## TAX GUARD PORTAL FAQ: Form 8821 Rejection Glossary

## General

Form is Illegible. Form 8821 is not clear enough to be processed by the IRS. The resolution of Form 8821 could be too dark, too light, etc.

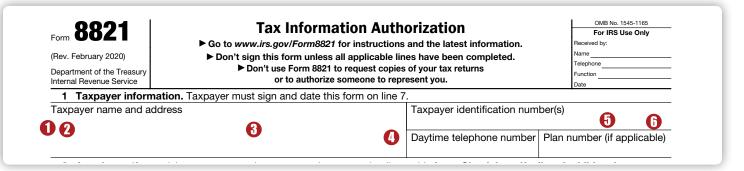
An incorrect document was uploaded or the version of Form 8821 is no longer accepted. Form 8821 was not the first page of the document submitted, or the version of Form 8821 that was submitted is no longer accepted by the IRS.

**Revoked.** Tax Guard has lost authorization for this client and is unable to obtain any tax information from the IRS until a new Form 8821 is submitted.

**Identity Theft.** The IRS has frozen the account, and until they conclude their investigation, Tax Guard is unable to complete a report.

**IRS Processing Unsuccessful.** The Form 8821 submitted to Tax Guard was unable to register with the IRS in the specified timeframe. It is possible this was a processing error at the IRS.

## **Section 1**



Section 1 on Form 8821 is incomplete or incorrect. Important information may be missing or is not in a format that the IRS will accept for processing.

 $m{2}$  The name entered does not match IRS records. The IRS indicated the name provided on Form 8821 is incorrect.

🚯 The organization type is incorrect. The IRS has indicated this business is registered as a different entity type.

**(1)** The name, EIN and/or SSN does not match IRS records. Information on a Tax Return or Letter 147c directly from the IRS can provide the exact information the IRS has on file.

The EIN/SSN entered does not match IRS records. The IRS indicated the EIN/SSN listed on Form 8821 is incorrect and must be corrected to grant Tax Guard authorization.

**(b)** The EIN/SSN on the 8821 does not match the EIN/SSN in the portal. The EIN/SSN on the submitted Form 8821 does not match what was provided.



appointees is attached ►	than one appointee, attach a list to this form. Check here if a list of additional
Name and address	CAF No.
	PTIN
	Telephone No.
	Fax No.
	Check if new: Address 🗌 Telephone No. 🗌 Fax No. 🗌

Section 2 on Form 8821 is incomplete or incorrect. Tax Guard's information must be provided in this section to grant us authorization with the IRS.

		for the type of tax, forms,
cess to my IRS records via ar	n Intermediate Service Provider.	
<b>(b)</b> Tax Form Number (1040, 941, 720, etc.)	<b>(c)</b> Year(s) or Period(s)	(d) Specific Tax Matters
t	t below. See the line 3 instruct ess to my IRS records via ar (b) Tax Form Number	Tax Form Number Year(s) or Period(s)

Section 3 on Form 8821 is incomplete or incorrect. The tax forms and periods must match the entity type and include the current year for full authorization.

individual, i	of taxpayer. If signed by a corporate officer, partner, guardia f applicable), executor, receiver, administrator, trustee, or par ity to execute this form with respect to the tax matters and ta	rty other than the taxpayer, I ce	rtify that I have the
legal autio	Ty to execute this form with respect to the tax matters and the		ve.
► IF NOT C	COMPLETE, SIGNED, AND DATED, THIS TAX INFORMATI	ON AUTHORIZATION WILL B	E RETURNED.
	IGN THIS FORM IF IT IS BLANK OR INCOMPLETE		
► DON'T S	IGN THIS FORM IF IT IS BLANK OR INCOMPLETE.		0
► DON'T S	IGN THIS FORM IF IT IS BLANK OR INCOMPLETE.		0
► DON'T S	IGN THIS FORM IF IT IS BLANK OR INCOMPLETE.	Date	0
)	IGN THIS FORM IF IT IS BLANK OR INCOMPLETE.	Date	<u>0</u>

- **Signature is missing or IRS declined e-signature.** IRS does not accept e-signatures on Form 8821s. A wet-signed Form 8821 is required for processing.
- 2 Signature date is missing, illegible or over 120 days. The IRS will not accept Form 8821 if a signature date is missing, illegible or has a signature date greater than 120 days.
- **IRS does not associate the signer listed with the individual.** The IRS has indicated that the individual who signed the Form 8821 is not associated with the individual in Section 1.
- **()** Title is missing or incorrect. The signer title may be missing or doesn't match the business entity type.