

## AMENDMENT REQUEST FORM

### Who should use this form?

Individuals who previously filed their taxes with Prepare + Prosper (P+P) and now need to file an amended tax return (Form 1040X, M1X, or M1PRX).

You should file an amended return if you need to correct an original return to:

- Report additional income
- Claim additional credits or deductions (including adding dependents or Renter's credit)
- Remove credits or deductions (including removing dependents)
- Change your filing status
- Respond to a letter from the IRS or Minnesota Revenue

### How do I request an amendment?

Fill out the information on the back of this form and include copies of supporting documents for the corrections. Please call 651-262-2167 with any questions.

Three ways to submit your Amendment Request:

- Drop off at 2610 University Ave W., Suite 450, St. Paul, MN 55114
- Mail to 2610 University Ave W., Suite 450, St. Paul, MN 55114
- Fax to 651-287-0190

### How is an amendment processed?

Prepare + Prosper staff or volunteers will prepare your amendment. Please allow 3-4 weeks for staff to process returns or to contact you with follow-up questions. Requests made during the regular tax season (January-April 15) generally take longer due to the high volume of requests.

After your amendment is prepared, P+P staff will contact you about the results and any required next steps. Depending on the type of amendment and year of the return, you may need to sign paperwork and mail in the paperwork to the IRS or MN Department of Revenue to finish filing your amendment.

After your amendment is filed with the IRS or MN Department of Revenue processing can take up to 16 weeks or more.

### What's next?

Additional refunds may be received by direct deposit into your bank account or by a paper check mailed to your address.

If you have a balance due, you can include a check or money order when mailing in your amended return. You can also make payments online or by mail after filing the amended return. P+P staff can provide additional information about paying a balance due or setting up a payment plan with the IRS or Minnesota Revenue.

Date: \_\_\_\_\_ Taxpayer name(s): \_\_\_\_\_

Phone: \_\_\_\_\_ Last four numbers of primary SSN or ITIN:XXX-XX-\_\_\_\_ \_

Tax Site Location: \_\_\_\_\_ Year to be amended: \_\_\_\_\_

**1. If your address has changed since you filed your original return, enter your new address.**

Check this box if you plan to move in the next few months.

**2. If an amendment results in a refund, how do you want to receive it?**

Deposit the refund into my account:

Routing number \_\_\_\_\_  checking account

Account number \_\_\_\_\_  savings account

Send a check to my current address.

**3. What changes are you requesting?**

**Add tax year 2024 Certificate(s) of Rent Paid** Number of CRPs to enter \_\_\_\_\_

**Add a tax form.** Include a copy of each form to be added, for example: W-2, 1099-R, 1098, 1099-MISC, 1095-A, etc. For 1099-MISC, see instructions for self-employment or business income. For 1098-T, see instructions for tuition or education expenses.

**Add income or expenses related to self-employment or a business.** Include a copy of form 1099-NEC and/or documentation of cash income or expenses. P+P staff will contact you for additional information required to make changes related to Schedule C, Profit or Loss From Business. For self-employment questions please call 651-262-2169.

**Add tuition or education expenses.** Include a copy of Form 1098-T. If available, include a student account statement showing charges and payments. P+P staff will contact you for additional information required to make changes related to education credits.

**Add a dependent.** Include a copy of the dependent's social security card, ITIN letter, or a copy of a previous tax return with the dependent's name and social security number.

1. Relationship of dependent to you (daughter, son, parent, etc.) \_\_\_\_\_

2. Dependent's date of birth (MM/DD/YYYY) \_\_\_\_\_

3. Number of months the dependent lived with you during the amended year \_\_\_\_\_

4. During the year you are amending

a. Was the dependent 18 years of age or younger  Yes  No

b. Was the dependent under 24 and a full-time student  Yes  No

c. Was the dependent totally and permanently disabled  Yes  No

d. Did anyone else claim the person as a dependent?  Yes  No

**Other.** Provide a brief explanation and copies of supporting documents. Use this space to answer questions 1-4 about additional dependent(s).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*For staff/volunteer use only.*

Logged  Prepared  Reviewed  \$ \_\_\_\_\_  Transmitted  Letter mailed