

Amendments

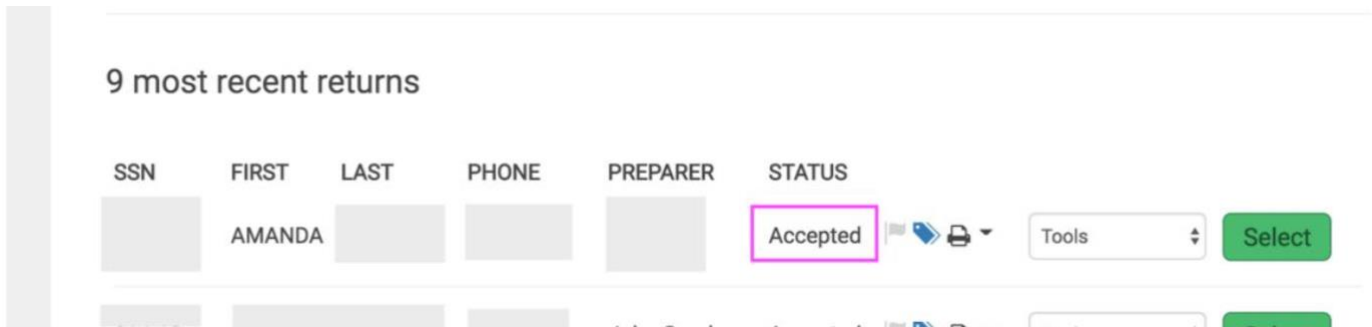
We will do an amendment whether or not we did the original return.

If we did not do the original return, we will need to see a copy of it.

Make sure to verify the identity of the taxpayer, even if we did the original return!

1. Take note of your starting point. You may be adding it new or you may be working with a file that was originally created at our site. If it was done at our site, log in and note whether the return was ACCEPTED or not.

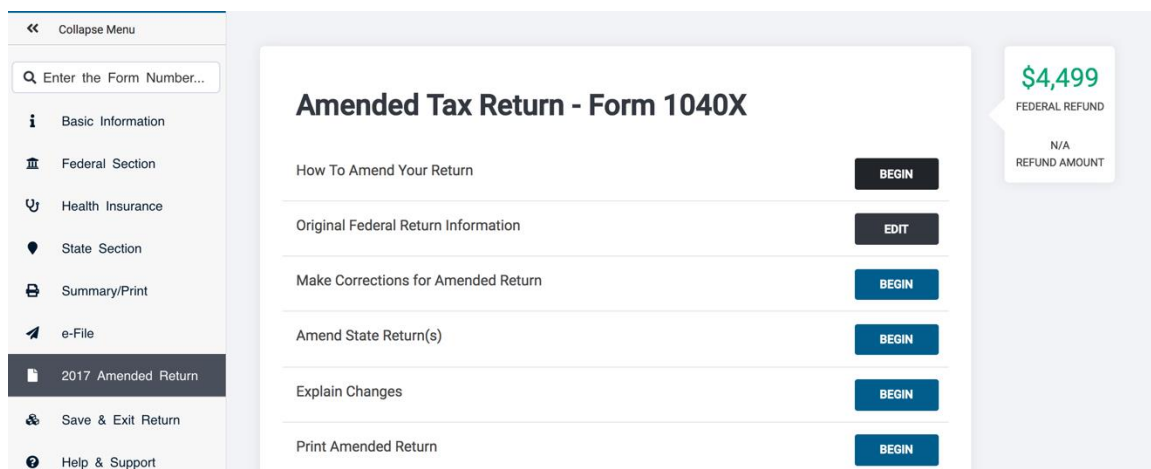
If we did the return, open the return, and print it. We do not need the 8879 or extraneous pages, but you do want the whole 1040. (Make sure to also read any notes previously entered.) *Please do not ever skip this step, even on a simple amendment.*



SSN	FIRST	LAST	PHONE	PREPARER	STATUS				
	AMANDA				Accepted			Tools	Select

If we did not do the original return, start a new return and enter in the basic info (e.g. filing status, SSNs, address). Remember it is crucial to get the names, socials, and birthdays correct. We will also need to **enter the tax information as it appears on the return** so that the summary level information (e.g. AGI, taxes, credits) matches the original return.

2. Navigate to the “Amended Return” section on the sidebar.



Collapse Menu

Enter the Form Number...

Basic Information

Federal Section

Health Insurance

State Section

Summary/Print

e-File

2017 Amended Return

Save & Exit Return

Help & Support

Amended Tax Return - Form 1040X

How To Amend Your Return

BEGIN

Original Federal Return Information

EDIT

Make Corrections for Amended Return

BEGIN

Amend State Return(s)

BEGIN

Explain Changes

BEGIN

Print Amended Return

BEGIN

\$4,499

FEDERAL REFUND

N/A

REFUND AMOUNT

3. Choose “Original Federal Return Information”

Q Enter the Form Number...

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File
- 2017 Amended Return**
- Save & Exit Return
- Help & Support
- Save & Exit Return

Amended Tax Return - Form 1040X

How To Amend Your Return **BEGIN**

Original Federal Return Information **EDIT**

Make Corrections for Amended Return **BEGIN**

Amend State Return(s) **BEGIN**

Explain Changes **BEGIN**

Print Amended Return **BEGIN**

Delete Amended Return **BEGIN**

\$4,499
FEDERAL REFUND
N/A
REFUND AMOUNT

4. If the return was done by us and accepted, you'll see that numbers are already filled in. If not, carefully type in the fields matching the original return the client filed. *As of November 2019, TaxSlayer requires us to enter information for a return prepared elsewhere through the initial return preparation screens mentioned in Step 1 and then re-enter some stats on this screen. Be careful when navigating this step to make sure amounts later appearing on the 1040X are correct.*

<< Collapse Menu

Q Enter the Form Number...

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File
- 2017 Amended Return**
- Save & Exit Return
- Help & Support

Review Original Column and Override Amounts

Please verify that the information below matches what is printed on your most recently accepted return.

Do not make changes to this page unless you have already mailed in an amended return. In most cases, the information on this page should match the return that was previously filed and accepted by the IRS.

Original Amount

Adjusted gross income
Where is this located? **Click here to help you find it on the 1040**

\$

Itemized or standard deduction
Where is this located?

\$

\$2,023
FEDERAL REFUND
N/A
REFUND AMOUNT

Make sure to put the dependent info in, even if it didn't change!!

<< Collapse Menu

Q Enter the Form Number...

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File

☒ Verify or enter your originally filed exemption amounts for yourself, spouse, and dependent(s). If not adding or removing an exemption, uncheck this box.

Exemptions: If you filed Form 1040 or 1040A, these figures can be found at the far right of line 6. If you filed Form 1040EZ, enter 1 if single or 2 if Married Filing Joint.

Yourself and spouse

Your dependent children who lived with you

Your dependent children who did not live with you due to divorce or separation

\$2,023
FEDERAL REFUND
N/A
REFUND AMOUNT

5. Click back to the 2019 Amended Return selection, and this time choose “Make Corrections.”

Q Enter the Form Number...

Basic Information
Federal Section
Health Insurance
State Section
Summary/Print
e-File
2017 Amended Return
Save & Exit Return
Help & Support
Save & Exit Return

Amended Tax Return - Form 1040X

How To Amend Your Return **BEGIN**

Original Federal Return Information **EDIT**

Make Corrections for Amended Return **BEGIN**

Amend State Return(s) **BEGIN**

Explain Changes **BEGIN**

Print Amended Return **BEGIN**

Delete Amended Return **BEGIN**

\$4,499
FEDERAL REFUND
N/A
REFUND AMOUNT

https://vita.taxslayerpro.com/2017/avalon/Amended/Warning

6. Make your corrections. Add a dependent, add educational expenses, whatever it is they need to amend. It will feel as if you are just doing a QR or completing a return. One important exception: **we do not change from Married Filing Jointly to Married Filing Separately.**

Q Enter the Form Number...

Basic Information
Federal Section
Health Insurance
State Section
Summary/Print
e-File
2017 Amended Return
Save & Exit Return

Correct Original Return

To make the necessary changes to prepare your amended return, you will now be taken to the Main Menu of your account. You can then add, edit, or remove information as needed. You will only need to edit or enter information that was incorrect on your accepted return.

Once you are done making changes, select "2017 Amended Return" to come back to the Amended Menu where you can create your state amended, if applicable, and/or print your amended return.

CONTINUE

\$4,499
FEDERAL REFUND
N/A
REFUND AMOUNT

7. Navigate once more to the amended return menu and choose “Explain changes.”

Q Enter the Form Number...

Basic Information
Federal Section
Health Insurance
State Section
Summary/Print
e-File
2017 Amended Return
Save & Exit Return
Help & Support

Amended Tax Return - Form 1040X

How To Amend Your Return **BEGIN**

Original Federal Return Information **EDIT**

Make Corrections for Amended Return **BEGIN**

Amend State Return(s) **BEGIN**

Explain Changes **BEGIN**

Print Amended Return **BEGIN**

\$4,499
FEDERAL REFUND
N/A
REFUND AMOUNT

8. Explain your changes – why is the client amending and what did you change?

2018 TaxSlayer Pro

9. Go to “Print Amended Return.” Print two copies. The copies should each include the 1040X, any related schedules and/or forms, and the updated 1040. **Have the client(s) sign the 1040X, staple to page 1 of the 1040X any income forms added with the amendment (e.g. W-2), and mail all paperwork** (including the 1040X, schedules and/or forms, and the updated 1040).

Please note: if we did the original return, DO NOT change any settings in the e-file section. (This allows TaxSlayer reports to count both returns we prepared for this client.) If we did not prepare the original return, you should navigate the e-file section as you would for a paper return. In all cases, you should (1) **make a note** about the amendment and (2) **fill out the processing envelope as you would for a completed paper return and select “Amendment” very clearly.**

https://vita.taxslayerpro.com/2017/avalon/Amended/Warning

Things to remember:

- All amendments are paper returns.
- All refunds will be paid via check; no direct deposit.
- All amendments still need to be QR'd.