

Amendment Tracker

Name: _____
Last 4 SS: _____
Tax Year: _____
(One form per year)

Note: Please answer ALL the questions below.

Case Reviewer (Name):

<input type="checkbox"/> Confirm you have original tax return 1040 and all income documents.		
Original return prepared by Ladder Up:	YES	NO
If Yes, What tax site location was it originally prepared: (Hint: See bottom of page 2 of 1040 for location)		
Reason for Amendment:		
Change in Filing Status	YES	NO
Adding / Removing a dependent	YES	NO
Adding / Removing a tax form	YES	NO
What kind of tax form:		

Tax Preparer (Name):

When was the original return filed?		
Was the return originally e-filed or paper filed?	E-FILED	PAPER FILED
Accepted date (if LU prepared):		

Paper file: If any of the below are **YES**, the **FEDERAL** amendment must be **PAPER FILE**.

Original Return was filed by paper.	YES	NO
Primary SSN is different from original tax return.	YES	NO
Spouses SSN is different from original tax return.	YES	NO
Original return was filed as surviving spouse (Prev. Widower)	YES	NO
Responding due to IRS notice and including other changes to the return not included in the notice (send to address on notice).	YES	NO
Your site did not prepare the original e-filed return and you are unable to recreate the original e-filed return with all documents.	YES	NO

Quality Reviewer (Name):

Steps to Complete:		
<input type="checkbox"/> Review Tax Preparer checklist above to determine if federal Amendment is eligible for Efile.		
<input type="checkbox"/> Complete Quality Review for Amendment return.		
<input type="checkbox"/> Follow Print Charts in Pub 4012 (M-4 and M-5) to print out needed copies for each return.		
Federal Amendment:	E-File	Paper file
State Amendment:	Paper file only	
What location is the return saved?		

Client Packet for Site to File

Client Agreement form	YES	
Efile Page, If applicable for Federal (Form 8879)	YES	NO
Amendment Tracker	YES	