

Can We Efile That???

Need a quick confirmation of whether a tax return can be e-filed or should be paper? Consult this table!

	Can We Efile That?
Tax return has a negative AGI	Yes
Tax return has zero AGI and no tax due or refund owed	No
A dependent on the tax return is deceased and the date of death is more than 6 months prior to tax return preparation	No
Self-employment income was mis-reported on Form 1099-MISC in Box 3 rather than on Form 1099-NEC , for tax years 2020 and forward	Yes! Report the amount from Form 1099-MISC Box 3 as Cash income on Schedule C
Married Filing Separately tax return prepared for a taxpayer who is a resident of a non-community property state (and thus there is no Form 8958 , Allocation of Tax Amounts Between Certain Individuals in Community Property States)	No (Tax Program policy)
Amendment for 2022 or later if the taxpayer is changing filing status from the original tax return	Yes
An ITIN holder is filing with a newly-issued SSN for the first time.	Maybe If the taxpayer will file with a new SSN but there is a different SSN on their Forms W-2 (if any), the tax return <u>must be Paper</u> to make sure the IRS can connect the W-2 earnings with the taxpayer's new SSN. A statement should be included to explain the circumstances. See: When an ITIN Holder Gets a SSN If the taxpayer has only self-employment income or is able to get the Forms W-2 updated with their accurate SSN, the tax return can be efiled. The taxpayer must send a statement to the IRS. See: When an ITIN Holder Gets a SSN

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The taxpayer is deceased.	<p>Maybe</p> <p>See: What Must Be A Paper Return?</p>
The tax return was prepared from a redacted transcript and the tax preparer used any incomplete or placeholder information for the redacted information.	No
An amendment where the original return was NOT prepared by the Tax Program AND incomplete or placeholder information and/or mathematical gymnastics were used in TaxSlayer to match the taxpayer's original tax return numbers.	<p>No</p> <p>The amendment (Form 1040-X) must be printed and mailed without Form 1040 (but with all forms or schedules that relate to the changes being made on the amendment). If e-filed, TaxSlayer will send Form 1040 and all schedules and forms with Form 1040-X and the placeholder or incomplete information will be included.</p>