



Official 1996 State Tax Form
Commonwealth of Massachusetts
Department of Revenue



See worksheet inside.
Credit Card Payment Option Now Available

Amended Telefile Worksheet

PREPARE FOR YOUR AMENDED TELEFILE CALL BY COMPLETING THIS WORKSHEET. RETAIN THIS WORKSHEET FOR YOUR RECORDS. DO NOT MAIL.

Your Social Security number _____ Your Spouse's Social Security number _____

Your birth year 19 _____ Spouse's birth year 19 _____ Your "Total tax for 1996" from line 19 of your Telefile worksheet \$ _____

1. Correct filing status: Single (from head of household) ☐ Head of household (from single) ☐

2. Correct number of dependents ☐ Were any dependent members of household under age 12 as of 12/31/96? ☐ Yes ☐ No

Social Security numbers of dependents _____

3. Total number of W-2 forms for you ☐ for your spouse ☐

4. Employer Identification Number	5. Amount of State Wages and Tips	6. YOUR Amount of Soc. Sec./Retirement	7. SPOUSE'S Amount of Soc. Sec./Retirement	8. Amount of Mass. Withholding
1st W-2				
2nd W-2				
3rd W-2				
4th W-2				
5th W-2				

TOTALS: 5. \$ 6. \$ 7. \$ 8. \$

AMOUNT OF DIFFERENCE: 5. \$ 6. \$ 7. \$ 8. \$

Amended Telefile will provide the amounts that should be entered in the shaded boxes.

9. Unemployment compensation additional amount ..	\$	CORRECTED TOTAL	9. \$
10. Mass. bank interest amount of increase/decrease ..	\$	CORRECTED TOTAL	10. \$
11a. Winnings and fees additional amount	\$	CORRECTED TOTAL	11a. \$
11b. Mass. withholding additional amount	\$	CORRECTED TOTAL	11b. \$
12. Rent paid in 1996	\$	CORRECTED TOTAL	12. \$
(List your landlord's name) _____		(you will need to state this information to Amended Telefile)	

After completing this worksheet, you are ready to amend your Telefile return. Dial (617) 660-2033.

13. Correct amount of tax for 1996... \$

14. Additional amount of your refund.. \$

15. Additional amount you owe..... \$

(Pay by credit card — see back cover for more information)

If you paid by credit card, enter your authorization number here _____

"Sign" your return You (and your spouse, if filing jointly) must be present to state your name(s) and Social Security number(s) for the Amended Telefile system. This recording will serve as your lawful signature for this return. Amended Telefile will assign you a new 9-digit confirmation number. Do not hang up until you receive this number, it is your proof of filing.

Confirmation Number _____ Date of amended filing ____ / ____ / ____

Filing An Amended Telefile Worksheet

Who Should File An Amended Telefile Worksheet?

You should file an Amended Telefile Worksheet by phone if your original return was filed and accepted through Telefile at least four business days ago, you have access to a touch-tone telephone and you meet any of the following criteria:

- You are amending your filing status only to single (from head of household) or head of household (from single);
- You are correcting the number of dependents claimed;
- Your income that is being amended comes from one or more of the following sources **only** — wages and/or tips reported on Form W-2, unemployment compensation, Massachusetts bank interest and, winnings and fees;
- You are reporting only **additional** and/or **corrected** W-2 information, such as wages, tips, state withholding and Social Security withholding as reported on Form(s) W-2 or W-2C;
- You are increasing or decreasing the amount of Massachusetts bank interest or the amount of rent paid **only**;
- You are **not** reporting corrected winnings and fee income; and
- The total number of W-2s reported between Telefile and Amended Telefile does not exceed five.

If you do not meet the above criteria for filing an Amended Telefile Worksheet, you must file a Massachusetts Amended Income Tax Return, Form 33X. This form is available by calling the Customer Service Bureau at (617) 887-MDOR or by calling the Fax on Demand system at (617) 887-1900 using the handset and the keypad of your fax machine and entering code 339.

Step-By-Step Instructions

Enter your Social Security number, and your spouse's (if married filing jointly), the year you were born and the amount of "Total tax for 1996" from line 19 of your original Telefile Worksheet.

Line 1 If you are changing your filing status, check the appropriate box.

Line 2 Enter the correct number of dependents (do not include yourself or spouse). You will be asked if any dependent members of household were under age 12 as of 12/31/96. In the spaces provided, enter the Social Security number(s) of any additional dependent(s).

Line 3 Enter the total number of W-2 forms for you and your spouse (if married filing a joint return).

Line 4 Enter the Employer Identification number in the boxes provided for each additional and/or corrected Form W-2. This is generally found in box b of Form W-2.

Amended Telefile will provide the amounts for the following information. These amounts should be entered in the shaded boxes.

Line 5 Enter on the lines in column 5 the additional and/or corrected amount of wages/tips from each W-2 form.

Lines 6 and 7 Enter on the lines in column 6 for yourself, and in column 7 for your spouse, the additional

and/or corrected amount paid to Soc. Sec., U.S., R.R. or Mass. retirement PLUS Medicare for each W-2 form.

Line 8 Enter on the lines in column 8 the additional amount of Mass. Income Tax withheld from each W-2.

Add the amounts down the columns in **Lines 5** through **8** and enter these totals in the appropriate white boxes. These are the amounts you will need when you make your call.

Line 9 Enter the amount of additional unemployment compensation received from Form 1099.

Line 10 Enter the amount of increase or decrease of Massachusetts bank interest from all 1099 forms.

Line 11a Enter the amount of additional winnings and/or fee income from all W-2G, 1099 and/or 1099MISC forms.

Line 11b Enter the amount of additional Mass. withholding from all W-2G, 1099 and/or 1099MISC forms.

Line 12 Enter the correct amount of rent paid in 1996. You will be asked to speak your landlords name.

Lines 13 through 15 Amended Telefile will automatically compute the correct tax amount for 1996, as well as the additional amount of your refund or amount you owe. These amounts should be entered in the shaded boxes.

TaxTalk

TaxTalk is our new, automated system of recorded tax information available 24 hours a day, seven days a week. Call (617) 887-MDOR to select from a menu of 40 tax topics. A complete list of tax topics is also available through the Department's Fax on Demand system or via DOR's Web site (<http://www.magnet.state.ma.us/dor/dorpg.htm>). For a menu of tax topics available on Fax on Demand, please call (617) 887-1900 using the handset and keypad on your fax machine and, when prompted, enter document retrieval number 4000. To access the list of tax topics through DOR's Web site, click on the section entitled "Tax Help and Filing Options."

Credit Card Payment

If Telefile determines that you owe tax, you now have the option of paying this amount with your Mastercard or Visa card. To do so, you will be required to enter your account number and the four-digit expiration date (month and year) after providing your voice signature. You should have your credit card information readily available.

Note: This transaction will occur while you are on the phone and the appropriate amount will be credited to your Department of Revenue account on the next business day.

If You Need to Send a Payment

Complete the Amended Telefile Payment Voucher and be sure to include the following information:

1. Your name and spouse's name, if filing a joint return, and address;
2. The amount of the enclosed payment; and
3. Your Social Security number, and spouse's Social Security number, if filing a joint return.

If you do not make full payment of the tax due on or before April 15, 1997, you will be sent a Notice of Assessment (NOA). This notice will show your tax due, plus any interest and penalty assessments for late payment.

Amended Telefile Payment Voucher

1996

Massachusetts

Department of Revenue

Name of taxpayer(s)

Amount enclosed

\$

Street address

Your Social Security number

City/Town

State

Zip

Spouse's Social Security number

Mail to: Massachusetts Department of Revenue, P.O. Box 7062, Boston, MA 02204

Make check payable to: Commonwealth of Massachusetts. Write your social security number on your check or money order.

