

TaxWise® Desktop Learning Portal

Tax & Accounting

Correcting Rejected Returns

You can correct and resubmit a rejected return without new signatures or authorizations if the amounts are not significantly different from the original return. Be sure to provide a copy of the most current return to the taxpayer.

You should get new signatures from the taxpayer if either of the following is true:

- The total income or adjusted gross income differs by more than \$50.
- The total tax, federal income tax withheld, refund or amount owed differs by more than \$14.

i If you are required to get new signatures, provide the taxpayer a copy of the new form.

IRS Reject Codes

To correct and resend a rejected return:

1. Process the rejected acknowledgement from the IRS or state.
2. Open the rejected return in TaxWise.

The first time you open a rejected return, TaxWise identifies the form containing the error using a red exclamation point, and marks in red the entry causing the error.

This return can be filed on Form 1040.

Check form you are using: 1040 1040PR 1040NR 1040NREZ

Check one: Spanish forms on the screen and printed. Spanish forms printed only.

Sal.	Your first name	Initial	Last name	Suffix	Your SSN
	Jane		Doe		

If filing a **JOINT** return, enter your spouse's

Sal.	First name	Initial	Last name, if different from yours	Spouse's SSN

Mailing address

Name line 2. Use % for care of

Present home address

Zip code, city, and state 30165- ROME GA

Taxpayer's email address

Spouse's email address

3. Use the acknowledgment report to help you locate the error. Enter the information required to correct any errors.
4. After you correct the error(s), run **Diagnostics**.
5. Create a new e-file and transmit the return using the same steps as before.

Timely Filing of a Rejected Return

For rejected returns, you should correct any issues and resubmit the return as quickly as possible. The IRS recommends that you inform the taxpayer of the rejection within 24 hours and include the reason for the rejection. If necessary, verify with the taxpayer the information that caused the rejection, such as Social Security numbers, birth dates, etc.

Paper Filing After a Reject

In some cases, the taxpayer may decide not to re-transmit, or the return may not be eligible for electronic filing. In these cases, make sure the taxpayer is aware that he/she needs to mail a paper return by the due date, or within 10 days of receiving a rejection. Otherwise, the return may fall outside the parameters of timely filing.

- i** If the taxpayer mails the return within 10 days of receiving the acknowledgment but after the return due date, make sure to include an explanation about why the taxpayer is mailing the return after the due date.

Once the extension is accepted, the taxpayer has until Oct 15th to file the completed return.

Efiling Return after a Reject

To file the completed return:

Open the return from the Open Existing Returns list and complete the remaining information that was not sent with the extension file.

- On the Main Information Sheet, change the Forms being sent using PINs section to indicate you are sending the federal return.

Self-Select and Practitioner PIN(s)	
ERO PIN for both the Self-Select and Practitioner PIN programs	12345
Check here if using the Practitioner PIN method for e-filing this income tax return or Form 4868 with direct debit	<input checked="" type="checkbox"/>
What form(s) are you e-filing using PINs?	
The income tax return	<input checked="" type="checkbox"/>
Form 4868 without direct debit. No PINs required	<input type="checkbox"/>
Form 4868 with direct debit	<input type="checkbox"/>
* Form 2350 without direct debit	<input type="checkbox"/>
* Form 2350 with direct debit	<input type="checkbox"/>
* Requires date(s) of birth above and 2014 original AGI or 2014 PIN. F8 to change spouse AGI, if incorrect.	

- i** At this time, the taxpayer PIN is required if it was not already entered for the extension.

- On the toolbar, click **Diagnostics**, and then click **E-file**.
- Send the return using the same steps used previously.