

Amended Returns

Original Return Prepared by the Site and Accepted in TaxSlayer

1. Pull the original tax return amounts to Form 1040-X, Amended Return, column A. Original Amount, by taking the following steps:

- a. Find and open the original return in TaxSlayer.
- b. Select 20XX Amended Return. TaxSlayer displays the Amended Tax Returns – Form 1040-X page:
- c. Select **Begin** on the **Original Return Information** line.
- d. Because the IRS accepted the return through TaxSlayer, the software defaults the original accepted return information on this page. Compare the carryforward information to the printed original return. Make changes if necessary. If the IRS issued a notice and made an adjustment to the original return or if the taxpayer previously filed an amended return, update the information accordingly using these documents.

Amended Tax Return - Form 1040X

How To Amend Your Return	BEGIN
Original Federal Return Information	BEGIN
Make Corrections for Amended Return	BEGIN
Amend State Return(s)	BEGIN
Explain Changes	BEGIN
Print Amended Return	BEGIN
Delete Amended Return	BEGIN



- e. Show amount paid with original return and any additional tax paid later on designated line.
- f. TaxSlayer asks for the state refund amount, or the amount paid if there is a state balance due. If amending a state return, go to the Payments and Credits line and select Begin or Edit. Enter the amount paid with the original state return or state refund received.
- g. If the taxpayer is changing personal exemptions, has changed their address, or wants to change an election for the Presidential Election Campaign Fund, select the appropriate check boxes at the bottom of the page. If the taxpayer is not adding or removing an exemption, uncheck the last box.

When finished, select **Continue**.

2. Go to **Make corrections for Amended Return** and make all necessary changes based on the new information from the taxpayer. (For example, if the taxpayer needs to add a Form W-2, add it now as you would if preparing a return normally.)

3. Amend the State Return (if needed)

- a. Select **Begin** on the **Amend State Return(s)** line. If there are no state changes, skip to step 5.
- b. Select **Amend State** for the state you need to amend.

State	Return Type		
Wisconsin	Resident	Amend State	 

- c. Select **Begin** on the Amended Return line.
- d. Read the screen and select **Yes** from the drop-down list.

Amended Returns (continued)

- e. Select **Begin** on the Review and Complete Amended Return line.
 - f. Select **Begin** on each line of the State Return: Review and Complete Amended Return page. Use the printed original return to ensure all information has been entered correctly based on the original accepted return.
 - g. When you finish reviewing all information, select **Back**.
 - h. TaxSlayer Pro displays the State Return: Amended Return page. When finished with all the information for the amended return, select **Save**, then **Exit** return to leave the state's page. Repeat as necessary for other states.
4. Review amended return and explain changes
- a. From the Amended Tax Return – Form 1040X page, select **Print Amended Return**, select **Begin**, then **Continue**. On the “Print Results” page select Print your 20XX Tax Return.
 - b. In the PDF file of the return, examine Column A to verify all the information agrees with the original Form 1040, U.S. Individual Tax Return. Next, verify the amounts in Column C agree with the amended return figures. Then, confirm Column B is the difference between Columns C and A, which represents the amounts of what is being added or removed.
 - c. Verify the correct amount overpaid or owed. On page 2, verify that all information is correct and that appropriate boxes are checked for qualifying children eligible for Child Tax Credit.
 - d. If the state form is amended, scroll down the pdf to the state forms and verify that additions to or subtractions from the federal AGI that were manually made on the amended state return are correct.
 - e. Write down which lines have changed on Form 1040-X and state amended return.
 - f. Select **Begin** on the Explain Changes line. Enter each line number and an explanation for the change on that line. Repeat with each state amended return (menu wording and location varies by state).
 - g. Ask a Quality Reviewer to double-check all entries on the federal and state amended returns.
5. If the amended return will be e-filed:
- a. Go to e-file section and select the radio button for amended tax return.


The screenshot shows the TaxSlayer Pro interface for the year 2021. At the top, there are navigation links for 'Help & Support', 'Sample Taxpayer', and 'Save & Exit'. A sidebar on the left contains a 'Form Finder' section with a search bar and a list of categories: Basic Information, Federal Section, Health Insurance, State Section, Summary/Print, and E-file. The main content area is titled 'E-File' and includes the instruction 'Select an option below to get started.' Below this, there are two radio button options: 'Original tax return' and 'Amended tax return'. At the bottom of the main area, there are two buttons: 'BACK' and 'CONTINUE'. The footer of the page indicates 'Copyright © 2022 TaxSlayer Pro'.

- b. At the following screen, set the return type to either E-file: Mail Payment or E-file: Paper Check. **Direct deposit is available on tax year 2021 and subsequent electronically filed amended returns.** However, direct debit is not available. Do not select the option for direct debit even if offered by TaxSlayer.

Amended Returns (continued)

- c. Continue through the remainder of the Submission section.
- d. Quality Reviewers: Please refer go to Page 4 for printing details.
Note: Print return copies for taxpayer (including Form 8879, IRS e-file Signature Authorization) and state as shown below. Form 8879 may show incorrect amount of balance due (1040-X Line 20) or overpayment (1040-X Line 21) – if so, make pen and ink change.

Original Return Not Created by the Site Preparing the Amended Return

 *The taxpayer must provide a copy of the original return, IRS adjusted amounts after the original return was processed, or previously filed amended returns.*

1. Since the return does not currently exist, create a federal return and state return, if applicable, that includes the amended information. These return figures comprise Form 1040-X, Column C.
When amending a return electronically, all documents must be input individually.
2. Go to the 20xx Amended Return menu > Original Federal Return Information screen to provide the original return information.
 - a. This menu populates Form 1040-X, column A. Enter information from original return, or adjusted figures if a previous amendment was filed or an IRS adjustment was made.
 - b. Form 1040-X columns C will populate based on the return prepared with the amended information. Column B will populate based on the differences between Columns C and A.
 - c. Go to the Amend State Return screen.
 - d. Select **Edit Amended** link at Amended State Return screen.
 - e. Select **Amended Return**.
 - f. Select **Yes** at the Create Amended Return box.
 - g. Complete entries at Review and Complete Amended Return screen, particularly entries involving dollar amounts.
3. When you have confirmed or entered all amounts from the original return, continue with steps 3 through 5 above.

 *Taxpayers can use the [Where's My Amended Return?](#) online tool to check the status of their Form 1040-X.*

For more information, see [IRS Form 1040-X FAQs \(www.irs.gov/filing/amended-return-frequently-asked-questions\)](http://www.irs.gov/filing/amended-return-frequently-asked-questions).

Quality Reviewer Step

E-file Print Chart

Tax Forms	Total	IRS	State	Taxpayer
1040-X*	2		1	1
1040 (with "As Amended" written across the top)	1			1
Any federal forms changed or added*	2		1	1
State voucher (if any)	1		1	
Any required State forms	2		1	1

- e. If amended return results in a balance due, review Form 1040-V, Payment Voucher. If amount is not correct, make pen and ink change. If no 1040-V in print package, go to this [1040-V link](#), choose voucher for year of amended return and fill in the fillable form. Provide taxpayer with address from current 1040-V since remittance addresses on prior year 1040-Vs may have changed.
- f. Share return with taxpayer and secure signature(s) on Form 8879.
- g. In TaxSlayer, mark return Complete.
- h. Prepare paper return for state amended return filing.

6. If amended return will be a paper return: Print forms as indicated in table below.

Paper Return Chart

Tax Forms	Total	IRS	State	Taxpayer
1040-X*	3	1	1	1
1040 (with "As Amended" written across the top)	1			1
Any federal forms changed or added*	3	1	1	1
State voucher (if any)	1		1	
Any required State forms	2		1	1

- a. Staple to the front of the 1040-X:
 - i. A copy of any Form W-2 or Form W-2c that supports changes on this return.
 - ii. A copy of any Form W-2G or 1099-R that support changes on this return, but only if tax was withheld.
- b. If there is a balance due, taxpayer needs to include the payment with the 1040-X. Attach the payment to the 1040-X. No separate payment voucher is needed. Direct debit is not available for amended returns. Alternatively, the taxpayer can make a payment through direct pay on IRS.gov.
- c. Direct deposit is not available for paper filed amended returns.
- d. Verify the state payment voucher amount (if used for your state) and that the state amended return requirements are met.
- e. Do not attach the original return
- f. Have the taxpayer(s) sign the 1040-X and amended state return.
- g. If responding to a notice from the IRS to include other changes not included in the notice, send the federal amended return to the address shown on the notice. If not, use the address in the 1040-X instructions.



The current processing time is more than 20 weeks for both paper and electronically filed amended returns.