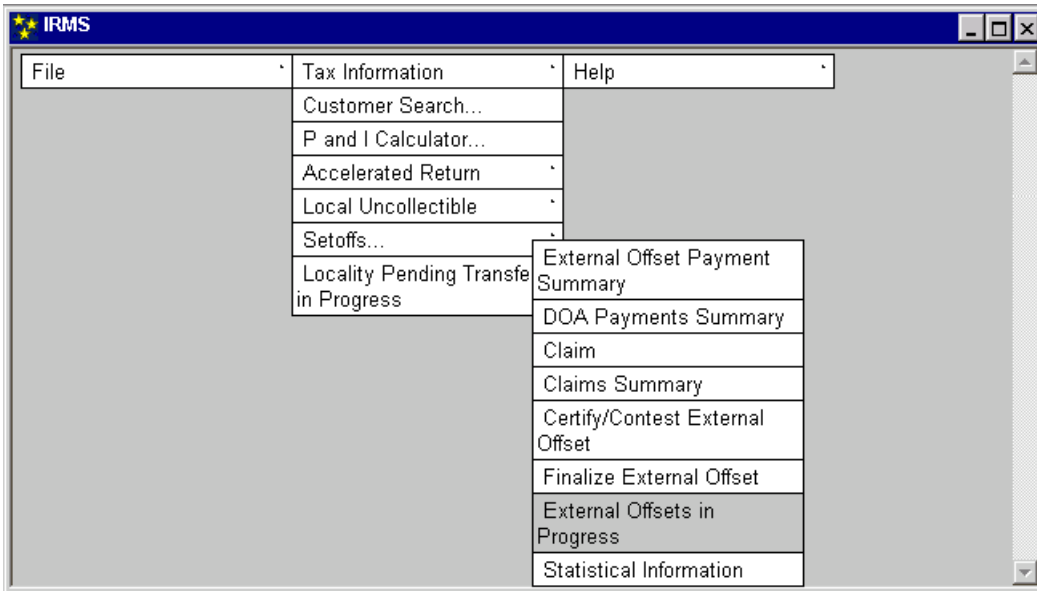
The table below lists the fields in the External Offsets in Progress window and provides a brief description of each.

Field	Field Type	Description
Agency Number	Required	Unique, assigned number of the Set-Off Agency. This number is provided by TAX.
Pending Default	Optional	Selecting this option displays only those claims with a date that is eligible to default within the next seven calendar days. This option can be combined with any other selection option.
Active	Optional	Selecting this option displays only those claims that are active (i.e., not finalized, defaulted, nor withdrawn). This option can be combined with any other selection option.
Certified	Optional	Selecting this option displays only those claims for which the taxpayer has been notified. This option can be combined with any other selection option.
Contested	Optional	Selecting this option displays only those claims that are being appealed (or contested) by the taxpayer. This option can be combined with any other selection option.
Claim Name	System Generated	Name of the taxpayer identified by the SSN/FEIN.

Field	Field Type	Description
External ID	System Generated	Social Security Number (SSN) or Federal Employer Identification Number (FEIN) of the taxpayer.
Claim Number	System Generated	Unique number automatically assigned to the claim by the system.
Claim Status	System Generated	Current status of the claim in the set-off process (such as Open, Matched, or Deleted).
Amount	System Generated	Amount of the claim.
Match Date	System Generated	Date a match was made to the claim.
Match Status	System Generated	Current status of the match (such as Pending Default, Active, Certified, or Contested).
Match ID	System Generated	Nine-digit number that uniquely identifies the external offset/match.
Date Eligible for Default	System Generated	Date that the external offset will become eligible for default.

### View External Offsets in Progress

To view the External Offsets in Progress window, the following steps are performed:



**Step 1:** From the IRMS Main window, select: **Tax Information: Setoffs: External Offsets in Progress.**





**Note:** Using the buttons along the bottom of the window, you can select a match and access the Certify-Contest External Offset window to **Certify** and/or **Contest** the match. Or, you can select a match and access the Finalize External Offset window to **Finalize** the match.

**Step 5:** Click **Close** to exit the External Offsets in Progress window and return to the IRMS main window.

