



# DON'T TAX YOURSELF

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## Made a Mistake on Your Tax Return? What to Do if You Filed Incorrectly

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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 FROM YOUR TAX RETURN

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 ABOUT YOUR TAX RETURN

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 YOUR TAX RETURN

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 2024 tax return will have until April 15, 2028, 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. Massachusetts taxpayers can find more information on the [state website](#).