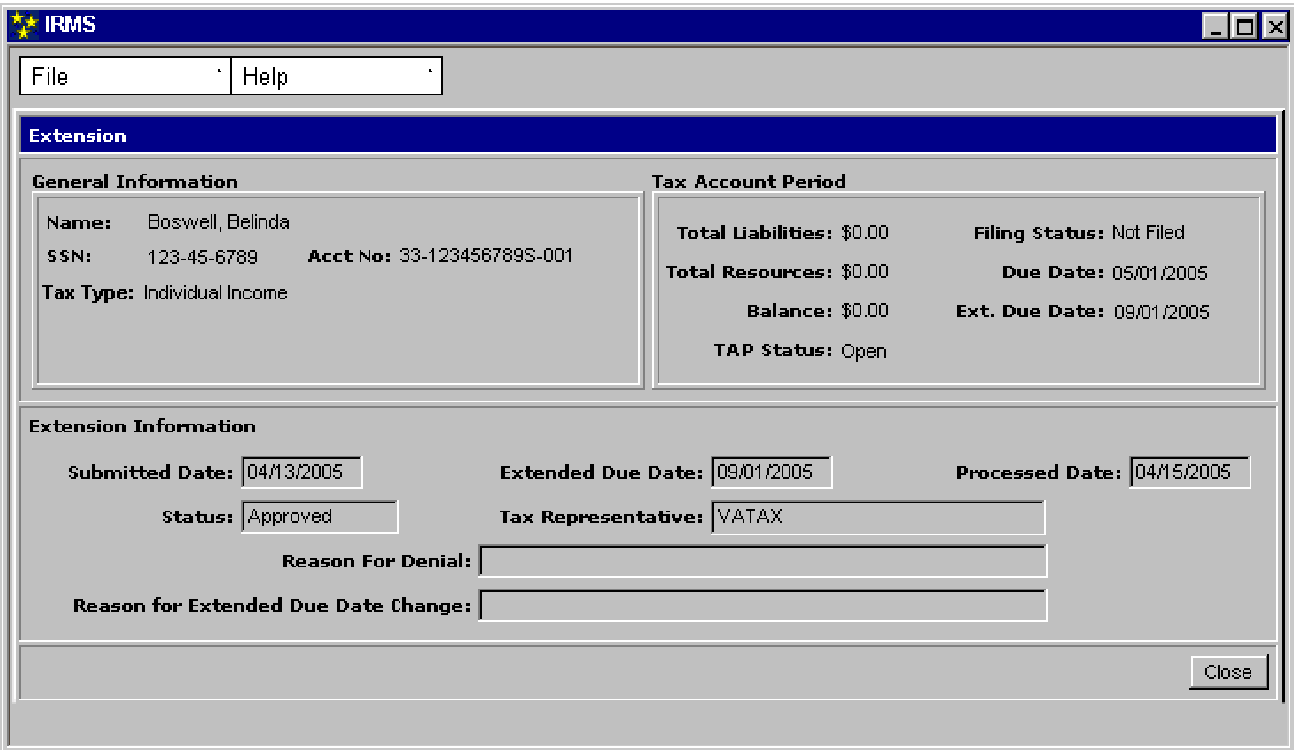
8 CHAPTER: VIEW EXTENSION INFORMATION

8.1 Overview

Taxpayers can request an extension of time beyond the original due date to file a tax return. This extended due date is determined based on the tax type, the federal requirements for extensions, and state law. If your MOU allows you access to local-filed or direct-filed return information, you can view extension information for business taxpayers in your locality or up to 20 adjacent localities, and individual taxpayers regardless of their locality on the Extension window in the IRMS Web application.

Extension Window

The illustration below is the Extension window.



Extension Window Fields

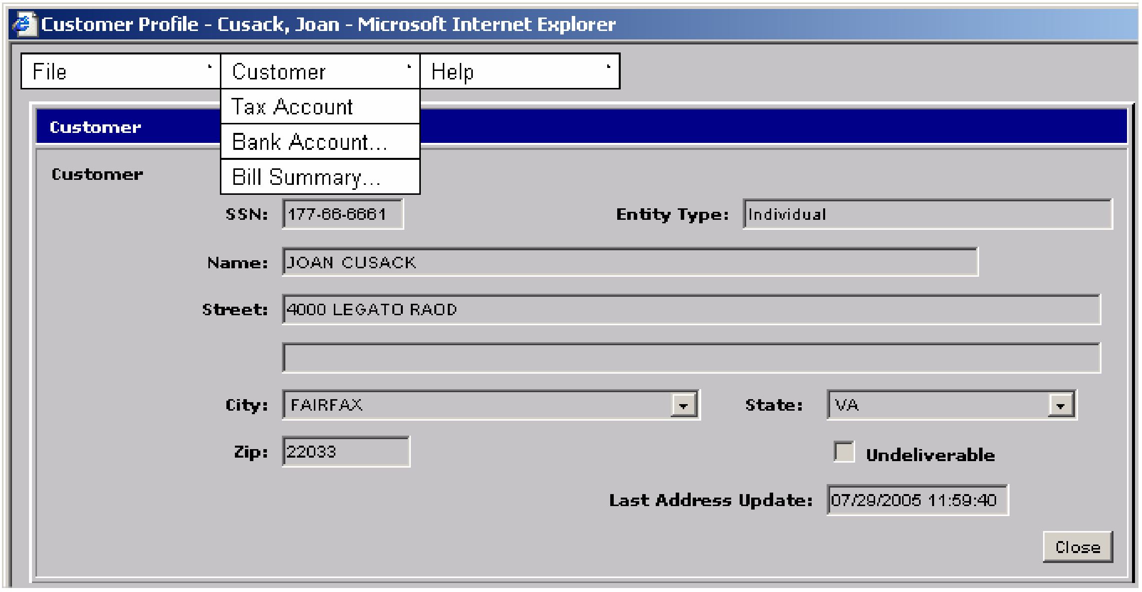
The table below lists the fields in the Extension window and provides a brief description of each.

Field	Field Type	Description
Name	System Generated	The name of the account holder (If an individual, the name(s) of the account holder(s). If a business, the name under which the business is legally registered).
SSN/FEIN	System Generated	The social security number (SSN) of the account holder(s) if an individual. The FEIN (Federal Employer Identification Number) of the account holder(s) if a Business, (If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays).
Account No	System Generated	The number assigned to the Tax Account.
Tax Type	System Generated	The type of customer (i.e. individual, corporate, etc.).
Total Liabilities	System Generated	The total amount of tax owed for this period.
Filing Status	System Generated	Indicates if the filer has or has not filed a return for the period (i.e. Filed, Not Filed). Can also indicate if the return has been adjusted (i.e. Filed-Adjusted).
Total Resources	System Generated	The amount of credits applied, if any, the taxpayer has for this period.
Due Date	System Generated	The date the return is due for this period.
Balance	System Generated	The total amount of tax owed after any credits are applied for this period.
Ext. Due Date	System Generated	The date the return is due when an extension has been granted. If an extension has not been granted, this field is blank.
TAP Status	System Generated	The current state of the TAP (i.e. Open, etc.).
Submitted Date	System Generated	The date executed if electronically submitted; the postmark date if mailed; the hand-stamped date if delivered personally.
Extended Due Date	System Generated	The date by which the taxpayer must file a return after being granted the extension.
Processed Date	System Generated	The date IRMS processes the extension.
Status	System Generated	Indicates if the extension has or has not been approved.
Tax Representative	System Generated	Usually indicates that the extension was approved automatically by the system. If manually approved, the name of the approving representative will display.
Reason for Denial	System Generated	Text explaining why the extension was denied (Populated only when the Status is Denied).
Reason for Extended Due Date Change	System Generated	Text explaining why the extended due date was moved (Populated only when an existing extension date has been changed).

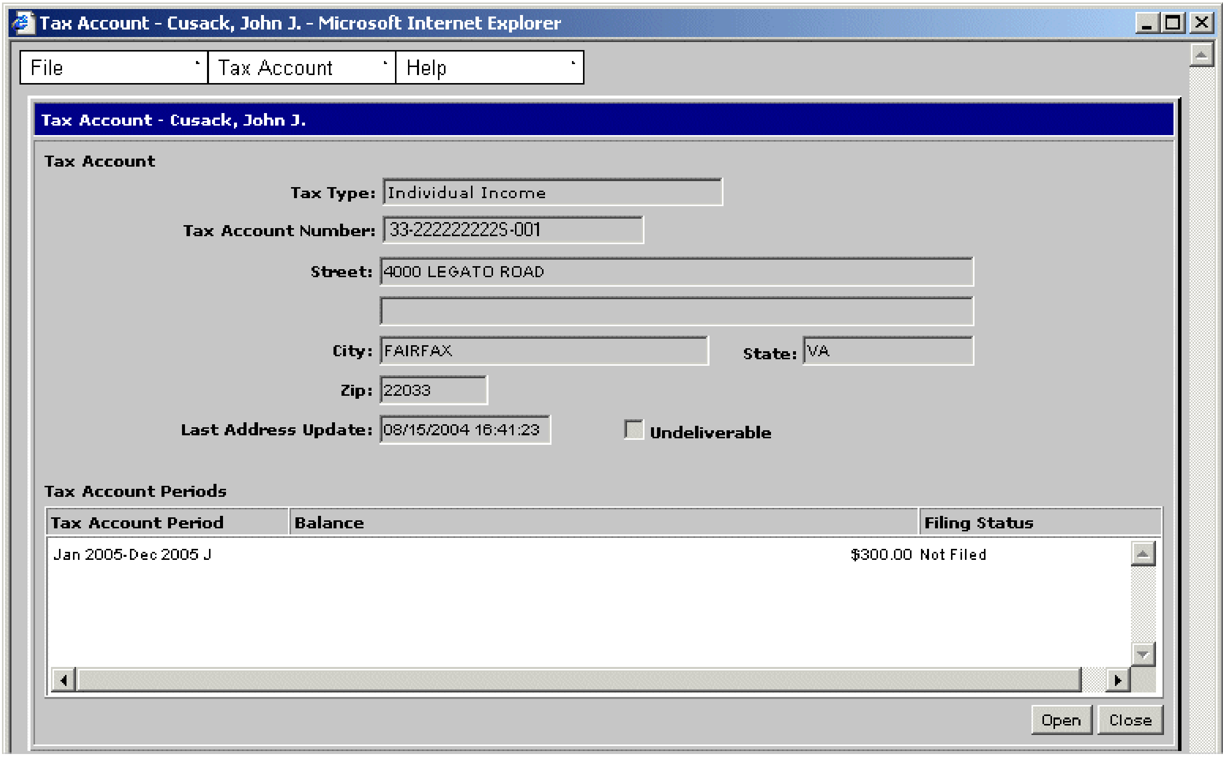
8.2 View Extension Information

To view extension information, the following steps are performed:

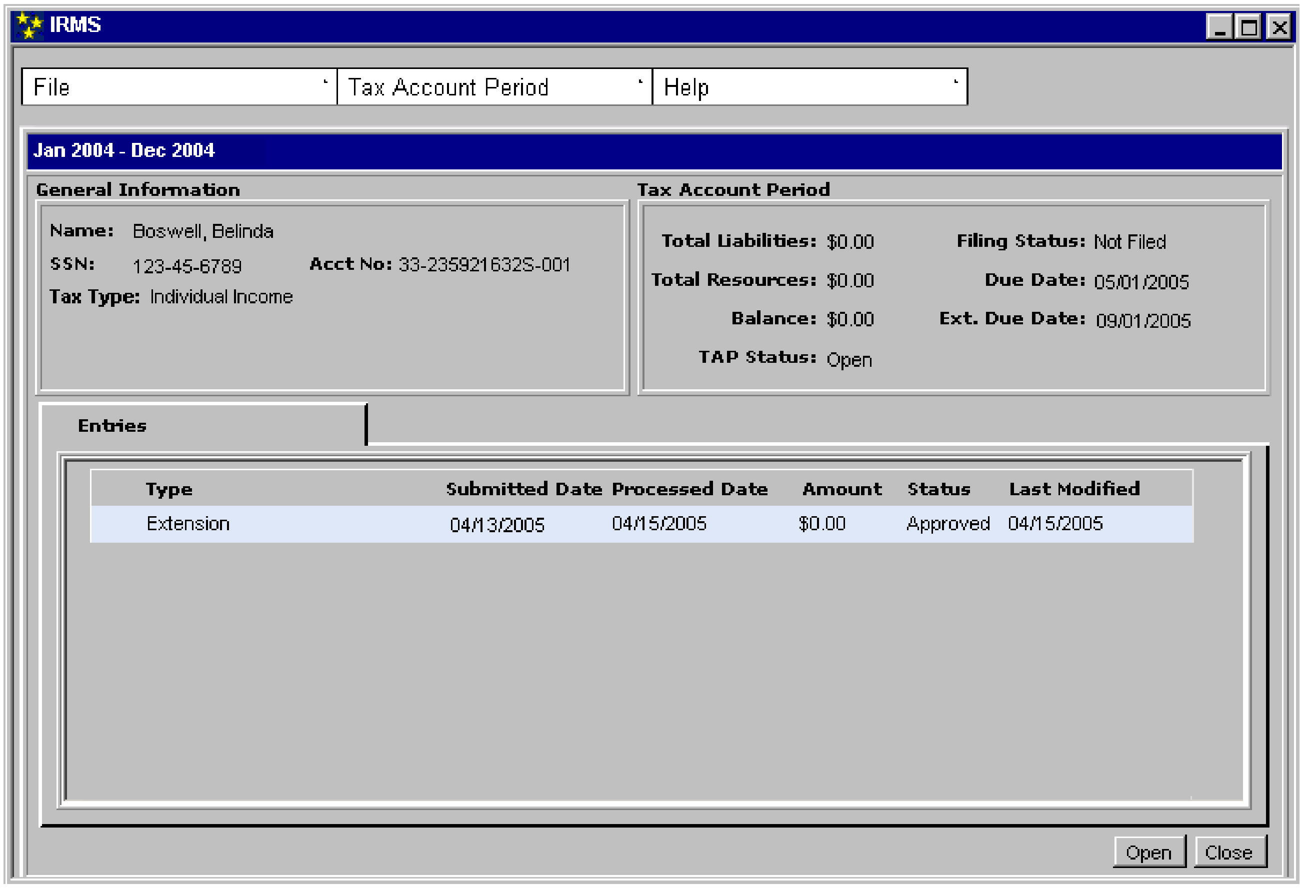
Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).



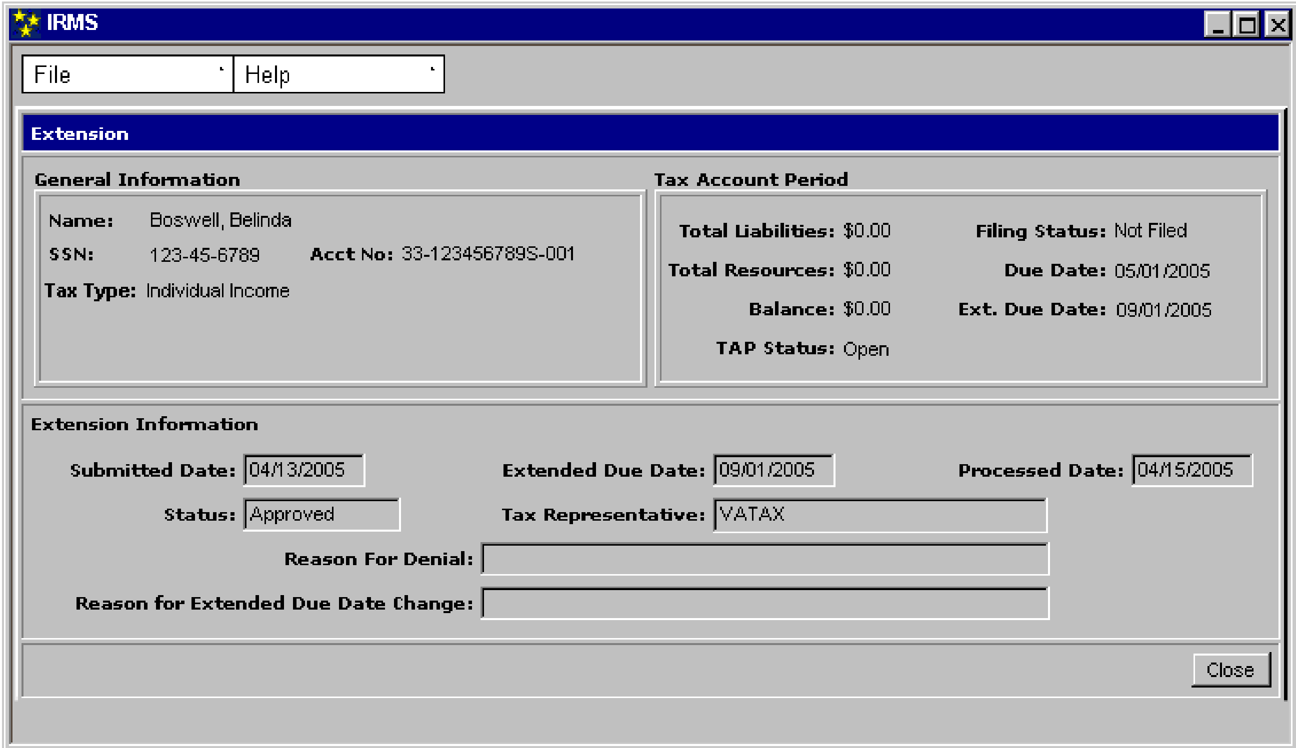
Step 2: From the Customer Profile window, select **<u>Customer: Tax Account</u>**. The Tax Account window opens.



Step 3: **Double-click** on the desired Tax Account Period entry. The Tax Account Period Entries window opens.



Step 4: **Double-click** on the Extension entry.
The Extension window opens.



Step 5: From the **File** menu, select **Close** to exit the window and return to the Tax Account Period Entries window.