

Ebuzz Most Common Errors

Below is a list of common errors that the Ebuzz team encounters. These issues will cause delays in processing documents and processing returns.

Interview Sheets:

1. It is important to review all pages of the interview sheets prior to submitting them to Ebuzz to be sure that all sections are complete. If any portion of the interview sheets is not complete, they will be rejected.
2. Page 4: Dependent Information, Question 2 asks why the absentee parent is not claiming the dependent. This is important to answer to satisfy due diligence requirements.
3. Each page of the interview packet needs to be submitted together. There are a total of 3 pages, plus the dependents page in the 2021 packet. Please submit a dependent page for each dependent that is listed on the return. Ex. Married couple with 2 children will have 5 pages to the interview packet.
4. Page 2, Section B; Due Diligence-Income: For all tax returns whose household income is less than \$15,000: the IRS requires that they provide documents stating how they supported the household during the tax year. Proof **MUST** be given to show this support. Ebuzz Tax is programmed to stop all returns in this category and require information. Acceptable proof includes utility bills, rent receipts, lease agreements, etc.
5. All interview packets need to be signed by the taxpayer before submittal. If interview packets are not signed, the document will be rejected.
6. When corrections need to be made to the interview packet, please re-submit ALL pages of the interview packet.

Residency Documents:

1. Immunization records/shot records are NOT acceptable as proof of residency. These records do not contain the required information and therefore cannot be used to prove residency.
2. Residency templates **MUST** be on agency letterhead. The residency templates are to be used as a guide to the information required to show proof of residency. If using the templates, they must be submitted on agency letterhead in order to be processed.
3. Address on interview sheet does NOT match address on documents: Please be sure that the address listed on the interview sheet matches the address entered in the return. This address must be the address where the taxpayer lived during the tax year.
4. Lease/Rental Agreements: All lease/rental agreements must contain taxpayer's name, address, and phone number, as well as the landlord's name, address, and phone number. Agreements without this information are not acceptable.

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Ebuzz Program:

1. Information on the W-2 must be entered exactly as shown on the physical W-2. Below are some specifics that we have found are recurrent:
 - a) Box 12 Codes and Amounts: this field can change the outcome of the refund/amount owed. Accurate information in this field helps the accuracy of the overall return.
 - b) Box 3 and Box 5 amounts do not match the physical W-2: These amounts may be different on the physical W-2 and need to be entered exactly. This field also can change the outcome of the refund/amount owed.
 - c) Employer name does not match the physical W-2: The employer name on the W-2 must match exactly what is on the physical W-2.
 - d) Do not change the code in Box 15 of the W-2 to the state code where the taxpayer lives. The state codes in this field are specific to where the taxpayer earned wages.
2. Information on the 1099-R must be entered exactly as shown on the physical 1099R. Below are some specifics that we have found to be recurrent:
 - a) The Payer field on the 1099-R is NOT for the taxpayer's information. These fields are strictly for the agency issuing the 1099-R. This form should be filled out exactly as the physical 1099-R.
 - b) Box 2 for taxable amount is often missed. Please be sure to confirm that all fields in the program match the physical 1099-R.
 - c) Box 7 codes need to match what is on the physical 1099-R. This code can change the outcome of the refund/amount owed.
3. 1098-T Tuition Statement: Information on the 1098-T must match exactly what is on the physical 1098-T. Special attention should be paid to the following:
 - a) Is student considered half-time or full time? If the student is half-time, they ONLY qualify for the Lifetime Learning Credit. In this case, they must be marked as a graduate student.
 - b) Is student a graduate student or undergraduate student? Be sure to answer exactly as indicated on the 1098-T
4. The return was created with the wrong SSN: If a return was created with the wrong SSN, the return will need to be deleted and a new return started with the correct SSN. You cannot change the primary taxpayer SSN once a return has been created.
5. Taxpayer does not have SS cards: If a taxpayer has lost or had their SS Card stolen, they can request one be sent to them. They can apply in person at their local SS office, or they can apply for one online. Confirmation of this request must be provided at the time of filing.
6. It is important to check the status page within 24 hours after submitting a return. We DO NOT contact stores for returns that are rejected.
7. If the taxpayer has marked yes that they received insurance coverage through the Marketplace/ObamaCare, a 1095-A should be submitted in the document file.

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