

## Form 843 Instructions

### Files Needed

Download the Example Zip file to see a completed Spreadsheet and PDF 843 Form

Download the 843SpreadsheetandPDFForm.zip

Open the files

843Form06082026.pdf, and

IRS\_Practitioner\_Interest\_Penalties06082026.xls

### Completing the Spreadsheet:

Review the Instructions in the “Instructions” Tab of the Spreadsheet

Review your own Tax Account Transcripts for 2019 through 2022

Fill out the “Data Entry” Tab of the Spreadsheet for the information on your Tax Transcripts for each year. If you do not have penalties or interest assessed on a transcript, you do not need to fill out column in the Data Entry Tab for that year.

If there are any payments that were made of Interest, Penalties, or Tax, add those to the Year Tab in question in the light blue shaded box in the correct column for the type of payment.

After entering in the Data for each year, review the “Summary” Tab. The spreadsheet should calculate how much should be abated (removed) and or refunded.

### Completing the 843 Form(s)

Review the First Page of the 843 PDF, these are the instructions.

You will need to save an 843 Form for EACH year that penalties and interest were assessed or paid.

For each Year you need an 843 form; copy the information from the Summary Tab of the spreadsheet onto the 2<sup>nd</sup> page of the pdf. You should not need to enter anything on any other page.

Print pages 3-6. Attached your Transcripts, sign and date the bottom of the 843 Form.