

# 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

Form <b>8821</b> (Rev. February 2020) Department of the Treasury Internal Revenue Service	<b>Tax Information Authorization</b> ▶ Go to <a href="http://www.irs.gov/Form8821">www.irs.gov/Form8821</a> for instructions and the latest information. ▶ Don't sign this form unless all applicable lines have been completed. ▶ Don't use Form 8821 to request copies of your tax returns or to authorize someone to represent you.	OMB No. 1545-1165 <b>For IRS Use Only</b> Received by: Name _____ Telephone _____ Function _____ Date _____
<b>1 Taxpayer information.</b> Taxpayer must sign and date this form on line 7.		
1 2 Taxpayer name and address	3 Taxpayer identification number(s)	5 6 Daytime telephone number   Plan number (if applicable)

- 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.
- 2 The name entered does not match IRS records.** The IRS indicated the name provided on Form 8821 is incorrect.
- 3 The organization type is incorrect.** The IRS has indicated this business is registered as a different entity type.
- 4 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.
- 5 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.
- 6 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.

## Section 2

**2 Appointee.** If you wish to name more than one appointee, attach a list to this form. **Check here if a list of additional appointees is attached**

Name and address	CAF No. _____
	PTIN _____
	Telephone No. _____
	Fax No. _____
	Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

**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.

## Section 3

**3 Tax Information.** Appointee is authorized to inspect and/or receive confidential tax information for the type of tax, forms, periods, and specific matters you list below. See the line 3 instructions.

By checking here, I authorize access to my IRS records via an Intermediate Service Provider.

(a) Type of Tax Information (Income, Employment, Payroll, Excise, Estate, Gift, Civil Penalty, Sec. 4980H Payments, etc.)	(b) Tax Form Number (1040, 941, 720, etc.)	(c) Year(s) or Period(s)	(d) Specific Tax Matters

**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.

## Section 7

**7 Signature of taxpayer.** If signed by a corporate officer, partner, guardian, partnership representative (or designated individual, if applicable), executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the legal authority to execute this form with respect to the tax matters and tax periods shown on line 3 above.

▶ **IF NOT COMPLETE, SIGNED, AND DATED, THIS TAX INFORMATION AUTHORIZATION WILL BE RETURNED.**

▶ **DON'T SIGN THIS FORM IF IT IS BLANK OR INCOMPLETE.**

**1** \_\_\_\_\_ **2**  
Signature Date

**3** \_\_\_\_\_ **4**  
Print Name Title (if applicable)

For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Cat. No. 11596P

Form **8821** (Rev. 2-2020)

- 1 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.
- 3 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.
- 4 Title is missing or incorrect.** The signer title may be missing or doesn't match the business entity type.