

TAX HELP PROGRAM

TRANSMITTING TAX RETURNS AND WORKING REJECTS

VITA Conference



AGENDA

1. Transmitting Team
2. Contacting Clients
3. Reject Log
4. Transmitting Report

TRANSMITTING TEAM'S RESPONSIBILITIES

- Export Rejected Returns report daily for all sites
- Update Reject Log
 - Used to track and update the status of each rejected tax return
- Contact taxpayers about their rejected tax returns
- Work with the site managers to ensure each tax return's status is up to date and correct
- Add notes to taxpayer's records
 - Guides staff and volunteers through the next steps to resolve the rejected tax return

Adding TaxSlayer Notes

CODE	DESCRIPTION	SHORTHAND
F8863-528-03	Each Student SSN that has a value on Form 8863, must not be the same as that in another Form 8863 for the same tax year.;	Student claimed 2x
F8888-015	DepositorAccountNum' on Form 8888 must be unique.	Bank account # used 2x
F8889-004	If Form 8889, 'HSA LimitedAnnualDeductibleAmt' has a non-zero value, then it must not be greater than 8750.	
F8962-058	If Form 8962, Line 24 'TotalPremiumTaxCreditAmt' has a non-zero value, then Line 1 'TotalExemptionsCnt' must have a non-zero value	Invalid Form 8962 entry

Personal Notes

TY25 RESOLVED

TP CALLED MP TO GET 1095A INFO. REJECT REOLVED. TAX RETURN WAS RETRANSMITTED. 10476MD 9/1/26

TY25 REJECT
TY25 RESOLVED
 Add New +

Edit TY25 RESOLVED

Title

TY25 RESOLVED

Description

TP CALLED MP TO GET 1095A INFO. REJECT REOLVED. TAX RETURN WAS RETRANSMITTED. 10476MD 9/1/26

CONTACTING CLIENTS

- The Transmitting team makes up to three attempts to contact the taxpayer
- Each attempt includes:
 - A phone call
 - A text message and/or voicemail if there is no response
- The goal is to make sure the taxpayer:
 - Is aware of the reject
 - Understands that action is needed
- If needed, a letter is sent as a final attempt
- The letter includes:
 - The location where they filed
 - The reason for the reject and/or action items
 - The affected tax year(s)

REJECT LOG

- The Reject Report is exported from TaxSlayer and used to create and update our Reject Log
- Keeps track of:
 - Rejected returns and their status
 - Taxpayer contact attempts
 - Whether a letter was sent
 - If there was a change in the return status and any actions taken

REJECT LOG

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Needs Attn	Retransmitted	Resolved	Letter Needed	No Longer Need to Contact - Letter Mailed	No Longer Need to Contact	No Longer Need to Contact - Diagnostic / Not a Reject						
2	Reject Log 01 NO (Prosper Center North)												
3													
4	REJECT DATE	LAST 4 SSN	TAX YEAR	NAME	ISSUE	ADDITIONAL NOTES	REFUND OR OWE?	PHONE NUMBER	1ST ATTEMPT (Call and Text)	TAXSLAYER NOTE	2ND ATTEMPT (Call and Text)	LETTER CREATED	LETTER PRINTED & SENT
5	1/20/26	1234	2026	BEYONCE KNOWLES	Primary missing/incorrect IP PIN	Spanish speaker	Refund ▾	857-123-4567	1/9 - Left VM and sent text - LB	☒	1/12: Spoke to TP- she will return to the tax site next week - LB	1/15 - LB	1/15 - LB
6	3/13/26	4567	2024	SUNNY MCCLOUD	TP claimed as dependent		Owe ▾	512-135-7911	3/16 - TP does not know who claimed her and will go to site for Paper return -MD	☒			
7	3/16/26	9876	2025	RILEY SAMPLE	FORM 8962 REQ'D		Refund ▾	512-222-1111	3/17 - TP is bringing 1095A to re	☒			
8	3/27/26	4321	2024	DATA JONES	DEP claimed 2x		Refund ▾	737-987-6543	3/30 - Left VM and text message -AB	☒	4/1 - Left VM and text message - LV		
9							▾			☐			
10							▾			☐			
11							▾			☐			

- Before transitioning to a new season, we make sure that all Rejected tax returns are changed to Failed

2024

Return review status

Select the status of the return below

☒ RETURN FAILED

Failed Reason:
IRS REJECT

☐ Approved

☒ Failed

Why did the return fail?

Please briefly explain why the return was not approved.

UNRESOLVED IRS REJECT

Personal Notes

TY24 UNRESOLVED
REJ
From the Transmitting
Office: Unresolved reject.
Failed. 10058RS

TY24 REJECT
TY24 UNRESOLVED REJ
TY24 UNRESOLVED REJ
Add New +

Edit TY24 UNRESOLVED REJ

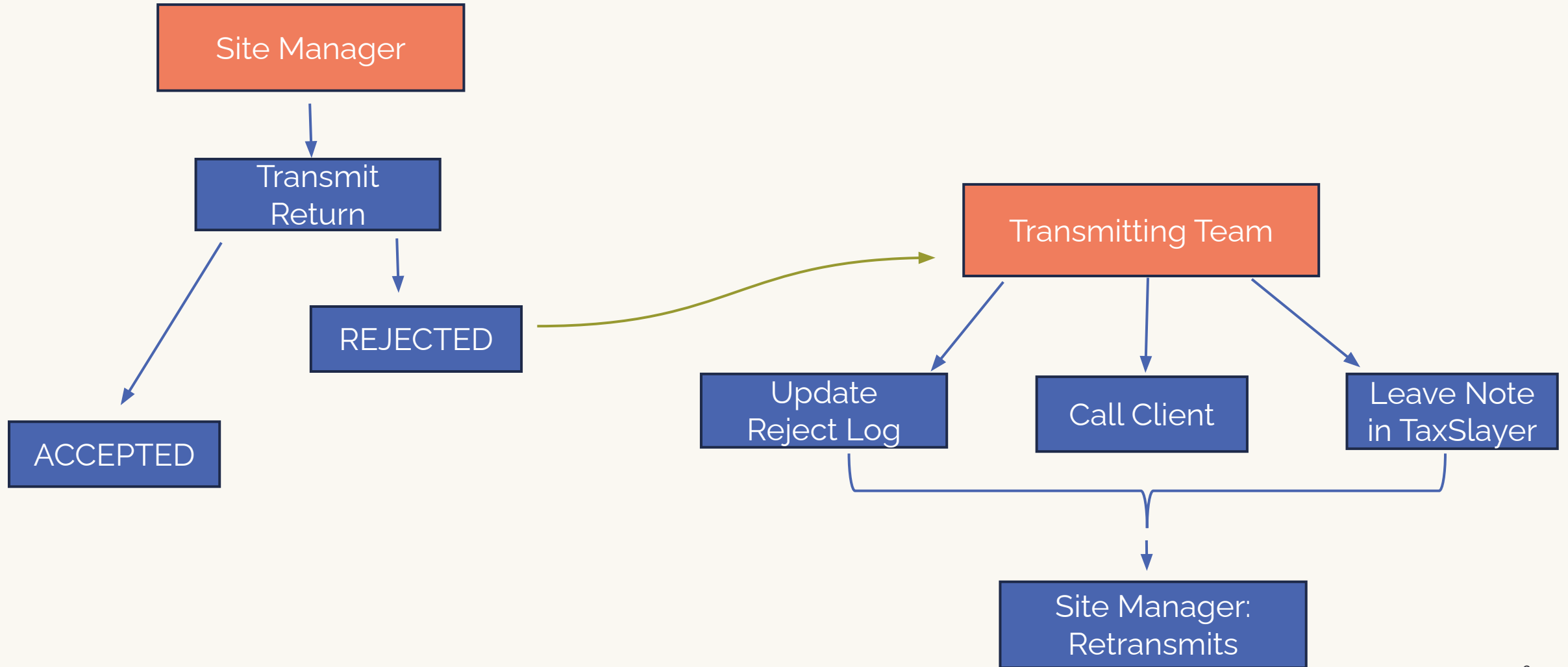
Title

TY24 UNRESOLVED REJ

Description

From the Transmitting Office: Unresolved reject. Failed. 10058RS

WORKFLOW



TRANSMITTING REPORT

- A communication tool for site managers and the transmitting team
- Used to:
 - Ensure a clean up of TaxSlayer
 - Identifies returns that might be in an incorrect status so they can be corrected
- Separated into two sections
 - Site Manager: Notifies the transmitting team when a taxpayer needs to return to sign Form 8879
 - The transmitting team then reaches out to the taxpayer to have them return and sign
 - Transmitting Team: Notifies the site manager if a tax return's status needs to be changed or updated

TRANSMITTING REPORT

Communication tool for both teams

	A	B	C	D	E
1					
2	NEED SITE MANAGER'S ATTENTION - SOUTH				
3	Updated:				
4	L4SSN	YEAR	LAST NAME	DESCRIPTION	NOTES
5					
6					
7					
8					
9					
10					
11	NEED TRANSMITTING TEAM'S ATTENTION - SOUTH				
12					
13	L4SSN	YEAR	LAST NAME		NOTES
14	(please Do Not Add Rejects)				
15					
16					
17					
18					
19					
20					



THANK YOU!