

Amendment practice!

We prepared Julia Oakley’s tax return during tax season. Now she has returned because she realized she had completely forgotten that she also worked for Clickety-Clack Data Shack¹ at the beginning of the year. She brought her W-2 for us to add to her return.

We only prepared Julia’s federal return, so she’s in sort of a hybrid situation: We are amending a federal return we prepared and a state return that was prepared somewhere else.

Sign into the practice lab to amend Julia’s return! <https://vita.taxslayerpro.com/IRSTraining/>

Universal password: TRAINPROWEB

Do you remember your login credentials?

Once you get in, open up Julia’s return.

We will create her state return, then amend her federal and state returns together.

22222		a Employee’s social security number 605-00-xxxx		OMB No. 1545-0008		
b Employer identification number (EIN) 55-1234567		1 Wages, tips, other compensation 9875.00		2 Federal income tax withheld 1761.58		
c Employer’s name, address, and ZIP code <u>Clickety-Clack Data Shack</u> 123 Keyboard Avenue Chicago, IL 60601		3 Social security wages 9875.00		4 Social security tax withheld 612.25		
		5 Medicare wages and tips 9875.00		6 Medicare tax withheld 143.19		
		7 Social security tips		8 Allocated tips		
d Control number		9		10 Dependent care benefits		
e Employee’s first name and initial Julia		Last name Oakley		Suff.		
159 Archer Blvd Your City, Your State, Zip		11 Nonqualified plans		12a		
		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b		
		14 Other		12c		
f Employee’s address and ZIP code				12d		
15 State	Employer’s state ID number IL 551234567 000 2	16 State wages, tips, etc. 9875.00	17 State income tax 493.75	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Form **W-2** Wage and Tax Statement
Copy 1 – For State, City, or Local Tax Department

2023

Department of the Treasury—Internal Revenue Service

¹ Thanks to ChatGPT for coming up with this business information.