

Amending a Tax Return

This playbook provides step-by-step instructions for when and how to amend a tax return using IRS Form 1040X. It guides individuals through the process of making corrections to forms previously filed.

Step 1: **Check Eligibility**

Verify that you meet the criteria for amending a tax return. Common reasons include reporting incorrect income, claiming improper credits or deductions, or changing your filing status.

Step 2: **Gather Documents**

Collect the original tax return, any new tax documents such as W-2s or 1099s, and any supporting documentation for your amendments.

Step 3: **Obtain Form 1040X**

Download the current version of Form 1040X from the IRS website or obtain a copy from a local tax office.

Step 4: **Fill Out Form 1040X**

Complete the Form 1040X, entering the corrected information. Be sure to explain each change made on the return in the space provided.

Step 5: **Attach Documents**

Include any newly required forms or schedules that support the changes on Form 1040X.

Step 6: **Review Changes**

Carefully review the amended return to ensure that all changes are accurate and all necessary forms have been included.

Step 7: **Sign and Date**

Sign and date Form 1040X. If filing jointly, both spouses must sign the amended return.

Step 8: **Mail the Form**

Mail Form 1040X and all accompanying documents to the IRS address for your state, as listed in the Form 1040X instructions. Amended returns cannot be e-filed and must be mailed.

Step 9: **Track Status**

After mailing, you can track the status of your amended return using the 'Where's My Amended Return?' tool on the IRS website, usually available about three weeks after filing.

General Notes

Time Limit

Generally, to claim a refund, you must file Form 1040X within 3 years after the date you filed your original return or within 2 years after the date you paid the tax, whichever is later.

Multiple Amendments

If you are amending more than one tax return, prepare a separate 1040X for each year and mail them in separate envelopes.

Payment

If the changes involve additional tax owed, pay the additional amount owed as soon as possible to limit interest and penalty charges.

State Returns

If you amend your federal return, you may also need to amend your state tax return. Contact your state tax agency for instructions.

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