

# TaxWise® Online Learning Portal

## Tax & Accounting

# Receiving and Rehanging Acknowledgements

The Wolters Kluwer Electronic Filing Center (EFC) posts acknowledgments to your electronic mailbox. Acknowledgments identify whether a return is accepted or rejected by the IRS or state. If the return is rejected, TaxWise Online includes the IRS or state explanation citing the reason, the form(s), and the box that contains the reject.

The IRS includes important information about accepted returns, such as:

- The confirmation or acceptance of a PIN
- Any balance due payment using electronic funds withdrawal
- Acceptance of extensions using Form 4868, *Application for Automatic Extension to File*

## Types of Acknowledgment Files

In addition to IRS and state acknowledgments, you may receive the following types of files in the session information section:

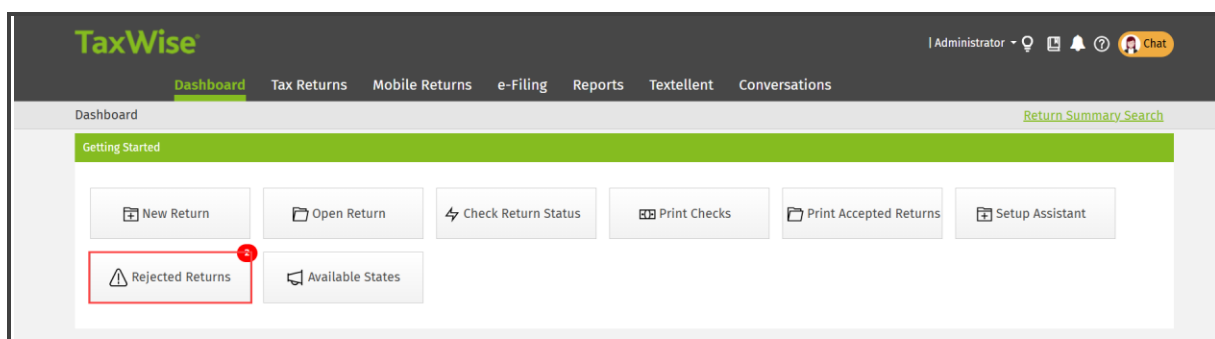
- Bank acknowledgments
- EFC rejects

EFC rejects are different from IRS rejects. Wolters Kluwer can reject a return before sending to the IRS if the return does not meet the IRS electronic format. The following are common reasons for EFC rejects:

- The e-file did not process properly.
- The primary last name is blank.
- The return was previously filed.
- This return has failed schema validation.

### Rejected e-File Workflow improvement

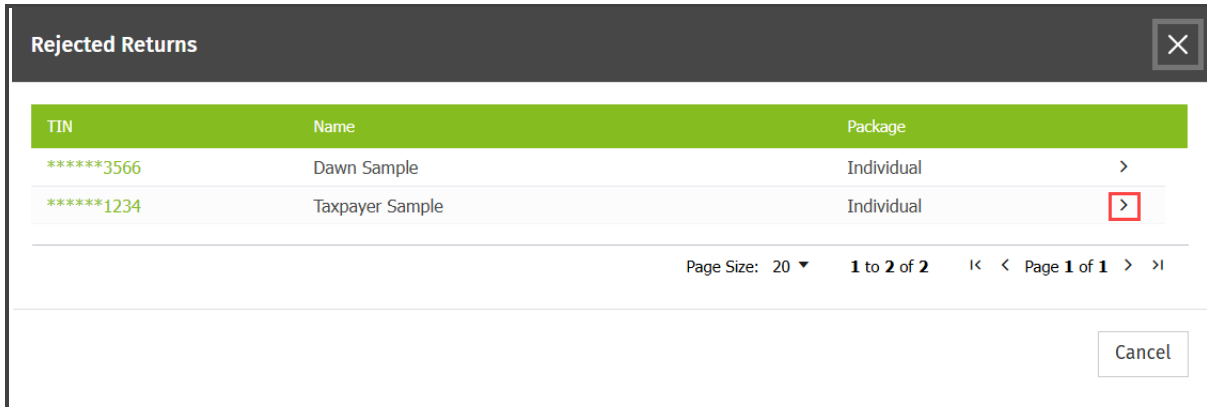
Starting with Tax Year 2025, you will be able to see a notification of any rejects on the Dashboard.



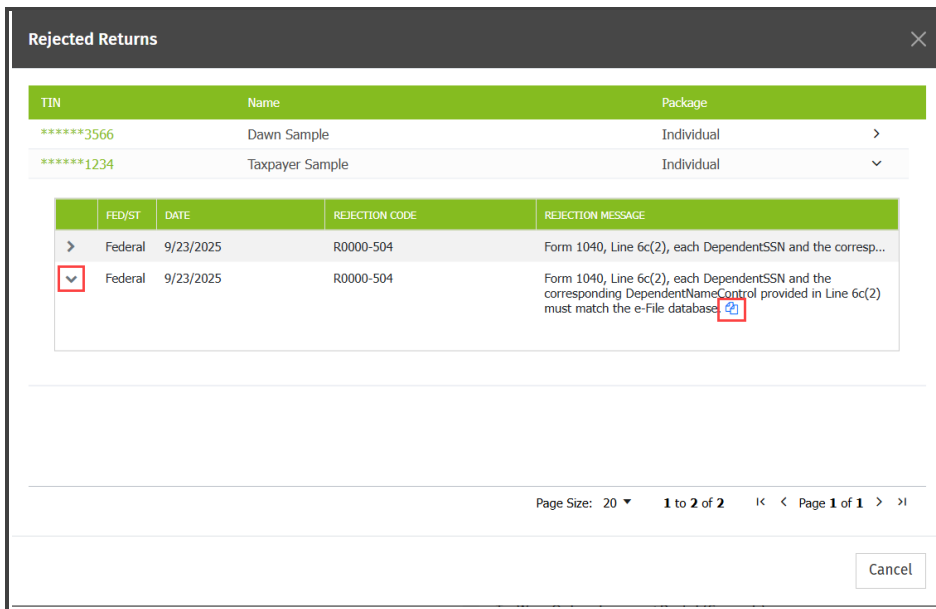
To view the details:

Click the Rejected returns button.

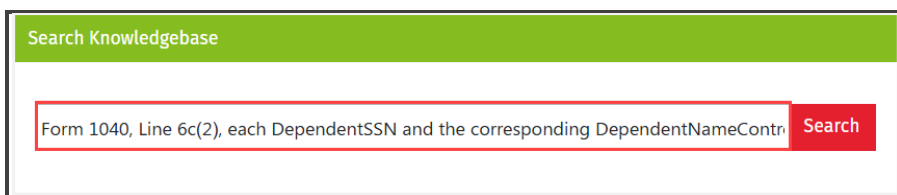
TaxWise Online displays the Rejected Returns dialog box with a list of the rejected returns. To see the reject for each individual return, click the arrow at the end of the line.



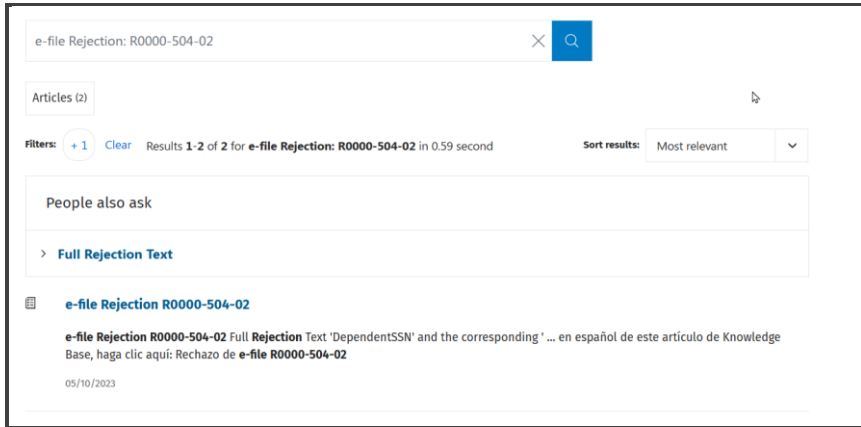
1. This will expand the reject history, click the arrow to expand the details of the reject.
2. You can copy the reject details and then search for the solution to that reject in the Knowledge Base.



3. Once you copy the reject, close the dialog box, and then click in the Search Knowledge Base field and paste the reject.
4. Click **Search**.



- The TaxWise Knowledge Base displays on a second browser tab, with viable solutions to the information searched.
- Select the Knowledge Base article to see the details.



**i** Having this visibility on the dashboard, gives you immediate visibility to the reject allowing you to access and resolve this issue faster.

## Reviewing Acknowledgements

TaxWise Online allows you to view current federal, state and bank acknowledgements. You can normally expect to receive an acknowledgment within a few hours. Acknowledgements are available as soon as the IRS or state acknowledges the return.

To view acknowledgments:

From the e-Filing page, click **View Acknowledgements**.



- TaxWise Online displays the Acknowledgments page. This page allows you to view any acknowledgements you receive for submitted returns. The Acknowledgements page consists of three tabs: IRS Acknowledgements, State Acknowledgements, and Bank Acknowledgements. Click the tab of the type of acknowledgement you want to view. For this lesson we will stay on the IRS Acknowledgment tab.

e-Filing > Acknowledgements

View Federal and state acknowledgements.

IRS Acknowledgements   State Acknowledgements   Bank Acknowledgements

From Date:  To Date:  Go

Archive Selected   Print All

- Use the date fields to filter acknowledgments for a particular period of time. Here we are looking at acknowledgements for the month of March. Once you enter the date range, click **GO**.

From Date:  To Date:  Go

- TaxWise Online displays the acknowledgements for the defined period of time. Notice the Status column indicates if the return has been accepted or rejected.

Date	TIN	Name	Ack Type	Refund	Status	e-File ST	Sig. Doc	Debt Ind	EIC Ind	Submission Id
			Federal	\$1,507.00	Accepted		PIN	None		61423720200718000026
			Federal	\$1,507.00	Rejected			None		61423720200708000024
			Federal	\$324.00	Accepted		PIN	None		61423720200698000022
			Federal	\$790.00	Rejected			None		61423720200698000019
			EfcReject	\$0.00	None					

Thrift.

- If the return was accepted, in the message column you will see message thanking you for using e-File. If the return was rejected, the message column displays the description of what caused of the rejection.

id	Status	e-File ST	Sig Doc	Debt Ind	EIC Ind	Submission Id	Message
7.00	Accepted		PIN	None		61423720200718000026	Thank you for using e-File.
7.00	Rejected			None		61423720200708000024	Form W-2, Line B 'EmployerEIN' must match data in the eFile database.
7.00	Accepted		PIN	None		61423720200698000022	Thank you for using e-File.
7.00	Rejected			None		61423720200698000019	The e-File database indicates a First Time Homebuyer Installment Payment is due for the Primary SSN. Include amount on Schedule 2 (Form 1040), 'FirstTimeHmByrRepaymentAmt' and attach Form 5405 if required.
7.00	None						Federal Individual E-File is already accepted or pending acknowledgement. We have discarded the e-file. Please note that if you resubmit an e-file before the original e-file is acknowledged, we will discard the resubmittal. If you are certain we do not already have the e-file, please notify Customer Service.

11. If you want to print the details, click **Print All**.

12. TaxWise Online displays a preview of the acknowledgements. Select your print preferences and click **Print**.

Date	TIN	Name	Ack. Type	Refund	Status	# of Filings	Sig. Date	EIC Ind	Submission ID	Message
			Failed	\$1,507.00	Rejected			None	614217202000100000024	Form W-2, Line B (Employer EIN) must match data in the file definition.
			Failed	\$324.00	Accepted			PDV None	614217202000100000022	Thank you for using e-file.
			Failed	\$760.00	Rejected			None	614217202000100000019	The e-file database indicates a First Time Homebuyer Installment Payment is due for the Primary SSN. Include amount on Schedule 2 (Form 1040), First Time Installment Payment/Am't and attach Form 5405 if required.
			EIC/Reject	\$0.00	None					Failed Individual ID-File is already recognized or pending acknowledgment. We have discarded the e-file. Please note that if you resubmit an e-file before the original e-file is acknowledged, we will discard the resubmitted. If you are certain we do not already have the e-file, please notify Customer Service.

**Total Filings** 4      **Accepted** 1      **Rejected** 2      **Duplicate**      **Exception**

## Print Reject Details

If any submitted returns are rejected by the IRS or state agency, you can use this page to print the details for those reject codes.

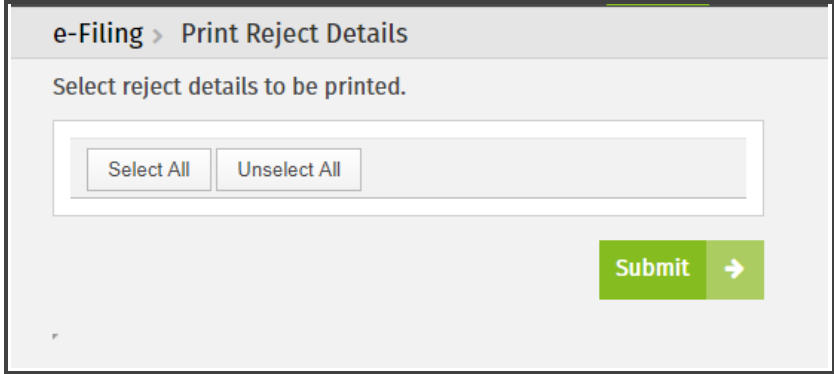
To print reject details:

From the e-Filing page, click **Print Reject Details**.

**Print Reject Details**

Select reject details to be printed.

**13.** TaxWise Online displays the Print Reject Details page. If there are any rejected returns that you have not yet corrected, you will see those listed here. In this instance they have all been resolved.



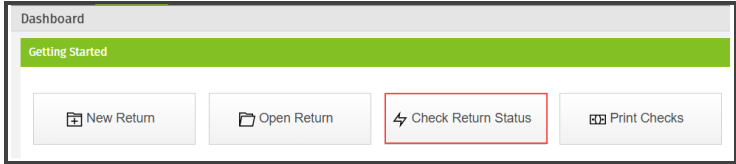
# Rehanging

## Acknowledgements

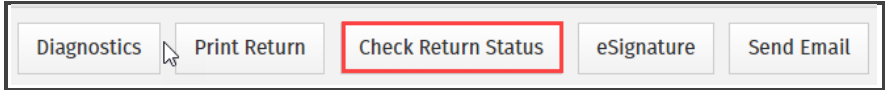
TaxWise Online allows you to track the status of an e-filed return. The return query can be accessed from within an open return, the Dashboard or from the Tax Returns Tab. Use the Return Status to rehang acknowledgments when necessary.

To access the return query tool:

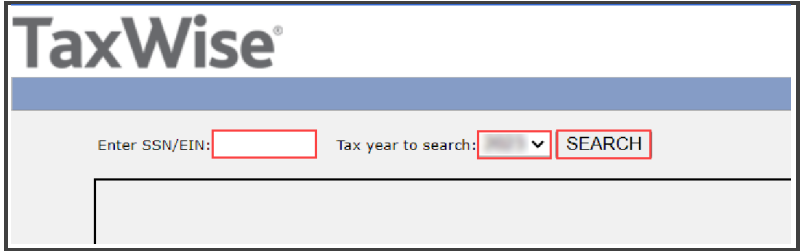
Once logged in to TaxWise Online, from the Dashboard, click **Check Return Status**.



**i** You can also check the status of any e-filed return from within the open return.



**14.** The Return Query displays in a separate browser tab. Enter the Social Security number or Employer Identification number in the field, select the tax year, and click **Search**.



**15.** The Return Query tool displays the history of the selected return.

**TaxWise**

Enter SSN/EIN: [\*\*\*\*\*] Tax year to search: [ ] SEARCH

Name	Package	Period	Product	Status	Received by EFC	Rehang ACK
Select	US 1040		TaxWise Online	Accepted		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	GA 1040		TaxWise Online	Accepted		Rehang

16. In this example, the federal return was rejected a couple of times before being accepted. Since the status column in TaxWise Online is currently stuck at rejected, we need to rehang the Accepted acknowledgement to update TaxWise Online. To do this, click the **Rehang** link.

**TaxWise**

Enter SSN/EIN: [\*\*\*\*\*] Tax year to search: [ ] SEARCH

Name	Package	Period	Product	Status	Received by EFC	Rehang ACK
Select	US 1040		TaxWise Online	Accepted		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	US 1040		TaxWise Online	Rejected		Rehang
Select	GA 1040		TaxWise Online	Accepted		Rehang

17. The Return Status tool displays a message stating that that the acknowledgement has been successfully rehung and should be available shortly. This process can take up to 20 minutes.

Enter SSN/EIN: [\*\*\*\*\*] Tax year to search: [ ] SEARCH

**ACK Scheduled for rehang successfully. Available within 20 minutes ( or min).**

Name	Package	Period	Product
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online
Select	US 1040		TaxWise Online