

Deceased Taxpayer or Spouse

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(Use your back button to return to the Form 1040N instruction booklet.)

If you are e-filing through the Fed/State e-file program, the software will bring forward the deceased individual's information from the federal return. Required supporting documentation may be submitted as an attached PDF document when e-filing your return, if your software supports these types of attachments. If the supporting documentation is not received with the return, DOR may request the required documentation when processing your return. This may result in a delayed refund.

Required documentation may include one or more of the following:

- ◆ [Statement of Person Claiming Refund Due a Deceased Taxpayer, Form 1310N](#);
- ◆ Proof of appointment as personal representative; and
- ◆ Proof of death (copy of a death certificate, or notification from the appropriate government office).

This documentation is only required when claiming a refund or overpayment for a deceased taxpayer. Documentation is not required when the surviving spouse is filing an original return jointly with the deceased taxpayer.