

ATX™ Learning Portal

Creating Extension Returns

In some situations, the taxpayer might need additional time to file his or her return. By filing Form 4868, *Application for Automatic Extension of Time to File U.S. Individual Income Tax Return*, taxpayers can request up to six additional months to file the return.

i Even if the IRS grants the request for an extension, all payments are due on the original due date to avoid penalties and interest.

Completing an Extension in ATX

In ATX, you can create an extension for a single return, or for several returns at once. You can also choose to create extension returns with no income or tax information or returns that include some tax data.

To create an extension in ATX:

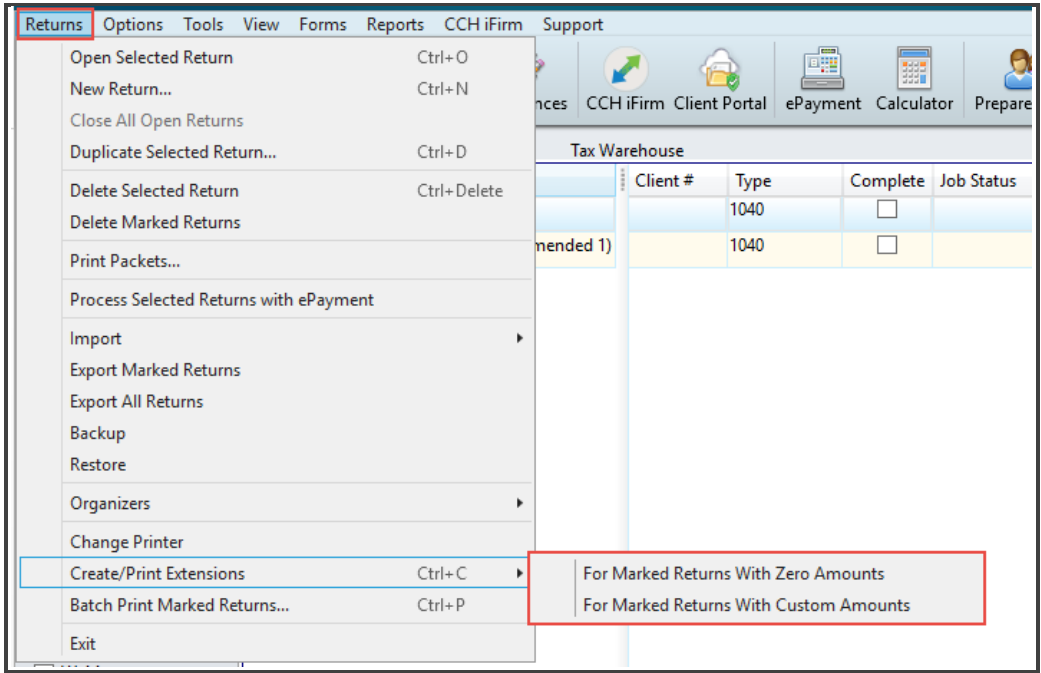
1. Create the return, completing the taxpayer's name, Social Security number and address.
2. If you have any tax data, such as income amounts, complete those sections.
3. Save and close the return.

i If you want to create extensions for multiple returns at once, complete these steps for each taxpayer for whom you need to file an extension.

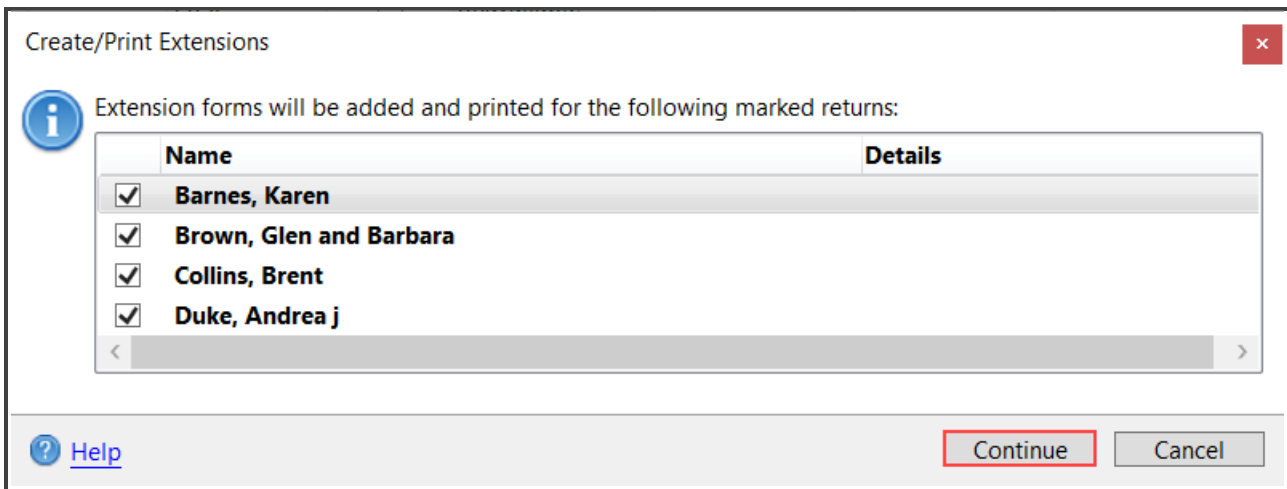
4. From **Return Manager**, select the check box for each return for which you want to create an extension.

Returns	Accounts Receivable	Tax Wi
E-file	Return Name	
<input checked="" type="checkbox"/>	Ambrose, Samuel J and Dia	
<input checked="" type="checkbox"/>	Brown, Glenn and Barbara	
<input type="checkbox"/>	Credit for State Taxes Paid -	
<input type="checkbox"/>	Example of Book	

- On the **Returns** menu, point to **Create/Print Extensions** and choose either:
 - For Marked Returns with Zero Amounts** or
 - For Marked Returns with Custom Amounts**



- ATX displays the Create/Print Extensions dialog box, confirming the returns you selected. Click **Continue**.



- ATX displays the Returns Marked for Printing dialog box. Make any changes needed to the printer options and click **Print**.

Returns Marked for Printing: 4

You can change print settings in Preferences.
[Adjust print settings](#)

Printing Order

Company name/Last name City
 Client number State
 Current return manager order Zip

Copies to print

Filing Copy Client Copy Preparer Copy Custom Copy

[Help](#) [Printer Setup](#) **Print** Cancel

i When you choose this option, ATX prints the forms, and adds Form 4868 to the marked returns.

To view or edit this form:

1. Open the return.
2. Click the **Form 4868** tab.
3. Click the **Page 1** worksheet tab. ATX displays the form, including any information you have already entered on the return:

▼ DETACH HERE ▼

Form 4868 <small>Department of the Treasury Internal Revenue Service (99)</small>	Application for Automatic Extension of Time To File U.S. Individual Income Tax Return For calendar year . . . or other tax year beginning . . . ending . . .	1833
David Frank and Julie Ann Gilbert 523 Rockwell Street Jasper, GA 30143		
Line 4 - Estimate of total tax liability for year \$	<input type="text"/>	0
Line 5 - Total payments	<input type="text"/>	0
Line 6 - Balance due. Subtract line 5 from line 4	<input type="text"/>	0
Line 7 - Amount you're paying (see inst)	<input type="text"/>	0
Line 8 - Check here if you're "out of the country" and a U.S. citizen or resident		
Line 9 - Check here if you file Form 1040NR or 1040NR-EZ and didn't receive wages as an employee subject to U.S. income tax withholding		

4. Complete as much of the return as you can, including income and payments.
5. On Form 4868, box 7, enter the payment amount included with this return, if any.

i Remember, any amount owed is due on the original due date, and penalties and interest apply for late payment, even if the return is extended.

6. If submitting a payment with the extension, click the **Payment** navigation tab.

7. Select the method of payment, and if necessary, enter any bank information on the **Bank Account** tab.

Payment Options for Electronically Filed Extension (4868)	
Zero Balance Option	
<input checked="" type="checkbox"/>	The taxpayer has no estimated tax liability. Do not complete the Bank Information section below.
Payment Options	
<input type="checkbox"/>	The taxpayer has an estimated \$0 in tax liability.
<input checked="" type="checkbox"/>	Paper check by mail. See page 4 of Form 4868 instructions for addresses.
<input type="checkbox"/>	Direct Debit. Complete the Bank Information on the Bank Account Info form. Be sure to include the payment date below.
<input type="checkbox"/>	Credit or Debit Card payment via Internet or phone. Use the 'Credit or Debit Card Paym't' worksheet.
Bank Information	
Taxpayer's Bank Information:	
Routing number:	<input type="text"/>
Account number:	<input type="text"/>
Type of account:	<input type="checkbox"/> Checking <input type="checkbox"/> Savings
If a payment is due, enter the date of payment and the amount the taxpayer will pay. This date may not be before today's date or after April 18, 2023 to avoid penalties and interest.	
Date	<input type="text"/>
Amount to Pay	<input type="text" value="0"/>
In order to comply with new IRS requirements, please answer the following question: Are these funds coming from an account outside of the United States?	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
Pages & Worksheets 1 E-file Info Payment DeviceID Rejection Extension PIN Self-Select PIN Method Where to File Credit c	