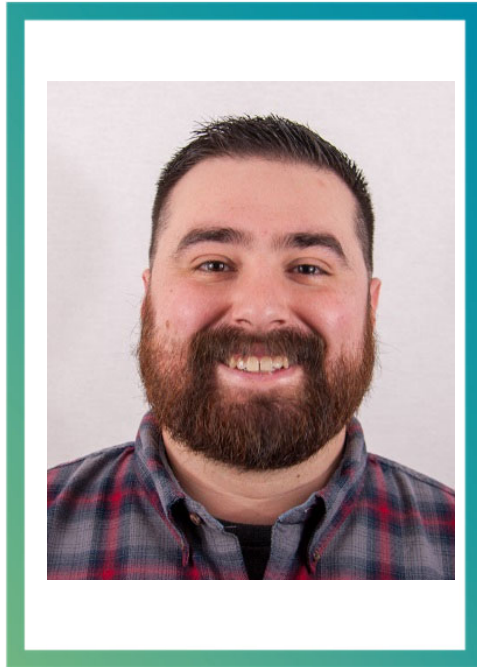TAX TRANSFORMATION
SUMMIT
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Top Ten SSR Support Issues and How to Overcome Them

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Steven Lyon

Steven Lyon is the Program Manager for SafeSend Returns at cPaperless, LLC. Steven has been with cPaperless for six years. He is the longest tenured support rep and continues to manage our Customer Support Team.

Today's Agenda

- Review the Top Ten Support Issues

- Discuss why they occur?

- Discuss best practices for overcome them

- Q & A

Unsupported Returns

Why does this happen?	How to solve?
Tax Return type is not supported (i.e. 990)	• SSR currently supports 1040, 1065, 1120, 1120S and 1041 Tax Return types
Print settings are incorrect (Bookmarks or K-1 packages)	• All returns must have bookmarks • For 1065 and 1120S, K-1 Packages are required • Keep print settings in an accessible location • Assign a specific user to oversee the printing process
PDF has been altered	• Do not alter Tax Return PDFs before uploading
PDF is password protected	• Do not use password protected PDFs

Data Recognition Issues

Why does this happen?	How to solve?
Forms not recognized or data not extracted correctly • Client Info • Transmittals • Refunds • Payment Vouchers • E-file forms	• Always "Report a Problem" • The Support team will send the item for correction • Always do a QA/QC of your return while processing

Certain Payments Are Not Recognized

Why does this happen?	How to solve?
No voucher is generated • Scheduled for Automatic withdrawal • Online payment required	• Always review your Transmittals/Filing Instructions (QA/QC)

Incorrect Voucher Due Dates

Why does this happen?	How to solve?
The Payment Voucher does not have a printed Due Date	• This policy will be updated January 2020 • Our SSR Team will be able to manage the Due Dates for Authorities individually
SSR's due date policy defaults to the Fed due dates	• As users, if you see an incorrect due date, please submit to the Support team by selecting "Report a Problem"

Taxpayer Is Not Receiving Initial Email

Why does this happen?	How to solve?
Email goes to Junk or Spam	• Sending a templated email at the time of delivery. This informs the client that the initial email has been delivered or to expect
Email is overlooked by the Taxpayer	
Email address is incorrect	• Verify and update the email address in the "Edit Client Info" section

Access Code Email Not Received

Why does this happen?	How to solve?
Taxpayer has not completed the process by requesting an Access Code	• Ensure the Taxpayer has selected the "Request Access Code" button
Access code email goes to Junk or Spam or Taxpayer cannot find it	• Use the "View Access Code" feature to help your Taxpayer access their Tax Return

Manually Signed Returns – Wrong Forms Uploaded

Why does this happen?	How to solve?
Taxpayer uploads entire return in place of signed E-File forms	• Good communication to the Taxpayer. Possibly include a note in the templated email sent at delivery • We will be making changes to this process that we feel will eliminate this use case

Unable To Establish Taxpayer Identity

Why does this happen?	How to solve?
This occurs when the Taxpayer cannot be accurately located by our third party KBA provider	Understand who is signing this return and the situations in which this may happen

Unable To Locate A Tax Return

Why does this happen?	How to solve?
Delivered Returns report appears cluttered	Create a plan for Archiving returns. We recommend anything with a completed status, you "Archive"
Previous year returns are not located	Select the proper year from the "Tax Year" filter

Miscellaneous Bugs & Other Issues

What are you experiencing?	How to solve?
Issues you have not seen before	• "Report a Problem" as soon as you can
Issues that impact or stop you from completing a task	• Check and Subscribe to our Status Page available on our website
Features that may not appear to be functioning properly	

Q & A

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