

## 19 CHAPTER: VIEW CLAIM INFORMATION

In the IRMS Web application, you can review your agency's claims. Viewing either the Claims Summary or Claims Detail windows, you can see claim status, claim history, contested claims, and finalized claims.



**Note:** You can only view claims that belong to your agency.

### 19.1 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

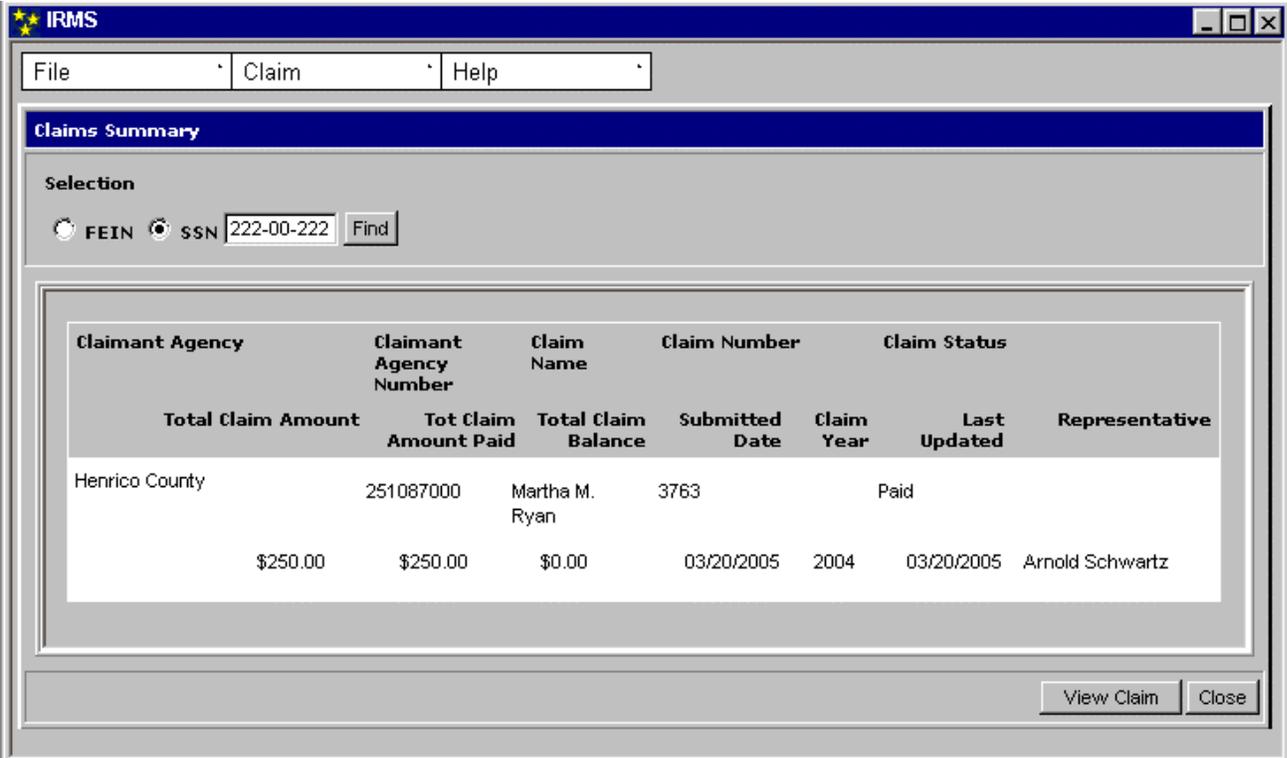
#### Claims Summary Window

The illustration below is the Claims Summary window.









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



## Claim Detail Fields

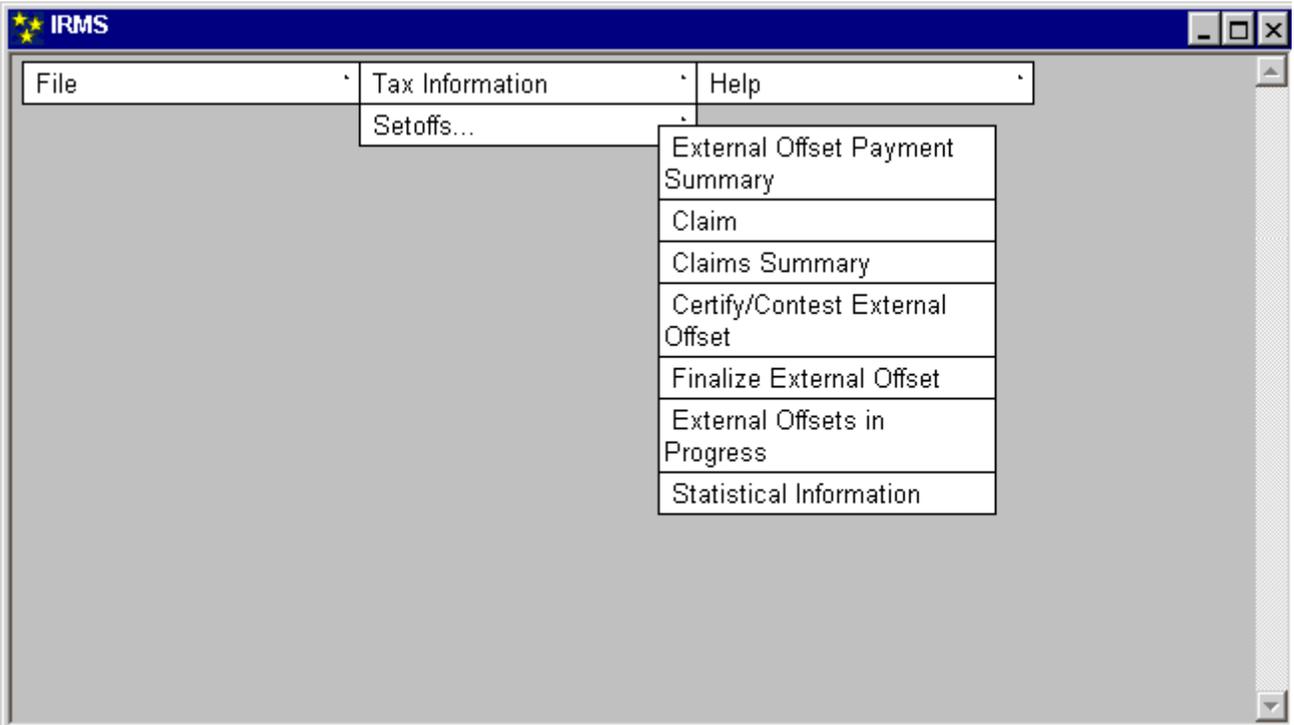
The table below lists the fields in the Claim Detail window and provides a brief description of each.

| 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, or DOA Payment).      |
| Tax Account Period      | System Generated | The tax period of time against which the claim is made.                                             |

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Generated | The current state of the match in IRMS (i.e. Active, Certified, Contested, Finalized, Withdrawn, or Defaulted).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

