

Amendment Tracker

Note: We **MUST** have a copy of the original 1040 filed to process an amendment.

Last Name: _____
Last 4 SS: _____
Tax Year: _____
(One form per year)

Case Reviewer Section:

Original return prepared by Ladder Up:	YES	NO
If Yes, What tax site location & date was it originally prepared: (Hint: See bottom of page 2 of 1040 for location)	Location: Date:	
Reason for Amendment:		
Change of Filing Status	YES	NO
Add / Remove a dependent	YES	NO
Add / Remove a tax form	YES	NO
What kind of tax form/Notes:		

Tax Preparer Section:

Was the return originally e-filed or paper filed?	E-FILED	PAPER FILED
Reason for filing amendment:		

Paper file: If any of the below are **YES**, the **FEDERAL** amendment must be **PAPER FILED**.

Original return was paper filed.	YES	NO
Primary Taxpayer or Spouse's SSN is different from the original tax return.	YES	NO
Original return was filed as surviving spouse (Prev. Widower)	YES	NO
Responding due to IRS notice/letter (send the amendment to address on notice).	YES	NO
Ladder Up did not prepare the original e-filed return and you are unable to recreate the original e-filed return with all documents.	YES	NO

Quality Reviewer Section:

Steps to Complete:		
Thoroughly complete Quality Review for Amendment return.		
Refer and review Tax Preparer checklist above to determine if the amendment could be e-filed or if it must be paper-filed.		
Follow Print Charts in the Amendment Instructions		
Federal Amendment:	E-File	Paper file
State Amendment:	Paper file only	
What location is the return saved?		

Client Packet for Site to File

Efile Page, If applicable for Federal (Form 8879)	YES	NO
Client Agreement form	YES	
Amendment Tracker	YES	