

# Preparing and Printing Amendments in TaxSlayer

Before beginning, review these documents on CTC Resources:

- [Policy: Amended Returns - Form 1040X](#);
- [Amendment FAQ](#);
- Amendments: When Efile and When Paper?; and
- [Policy & Preparation: Amending to Revise Filing Status \(MFJ/MFS\)](#) (if applicable)

To jump ahead to [Printing an Amendment](#), click [here](#).

## Things to Remember:

1. We will prepare an amendment whether or not we prepared the original return. If we did not prepare the original return, we need to see a copy of the original return. Even if we did prepare the original return, be sure to verify the identity of the taxpayer!
2. Amendments must be Quality Reviewed after they are prepared, just as with any other return type.
3. When preparing an amendment, exercise care to ensure that the amendment does not duplicate any improperly claimed credits included on the original tax return. For example, if the Child Tax Credit was improperly claimed on the original tax return because the taxpayer was not eligible, do not file an amended tax return that continues to improperly claim that credit.

## Preparing the Amendment

**Step 1.** Take note of your starting point. Are you recreating a return already filed elsewhere or amending a return prepared and filed at FC?

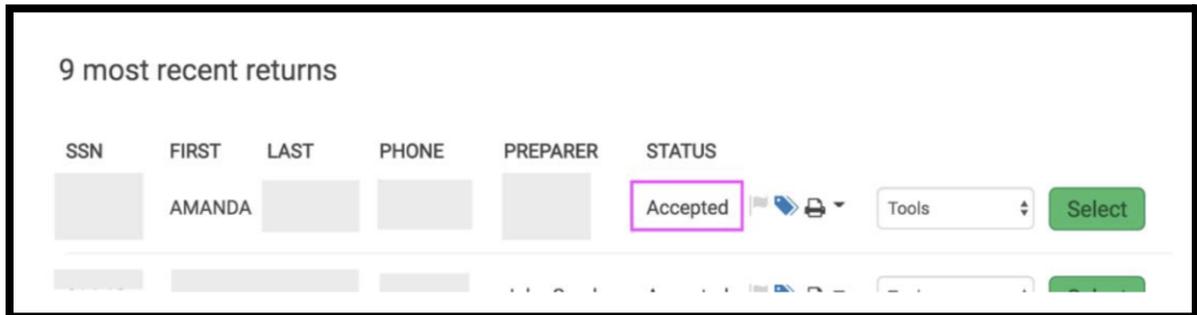
► **If FC prepared the original return:**

- a. Log into TaxSlayer and verify that the return status is either Accepted or Paper (below). If the return has any other status, we cannot prepare the amendment.

**If the return status is Paper**, verify that the taxpayer mailed the return to the IRS.

- b. Read any return Notes in TaxSlayer and determine if there are any concerns or circumstances you should be aware of.

- c. Open and print the original return. You will not need **Form 8879** or other extraneous pages, but you will need the entire Form 1040. You will not be able to access the original once you begin preparing the amendment.
  - a. Mark the printout clearly with “ORIGINAL”.
  - b. After you have prepared the amendment, store the printout of the original return in the Processing Envelope for use during Quality Review.
- d. Do not skip these steps, even for a simple amendment.
- e. Continue to **Step 2** below.



► **If FC did not prepare the original tax return:**

- a. Log into TaxSlayer and start a new return.
- b. Complete the **Basic Information** sections, including Filing Status, Personal Information, Dependents/Qualifying Relatives, etc.
- c. Remember it is crucial to get the names, SSNs and birthdays correct. The tax information must match the original return, so that all the summary level information (e.g., AGI, taxes, credits) also matches the original return.

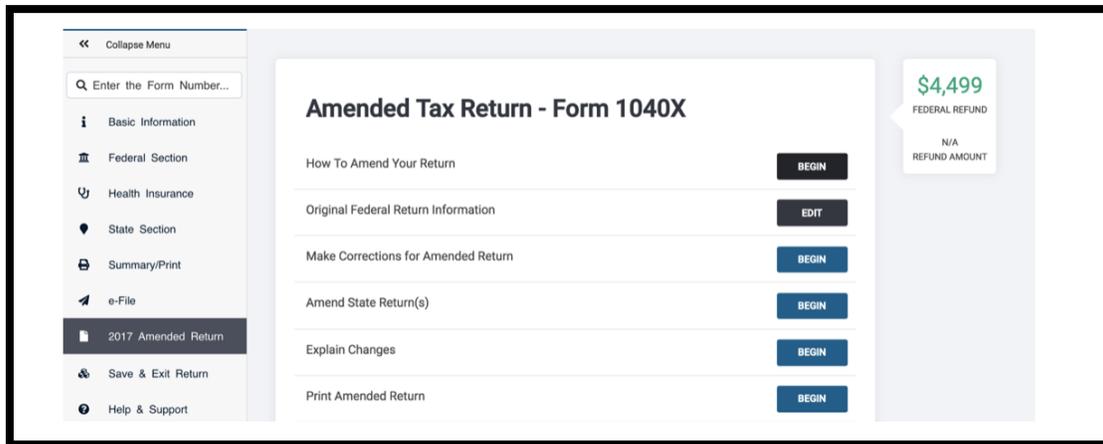
**Exception:** If the taxpayer’s mailing address has changed since the original return was filed with the IRS, you may enter the current address.

- d. Continue to **Step 2** below.

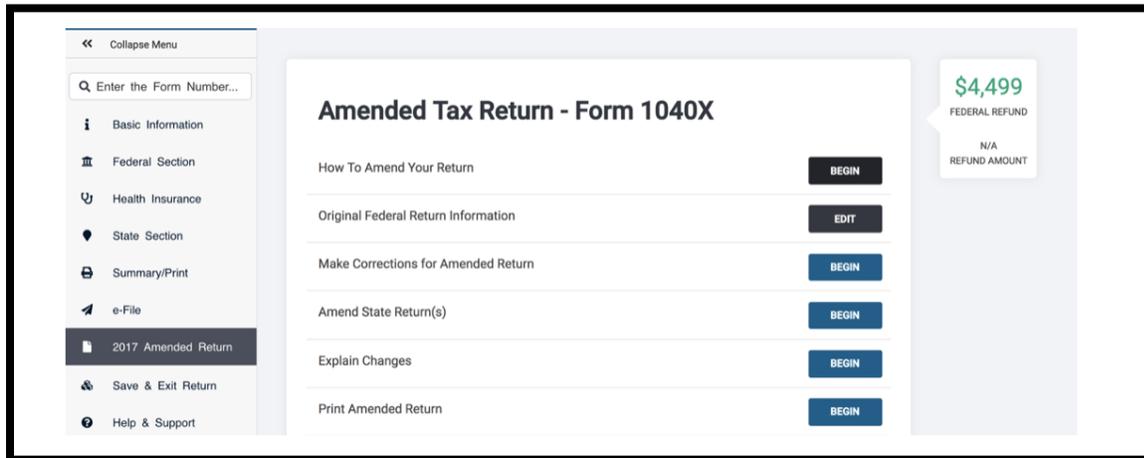
**Step 2.** Recreate the original tax return in TaxSlayer. If you have original tax documents, enter them. If you do not have all the original tax documents for that year, you will need to enter placeholder information into TaxSlayer. Your goal is to have the final Form 1040 contain the same numbers as the original tax return.

**Take Note!** If the tax return you recreate has any placeholder or “fake” information that you have used in order to obtain a tax return that matches the original, the Amendment **CANNOT BE E-FILED** and Form 1040-X should be mailed with only the Schedule and/or Fors that were edited or added by the amendment. See [Amendments: When are They Efiled and When Are They Paper?](#)

**Step 3.** Click on the “Amended Return” section on the sidebar.



**Step 4.** Click on **Edit** for “**Original Federal Return Information**”.



**Step 5.** If the return was done by Foundation Communities and has been **Accepted**, you will see that return data is already filled in. If the return was prepared elsewhere, carefully type in the fields to match the original return.

**Note:** As of November 2019, TaxSayer requires you to first enter information for a return prepared elsewhere through the **Federal** section as you would for regular tax return preparation and then re-enter some data on this screen. Be careful when navigating this step to make sure amounts later appearing on **Form 1040-X** are correct.

**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

**Note:** Be sure to enter the dependent information, even if it didn't change!

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

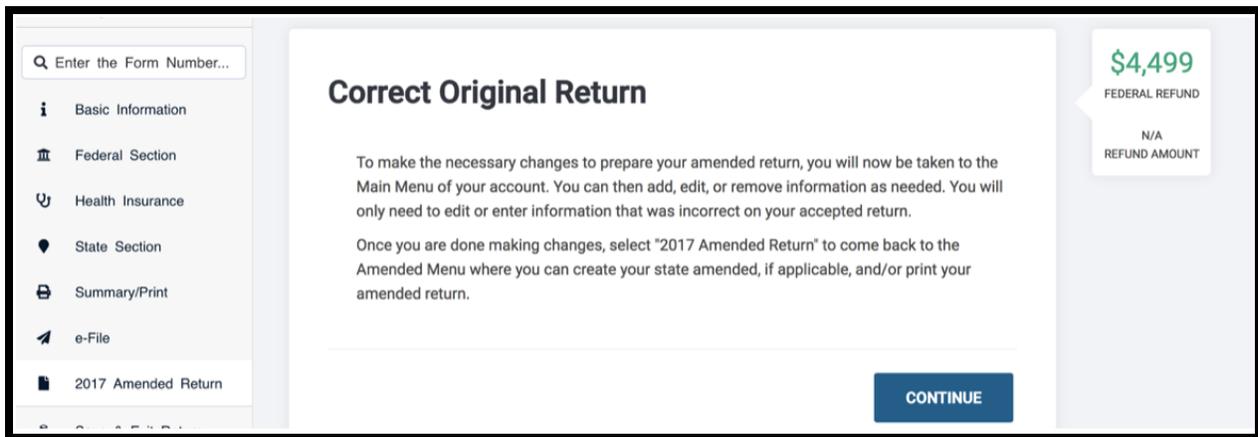
Your dependent children who lived with you

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

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

**Step 6.** Click again on the **“Amended Return”** section on the sidebar.

**Step 7.** Click on **Begin** for **“Make Corrections for Amended Return”**. This will take you to the **Federal** section of TaxSlayer. This is correct! The information you enter after this point will affect only the amendment and not the original return.

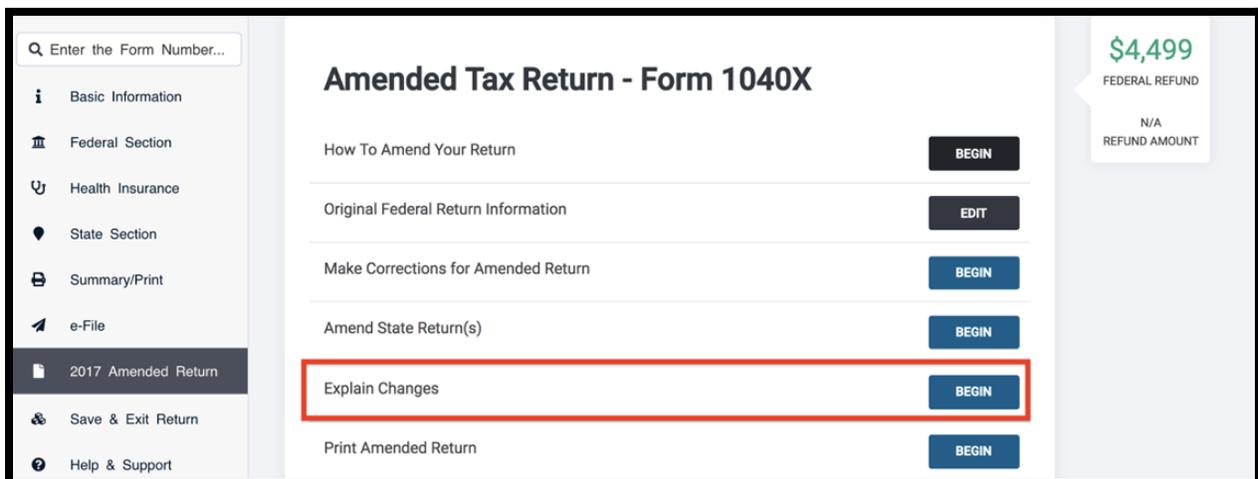


**Step 8.** Enter your corrections. Add a dependent, add educational or business expenses, enter a new tax document or whatever is needed to amend.

**Note:** If you are changing filing statuses from MFS to MFJ, be sure to review [Amending to Revise Filing Status: MFJ/MFS](#) on CTC Resources.

**Step 9.** Click again on the “Amended Return” section on the sidebar.

**Step 10.** Click on **Begin** for “Explain Changes”.



**Step 10.** In the text box, enter the reason for the amendment and what was changed. Write your explanation continuously with no line breaks. Do not press “Enter” to make separate entries on different lines.

**Step 11.** Determine if the Amendment can be e-filed or must be Paper. See **Amendments: When Efile and When Paper?** on CTC Resources.

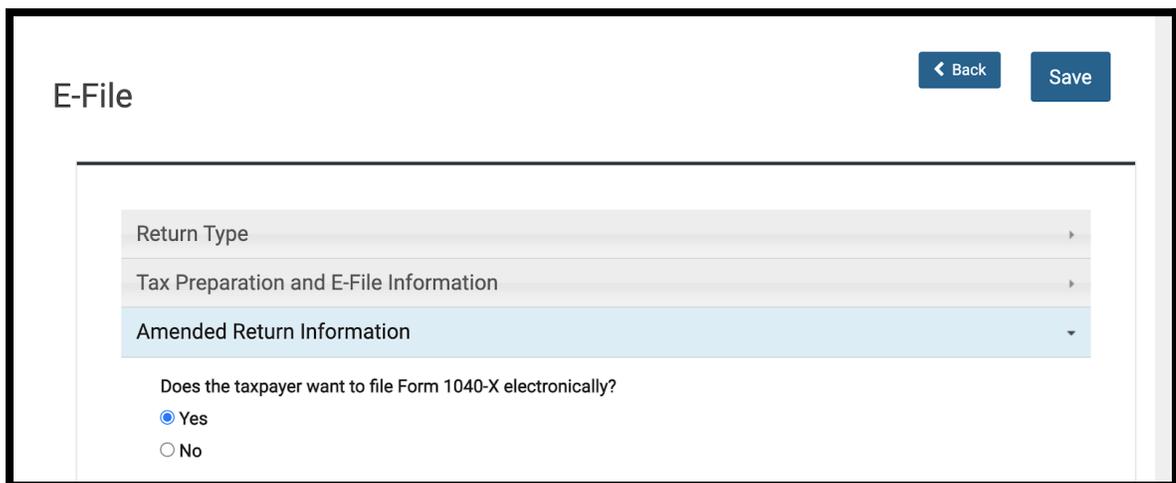
- ▶ If the amendment can be e-filed and you added the amendment to an FC-prepared return:
  - a. Navigate to the **E-File** screen.
  - b. You will not be able to adjust the **Return Type** field. It is based on the original return.
  - c. In the **Amended Return Information** field, click **Yes** that the taxpayer wishes to file the Form 1040-X electronically.

**Note:** When you **Save** and **Exit** the return, the return status in TaxSlayer will still read **Accepted**.

- d. The amendment is ready for Quality Review.

**Note:** Once the amendment has been Quality Reviewed, the Reviewer should **Save and Exit** the return. The Form 1040-X will be ready to transmit to the IRS.

- ▶ If the amendment can be e-filed and you **recreated** the original return in TaxSlayer:
  - a. Navigate to the **E-File** screen.
  - b. Click in the **Return Type** field and select **E-file**.
  - c. In the **Amended Return Information** field, click **Yes** that the taxpayer wishes to file the **Form 1040-X** electronically.



The screenshot shows the 'E-File' screen in TaxSlayer. At the top right, there are two buttons: 'Back' and 'Save'. Below the title, there is a navigation menu with three items: 'Return Type', 'Tax Preparation and E-File Information', and 'Amended Return Information'. The 'Amended Return Information' item is highlighted in blue. Below the menu, there is a question: 'Does the taxpayer want to file Form 1040-X electronically?' with two radio buttons: 'Yes' (selected) and 'No'.

- d. On the **Submission** screen, scroll down and click on **Ready for Review** before **Saving** and **Exiting**.
- e. The amendment is ready for Quality Review.

**Note:** Once the amendment has been Quality Reviewed, the Reviewer should **Approve** the tax return and then mark it as **Complete** on the **Submission** screen. When the return is **Saved** and you have exited the return, the return status in TaxSlayer will read **Complete**. The Form 1040-X will be ready to transmit to the IRS.

- ▶ If the amendment must be **Paper** that is mailed to the IRS and you **recreated** the original return in TaxSlayer:
  - a. Navigate to the **E-File** screen.
  - b. Click in the **Return Type** field and select **Paper**.

- c. In the **Amended Return Information** field, click **No** —the taxpayer does not wish to file the Form 1040-X electronically.
- d. On the **Submission** screen, scroll down and click on **Ready for Review** before **Saving** and **Exiting**.
- e. The amendment is ready for Quality Review.

**Note:** Once the amendment has been Quality Reviewed, the Reviewer should **Approve** and then mark as **Complete** the return on the **Submission** screen. When the return is **Saved** and you have exited the return, the return status in TaxSlayer will read **Paper**. The Form 1040-X will be ready to print and deliver to the taxpayer for mailing.

► If the amendment must be **Paper** that is mailed to the IRS and **FC prepared the original return** in TaxSlayer:

- a. Navigate to the **E-File** screen.
- b. Do not modify the original return type in the **Return Type** field.
- c. In the **Amended Return Information** field, click **No** —the taxpayer does not wish to file the Form 1040-X electronically.
- d. **Save** and **Exit**. The amendment is ready for Quality Review.

**Note:** Once the amendment has been Quality Reviewed, the Reviewer will not be able to mark the amendment as Complete, but the Form 1040-X will be ready to print and deliver to the taxpayer for mailing.

**Step 12.** For all amendments, leave a TaxSlayer **Note** in the return that an amendment was created. Include the tax year, the reason for the amendment, whether the original return was e-file or paper, whether the amendment can be e-filed, and any other relevant information.

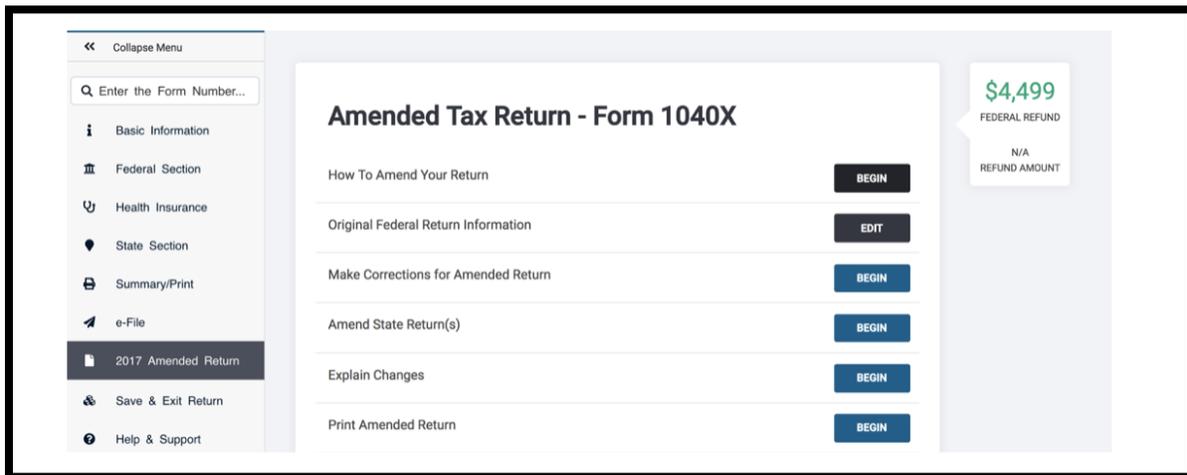
Sample Note subject: TY21 Amend

Sample Note text: TY21 amendment created to add one W-2; original return was prepared and e-filed elsewhere; amendment will be e-filed

## Printing An Amendment

If the Amendment will be transmitted electronically, the taxpayer will need one copy of the Amendment for their records. If the Amendment will be mailed to the IRS, the taxpayer will need two copies: one for their records and the other to be signed and mailed to the IRS.

1. Click on the “**Amended Return**” section on the sidebar in the return in TaxSlayer.
2. Click on **Begin** for “**Print Amended Return**”.



3. In the **Amended Questions** screen, click on **Continue**. This screen describes the printed documents to be mailed to the IRS.
4. In the **Print Results** screen, click on **Print Your Tax Return**.

**Note:** This will print both **Form 1040-X**, any Schedules or Forms and **Form 1040**. In most cases, all of these documents are to be submitted to the IRS electronically or as a **Paper** return.

5. If the Amendment will be e-filed:
  - a. Obtain the client’s signature on **Form 8879** giving authorization to e-file the Amendment. Be sure to retain copies of the ID and SSN verification documents required for any e-file return, as well any **Form W-2s** added to the return in the amendment.
  - b. Give the client one printed copy for their records.
6. If the Amendment will be mailed to the IRS:
  - a. Print two copies of the amendment and all supporting documents, including **Form 1040**.
  - b. Instruct the client to keep one copy for their records.
  - c. Instruct the client to:

- i. Sign **Form 1040-X**.
- ii. Staple to page one of **Form 1040-X** any new income forms added with the amendment (e.g., **Form W-2**).
- iii. Mail the entire packet including **Form 1040-X**, any Schedules and Forms, and **Form 1040** to the IRS.

**Important:** For all amendments, leave a TaxSlayer **Note** in the return that an amendment was created. Include the tax year, the reason for the amendment, whether the original return was e-file or paper, whether the amendment can be e-filed, and any other relevant information.

Sample Note subject: **TY21 Amend**

Sample Note text: **TY21 amendment created to add one W-2; original return was prepared and e-filed elsewhere; amendment will be e-filed**