INDIVIDUAL AMENDMENT RETURN PREPARATION

This section outlines the checklist for preparing an amendment tax return within Taxcat. Amendment return (AI) is only applicable to Individual tax return (EI) only, for the purpose of electronic lodgement. Prior to starting an amendment tax return, ensure:

Step 1: Check Individual Return

1. Ensure the Individual tax return (EI) exist on the Taxcat database.

2. For the individual tax return you intend to amend, check that its status on the front cover is: Validated.

Step 2: Validate Individual Tax Return

Note: this section is only relevant if the individual tax return status is not Validated. Ignore this section and proceed to Step 3 the return has a Validated status.

1. On the Individual tax return front cover, press the **F3** key.

2. After step 1, press the **CTRL** and **K** keys simultaneously.

3. After step 2, the status of the client should be Validated. Press the **F4** key to save the client record.

Step 3: Preparing an Amendment Tax Return (AI)

Figure.1

1. On the Amendment front cover, assign a new client code for field: Client Code

2. Then, when the cursor is positioning at field: Code of return to be Amended, press the **F5** key.

3. After step 2, the Taxcat complete client pick-list will be displayed. Select the individual return you would like to amend from the list.

4. Ensure you select the type of amendment, namely:

    3. Departmental Errors – ATO mistakes caused in the original tax return.
    4. Client Errors – Mistakes made by the clients in the original tax return.

5. Before proceeding to the body of the Amendment tax return ensures the mandatory field Reasons for Amendment on the front cover is completed.

6. The original information from the Individual tax return will be copied into the Amendment tax return when the user proceeds to the body of the tax return.