

## How to do Amendments for Tax Year 2021 January 19, 2022

1. See CORE for scope issues and 4012 page M-1 for general instructions
2. Open existing TaxSlayer return or create a new original return
3. Add CO return if new return was created
4. Click [2021 Amended Return](#) from menu
5. If desired, read [How to Amend Your Return](#)
6. Click [Original Federal Return Information](#)
7. If no data are in boxes, return wasn't e-filed in TaxSlayer – add data from original 1040, click [Continue](#)
8. If boxes are populated by TaxSlayer, verify data with original 1040. Make any corrections on this page.
9. Click [Make Corrections for Amended Return](#), read information and click [Continue](#)
10. Add changes that require amendment to federal return (these will also flow to CO return). After this step, ignore the Federal and State Refund Monitors on the screen.
11. Go back to [2021 Amended Return](#) on menu
12. Click [Explain Changes](#) with 1040 line numbers
13. Click [Amend State Return](#)
14. Click link that says [Amend State](#) or [Edit Amended](#)
15. Click [Amended Return](#) at bottom of page
16. Answer Yes to create amended return
17. Click [General Questions](#)
18. Provide reason for amendment and click [Continue](#)
19. Click [Payments or Credits from Original Return](#)
20. Enter overpayment or amount owed from original state return and click [Continue](#)
21. Click [How to File](#) and read information. Click [Back](#) and [Continue](#) on next page
22. On Colorado Return page, enter any changes that apply only to Colorado - Additions, Subtractions, etc.
23. Click [Exit CO Return](#), and [Continue](#) on Amended State Return page
24. Click [Continue](#) on Amended Tax Return-1040X page
25. On Tax Return Summary page, Click [View/Print](#) and [Print 2021 Tax Return](#)
26. Verify 1040X and 104X are correct
27. Discuss amended returns with taxpayer
28. Send to QR for review, printing required forms, and giving instructions to taxpayer to paper file

### Quality Review of Amended Return

1. Review changes and original return (if created new), and discuss amended return with taxpayer
2. Federal and Colorado amended returns for TY2019 and later may be e-filed if they were originally e-filed, and if primary/spouse SSN or filing status are NOT changed. All other amended returns must be mailed. Form 8879 must be signed if e-filed. Direct deposit/debit is not available for amended returns.
3. Print multiple copies of return sections if return is mailed and not e-filed

	Total	To IRS	To Colorado	To Taxpayer
1040X	3	1	1	1
1040 (with "As Amended" written across top)	1			1
All federal forms changed or added	3	1	1	1
All Colorado forms, even if not changed	2		1	1

4. Have taxpayers sign the 1040X and the 104X and initial any handwritten entries
5. Attach any new or corrected documents (like a late 1099-R) to 1040X. Do not attach the original 1040
6. If payment is due, remind taxpayers to enclose a check(s) for the amount on 1040X line 20. Do not use printed vouchers
7. Advise taxpayer that amended return should not be filed until all refunds have been received or by April due date for a current year amended return
8. If responding to a notice from the IRS, mail amended return to the address shown in the notice. Otherwise

Mail federal forms to	Mail CO forms with payment to	Mail CO forms without payment to
Department of the Treasury Internal Revenue Service Ogden UT 84201-0052	Colorado Department of Revenue Denver, CO 80261-0006	Colorado Department of Revenue Denver, CO 80261-0005

**E-filing Amended Returns (These are TaxSlayer instructions from TY2020. Confirm for TY2021.)**

For tax years 2019 and beyond, you can electronically file the amended Federal return if the original Federal return was also electronically filed and accepted. Only amended forms 1040 and 1040-SR can be electronically filed. The amended form 1040-NR must still be mailed.

1. Complete the amended return
2. Select E-File
3. Be sure the Federal return type is electronic
  - Original return filed and accepted at your site: the return type will already be electronic
  - Original return not filed and accepted at your site: If the taxpayer is due a refund, select E-file Mail Check. If the taxpayer owes a balance, select E-file Mail Payment.
4. Select Amended Return Information
5. Select YES for "Does the taxpayer want to file Form 1040-X electronically?"
6. Complete all other required information for e-file
7. Select Save and Transmit Amended Return