Procedure: **<u>Amended Returns</u>**

1) Verify demographics *(especially address)*
2) Check & write down original return results *(refund/balance due)* for Federal & states.
3) If balance is due on original return, verify balance was paid in full, if not, get amount paid *(especially Federal)*
4) Before changing any data in the return, start amended returns for Federal and state(s):
    a. Federal: go to the "other forms" tab, then ***x*** the screen at the "**auto fill screen**" message, select yes
    b. Mass: go to the "other forms" tab and select **CA6**.
    c. Fill in the appropriate explanations for both and check relevant boxes:
        - ie: Mass increase or decrease tax
5) Once the "**all amended return screens**" are completed, make the appropriate changes to the return *(add w-2, 1099 etc. – same as you would on the original return data entry)*
6) When all the changes are made, ***calculate*** and ***view*** the return.
    a. **Federal – 1040X**
        i. Review the changes to the 1040X *(form should now reflect how it "**should**" have been originally filed w/correct info).*
    b. **MA Form 1 –**
        i. Results are reflected on page 3
            1. Calculate the difference from the original return
            2. Enter refund or balance due amount in CA6 Letter box near bottom of screen. This will print the correct information in the cover letter..
7) Complete Checklist on Aero Task
8) Assign Aero to appropriate Front Desk (if preparer not completing/contacting client).

Check list:

- ☐ Check demographics *(especially address)*
- ☐ Add amended returns *(Fed & State[s])*
- ☐ Make ALL changes to the returns
- ☐ Verify numbers that were changed in the return Print: *filing, client & pdf copy*
- ☐ Client & Preparer need to both sign filing copy – then mail *(*please note that all amended individual returns must be paper filed*)
- ☐ Write "Amended Return" across the top of the Mass return (for 2015 and earlier)