

REJECTED RETURN SOLUTIONS

Rule Text	What It Means	What the customer needs to do
<p>'PrimaryPriorYearPIN' or 'PrimaryPriorYearAGIAmt' in the Return Header must match the e-File database.</p>	<p>The primary taxpayer's prior year pin or prior year AGI do not match IRS records.</p>	<p>Log in, click on the Review heading and save and continue until the self-select pin page. Review and update the information for prior year, then save through and resubmit the return</p>
<p>'SpousePriorYearPIN' or 'SpousePriorYearAGIAmt' in the Return Header must match the e-File database</p>	<p>The spouse taxpayer's prior year pin or prior year AGI do not match IRS records.</p>	<p>Log in, click on the Review heading and save and continue until the self-select pin page. Review and update the information for prior year, then save through and resubmit the return</p>
<p>'PrimarySSN' and 'PrimaryNameControlTxt' in the Return Header must match the e-File database.</p>	<p>The primary taxpayer SSN or name do not match IRS records.</p>	<p>Review the SSN and name entered. Be sure they are entered exactly as they appear on your social security card. If there is a mistake, update your entries and resubmit the return. If it appears to be correct, contact the social security administration to see if there is an error in their records at 1-800-772-1213.</p>
<p>Spouse SSN and Spouse Name Control in the return must match the eFile database.</p>	<p>The spouse taxpayer SSN or name do not match IRS records.</p>	<p>Review the SSN and name entered. Be sure they are entered exactly as they appear on your social security card. If there is a mistake, update your entries and resubmit the return. If it appears to be correct, contact the social security administration to see if there is an error in their records at 1-800-772-1213.</p>
<p>Taxpayer TIN in the Return Header must not be the same as a TIN of a previously accepted electronic return for the return type and tax period indicated in the tax return.</p>	<p>The IRS has already received and accepted a return where the taxpayer TIN (SSN or ITIN) was used.</p>	<p>Check to make sure there is not someone else that may have already filed a return for you. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>

<p>If 'PINTypeCd' in the Return Header has the value "Self-Select OnLine" and the filing status of the return is not married filing jointly, then 'PrimaryBirthDt' in the Return Header must match the e-File database</p>	<p>The IRS has already received and accepted a return where the taxpayer TIN (SSN or ITIN) was used. The primary taxpayer date of birth entered on the return is not matching IRS records.</p>	<p>Review the date of birth entered. If incorrect, update and resubmit the return. If the date is correct, contact Social Security Administration (SSA) at 1-800-772-1213 as their date of birth may be incorrect on SSA's database. Once it is straightened out with SSA, wait a week or two and resubmit via e-file.</p>
<p>If 'PINTypeCd' in the Return Header has the value "Self-Select OnLine" and the filing status of the return is married filing jointly and each of the following does not have a value: ['SpecialProcessingLiteralCd' and 'CombatZoneCd' and 'SpecialProcessingCodeTxt' and 'PrimaryDeathDt'], then 'PrimaryBirthDt' in the Return Header must match the e-File database.</p>	<p>The primary taxpayer date of birth entered on the return is not matching IRS records.</p>	<p>Review the date of birth entered. If incorrect, update and resubmit the return. If the date is correct, contact Social Security Administration (SSA) as their date of birth may be incorrect on SSA's database. Once they get it straightened out, wait a week or two and resubmit via e-file.</p>
<p>If 'PINTypeCd' in the Return Header has the value "Self-Select OnLine" and the filing status of the return is married filing jointly and each of the following does not have a value: ['SpecialProcessingLiteralCd' and 'CombatZoneCd' and 'SpecialProcessingCodeTxt' and 'SpouseDeathDt'], then 'SpouseBirthDt' in the Return Header must match the e-File database</p>	<p>The spouse taxpayer date of birth entered on the return is not matching IRS records.</p>	<p>Review the date of birth entered. If incorrect, update and resubmit the return. If the date is correct, contact Social Security Administration (SSA) as their date of birth may be incorrect on SSA's database. Once they get it straightened out, wait a week or two and resubmit via e-file.</p>
<p>Due to repeated unsuccessful attempts, this return cannot be filed electronically. Please submit a paper tax return. To find a proper mailing address, go to irs.gov/file.</p>	<p>The return has been submitted and rejected too many times. It now needs to be printed and mailed to file it.</p>	<p>The return will now need to be printed and mailed in order to file it.</p>
<p>Form W-2, Line B 'EmployerEIN' was issued after the Tax Year in the Return Header.</p>	<p>The employer federal identification number (tax ID) was issued after the tax year being filed.</p>	<p>Contact the issuer of the W-2 for resolution.</p>

<p>Form 1099-R, 'PayerEIN' must match data in the e-File database.</p>	<p>The payer federal identification number (tax ID) does not match IRS records.</p>	<p>Revisit the 1099-R section under income & earnings in the retirement and pensions section and review the payer EIN entered on the 1099-R. Update as necessary and resubmit the return. If it was entered correctly, the taxpayer should contact the issuer of the 1099-R for assistance.</p>
<p>Form W-2, Line B 'EmployerEIN' must match data in the eFile database.</p>	<p>The employer federal identification number (tax ID) does not match the IRS Records</p>	<p>Revisit the W-2 under Income & Earnings and review the payer EIN entered on the W-2. Update as necessary and resubmit the return. If it was entered correctly, the taxpayer should contact the issuer of the W-2 for assistance.</p>
<p>At least one of the following must have a non-zero value in the return: 'TotalIncomeAmt' or 'AdjustedGrossIncomeAmt' or 'TaxAmt' or 'TotalTaxBeforeCrAndOthTaxesAmt' or 'TotalCreditsAmt' or 'AggregateTaxAmt' or 'TotalPaymentsAmt'.</p>	<p>The return does not have any values entered that fall under the referenced areas.</p>	<p>Please review your income to see if it is necessary to file a return. Visit https://www.irs.gov/help/ita/do-i-need-to-file-atax-return if you are unsure.</p>
<p>Form 8862 must be present in the return. The e-File database indicates the taxpayer must file Form 8862 to claim Earned Income Credit after disallowance.</p>	<p>The form 8862 needs to be included with the return if the taxpayer is wanting to claim the Earned Income Credit after previously having been disallowed it in a prior year.</p>	<p>Click on Other Forms, then under Miscellaneous click Information to Claim Certain Refundable Credits After Disallowance. Review and update the answers as necessary.</p>
<p>Form 8862 must be present in the return. The e-File database indicates the taxpayer must file Form 8862 to claim Child Tax Credit or Other Dependent Credit or Additional Child Tax Credit after disallowance.</p>	<p>The form 8862 needs to be included with the return if the taxpayer is wanting to claim the Child Tax Credit or other dependent credit or additional child tax credit after previously having been disallowed it in a prior year.</p>	<p>Click on Other Forms, then under Miscellaneous click Information to Claim Certain Refundable Credits After Disallowance. Review and update the answers as necessary.</p>

<p>Form 8862 must be present in the return. The e-File database indicates the taxpayer must file Form 8862 to claim American Opportunity Tax Credit after disallowance.</p>	<p>The form 8862 needs to be included with the return if the taxpayer is wanting to claim the American Opportunity tax credit after previously having been disallowed it in a prior year.</p>	<p>Click on Other Forms, then under Miscellaneous click Information to Claim Certain Refundable Credits After Disallowance. Review and update the answers as necessary.</p>
<p>The e-File database indicates a First Time Homebuyer Installment Payment is due for the Primary SSN. Include amount on 'FirstTimeHmByrRepaymentAmt' of the return and attach Form 5405 if required.</p>	<p>The IRS records indicate that the primary taxpayer should have a first-time homebuyer installment payment on their return, however,they currently do not.</p>	<p>Click on Other Forms, then under Other Taxes click Repayment of the First-Time Homebuyer Credit, then proceed through the section to generate the form 5405.</p>
<p>The e-File database indicates a First-Time Homebuyer Installment Payment is due for the Spouse SSN. Include an amount on Form 1040, Schedule 2, 'FirstTimeHmByrRepaymentAmt' and attach Form 5405 if required</p>	<p>The IRS records indicate that the spouse should have a first-time homebuyer installment payment on their return, however,they currently do not.</p>	<p>Click on Other Forms, then under Other Taxes click Repayment of the First-Time Homebuyer Credit, then proceed through the section to generate the form 5405.</p>
<p>Primary taxpayer's Identity Protection Personal Identification Number (IP PIN) must match the e-File database. Please double check your entry and resubmit your return with the correct number.</p>	<p>The primary taxpayer's IP PIN is not matching the IRS records.</p>	<p>Review the entry of the IPPIN for accuracy and update and resubmit the return. The IPPIN is under the Personal & Family section on the page with the primary taxpayer details.</p>
<p>The Primary Taxpayer did not enter a valid Identity Protection Personal Identification Number (IP PIN). Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number.</p>	<p>The primary taxpayer did not enter an IPPIN and the IRS is expecting one to be entered.</p>	<p>Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number. The IPPIN is under the Personal & Family section on the page with the primary taxpayer details.</p>

<p>The Spouse Identity Protection Personal Identification Number (IP PIN) must match the e-File database. Please double check your entry and resubmit your return with the correct number.</p>	<p>The spouse taxpayer's IP PIN is not matching the IRS records.</p>	<p>Review the entry of the IPPIN for accuracy and update and resubmit the return. The IPPIN is under the Personal & Family section on the page with the spouse taxpayer details.</p>
<p>The Spouse did not enter a valid Identity Protection Personal Identification Number (IP PIN). Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number</p>	<p>The spouse taxpayer did not enter an IPPIN and the IRS is expecting one to be entered.</p>	<p>Please visit www.irs.gov/getanippin for further information and resubmit your return with the correct number. The IPPIN is under the Personal & Family section on the page with the spouse taxpayer details.</p>
<p>Primary SSN in the Return Header must not be equal to the Spouse SSN on another tax return for which filing status is Married Filing Jointly or [filing status is Married Filing Separately and the Spouse exemption is claimed].</p>	<p>The person listed as the primary taxpayer has already filed a return where they were listed as the spouse.</p>	<p>Check with your spouse to ensure that they have not already filed a return. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>
<p>The Spouse SSN in the return must not be the same as the Primary SSN on another return filed for the same tax year.</p>	<p>The person listed as the spouse taxpayer on this return has already filed a return where they were listed as the primary taxpayer.</p>	<p>Check with your spouse to ensure that they have not already filed a return. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>
<p>The Spouse SSN in the return must not be the same as Spouse SSN in another return filed for the same tax year.</p>	<p>The person listed as the spouse taxpayer on this return has already filed a return where they were listed as the spouse taxpayer.</p>	<p>Check with your spouse to ensure that they have not already filed a return. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>
<p>The Primary SSN in the Return Header must not be equal to the Primary SSN in another return filed for the same tax year.</p>	<p>The person listed as the primary taxpayer has already filed a return where they were listed as the primary taxpayer.</p>	<p>Check to make sure there is not someone else that may have already filed a return for you. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>

<p>A Dependent SSN in the return must not be the same as the Primary or Spouse SSN on another return where 'PrimaryClaimAsDependentInd' or 'SpouseClaimAsDependentInd' is not checked.</p>	<p>The dependent listed on the return that is referenced, already filed a return where they were listed as the primary or spouse and did not indicate someone else could claim them.</p>	<p>Check with the dependent to see if they possibly filed a return in error or missed checking the box to indicate they could be claimed by someone else. If the dependent did file their own return, either the other person could not claim them, or the dependent would amend their return to indicate they can be claimed as a dependent, then the other return can be filed by mail only. It will still reject via efile.</p>
<p>If the Primary SSN appears more than once in the e-File database, then 'PINTypeCd' in the Return Header must not have the value "SelfSelect On-Line".</p>	<p>This means the IRS has already received a return with the primary taxpayer SSN, therefore they must paper file the return.</p>	<p>Check to make sure there is not someone else that may have already filed a return for you. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>
<p>If the Spouse SSN appears more than once in the e-File database, then 'PINTypeCd' must not have the value "Self-Select On-Line".</p>	<p>This means the IRS has already received a return with the spouse taxpayer SSN, therefore they must paper file the return.</p>	<p>Check to make sure there is not someone else that may have already filed a return for the spouse listed. If there is no other return already filed to your knowledge, you should report to the IRS as possible identity theft at 1-800-908-4490</p>
<p>If the Primary Taxpayer is under the age of 16 and has never filed a tax return, then 'PINTypeCd' in the Return Header must not have the value "Self-Select On-Line".</p>	<p>If the primary taxpayer is under 16 and this is their first time filing, they must paper file the return</p>	<p>Print and mail the return to the IRS to file. The taxpayer will be able to efile in future years.</p>
<p>The Primary SSN in the Return Header has been locked because Social Security Administration records indicate the number belongs to a deceased individual.</p>	<p>The primary taxpayer's SSN has been locked by the Social Security Administration as their records indicate it belongs to a deceased individual.</p>	<p>Review the SSN entered. If there is a mistake, update and resubmit the return. If it is correct, contact the social security administration to see if there is an error in their records at 1-800-772-1213</p>

<p>The Spouse SSN in the return has been locked because Social Security Administration records indicate the number belongs to a deceased individual.</p>	<p>The spouse taxpayer's SSN has been locked by the Social Security Administration as their records indicate it belongs to a deceased individual.</p>	<p>Review the SSN entered. If there is a mistake, update and resubmit the return. If it is correct, contact the social security administration to see if there is an error in their records at 1-800-772-1213</p>
<p>Each 'DependentSSN' and the corresponding 'DependentNameControlTxt' that has a value in 'DependentDetail' in the return must match the SSN and Name Control in the e-File database</p>	<p>The dependent SSN or name do not match IRS records.</p>	<p>Review the SSN and name entered. Be sure they are entered exactly as they appear on your social security card. If there is a mistake, update your entries and resubmit the return. If it appears to be correct, contact the social security administration to see if there is an error in their records at 1-800-772-1213.</p>
<p>'DependentSSN' in 'DependentDetail' on the return was used as a Dependent SSN on a previously filed tax return for the same tax period.</p>	<p>The dependent was already listed as a dependent on another tax return that was filed.</p>	<p>If you know of someone else who may have claimed the dependent please check with them. If you wish to dispute that the other person claimed the dependent, you will need to paper file your return and include correspondence stating the issue and any documentation showing you are eligible to claim the dependent.</p>