

## 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

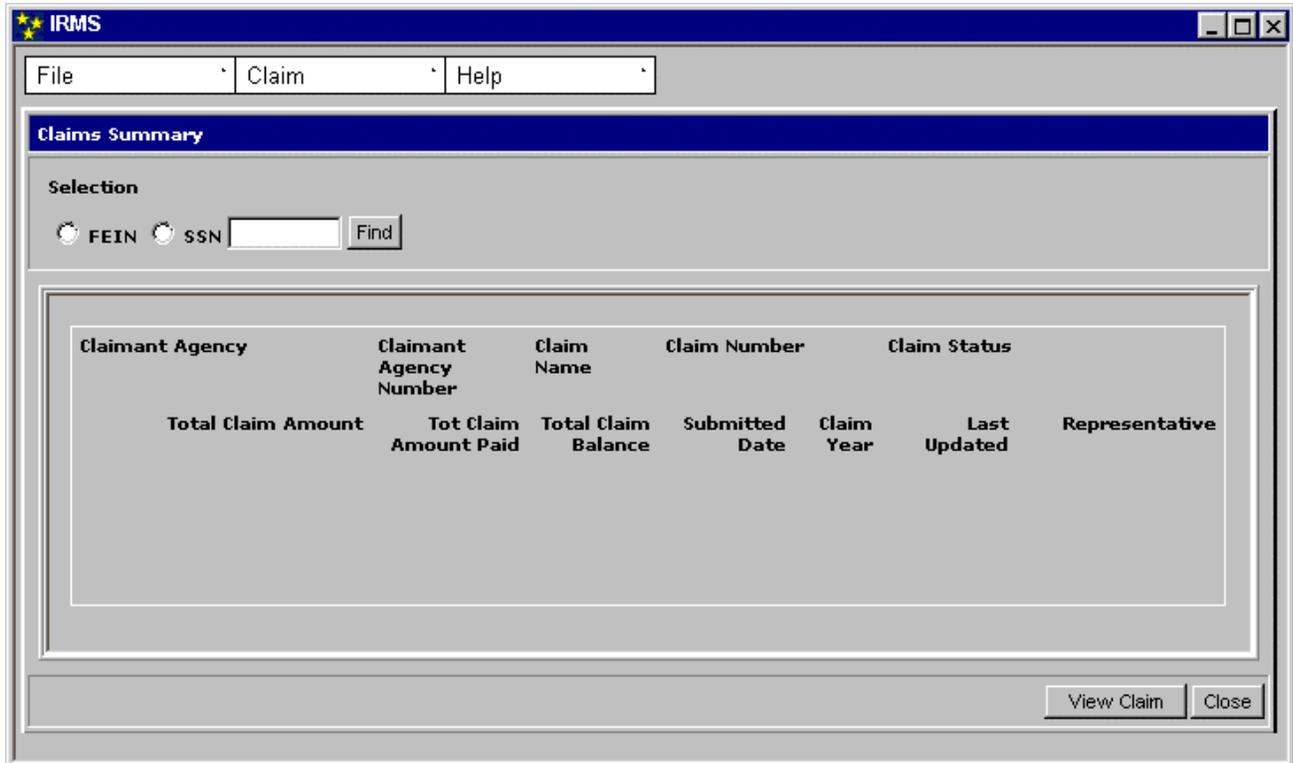
The illustration below is the Claims Summary window.



<b>Field</b>	<b>Field Type</b>	<b>Description</b>
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.



## 5.2 View Claim Detail Information

To see greater detail about a specific claim, you access the Claim Detail window. This window displays information about both individuals and businesses.

### Claim Detail Window

The illustration below is the Claim Detail window. The Claim Detail window is accessible only from the Claims Summary window.

The screenshot shows the IRMS Claim Detail window. The title bar reads 'IRMS'. The menu bar contains 'File' and 'Help'. The main content area is titled 'Claim Detail' and is divided into several sections:

- Customer:** FEIN/SSN: 222-00-2222
- Claim:**
  - Claimant Agency: Henrico County
  - Claimant Agency Number: 251087000
  - Claim Name: Martha M. Ryan
  - 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: Arnold Schwartz
- Funding Source Table:**

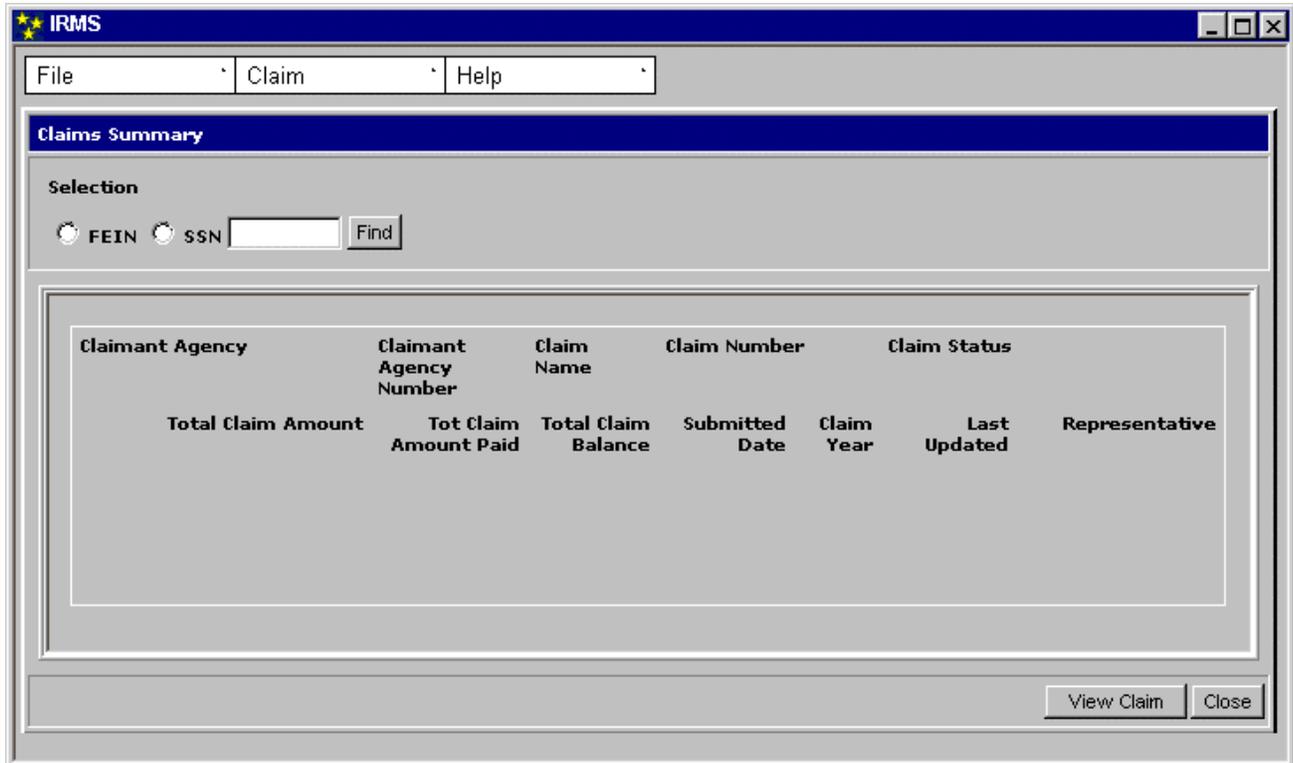
Funding Source Type	Tax Account Period	Match Amount	Match Status	Match Date	
Match ID	Certified Date	Initial Contested Date	Finalized Amount	Finalized Date	Last Update
Tax Overpayment	2005	\$250.00	Finalized	04/08/2005	
000024733	04/09/2005	\$250.00	05/01/2005	05/01/2005	

A 'Close' button is located in the bottom right corner of the window.



<b>Field</b>	<b>Field Type</b>	<b>Description</b>
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.





**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.



IRMS

File Help

### Claim Detail

**Customer**  
 FEIN/SSN: 222-00-2222

**Claim**  
 Claimant Agency: Henrico County Claimant Agency Number: 251087000  
 Claim Name: Martha M. Ryan  
 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: Arnold Schwartz

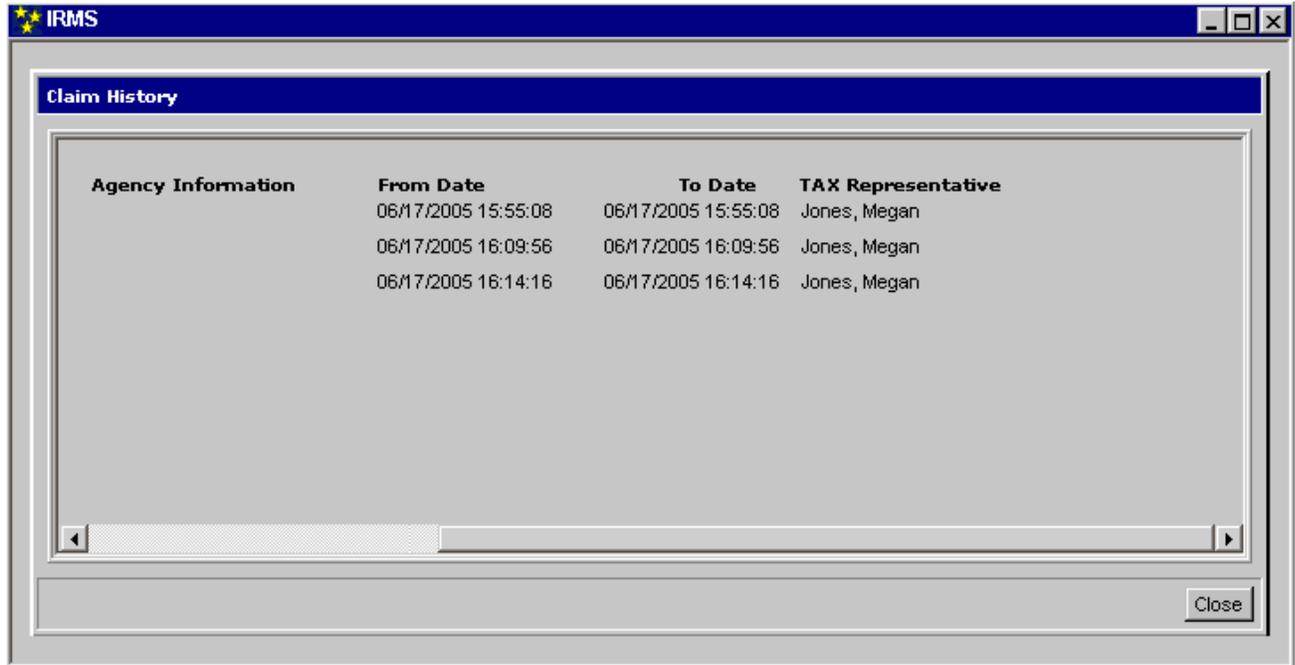
Funding Source Type	Tax Account Period	Match Amount	Match Status	Match Date
Match ID	Certified Date	Initial Contested Date	Finalized Amount	Finalized Date
				Last Update
Tax Overpayment	2005	\$250.00	Finalized	04/08/2005
000024733	04/09/2005	\$250.00	05/01/2005	05/01/2005

Close

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



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.



IRMS - External - Microsoft Internet Explorer

File Claim Help

**Maintain Claim Information**

**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 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.





