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.
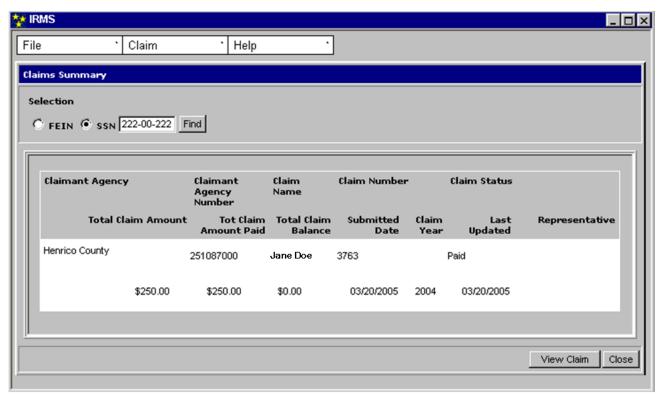
19.1 View Claim Summary Information

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

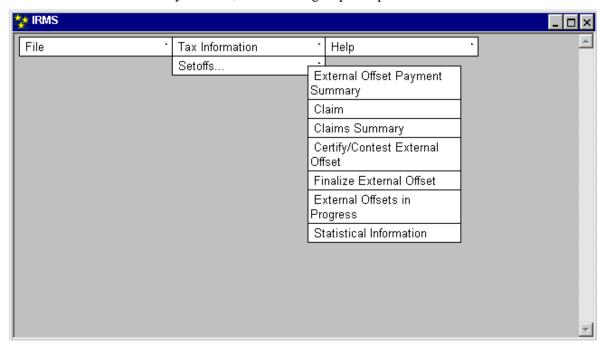The illustration below is the Claims Summary window.

Claim Summary Fields

The table below lists the fields in the Claims Summary 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 9-digit number.
Claim Name	System Generated	The name of the Debtor identified by the SSN or FEIN.
Claim Number	System Generated	A number identifying this claim as unique.
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.
Total Claim Balance	System Generated	Amount remaining to be paid.

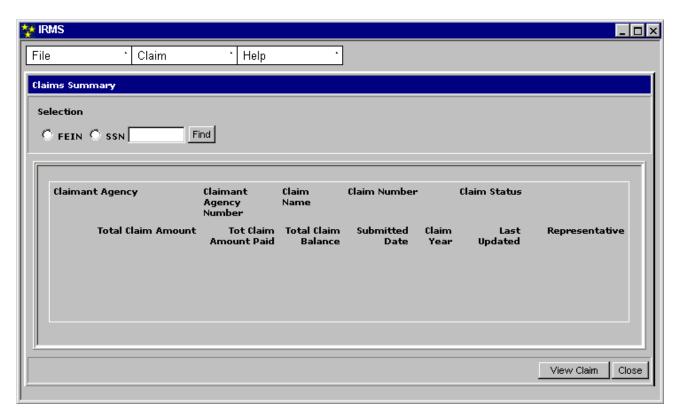| Field	Field Type	Description
Submitted Date	System Generated	Date the claim was submitted by the agency.
Claim Year	System Generated	The year the claim is submitted.
Last Updated	System Generated	The date of the last update to the claim.
Representative	System Generated	The name of the IRMS user who submitted the claim.

View Claims Summary Information

To access a Claims Summary window, the following steps are performed:

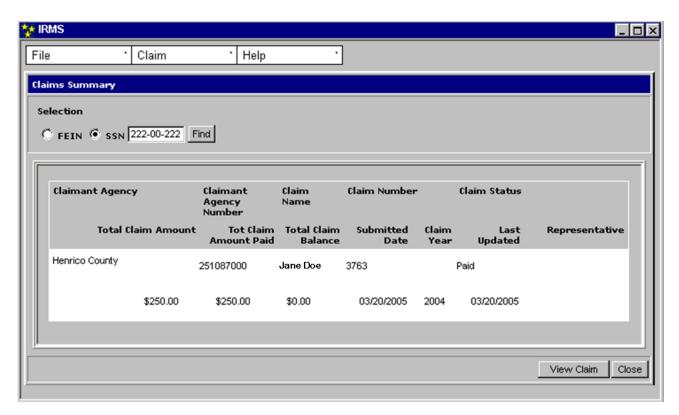**Step 1:** Select: **Tax Information: Setoffs: Claims Summary**.
The Claims Summary window opens.

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 2: Select the **FEIN** or **SSN** radio button.

Step 3: Enter a nine-digit **FEIN** or **SSN** (no hyphens).

Step 4: Click **Find**.
The Claim Summary window opens. It displays all of the claims for the debtor's FEIN/SSN for your agency.
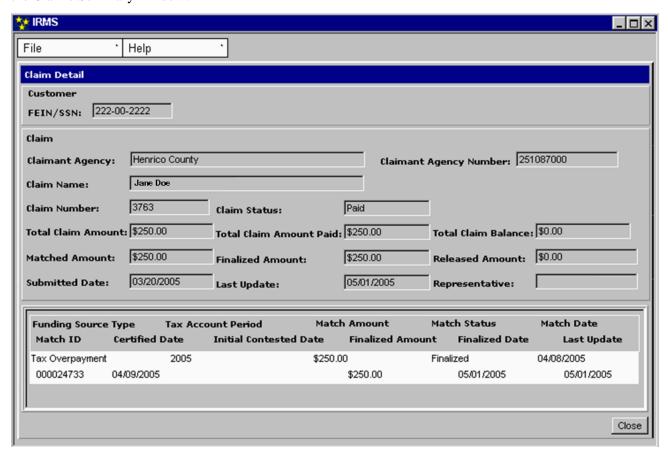
Step 5: Click **Close** to exit the Claims summary window and return to the IRMS Main window.

19.2 View Claim Detail Information

To see greater detail about a specific claim, you access the Claim Detail window. This window displays information about both individuals and businesses.

Claim Detail Window

The illustration below is the Claim Detail window. The Claim Detail window is accessible only from the Claims Summary window.
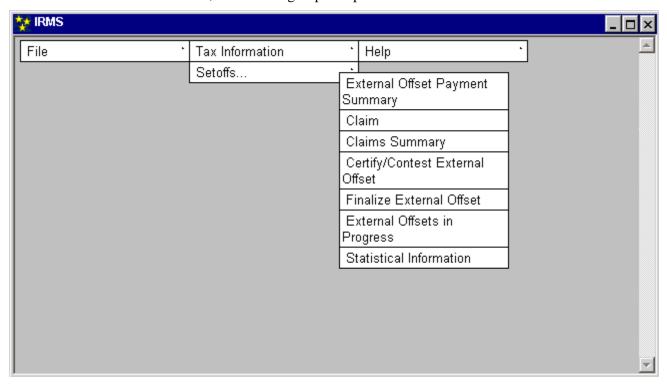
Claim Detail Fields

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

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

View Claim Detail Information

To view the Claim Detail window, the following steps are performed:
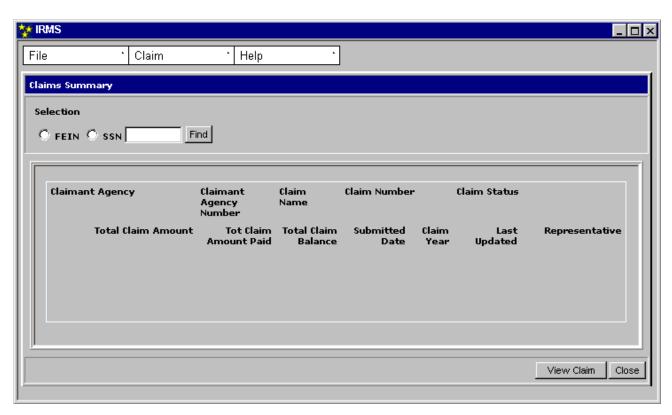

Step 1: Select: **Tax Information: Setoffs: Claims Summary**.
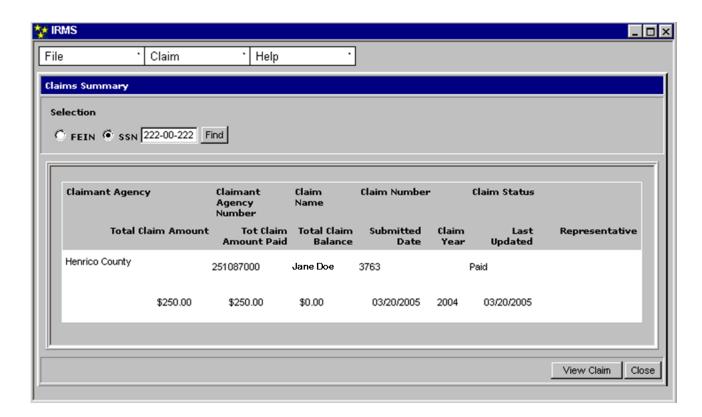The Claims Summary window opens.

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.
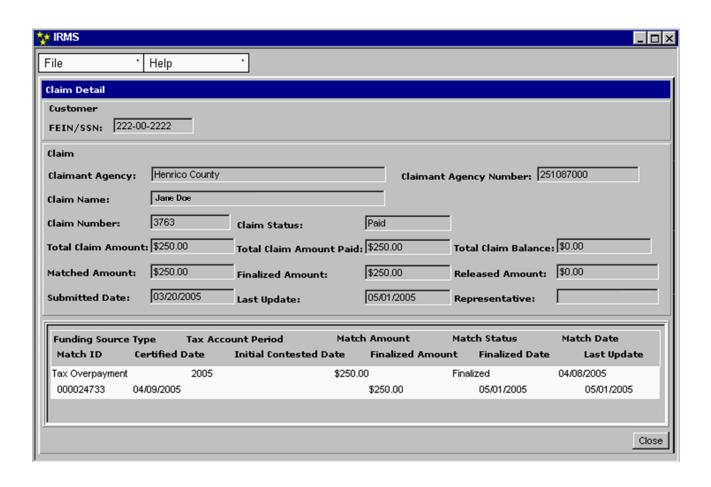
Step 2: Select the **FEIN** or **SSN** radio button.

Step 3: Enter a 9-digit **FEIN** or **SSN**.

Step 4: Click **Find**.
The Claim Summary window opens. It displays all of the claims for the debtor's FEIN/SSN for your agency.

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.

Step 7: Click **Close** to exit the Claim Detail window and return to the Claims Summary window.