

## 2 CHAPTER: IRMS INTRODUCTION AND NAVIGATION

### 2.1 Overview of IRMS

To enhance its ability to work effectively and provide the best possible service to taxpayers, the Virginia Department of Taxation (TAX) uses an Integrated Tax and Revenue Management System (IRMS). IRMS is a software suite for tax and revenue management that supports taxpayer registration, tax return processing, and taxpayer and revenue accounting to provide an integrated processing solution for all major tax types. You will be using a Web version of IRMS to access taxpayer and tax return information for your locality.

#### 2.1.1 How IRMS Organizes Information

Once you are successfully logged into IRMS, you can begin to view information about taxpayers. Some of the information you will have access to includes:

- Customer Profile which includes demographic information about the taxpayer.
- Bank Account which includes bank account and routing and transit numbers.
- Tax Account information for Individual, Fiduciary, Corporate Income, Withholding, and Sales and Use tax types.
- Business Location information which includes demographic, locality, and associated tax account information.
- Tax Account Period for each tax account. Returns are associated with a Tax Account Period.
- Tax Returns which include return type, return status, Tax account, Submitted and Processed dates, amount, detailed line items, and adjustments.
- History information for all available years in the system.

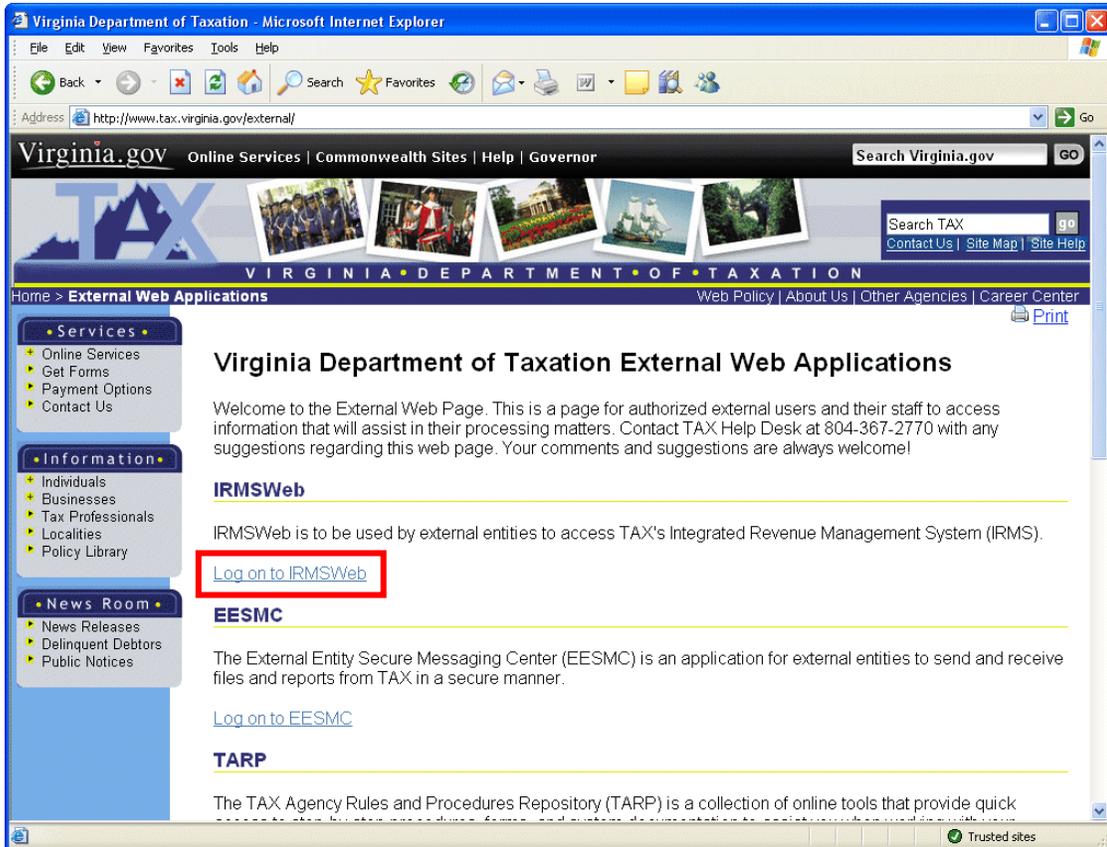


**Note:** Not everyone will be able to see exactly the same information. The details of your agency's MOU determine what taxpayer information you can access. Some kinds of information are secured. This means you need special levels of authorization to view or change it, but the information you need for your daily work is readily available to you.



**Note:** You can access individual taxpayer information regardless of their locality, but you can only view information about business taxpayers in your locality and up to 20 adjacent localities based on your agency's MOU.





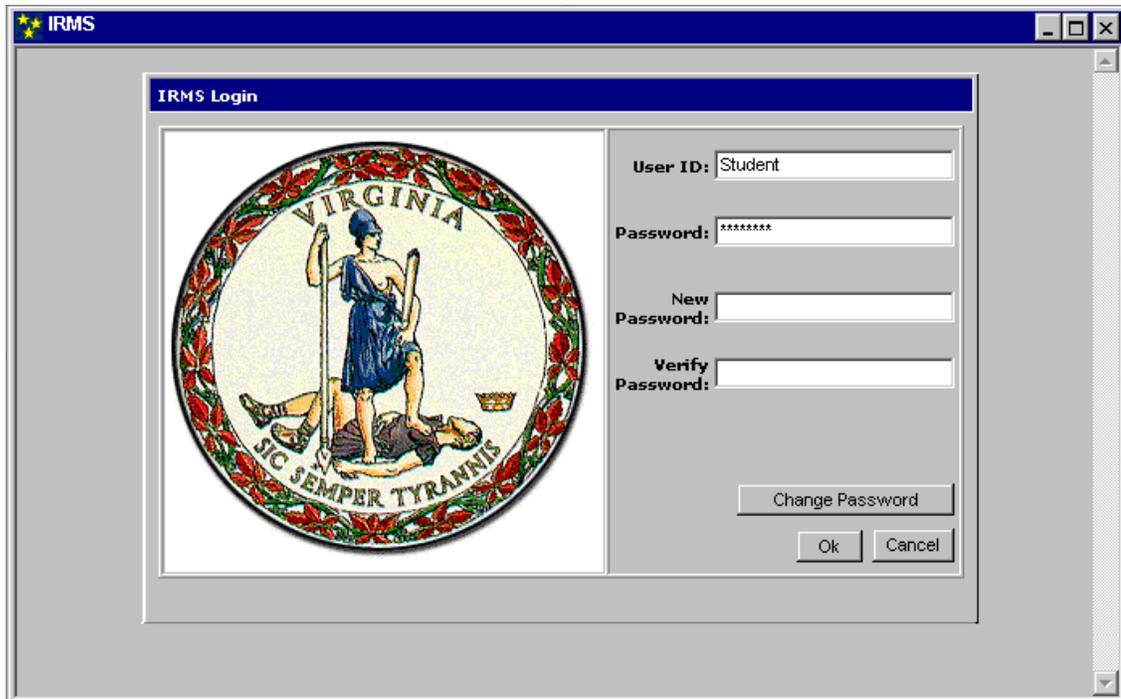
**Step 3:** Click the **Log on to IRMSWeb** link. The IRMS Login window displays.



**Note:** Subsequent logins will not require a Password change, but will display the main menu window when you enter your correct User ID and Password. You will be notified before your password expires. You can change your password before it expires by clicking the **Change Password** button when you login.





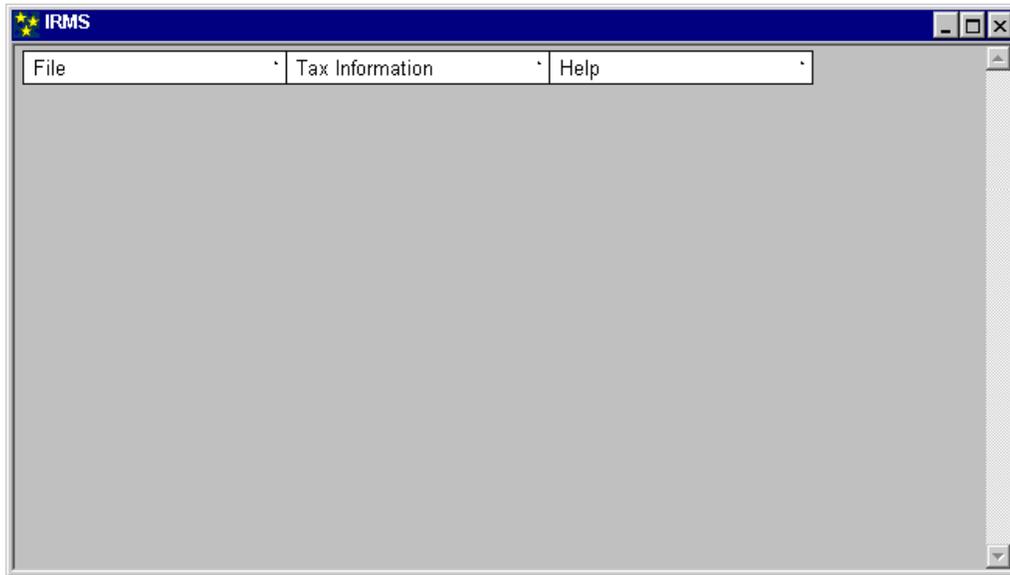


- Step 7:** Enter a new password in the **New Password** field. Your IRMS password must be between 8 and 16 characters in length. The first character must be a letter and the password must contain at least one number. The password is not case sensitive; therefore, you do not need to worry about entering upper and lowercase letters.
- Step 8:** Retype your new password in the **Verify Password** field to ensure that your password is correct.
- Step 9:** Click **OK** to log in.  
The IRMS Confidential Message window displays reminding you that you are dealing with confidential customer information.



**Note:** If you are unable to log in after three attempts, contact your Security Administrator to reset your password.

**Step 10:** Click **OK**. The IRMS Main window opens.



**Note:** Keep in mind that you need to login to the IRMS application at once every 60 days in order to keep your account active.

## 2.2.2 IRMS Main Window

After you have successfully logged into IRMS, you will see the IRMS Main window. All of your work in IRMS will originate from this window.

The contents of this window include:

- **Title Bar** identifies which window you have accessed and includes the standard windows resizing buttons.
- **Menu Bar** lists the pull down menus that are used to access IRMS windows. The menus displayed on the Menu Bar may change depending on which IRMS window is active. You can display the contents of each window by clicking on the menu and choosing an item from the pull-down boxes.
- **Display Area** contains the specific window you have accessed. The illustration below is the IRMS Main window.







There are several different types of windows in IRMS. The types of windows are:

- **List** - These windows display lists of items that you can select to view additional information. You highlight an item on the list to view a Detail window.
- **Detail** - These windows contain fields for you to view, enter, or change information.
- **Pop-up** - These windows are intended to make you aware of the consequences of your actions. Most often, they either remind you of what you have done, or ask for a confirmation that you have done what you intended. These message boxes and error messages are discussed in the appropriate chapter(s).

The illustration below is an example of a **List** window:



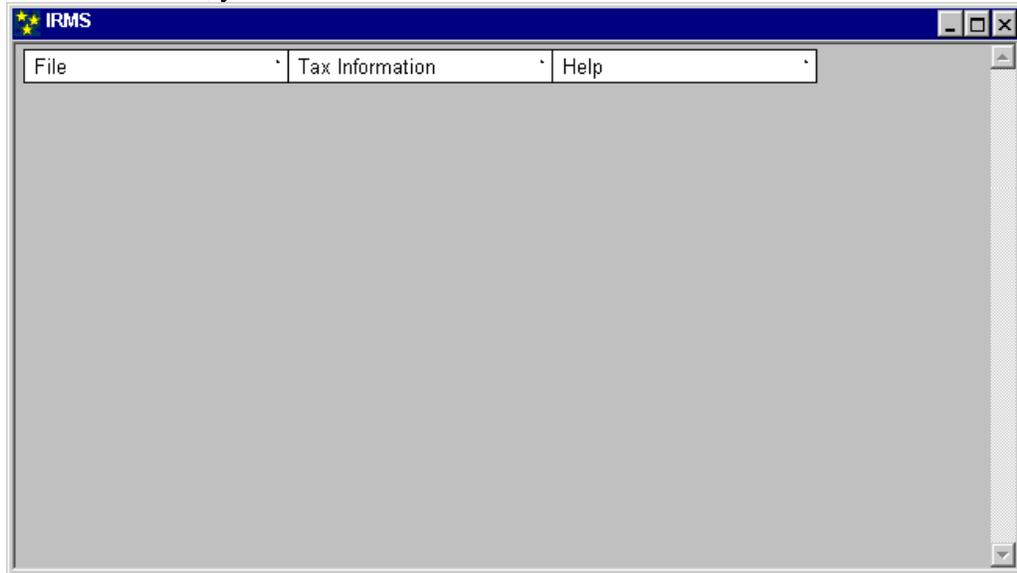
The screenshot shows a window titled "IRMS" with a menu bar containing "File", "Tax Account", and "Help". Below the menu bar is a title bar for the window "Tax Account List - Amce Inc.". The main content area contains a table with the following data:

Tax Type	Tax Account	Stars Legacy Number	Stars Combined Legacy Number	Current Filing Frequency
Sales and Use	10541111111F001			Monthly
Withholding	30541111111F001			Monthly



## 2.3 Ending a Session

To end an IRMS session, you must return to the IRMS Main Window.



**Step 1:** From the **File** menu, select the **Exit** option. You receive a system prompt pop-up window asking you to confirm the exit.



**Step 2:** Click **OK** to exit IRMS and return to your desktop window OR  
Click **Cancel** to return to IRMS if you do not want to exit.