

HERE'S HOW TO

Prepare an Amended Return in the Desktop Software Program

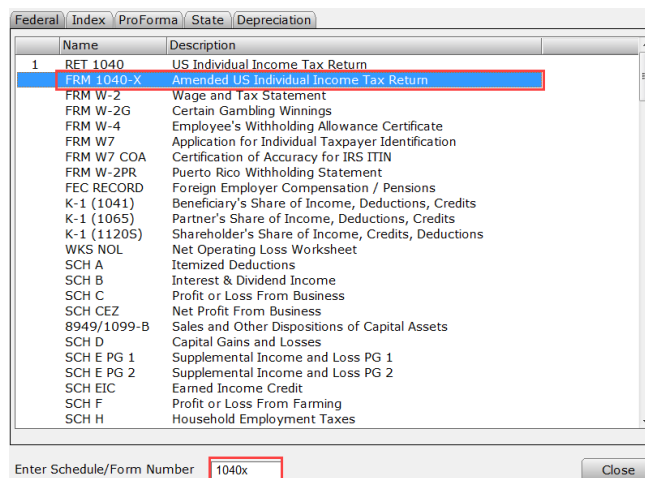
Update: Effective August 18, 2020, Form 1040-X can now be e-Filed from within the software program. You must be at software version 2020.034. For the initial phase announced by the IRS, only tax year 2019 Forms 1040 and 1040-SR returns can be amended electronically. You still have the option to mail amended forms to the applicable IRS Service Center. Refer to end of this document for those instructions.

Amending a Tax Return

1. Open the appropriate tax return and print the original federal (and state return if applicable) before making any changes. We recommended that you keep a copy of the original return for your records.
2. Click **Add Form** on the tax return toolbar.



3. In the "Enter Schedule/Form Number" box, enter **1040-X**. When **Form 1040-X** appears in the list, double-click it for the program to add the form to the return.



4. Make the necessary changes to the federal return.

5. Once all the changes are complete, complete the **"Explanation of Changes"** on **Part III** of Form 1040-X.

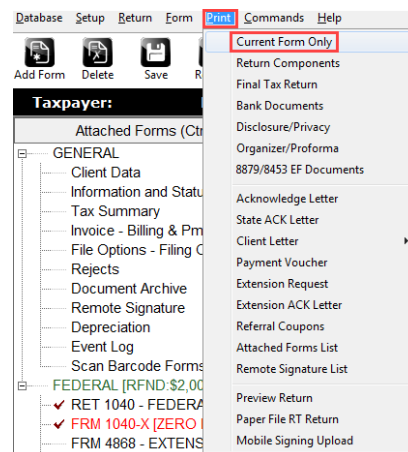
PART III Explanation of Changes

6. Obtain signatures on Form 1040-X (on-screen, remote, or print and sign, whichever is applicable)
7. To e-File the amended form: Check the applicable boxes as shown in the image below to queue the amended form for e-Filing. **Validation Note**: The original 1040 Form was e-filed, and any refund associated with the 1040-X will be disbursed by the IRS via paper check to the address on the 1040-X.

Electronic Filing	
Amendment #: <input type="text" value="1"/>	
E-File 1040-X: <input checked="" type="checkbox"/>	Direct Debit (EF-PMT): <input type="checkbox"/>
Validation Check - 1040 Return has been electronically filed <input checked="" type="checkbox"/>	
Validation Check - Refund will be received as a paper check <input checked="" type="checkbox"/>	

Amend a previously e-filed amended return:

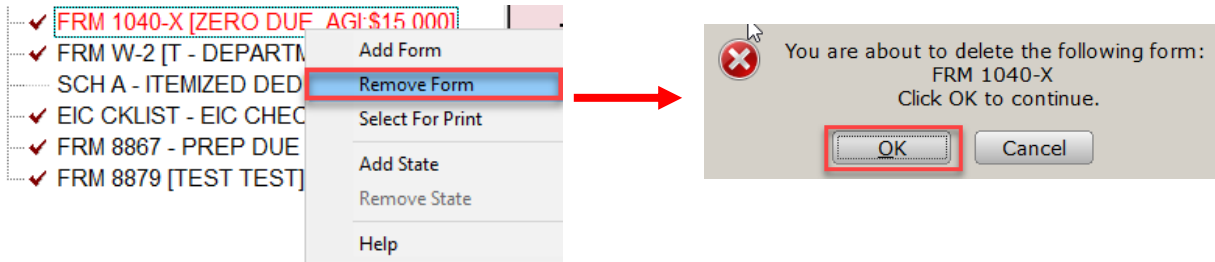
8. To mail the amended form: Print Form 1040-X and any other tax forms or schedules that have changed by navigating to the form or schedule and clicking **Print** in the menu bar and then **Current Form Only**.



Note: It is not necessary to send the original return or any forms that remain unchanged. Refer to **Additional Form 1040-X Resources Available at the IRS** at the end of this document to access **Where to File** instructions and IRS Service Center addresses.

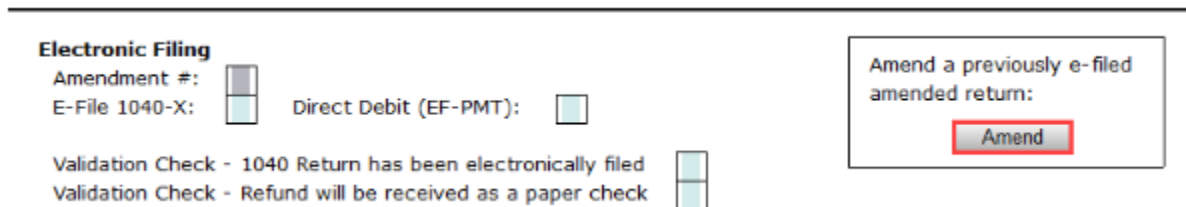
Amending a Tax Return that was Previously Amended

1. Open the appropriate tax return and print a copy of the previous amendment for your records.
2. On the "Forms Attached" pane, right click **Form 1040-X** and then click **Remove Forms**. When the confirmation dialog appears, click **OK**.



3. Click **Add Form** on the tax return toolbar. In the "Enter Schedule/Form Number" box, enter **1040-X**. When 1040-X appears in the list, double-click it and the program adds the form to the return.
4. Prepare the second amendment as described in the above section for "**Amending the Return.**"

Note: To amend a **previously e-Filed** amended return, select the **new "Amend"** button as shown in the image below.



If you have additional questions about these instructions, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at help@erosupport.com.

For any other assistance regarding Form 1040-X, **including where to mail the return**, please refer to the IRS Resources listed below.

Additional Form 1040-X Resources Available at the IRS:

1. Where to File 1040-X and Additional Information: Refer to **IRS Publication - [Instructions for Form 1040-X](#)** (Revised January 2020). **Where to File** instructions and IRS Service Center mailing addresses are located on Page 20.
2. About Form 1040-X Amended Tax Return & Recent Developments: Go to IRS.gov > [About 1040-X](#) or you can also check out [Tax Topic 308 Amended Returns](#) | [Español](#)

Important Note: The IRS has not yet updated the Form 1040-X Instructions regarding the new e-file functionality introduced for TY2019 1040 returns. For the latest information, refer to the August 17, 2020 IRS News Release IR-2020-182: [Now Available: IRS Form 1040-X Electronic Filing](#)