

How to File an Amended Return With the IRS

Updated for Tax Year: 2013

If you've made an error on a tax return you already filed or simply come across new information, such as a tax deduction or credit you now realize you qualify for, file an amended tax return to make the correction. The Internal Revenue Service (IRS) knows the tax code is complex, and that people make mistakes. The process for filing an amendment is straightforward. Simply file Form 1040X, Amended Tax Return, along with the corrected or additional documents you did not originally file with your return.

Step 1: Collect your documents

Gather your original return and all new documents. You will need to reference your original tax return and any documentation that relates to your amendment such as proof of a new deduction you are claiming or a W-2 you didn't have when preparing the original return. If you are missing a W-2, you can file a Form 4852 and have the IRS issue a W-2 replacement as long as your employer provided the IRS with this information.

Step 2: Get the right forms together

Download the necessary forms for the tax year you are amending. The IRS maintains a database on its website where you can access all tax forms for previous years. Alternatively, you can use TurboTax to file your amendment – we'll automatically find and fill in the forms you need.

Remember that you don't need to submit new forms for your entire tax return, just the areas that are affected. For example, if you originally prepared a Schedule B to report interest income, amending your return to claim a charitable contribution deduction (which is not reported on Schedule B) will not affect it. However, it will require you to prepare a new Schedule A to report the charitable contribution with your itemized deductions.

Step 3: Fill out a 1040X

Download a current IRS Form 1040X, Amended U.S. Individual Income Tax Return. TurboTax can help with this. The form includes easy-to-follow instructions and only requires you to include new or updated information. It is unnecessary to copy information from your original return. You will also find a space where you can write an explanation as to why you are amending your return.

Step 4: Submit your amended return

Send the IRS your amended return. Before mailing your return to the IRS, double check that you've attached all necessary forms and supporting documents. In the event your amendment results in a higher tax bill, you should include the additional tax payment with the return. By making a payment, you can minimize the amount of interest and penalties you may be subject to since technically, you

are making a late payment of tax. It takes the IRS eight to twelve weeks to process your amendment, so give it some time before you contact them regarding your amended return.

Tips

- In most cases, you have three years from the original return's filing deadline to submit an amended tax return.