

# Filing an Extension to file Form 4868

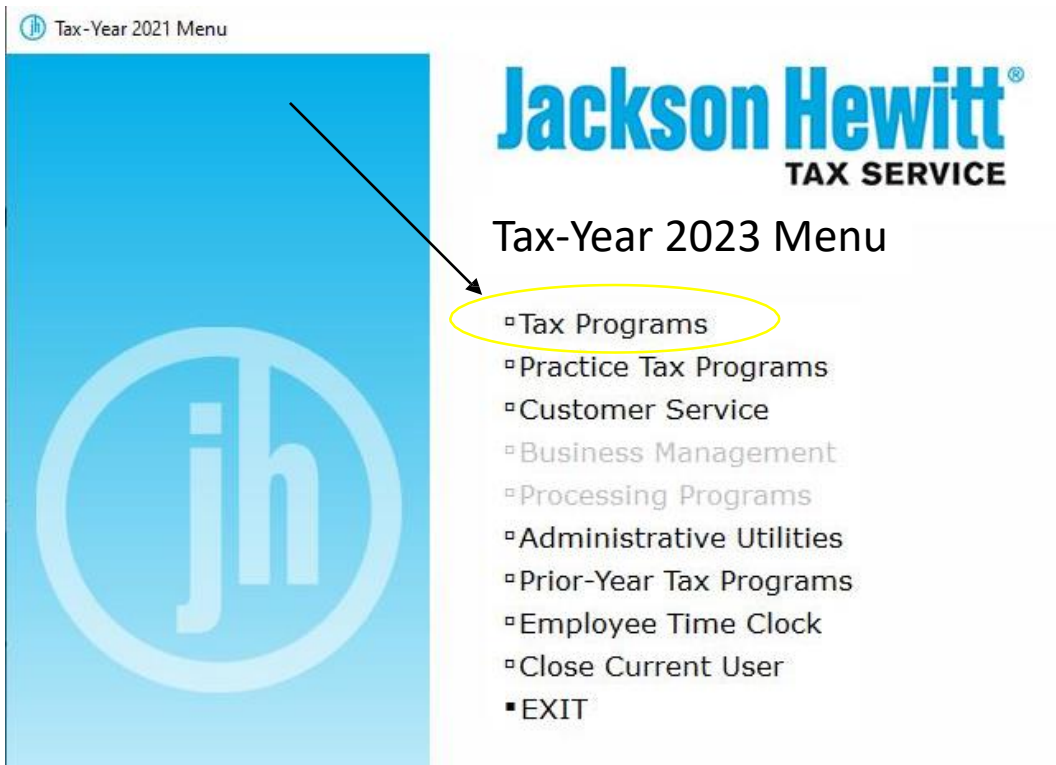
\*\*\*The cost is \$40 \*\*\*

cash, check, credit card only!!!

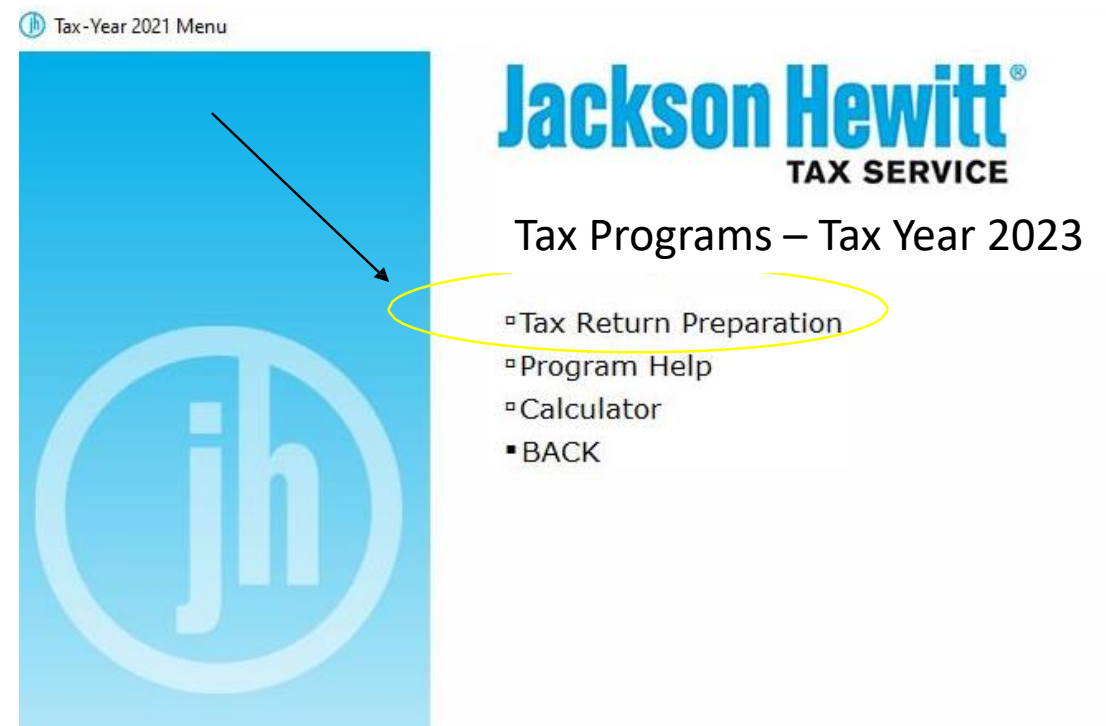
This MUST be paid upfront

# You will start the return like you always do

1.



2.



### 3. Enter Customer data

Please enter the primary SSN or the receipt number.  
If filing status is MARRIED FILING JOINT, enter BOTH SSNs.

Primary SSN: --

Secondary SSN: --

Or

Receipt Number:

Please enter the primary taxpayer's last name and phone:

Last Name:

Phone: ( ) -

Program Help

Calculator

BACK

4.

- You MUST "Create a New Tax Return!!"
- DO NOT use LYS information

Practice Tax Return Preparation - Existing Tax Returns

There are existing tax returns for this Social Security Number.

Create a New Tax Return

Use Existing Tax Return

Receipt	Name	Type	Location	Status
88001	SMITH, JOE	FD-PAP	Local	Hold

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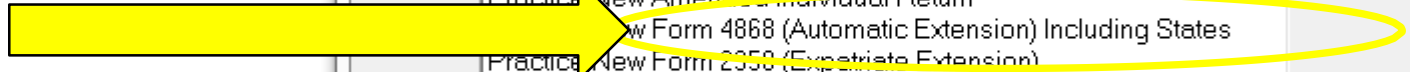
Choose: “New Form 4868 (Automatic Extension) Including States”

Practice Tax Return Preparation - Select Tax Return Option

Select one of the following available tax return options:

- Practice New Individual Return - Interview Entry
- Practice New Individual Return - Forms Entry
- Practice New Individual State Only
- Practice New Amended Individual Return
- Practice New Form 4868 (Automatic Extension) Including States
- Practice New Form 2350 (Expatriate Extension)
- Practice New Form 9465 (Installment Agreement)
- Practice New Form 1040 ES (Estimated Tax)
- Practice New Form 8379 (Injured Spouse)
- Practice Complete W-4 Withholding Information
- Practice New Client Service Associate Interview

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Once the return opens you will enter the personal information like normal. You will stop at the following question and follow the next steps:

On this screen you the answer is zero unless you have done a return already. In most cases you have not.

Form 4868

Federal Extension

Personal Information

Form 4868

Q: What is the amount of your estimated total Federal income tax liability for 2023 (Line 24 of Form 1040 or 1040-SR)?

A:



Question	Answer

Q: What is the total amount of all payments made toward your 2023 Federal income taxes? (Line 33 of Form 1040 or 1040-SR including withholding from Forms W2, W2-G, and 1099. Also include estimated EIC and estimated payments. Do not include amounts you intend to pay with this extension).

A:



Pending

	Answer
Estimated tax liability	0

1. Did they make quarterly payments? This information would go here

- Federal Extension
- Personal Information
- Form 4868

Q: Even when there is no expected balance due, you can still elect to make a payment with this request. What additional amount towards 2023 income tax would you like to pay with this extension document?

A:

Question	Answer
Estimated tax liability	
Total payments made	

If they are going to owe- Are they going to mail in a payment with the Extension? We can ACH on a specific Date from Checking account. This is more efficient, and they will have a record of the transaction.

\*\*\*REMEMBER- this is an extension to file NOT to pay. All payments and amounts owed are Due April 15th, 2024. If they will owe, they need to send as much as possible if not all of it

If they are getting a refund, then they Do Not have to mail a payment!

Form **4868**

Department of the Treasury  
Internal Revenue Service

# Application for Automatic Extension of Time To File U.S. Individual Income Tax Return

For calendar year **2022**, or other tax year beginning , **2023** ending , **20**

OMB No. 1545-0074

**2022**

## Part I Identification

## Part II Individual Income Tax

**1** Your name(s) (see instructions)

JOE SMITH

Address (see instructions)

1 MAIN STREET

City, town, or post office

State

ZIP Code

NASHVILLE, TN 37209

**2** Your social security number

400-00-1234

**3** Spouse's social security number

**4** Estimate of total tax liability for 2022 . . . \$ **NONE**

**5** Total 2022 payments. . . . . **NONE**

**6 Balance due.** Subtract line 5 from line 4.

See instructions . . . . . **NONE**

**7** Amount you're paying (see instructions) **0**

**8** Check here if you're "out of the country" and a U.S. citizen or resident. See instructions . . . . .

**9** Check here if you file Form 1040-NR and didn't receive wages as an employee subject to U.S. income tax withholding . . . . .

**For Privacy Act and Paperwork Reduction Act Notice, see instructions later.**

Form **4868** (2022)

MXA 10/7/22

DETACH HERE

A voucher with an "F" or an "S" in the upper right hand corner will print if they need to mail in a payment to Federal or State.



Finally:

- You will finish the return just as you do every other return you have been doing all year.
- The fee is \$40.00 and this has to be paid up front and CAN NOT be withheld.