

## How To Fix a Rejected Return

Rejected returns are found in Return Conversion

We **no longer** print DCR's

In Jhnet you will select eServices > Return Conversion > Click Rejects ~ Click your store or all the stores - Everyone helps work ALL rejects.

View by PCTR: DBC View by Office(s): 33 items selected



### RETURN CONVERSION

SHARED DOCUMENTS
HOLDS
VOIDS
REJECTS
SIGN & SAVE
REMOTE ESIGN
PREACKS
EXTENSIONS

#### RISK BREAKOUT

100%

High	0
Medium	0
Low	1
Total	1

#### HIGH RISK

100%

Over 7 days since Rejected  
0.0% of Total

0

#### MEDIUM RISK

100%

4.7 days since Rejected  
0.0% of Total

0

#### LOW RISK

100%

Up to 3 days since Rejected  
100.0% of Total

1

Filter by Callback Date:

Resolved?  No  Yes  Both

SMS Opt-Out  No  Yes  Both

[Clear All Filters](#) [Apply Filters](#)

Export
Export to Contact
ex. 12345
Search for Receipt

Client Name	Tenure	Tax Preparer	Return Rejected	Last Contact	Last Attempt	Last Disposition	Callback	Resolved?	Receipt	Office ID
CONFIDENTIAL	New	Algar CONFIDENTIAL	01/17/2023	-	01/17/2023	Left Recorded Message	-	No	10541	16133

Showing 1 to 1 of 1 entries

On the client click see details to pull their file and then click Customer Look Up

View by PCTR: DBC View by Office(s): 33 items selected

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#### Client Details

Client Name	Client Best Phone	Receipt ID
Spouse Name	Office ID 16133	Tax Preparer
Tenure New	Tax Prep Fee \$585.00	Form 8821 True

#### Enter Notes\*

Begin typing here...

0 / 1000

Call Disposition\*  
Select Disposition

#### Receipt Status

Risk Undefined	Days Since Rejected 0	Funded RA Yes
Product FD-ACR	Date Return Rejected 01/17/2023	
Reject Rule FB962-070		

Note History [Contact History](#)

- Logged by DBC.stantonh@jhnet.com 1/17/2023, 12:42:05 PM  
Return rejected due to needing 1095A, called client and left voicemail to return call. Will call marketplace with client and get issue sorted as soon as they call back - health
- Logged by DBC.bailey@jhnet.com 1/4/2023, 5:24:33 PM  
The 4 step children's biological father has been out of the picture, per the Mother, and Mr. Ramos has been their sole support.
- Logged by DBC.bailey@jhnet.com 1/4/2023, 5:12:17 PM  
TP, HOH, 5 Dependents, one natural biological son, and 4 step children, one w/2, only no insurance
- Logged by DBC.algar@jhnet.com 12/14/2022, 9:40:12 AM  
TP HOH 4 dependents, one pay stub
- Logged by DBC.algar@jhnet.com 12/14/2022, 9:14:54 AM  
TP HOH, one dependent, one pay stub

Cancel
Update

Showing 1 to 5 of 6 entries

Tools

Return Management

Make an Appointment

Client Information Tool

Customer Look Up

## In customer look up select the IRS/State tab

**Products:** FD-ACR      **Locked:** False      **Tax Year:** 2022      **Proc Year:** 2023  
**Disb Meth:** Amex Card      **Form 8821:** True      **Secure:** False      **Virtual:** False      **Customer ID:** 25766850

**Overview** | **Detail** | **IRS/State** | **Disbursement** | **Fees/Pmts** | **Customer** | **History**

[Return Management](#)

### IRS Information

<b>Tax Year:</b> 2022	<b>Preparer:</b>	<b>Prep of Rec:</b>	<b>GG:</b> Y
<b>Federal Refund:</b> \$9,720.00	<b>State Only:</b>	<b>Flex Type:</b>	<b>Flex Amount:</b>
<b>Rcvd NHQ:</b> 1/4/2023	<b>IRS Ack:</b> 1/17/2023	<b>IRS Status:</b> R	<b>EIC Amount:</b> \$4,682.00
<b>Filing Status:</b> HOH	<b>Identity Protection:</b> No		

### IRS Reject Information

OCT	JD	SQ	Rej#	Form	Occ	Field	Date	Retran	Reason
RP	017	001	070	F8962	1		1/17/2023		<a href="#">Click for details!</a>

Then under reject information "Click for details!"

This will open details about the reject

JHnet      Welcome **Stephie M. Potts Bell (@DBC)** | [logout](#)  
**Home** | **Business Centers** | **eServices** | **Reports** | **Support** | **Library** | **Contact Us**    
Modernized EF Reject Detail

**Rule:** F8962-070      **Category:** Missing Document  
**Detail:** The e-File database indicates that Form 8962 or a binary attachment with description containing "ACA Explanation" must be present in the return.  
**XPath:** /efile:Return/efile:ReturnData/efile:IRS1040  
**Data:**      **Document ID:** D00001k1v1

**This is just one of many reject reasons**

**But what does it all mean??**

**Rule:** This is a number that goes with the category

**Category:** General issue with the return

**Detail:** This gives you a little bit more detail to help you figure out the problem

**XPath:** Sometimes you can get a little bit more helpful information here. If you look you can make out "Return Header" and "Primary SSN"

**Data:** This shows the last four of the SSN causing your issue

**Document ID:** This only has info when the issue is because of a certain document in the return

Once you know the fix, pull return up in Profiler, MODIFY, fix and resend!

