



Amending Returns in TaxSlayer

1. Before you begin, make sure you have all the taxpayer's original tax documents for the year of filing and any documents needed for corrections.

Locating client's return:

- Log into the corresponding tax site TaxSlayer account. (i.e., jsmithloop)
- Click **Client Search** on the welcome screen and search for the client.
 - If the client's original return is NOT in Accepted status, find out if client mailed their return into the IRS or State.
- Print a copy of the accepted return by clicking the down arrow next to **Tools**, select **Client Status** and click the printer icon at the end of the Federal and State Transmissions lines.

Federal Transmissions								
State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Return Type	...
FD	2/28/2022 8:38:20 PM	2/28/2022 8:49:41 PM	596092	[REDACTED]	Accepted	\$1,127.00	1040	

State Transmissions								
State	Sent Date	Ack Received	Batch ID	Submission ID	Status	Refund Amount	Form Type	...
IL	2/28/2022 8:49:53 PM	3/1/2022 6:06:05 AM	596092	[REDACTED]	Accepted	\$100.00	IL1040	

- Once you have printed a copy of the original return, click, and open the client's return.

Completing an Amended Return that was Accepted in TaxSlayer (Site prepared the original filed return)

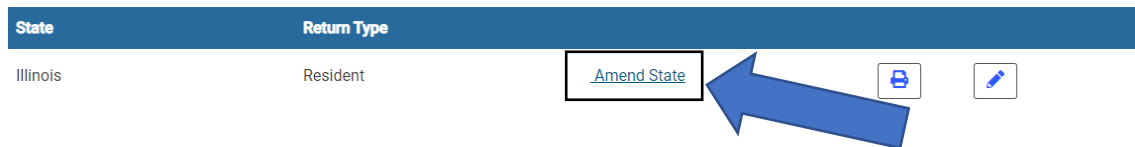
2. Pull the original tax return amounts to Form 1040-X, Amended Return, original column by taking the following steps:
 - Find and open the original return in TaxSlayer.
 - Make all necessary changes to the return based on the new information from the taxpayer. (For example, if the taxpayer needs to add a Form W-2, add it now as you would if preparing a return normally.)
 - When you finish making changes, select 20XX Amended Return (Left Menu Bar). TaxSlayer will display the Amended Tax Returns - Form 1040-X page:

Amended Tax Return - Form 1040X

How To Amend Your Return	BEGIN
Original Federal Return Information	BEGIN
Make Corrections for Amended Return	BEGIN
Amend State Return(s)	BEGIN
Explain Changes	BEGIN
Print Amended Return	BEGIN

- Select **Begin** on the Original Return Information line.
 - Because the IRS accepted the return through TaxSlayer, the software defaults the original accepted return information on this page. Review the information using the printed original return. If any information needs to be changed, change it here.
 - If the taxpayer is changing personal exemptions, has changed their address, or wants to change an election for the Presidential Election Campaign Fund, select the appropriate check boxes at the bottom of the page
 - When finished, select **Continue**.
3. Amend the State Return (if needed).
 - Select **Begin** on the **Amend State Return(s)** line from the Form 1040X main page. If there are no state changes, skip to step 4.
 - Select **Amend State** for the state you need to amend.

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- Scroll down and select **Begin** on the **Amended Return** line.
 - Read the screen and select **Yes** from the drop-down list.
 - Select **Begin** on the **General Questions** line.
 - Answer Question #1 – Question #2 then **must** be left blank.
 - **Skip** question #3.
 - Question #4 **must** be answered.
 - Question #5 and #6 automatically defaults to **No**, but you must ask the client and answer the questions appropriately.
 - If the Name, Address, or SSN are different from previous return, Select **Yes**. Then click **Begin** to fill out the section.
 - When you finish reviewing all information, select **Continue**.
 - If the client paid any balance due from the original return, enter the amount in the **Total amount paid with original return** line.
 - Enter the refund amount from the original return in the **Total of previous overpayments, refunds, or credit carryforward** line.
 - The **Explain Changes** section will be forwarded from the federal amended return.
 - Click **Continue** and **Exit Illinois Return**. Then, click **Continue** again.
4. **Explain changes**
- From the **Amended Tax Return – Form 1040X** page, select **Begin** on the **Explain Changes** line.
 - Enter an explanation for each change in the box provided. Click **Continue**.
5. **Tax Preparers:** This is where you will **Save & Exit** the client's return and complete your portion of the **Amendment Tracker**.

Quality Review Instructions:

1. Locate the client's return: Log into tax site the amendment was prepared – refer to the **Amendment Tracker** sheet.
2. Locate return from Client Search and open client's return.
3. Identify the new changes that were made – refer to the **Amendment Tracker** sheet.
4. Review all the information from the **Amended Tax Return – Form 1040X** page.
5. From the **Summary/Print** page, click **View/Print Return** on the top right corner of the page.
 - Then select **Print your 20xx Tax Return**.
 - A new pop-up window will appear with the tax return in PDF form.
 - In the PDF file of the return, examine Column A to verify all the information was appropriately carried over from the original Form 1040, U.S. Individual Tax Return. Next, verify the amounts in Column C are the true and accurate amounts. Then, confirm Column B is the difference between Columns C and A, which represents the amounts of what is being added or removed.
 - Verify the correct amount overpaid or owed. On page 2, verify that all information is correct and that appropriate boxes are checked for qualifying children eligible for Child Tax Credit.
 - If the state form is amended, scroll down the pdf to the state forms and verify that additions to or subtractions from the federal AGI that were manually made on the amended state return are correct.
 - For an amended return, Form 1040-X is the payment voucher if a balance is due. The taxpayer should simply enclose a check or money order with the amended return.
 - Verify the state payment voucher amount (if used for your state) and that state amended return requirements are met.

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- Close the amended PDF return window.
6. Select **E-file** on the left-side menu once the amended return is complete.
- At the e-file screen, select **Amended tax return**.

E-File

Select an option below to get started.

Original tax return

Amended tax return

- Select **Continue**.
 - **Amended Return** page – select the **Paper Return** filing method.
 - ❖ **Note:** Direct Deposit/Debit is **not** allowed at this time for amended tax returns.
 - Go through each section – the answers will be already populated from the original return.
 - A pop-up will appear regarding collecting fees – Click **Okay**.
 - Ladder Up **does not** collect any fees from clients.
 - In the **Submission Page – Print Tax Documents** – Select **PAPER FILE COPY** and print.
 - You will need to print out two copies (**Client and Mailing copy**).
7. Once the amended PDF return has been reviewed with the client, you must then assemble the 1040X package assemble for the client to mail out.
8. Have taxpayer(s) sign the 1040-X and the IL-1040-X amended return. Advise the taxpayer the amended return should not be filed until the refund, or the original return has been processed.
- Refer to the lavender colored "**Amended Return Instructions**" handout for volunteers and client's final steps instructions.

Save and exit the return.

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Completing an Amended Return that was NOT created by the site preparing the Amended Return

1. Since the return does not currently exist, create a federal return, and state return, if applicable, that **includes** the amended information. These return figures comprise Form 1040-X, Column C. For any return with multiple information-reporting documents, as an alternative to entering every document, add the documents together. The software requires an EIN and business address to calculate and place information on the correct line of the tax return. Choose an EIN and business address from the available information-reporting documents for software input. All information-reporting documents that support changes must be included with the tax return. If applicable, create state return.
 - Refer to the **Tax Preparer Checklist** for creating a new tax return, if needed.
 - For returns with adjustments, credits, and additional schedules:
 - Schedule C with no required amendment can be created by using the net profit as total income.
 - Schedule D with no required amendment can be created by using one transaction for long term and/or one transaction for short term. Enter the net gain as the sales price with no basis.
 - Adjustments and credits information are entered as applicable.
2. Go to the **20xx Amended Return** menu > **Original Federal Return Information** screen to provide the original return information.
 - This menu populates Form 1040-X, column A.
 - Form 1040-X columns C will populate based on the return prepared with the amended information. Column B will populate based on the differences between Columns C and A.
3. **Amend the State Return** (if needed).
 - Select **Begin** on the Amend State Return(s) line from the Form 1040X main page. If there are no state changes, skip to step 4.
 - Select **Amend State** link at **Amended State Return** screen.
 - Scroll down and select **Begin** on the **Amended Return** line.
 - Read the screen and select **Yes** from the drop-down list.
 - Select **Begin** on the **General Questions** line.
 - Answer Question #1 – Question #2 then **must** be left blank.
 - **Skip** question #3.
 - Question #4 **must** be answer.
 - Question #5 and #6 automatically defaults to **No**, but you must ask the client and answer the questions appropriately.
 - If the Name, Address, or SSN are different from previous return, Select **Yes**. Then click **Begin** to fill out the section.
 - When you finish reviewing all information, select **Continue**.
 - If the client paid any balance due from the original return, enter the amount in the **Total amount paid with original return** line.
 - Enter the refund amount from the original return in the **Total of previous overpayments, refunds, or credit carryforward** line.
 - The Explain Changes section will be forwarded from the federal amended return.
 - Click **Continue** and **Exit Illinois Return**. Then, click **Continue** again.
4. **Explain changes**
 - From the **Amended Tax Return – Form 1040X** page, select **Begin** on the Explain Changes line.
 - Enter an explanation for each change in the box provided.
5. Click **Continue** till you get to the E-file section.
6. Select **Original tax return** option, then **continue**.

Amending Returns in TaxSlayer

- In the **Return Details** page, select the **Paper Return** filing method for **both** the federal and state return.
 - Go through each page and answer all the required sections.
 - A pop-up window will appear regarding collecting fees – Click **Okay**.
 - Ladder Up **does not** collect any fees from clients.
7. Under **File return** (bottom section) – Select **Mark tax return ready for review**.
8. **Save and exit** the return.

Quality Review Instructions:

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 - Then select **Print your 20xx Tax Return**.
 - A new pop-up window will appear with the tax return in PDF form.
 - In the PDF file of the return, examine Column A to verify all the information was appropriately carried over from the original Form 1040, U.S. Individual Tax Return. Next, verify the amounts in Column C are the true and accurate amounts. Then, confirm Column B is the difference between Columns C and A, which represents the amounts of what is being added or removed.
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 - Verify the state payment voucher amount (if used for your state) and that state amended return requirements are met.
 - **Close** the amended PDF return window.
6. Select **E-file** on the left-side menu once the amended return is complete.
 - At the e-file screen, select **Amended tax return**.

E-File

Select an option below to get started.

Original tax return

Amended tax return

- Select **Continue**.
- Amended Return page – select the **Paper Return** filing method.
- ❖ **Note:** Direct Deposit/Debit is **not** allowed at this time for amended tax returns.
 - Go through each section – the answers will be already populated from the original return.
 - A pop-up will appear regarding collecting fees – Click **Okay**.
 - Ladder Up **does not** collect any fees from clients.
 - In the **Submission Page – Print Tax Documents** – Select **PAPER FILE COPY** and print.
 - You will need to print two copies (**Client and Mailing copy**).

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7. Once the amended PDF return has been reviewed, you must then assemble the 1040X package assemble for the client to mail out.
8. Have taxpayer(s) sign the 1040-X and the IL-1040-X amended return. Advise the taxpayer the amended return should not be filed until the refund, or the original return has been processed.
 - Refer to the lavender colored **“Amended Return Instructions”** handout for volunteers and client’s final steps instructions.
9. Under **File return** (bottom section) – Select **Mark tax return as complete**.
10. **Save and exit** the return.