

# Amending a Return (1040-X)

## When to Amend?

- When you discover an error after your return has been accepted. (if the return is rejected, you simply need to correct the return and resubmit)
- If the amendment will get the taxpayer more money back, the taxpayer should wait to receive their original refund before filing an amendment. Otherwise, the full refund will be held up for 16+ weeks.
- If the amendment causes the taxpayer to owe money back, they should file it as soon as possible.
- Generally, for a credit or refund, you must file Form 1040-X within 3 years (including extensions) after the date you filed your original return or within 2 years after the date you paid the tax, whichever is later.

## Can it be E-filed?

- The 1040-X can be e-filed in the current year or within the past 3 tax years if the original was e-filed.
- If the original was mailed in, the filing status is changing, or you are adding dependents that have already been claimed on someone else's return, you must paper file the amendment.
- SC State amendments must be paper filed.

## How to Amend a Return

1. Print the original return first before making any changes
2. If the return is NOT already in our system, you'll need to re-create the original return first in TaxSlayer. Do not file it.
3. On the left-hand side of the screen, click "20-- Amended Return"
4. Select "Get Started"
5. "Add/Edit" the original return



Form Finder

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- E-file
- 2023 Amended Return**
- Your Office

# Amended Tax Return - Form 1040X

How To Amend Your Return	<a href="#">BEGIN</a>
Original Federal Return Information	<a href="#">ADD/EDIT</a>
Make Corrections for Amended Return	<a href="#">BEGIN</a>
Amend State Return(s)	<a href="#">BEGIN</a>

6. 6. Complete each field. Select “Where is this located” in blue under each box if you aren’t sure.









7. 7. Choose “Make Corrections for Amended Return” next. Select “Continue.” At this point, you are able to make corrections in TaxSlayer to the original return. When you are finished, go back to “20— Amended Return”

8. 8. Select “Explain Changes”. Explain simply what has been changed. Some examples include:

- Amending to correct filing status
- Amending to add dependent, Frank Boxer, omitted on original return.
- Amending to add 1099-INT (Line 2), 1099-DIV (Line 3), and 1099-B (Line 7) received after initial filing
- Amending to add Education Credit (Line 20 & 29)

**Form Finder**

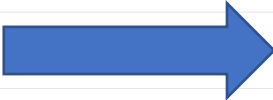
Enter the form number...

-  Basic Information
-  Federal Section
-  Health Insurance
-  State Section
-  Summary/Print
-  E-file
-  **2023 Amended Return**
-  Your Office

Amend State Return(s)	<a href="#">BEGIN</a>
Explain Changes	<a href="#">BEGIN</a>
Print Amended Return	<a href="#">BEGIN</a>
Delete Amended Return	<a href="#">BEGIN</a>

9. If the amendment affects the state return, you'll need to print the state amendment and mail it in. The state amendment will NOT e-file.
10. Print the amended return.

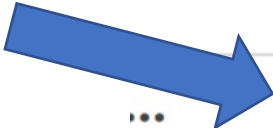
	BEGIN
Amend State Return(s)	BEGIN
Explain Changes	BEGIN
Print Amended Return	BEGIN
Delete Amended Return	BEGIN



11. Amendments should be quality reviewed by the Site Coordinator. Review the amendment with the taxpayer. The taxpayer must sign the return to give permission for it to be filed.
12. After it is filed, check back to make sure that it has been accepted. It will NOT notify you if it rejects. Go to Client Search → Client Status → Scroll down to “federal transmission” to see if it has been accepted.

## Always Add a Note

1. Go to Client Search and select the flag next to their name
2. You must create a Title and then a Description
3. An Example is:
  - a. Title: Amendment
  - b. Description: Amended to add in W-2



Tools Select

Personal Notes

Add New +

Create New Note

Title

Description

0 / 500

## **Mailing In an Amendment**

If you must mail in the federal amended return:

- Print 2 copies of the 1040X, and updated 1040 and all schedules (send everything-- because if you miss one form that changed, the IRS will reject it and that will cause a delay)
- Review it with the client and have them sign the 1040X AND the new 1040
- Attach to the front of Form 1040-X: • Copies of all new W2s, 1099s, etc that were added to the return as part of the amendment.
- Attach to the back of the 1040x: Any other documents that were added to the 1040 as part of the amendment (1095A, 1098s, etc) And New 1040 and schedules
- Mail to: Department of the Treasury  
Internal Revenue Service  
Kansas City, MO 64999-0052

The Taxpayer can check the status of their amended return: [irs.gov/filing/wheres-my-amended-return](https://irs.gov/filing/wheres-my-amended-return)

To mail the state amendment (Only if the state return changed)

### **South Carolina Income Tax** (SC 1040/SC 1040NR)

**Refunds or No Tax Due**



SC1040 Processing Center  
PO Box 101100  
Columbia, SC 29211-0100

**All Balances Due**



Taxable Processing Center  
PO Box 101105  
Columbia, SC 29211-0105

**Correspondence**



SC Dept of Revenue Income Tax  
PO Box 125  
Columbia, SC 29214-0400