

3 CHAPTER: VIEW CUSTOMER PROFILE INFORMATION

3.1 Overview

As a member of a private collection agency working with TAX, you can access IRMS to view select information about individual taxpayers.

IRMS houses demographic data about each taxpayer, such as name, address, and Social Security Number (SSN). You can view this information on the Customer Profile window in the IRMS Web application.



Note: The windows containing taxpayer information are display only. The information cannot be modified without contacting TAX.

3.2 Customer Search

A Customer Search is performed to access the Customer Profile window in IRMS. Customer information can be obtained by entering search criteria for the Search By **External ID** option:

3.2.1 Customer Search By External ID

The External ID option in the Search By area performs a search based on the SSN (Social Security Number) for an individual taxpayer.

Search Criteria By External ID Window

The window below shows the Search Criteria window with the External ID option pre-selected in the Search By area. This is the search option available to you based on your security access. Although visible, the other Search By options are not available for use.

Customer Search - Microsoft Internet Explorer

File Tax Information Revenue Accounting Help

Search Criteria

Search By

External ID

Name

Address

Name and Address

FEIN: [] or SSN: []

Clear Search... Close

The screenshot shows a window titled "Customer" with a sub-header "Customer". The fields are as follows:

- SSN: 222-22-2222
- Entity Type: Individual
- Name: JOHN J. CUSACK
- Street: 2222 KINGSBROOK DR
- City: RICHMOND
- State: VA
- Zip: 23238
- Undeliverable:
- Last Address Update: 08/15/2004 16:41:23

A "Close" button is located at the bottom right of the window.

Individual Customer Profile Window - Fields

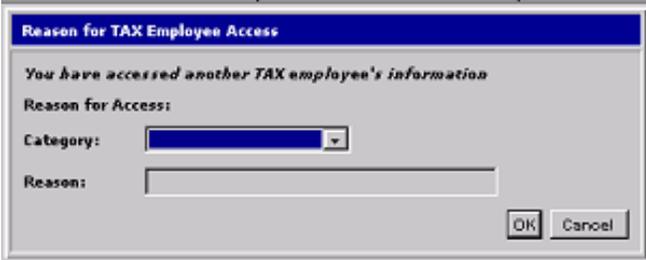
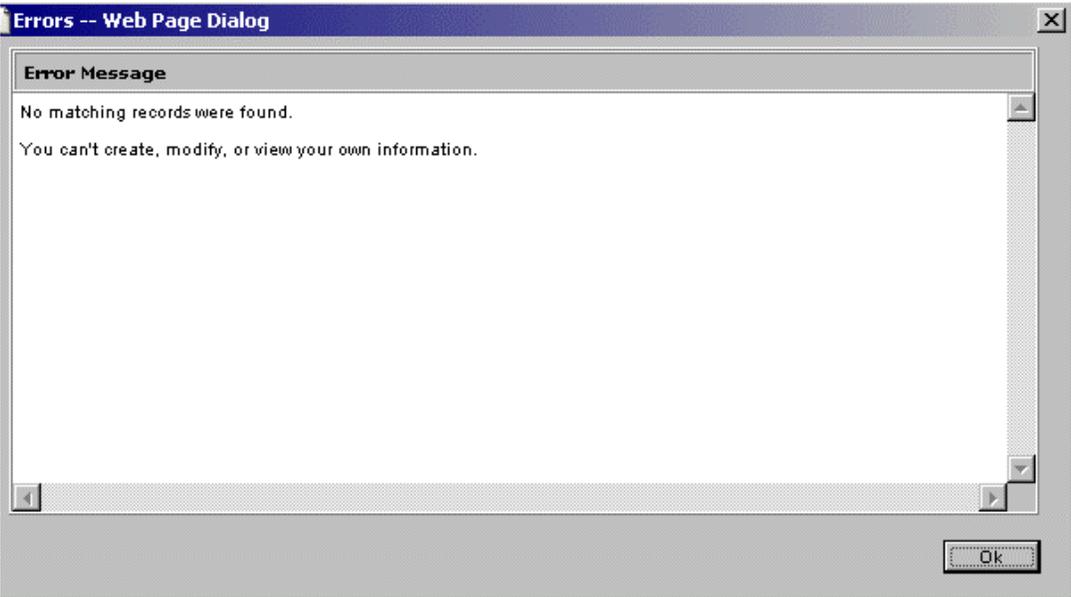
The table below lists the fields in the individual Customer Profile window and provides a brief description of each.

Field	Field Type	Description
SSN	System Generated	The taxpayer's Social Security Number.
Entity Type	System Generated	The type of taxpayer (i.e., Individual Income).
Name	System Generated	The name of the taxpayer associated with the Social Security Number.
Street	System Generated	The street address on which the taxpayer resides.
City	System Generated	The city in which the taxpayer resides.
State	System Generated	The state in which the taxpayer resides.
Zip	System Generated	The zip code in which the taxpayer resides.
Undeliverable	System Generated	When checked, indicates past attempts to deliver mail to this address have failed and no newer address is available.
Last Address Update	System Generated	The last date on which the address saved in IRMS for the taxpayer was updated.

Customer Search By External ID Results

Once the required information has been entered, the system will perform the search and display one of the following results.

Result	Action
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Result	Action
	 <p>A dialog box titled "Reason for TAX Employee Access" with a blue header. The main text reads "You have accessed another TAX employee's information". Below this, it says "Reason for Access:". There are two input fields: "Category:" with a dropdown menu and "Reason:" with a text box. At the bottom right are "OK" and "Cancel" buttons.</p>
<p>Own record match not found</p>	<p>The system will display the message, "You can't create, modify, or view your own information."</p> <p>Click OK to return to the Customer Search window and enter different information.</p>
	 <p>An "Errors -- Web Page Dialog" window with a grey border and a close button (X) in the top right. The title bar reads "Errors -- Web Page Dialog". Inside, there is a section titled "Error Message" containing the text: "No matching records were found." followed by "You can't create, modify, or view your own information." At the bottom right of the dialog is an "Ok" button.</p>