

## Quick Guide to E-File the 1040X in Desktop

Beginning August 17, 2020, the IRS is allowing tax professionals to E-File the 1040X Form. This IRS is currently only allowing this for the 2019 tax year and will not include any prior years. In order to E-File the 1040X through TaxSlayer Pro, the original return **must** have been electronically filed.

Please remember, this will only include the 1040 and 1040-SR, and will not include the 1040-NR.

To E-File the 1040-X in Desktop, starting in the Edit Form 1040X Menu, select Option 17 or Option 18 (depending on if the Amended Return has an amount due or not), **Mark Form 1040-X to Send Electronically?** and change it to YES:

14. Amount Paid with Original + Additions.....	[ 0 ]
15. Overpayment on Original.....	[ 655 ]
* 16. Net Refund.....	[ 965 ]
17. Apply Refund to .....	[ 0 ]
18. Mark Form 1040-X to Send Electronically?.....	[ NO ]
0. Exit	

Enter Option:

This will prompt the question below: **Mark Form 1040-X to Send Electronically?** Select YES.

Question

Mark Form 1040-X to Send Electronically?

YES NO

After changing this to YES, new menu options will appear. If the 1040X has a balance due, select Option 19, **Form 1040-X Electronic Payment** menu.

* 16. Net Refund.....	[ 965 ]
17. Apply Refund to .....	[ 0 ]
18. Mark Form 1040-X to Send Electronically?.....	[ YES ]
<<19. Form 1040-X Electronic Payment	
20. Ready to Send Form 1040-X Electronically?.....	[ YES ]
0. Exit	

Enter Option:

This will display the **Electronic Payment Menu** as shown below. If bank account information is to be included, **every field in the Electronic Payment Menu must be completed**. Otherwise, to exit this menu select Remove Electronic Payment.

**Electronic Payment Menu** X

- 1. Routing Transit Number...[ ]
- 2. Bank Account Number.....[ ]
- 3. Type of Account.....[ ]
- 4. Amount of Payment.....[ 0 ]
- 5. Requested Payment Date...[ / / ]
- 6. Day Time Phone Number...[ ]
- 7. Remove Electronic Payment
- 8. Exit

Enter Option:

After the Electronic Payment information has been entered (if it was needed) make sure that Option 20, **Ready to Send Form 1040-X Electronically** is set to YES.

- \* 16. Net Refund.....[ 965 ]
- 17. Apply Refund to .....[ 0 ]
- 18. Mark Form 1040-X to Send Electronically?.....[ YES ]
- <<19. Form 1040-X Electronic Payment
- 20. Ready to Send Form 1040-X Electronically?.....[ YES ]**
- 0. Exit

Enter Option:

After doing this, exit the return and navigate to the E-File Transmission Table in the program. There, you will see the return added and the Federal Type will say **Amended: E** as shown below:

SSN	First Name	Last Name	Federal Type	S	S	State Only	Prepa	EFIN	Fees	EFile	Sent
123-00-1234	AMENDED	EFILE	Amended: E			<input type="checkbox"/>	199999	000420	0.00		0

Buttons: Add Client, Clear Filters, Print, Export, Remove Client, Cancel, Transmit

For Amended returns that have an Electronic Payment attached, the Federal Type will show **Amended: P** as shown below:

SSN	First Name	Last Name	Federal Type	S	S	State Only	Prepa	EFIN	Fees	EFile	Sent
123-00-1234	AMENDED	EFILE	Amended: P			<input type="checkbox"/>	199999	000420	0.00		0

Buttons: Add Client, Clear Filters, Print, Export, Remove Client, Cancel, Transmit