



DON'T TAX YOURSELF

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I Made a Mistake on My Taxes – Now What Do I Do?

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Mistakes happen, and the tax law can be complex and ambiguous. The question becomes, what does a taxpayer do if they discover a mistake on their tax return? Should an amended tax return be filed? In some cases, the taxpayer will want to file an amended tax return. In other cases, the Internal Revenue Service will correct the error and no action will be required.

Math error or omitted schedule. If there is a math error on the return or the taxpayer omitted a schedule, the IRS will typically correct the error and notify the taxpayer of any change.

Notice from IRS. Taxpayers who omitted an item of income that was reported to the IRS by the payor (Form W-2, Forms 1099) will likely receive a notice from the IRS notifying the taxpayer of the omission and of the proposed additional tax. If the taxpayer agrees with this notice, they can simply send in payment with the IRS notice. If the taxpayer disagrees, an amended return may have to be filed (or a response letter sent to the IRS).

File amended tax return. The taxpayer will need to file an amended tax return to correct errors or report changes in the following cases:

- Income
- Deductions
- Tax credits
- Filing status

How to amend the tax return. Individual taxpayers can amend their tax return using [Form 1040X](#).

Time to amend. Generally, taxpayers have three years from the due date of a tax return to file an amended tax return to

claim an additional tax refund. For example, taxpayer's who just filed their 2023 tax return will have until April 15, 2027 to file an amended tax return claiming an additional tax refund.

State amended returns. Taxpayers who have state filing obligations will also want to [review whether a state amended tax return is required](#).