

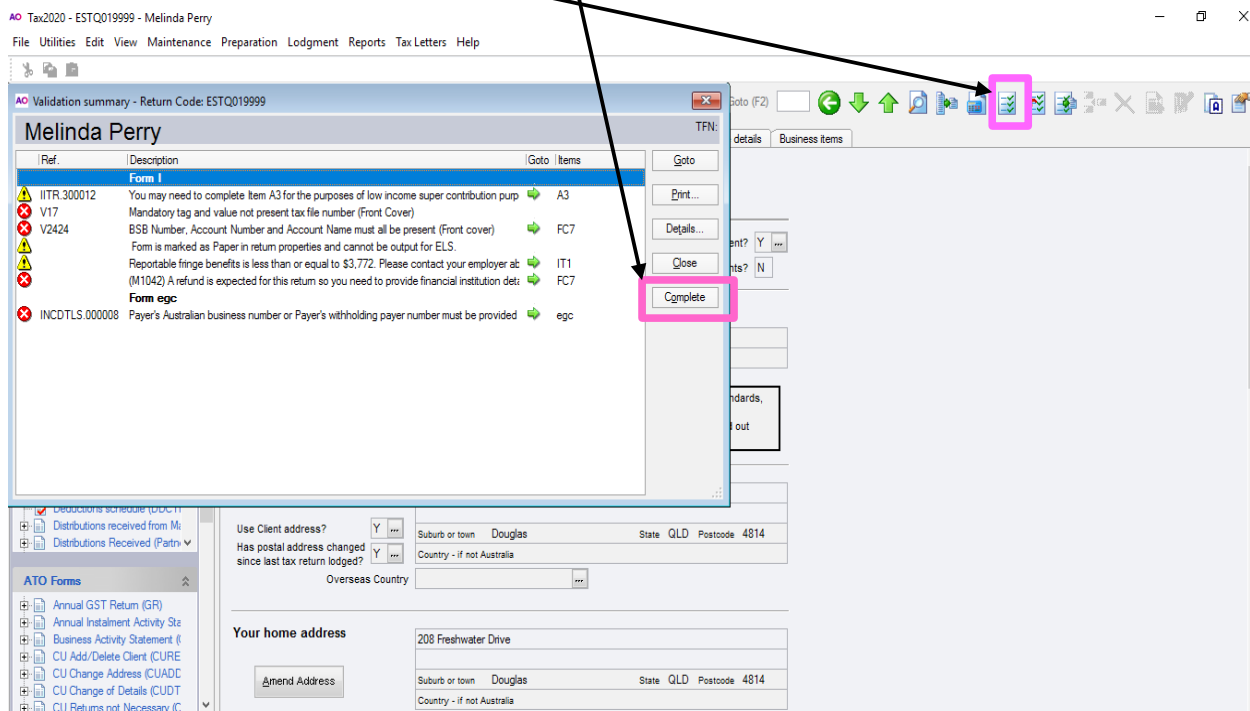
ezytax  
BLUE


amending  
tax returns

# AMENDING A TAX RETURN

## AMENDING A RETURN NOT ORIGINALLY COMPLETED BY US

- 1) Create client in MYOB as normal
- 2) Complete the tax return requiring amendment as normal exactly what was lodged with the ATO. You can find this on the Tax Agent Portal > Lodgments > Income Tax > History > View Details (of the year being amended)
- 3) Clear all '**V-Errors**' and click '**Complete**'



- 4) Click  to close the return
- 5) Highlight the year to be amended in the Tax Returns tab in MYOB
- 6) LHS taskbar > Lodgement > Update Status

File View Maintenance Window Help

Home Contacts Tax Reports Help Live

**TASKS**

- TAX RETURN
  - Create Return
  - Create Activity Stmt
  - Return Properties
  - Validate
  - Estimate
  - Preparation Schedules
  - Print Return
  - Print Schedule
  - Print Validation Report
  - Import Ledger Data
  - Amend
  - Delete Return
  - Lock/Unlock
- LODGMNT
  - Select for Lodgment
  - Update Status
  - Assessment Details
  - PLS Reports
- PRE-FILL FUNCTIONS
  - Download & Save
  - Pre-fill into Tax
  - Pre-fill Manager

Find Clients Client - Perry, Melinda

Client Name: Perry, Melinda  
Client Code: ESTQ019999

Main Responsibility Documents Client Accounting

**Tax Returns**

Drag a column header here to group by that column.

S	Tax Year	Form Type	From
<input checked="" type="checkbox"/>	2020	Individual	01/07/2019
<input type="checkbox"/>	2019	Individual	01/07/2018
<input type="checkbox"/>	2018	Individual	01/07/2017
<input type="checkbox"/>	2017	Individual	01/07/2016
<input type="checkbox"/>	2016	Individual	01/07/2015
<input type="checkbox"/>	2015	Individual	01/07/2014
<input type="checkbox"/>	2014	Individual	01/07/2013

Show all  Hide activity statements  Hide income returns

**Return Details**

Name	<b>Melinda Perry</b>	Return Required	<b>1</b>
Year	<b>2020</b>	Date Due	
TFN		Date Completed	<b>4</b>
ABN		Date Lodged	
Partner	<b>Jessica Darby</b>	Current Status	<b>1</b>
Manager		Status Date	<b>4</b>
Employee		DOB	<b>9</b>
Contact			

7) Change Status to LODGED

AO Lodgment Update

General

Return code: ESTQ019999  
Name: **Perry Melinda**

Lodged date: **04/09/2020**  
Report name:

Date: 04/09/2020

Status:
 

- Lodged
- Assessment received
- Lodged**
- Sent for signature
- In progress

Cancel Edit

8) LHS Taskbar > Tax Return > Amend

File View Maintenance Window Help

Home Contacts Tax Reports Help Live

**TASKS**

- ▼ TAX RETURN
  - Create Return
  - Create Activity Stmt
  - Return Properties
  - Validate
  - Estimate
  - Preparation Schedules
  - Print Return
  - Print Schedule
  - Print Validation Report
  - Import Ledger Data
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  - Select for Lodgment
  - Update Status
  - Assessment Details
  - PLS Reports
- ▼ PRE-FILL FUNCTIONS
  - Download & Save
  - Pre-fill into Tax
  - Pre-fill Manager

Find Clients Client - Perry, Melinda

Client Name

Client Code

Main Responsibility Documents Client Accounting **Ta**

**Tax Returns**

Drag a column header here to group by that column.

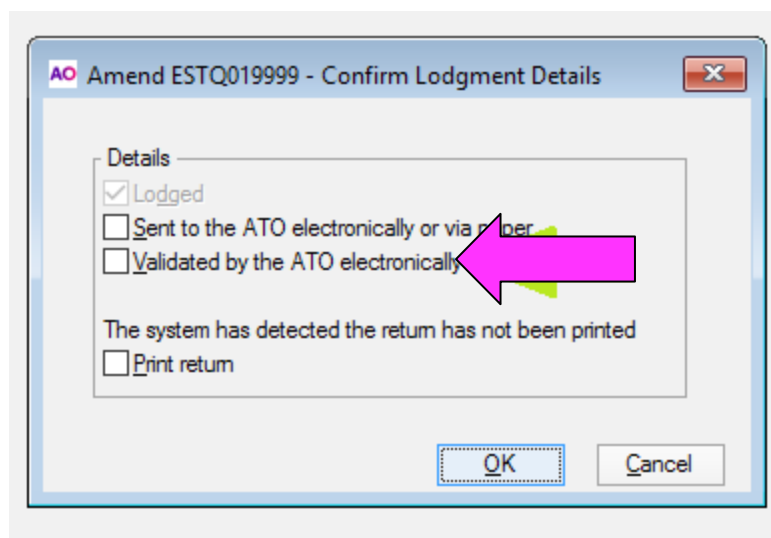
S	Tax Year	Form Type	From
<input checked="" type="checkbox"/>	2020	Individual	01/07/2019
<input type="checkbox"/>	2019	Individual	01/07/2018
<input type="checkbox"/>	2018	Individual	01/07/2017
<input type="checkbox"/>	2017	Individual	01/07/2016
<input type="checkbox"/>	2016	Individual	01/07/2015
<input type="checkbox"/>	2015	Individual	01/07/2014
<input type="checkbox"/>	2014	Individual	01/07/2013

Show all  Hide activity statements  Hide income returns

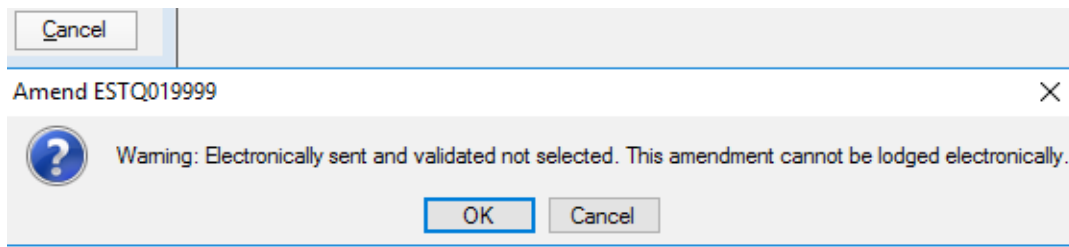
**Return Details**

Name	<b>Melinda Perry</b>	Return Required	<b>R</b>
Year	<b>2020</b>	Date Due	
TFN		Date Completed	<b>4</b>
ABN		Date Lodged	
Partner	<b>Jessica Darby</b>	Current Status	<b>I</b>
Manager		Status Date	<b>4</b>
Employee		DOB	<b>9</b>
Contact			

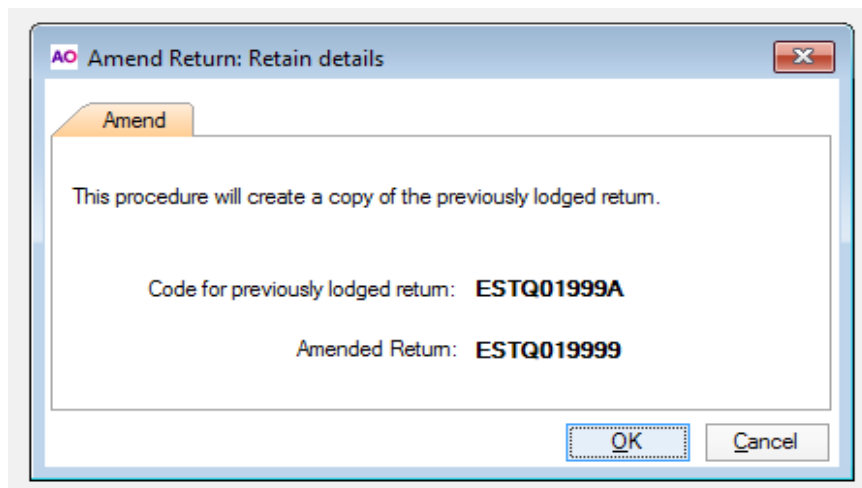
9) Confirm Lodgment Details box appears > tick **Validated by ATO electronically** box **only**.




10) If these boxes are not selected a warning will come up.




11) Once boxes are selected, click OK and the following should appear > click OK.



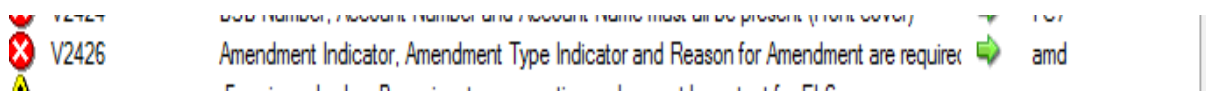
12) On the Tax Return tab, a new return should appear showing *In Progress* and a  next to the original return.

Drag a column header here to group by that column.

S	Tax Year	Form Type	From	To	Status	Status Date	Date Due	Date Lodged
	2020	Individual	01/07/2019	30/06/2020	In progress			
	2020	Individual	01/07/2019	30/06/2020	Lodged	04/09/2020		04/09/2020
	2019	Individual	01/07/2018	30/06/2019	Not started			
	2018	Individual	01/07/2017	30/06/2018	Not started			
	2017	Individual	01/07/2016	30/06/2017	Not started			
	2016	Individual	01/07/2015	30/06/2016	Not started			
	2015	Individual	01/07/2014	30/06/2015	Not started			

13) Open the newly created tax return > add in details to be the new information

14) Validate the return by clearing v-errors. The following error should appear > click on green arrow to fix error message.





17) Write a brief clear description as to why tax return is being amended > click OK

Amendment details

Amendment indicator  Amendment type indicator:

Reason for Changes:  
Did not list deductions

18) Check for v-errors > and finish the return as normal.

19) Get client to sign ELS, Sub Dec and any other paperwork.

20) Get client to pay > price is **INDIVIDUAL TAX RETURN** price.

21) Scan documents and complete as per normal tax return.

22) Enter onto station sheet under Work column as Amend{Year} eg: Amend19.

Complete station sheet as normal.

## **AMENDING TAX RETURN ORIGINALLY COMPLETED BY US**

1) Complete steps 5 – 19 above.

2) Get client to pay > price is **AMENDMENT** price.

3) Scan documents and complete as per normal tax return.

4) Enter onto station sheet under Work column as Amend{Year} eg: Amend19.

Complete station sheet as normal