

View Return Entries

Perform the following steps to view the Return Entries window:

Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

Customer Profile - Cusack, Joan - Microsoft Internet Explorer

File Customer Help

Customer

Customer

SSN: 177-66-6661 Entity Type: Individual

Name: JOAN CUSACK

Street: 4000 LEGATO RAOD

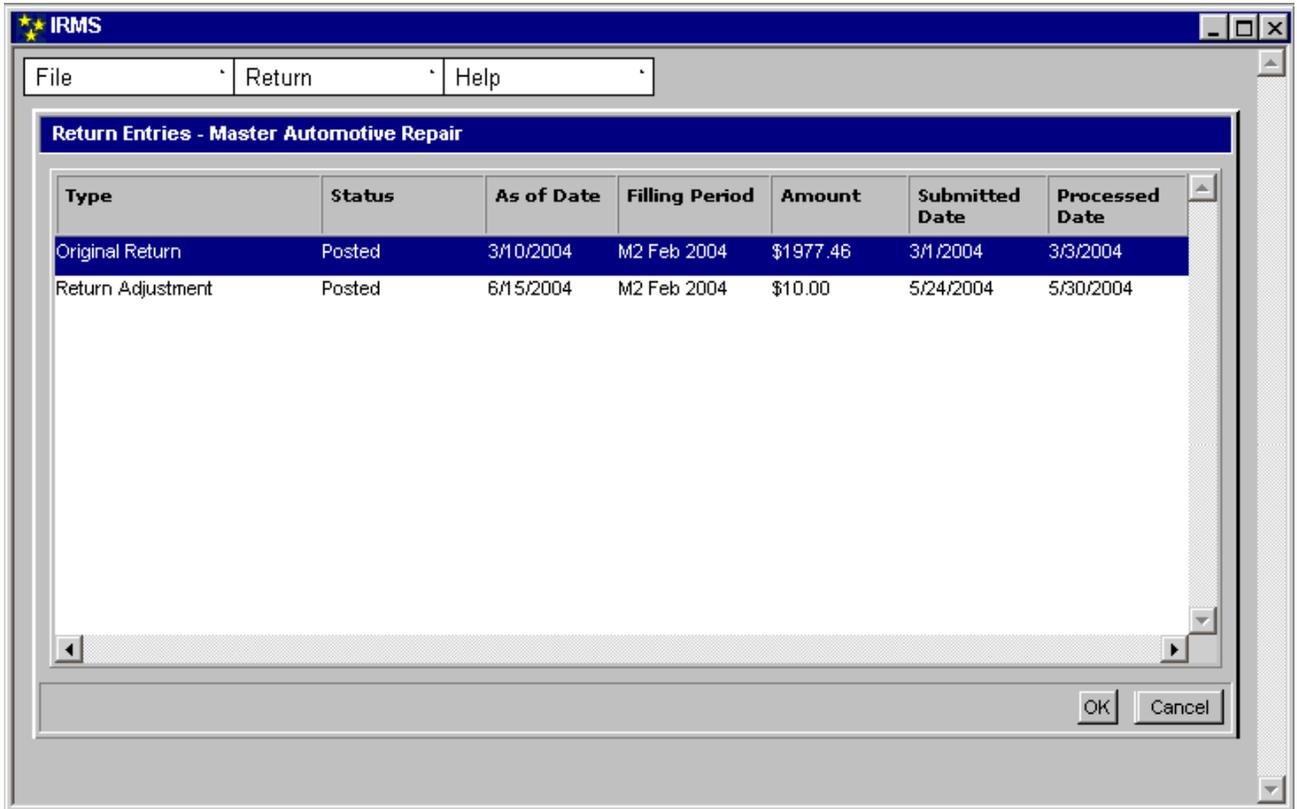
City: FAIRFAX State: VA

Zip: 22033 Undeliverable

Last Address Update: 07/29/2005 11:59:40

Close

Step 2: From the Customer Profile window, select **Customer: Tax Account**. The Tax Account window opens.



Step 4: Click **Cancel** to exit the Return Entries window and return to the Tax Account window.

11.2.2 View Return Status

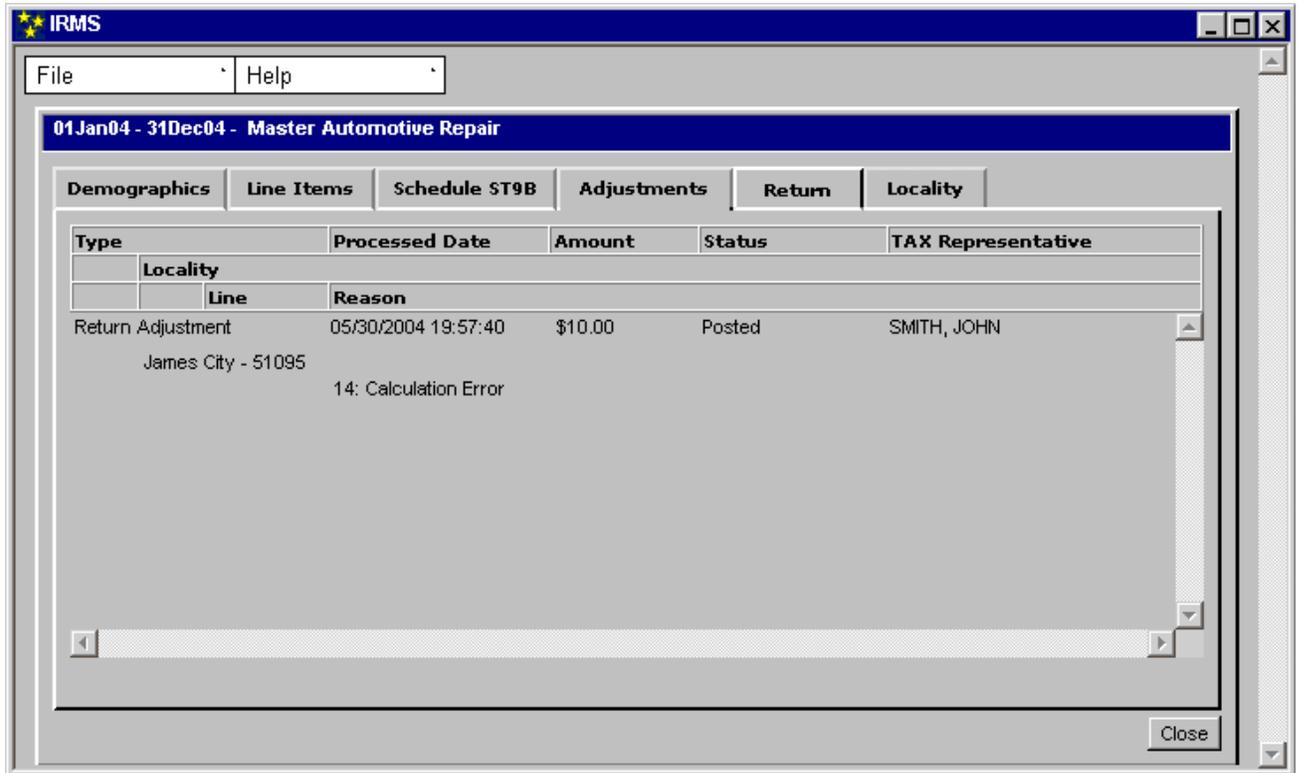
You can view the status of an individual taxpayer's return in processing, as well as the date and time this status was last updated. This information is available in the customer's Tax Account on the Entry List window.



Note: This functionality is currently limited to Commissioners of the Revenue.

Entry List Window

The illustration below is the Entry List window.



Return Details Window– Adjustments Tab Fields

The table below lists the fields on the Return Details window - Adjustments tab and provides a brief description of each.

Field	Field Type	Description
Type	System Generated	Type of Adjustment.
Processed Date	System Generated	Date the Adjustment was processed.
Amount	System Generated	Dollar amount of the Adjustment.
Status	System Generated	Status of the Adjustment.
Tax Representative	System Generated	Name of the Tax Representative who processed the Adjustment.
Locality	System Generated	Your agency.
Line	System Generated	Identifies the return line by number and title that was adjusted.
Reason	System Generated	Why the adjustment was made.

Return Details Window – Demographics Tab

The illustration below is the Return Details window with the Demographics tab open.

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Demographics | **Line Items** | Schedule ST9B | Adjustments | **Return** | Locality

Section: [ALL]

Line Description	Customer Calculations	Adjustments	Totals
1. Gross sales	\$44498.05	\$0.00	\$44498.05
2. Personal use	\$0.00	\$0.00	\$0.00
3. Exempt State Sales and Other Deductions	\$-214.67	\$0.00	\$-214.67
4. Total Taxable State Sales and Use	\$44712.72	\$0.00	\$44712.72
5b. State Food Sales & Use - Taxable Amount	\$903.69	\$0.00	\$903.69
5c. State Food Sales & Use - Tax	\$27.11	\$0.00	\$27.11
6b. State General Sales & Use - Taxable Amount	\$43809.03	\$0.00	\$4309.03
6c. State General Sales & Use - Tax	\$1533.32	\$0.00	\$1533.32
7b. Local Sales & Use - Taxable Amount	\$44712.72	\$0.00	\$44712.72
7c. Local Sales & Use - Tax	\$447.13	\$0.00	\$447.13
8. Total State Tax	\$1560.43	\$0.00	\$1560.43
9. Dealer's Discount	\$40.10	\$0.00	\$40.10
10. Net State Tax Due	\$1520.33	\$0.00	\$1520.33
11. Total State and Local Tax Due	\$1967.46	\$10.00	\$1977.46
12. Penalty	\$0.00	\$0.00	\$0.00
13. Interest	\$0.00	\$0.00	\$0.00
14. Total Amount Due	\$1967.46	\$10.00	\$1977.46

Close

Return Details Window – Return Tab

The illustration below is the Return Details window with the Return tab open. The fields on this tab are specific to the type of return.

Return Details Window – Return Tab Fields

The table below lists the fields in the Return tab on the Return Details window, and provides a brief description of each.

Field	Field Type	Description
Form Number	System Generated	The Number of the Tax Return form.
Status	System Generated	Current Status of the Return (i.e. posted, pending, cancelled).
Amount	System Generated	Dollar amount of the liability on the Return.
Processed Date	System Generated	Date the return was processed.
Detail Type	System Generated	The type of return the taxpayer files (i.e. original, amended, or informational).
Return Source	System Generated	How the return reached your agency (i.e. correspondence).
Submitted Date	System Generated	Date return was submitted.
Received Date	System Generated	Date return was received.
Filing Medium	System Generated	This shows how the return was filed, (i.e., Paper, Electronically, Telefile).
Out of Statute	System Generated	When checked, indicates the return is out-of-statute. IRMS will not process a refund or overpayment for an out-of-statute return.

Field	Field Type	Description
Bypass Out of Statute	System Generated	When checked, indicates the system will override the out-of-statute designation and process the refund or overpayment.
LCN Code	System Generated	LifeWorks Control Number - a unique code identifying the filed return in the LifeWorks system.
Name on Return	System Generated	Primary name on return.
Vendor ID	System Generated	Vendor ID Number.
Letter Type	System Generated	Letters sent to the taxpayer, if applicable.
Required Documentation	System Generated	Status of any documentation that should have accompanied the return.

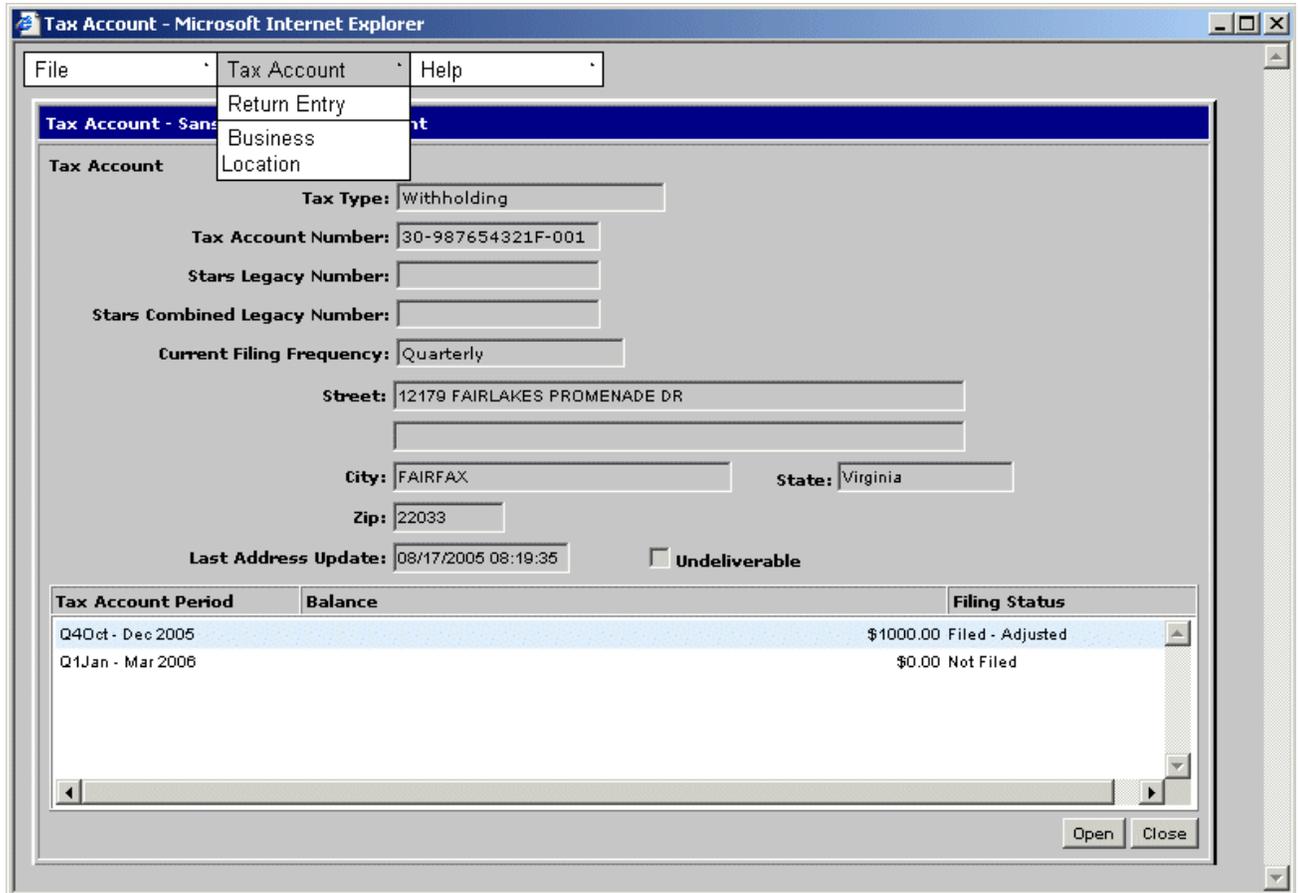
Return Details Window – Locality Tab

The illustration below is the Return Details window with the Locality tab open. The information on this tab displays the distribution between state and local tax.

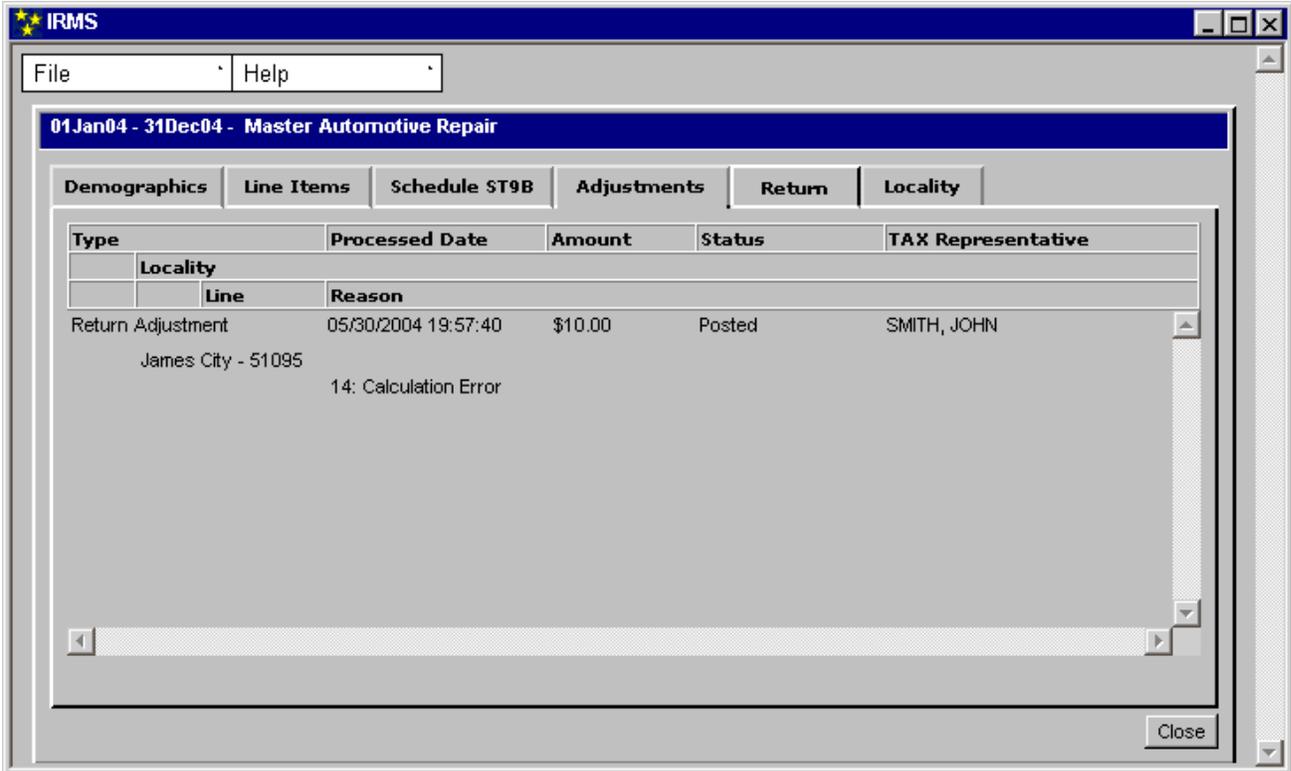
Line Description	Customer Calculations	Adjustments	Totals
State General	\$1533.32	\$0.00	\$1533.32
State Food	\$27.11	\$0.00	\$27.11
Vendor Discount	\$40.10	\$0.00	\$40.10
James City - 51095	\$447.13	\$0.00	\$447.13

Return Details Window – Locality Tab Fields

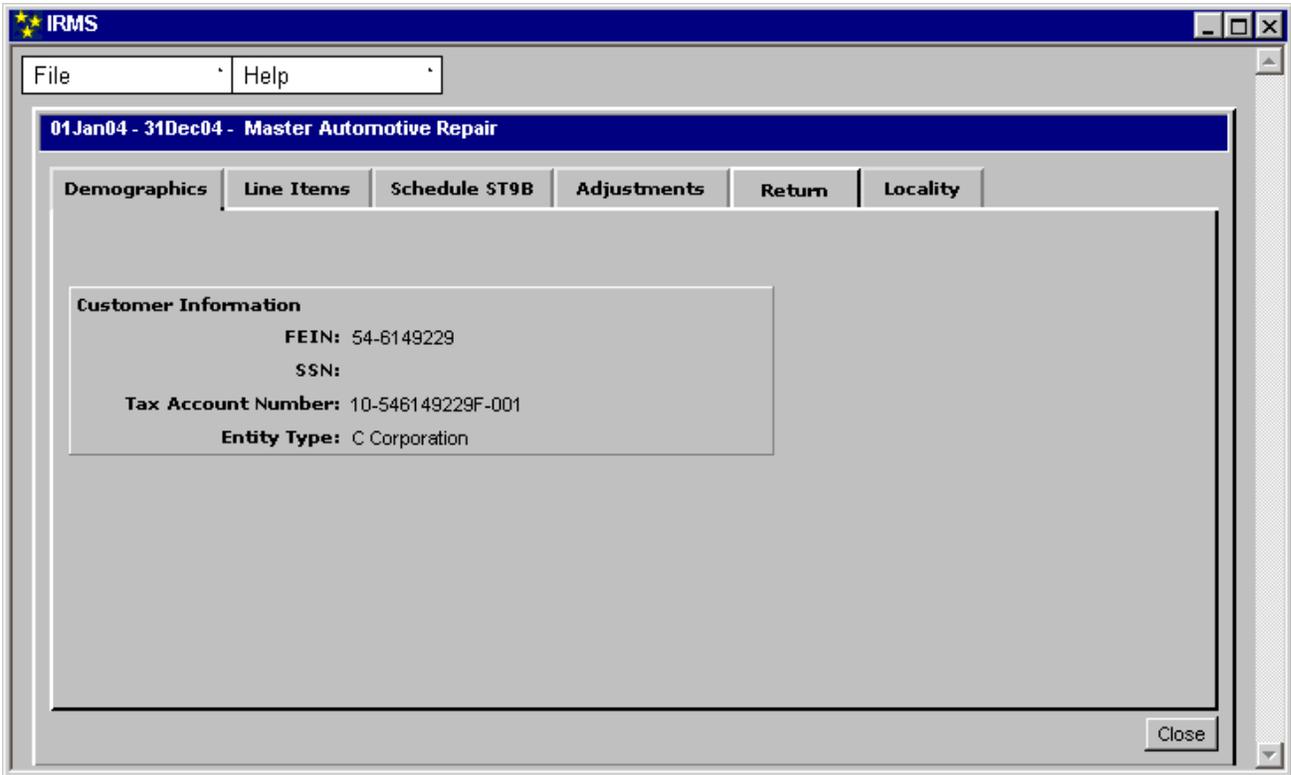
The table below lists the fields in the Locality tab on the Return Details window and provides a brief description of each.



Step 3: Select **Tax Account: Return Entry**.
The Return Entries window displays.



Step 5: Click on the **Demographics** tab.
The information on the Demographics tab now displays.



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Demographics | Line Items | Schedule ST9B | Adjustments | Return | Locality

Current Localities on Return

Locality	Description	Added

Line Description	Customer Calculations	Adjustments	Totals

Totals

Gross Sale:	\$44498.05	Personal Use:	\$0.00
Taxable Local Sale:	\$44712.72	Tax Liability:	\$447.13

Close

Step 8: Click **Return** to open the Return tab.
This tab contains a synopsis of the return with all of the activities pertaining to it.

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Demographics | Line Items | Schedule ST9B | Adjustments | Return | Locality

Form Number: ST92000 Status: Posted

Amount: \$1,977.46 Processed Date: 03/03/2004

Detail Type: Return Adjustment Return Source: Correspondence

Submitted Date: 03/01/2004 Received Date: 03/01/2004 Filing Medium: Paper

Out of Statute Bypass Out of Statute LCN Code:

Name on Return: Master Automotive Repair Vendor ID:

Letter Type(s): ARAJ402A - Adjustment Prior to Due Date

Required Documentation:

Locality: James City - 51095

EFT

Close

