2014 Idaho State Amend Instructions for CD/Download Users:

- 1) Select and open your return.
- 2) Select **File** and **Save As** "Amended 2014 return" before you update TurboTax to preserve your original return.



3) Select **Online** and **Check for Updates**.



4) Go to **Federal Taxes** tab (if using the Home and Business Product, go to the **Personal** tab) and then select the **Other Tax Situations** tab.



5) On the **Other Tax Situations** screen, scroll down to **Other Tax Forms** and next to **Amend a Return**, select the **Start** button.

intuit.						Due	CA Tax D	
TurboTax	🍼 Deluxe				\$ 82	5	\$ 74:	
PERSONAL INFO	FEDERAL TAXES	STATE TAXES	REVIEW	FILE				
Wages & Income	Deductions &	Credits Heal	th Insurance	Other 1	Tax Situations	Federa	Review 1	
2								
Underg	payment Penalties 🔝	arn More					Start	
Extra Tax on Early Retirement Withdrawals Learn More								
Nanny	and Household Emp			Start				
Apply I			Start					
Other								
Identity	Protection PIN Lear	n More					Start	
Preside	ential Campaign Fun	d Learn More					Start	
Other	Tax Forms							
Amend	a Return Learn More	\supset					Start	
File an	Extension Learn Mor	22					Start	
Form V	N-4 and Estimated Ta	axes Learn More					Start	

6) On the We'll Help you change (amend) your return screen, click Continue.

Step 1: Set ready to amend	Step 2: Start amending	Step 3: Finish up and file	
We'll start by asking a few questions about your original return.	Ver3 hep you ass. charge or remove into far your amended return	We'll make sure you're ready to print and mair your amended return	
Note: Amended retu	ms can't be e-filed. They need	to be filed the old-school	

7) On the Have You Already Filed This Return? screen, select Yes, I need to amend a return I already filed.

Also select I need to amend my 2014 return, then click Continue.



8) On the **Do you need to change anything else?** screen, scroll down to **State return** and click the **Update** button.

Wages & Ir	icome	Deductions & Credits	Health Insurance	Other Tax Situations	Federal Review
٩	1099-	R (withdrawals from 401(k), 403(b), IRAs, pensi	ons)	Update
ă	1099	MISC			Update
₹<	State	return			Update
کل	Inee	d to change (amend) my re	turn for a different rea	son	
	2 F	Personal Info			Update

9) We will now take you to the actual forms in order to make the changes. Select **Forms** in the upper right-hand corner of the program.

Forms	Flags
arch a topic or ask a question	Find

10) Under Forms in My Return on the left-hand side of your screen, select Medical Wks under Form 1040: Individual.



11) If you don't see the Medical Wks in the list, go to **Open Form** (above **Forms in My Return**). Enter **medical expenses** and click **Open Form**. Then click on **Medical Expenses Worksheet**.

Search or Browse the list of available f	orms	
medical expenses		1
2014 US Form 1040: Individual Inco	one Tax Return	
Schedule A: Itemized Deductions		
Medical Expenses Worksheet		
2014 Alabama		
2014 Arkansas		
2014 Arizona		
2014 California		
2014 Colorado		
2014 Georgia		
2014 Idaho		
2014 Illinois		
2014 Kansas		
2014 Kentucky		
2014 Louisiana	/	
2014 Maryland		
2014 Maine		

12) Now you'll see the federal Medical Expense worksheet. Write down the amount from Line 2b, which is the health insurance premium amount from your 1095-A.

Schedule A Line 1	Medical Expenses Worksheet			2014
Name(s) Shown on Return Joey Smith		Soc 32	ial Sec 1-65	urity Number - 4987
1 Prescription medicat 2 Health insurance pre a Premiums other than b From Form(s) 1095-/ Taxpayer's portion of Spouse's portion of for the spouse, the	ons. miums: self-employed health insurance or reported on a 10 + net of adjustments. of 1095-A premiums (notal less spouse)	95-	1 2a b	1,200.00

13) Under Forms in My Return, scroll down to Idaho Individual forms and select Health Ins Wks.



14) If you don't see the Health Ins Wks, go to Open Form (above Forms in My Return). Open 2014
 Idaho and Form 40, Individual Income Tax Return. Click on Health Ins & Long-Term Care Ins
 Wks.

🔮 Open Form	
Search or Browse the list of available forms	
Type a form name	م
C LVIT AILUNG	<u>د</u>
2014 California	
2014 Colorado	
2014 Georgia	
🖃 2014 Idaho	
 Form 40: Individual Income Tax Return Information Worksheet 	
Itemized/Std Deduction Worksheet	
Tax Payments Worksheet	
Health Ins & Long-Term Care Ins Wks	
Grocery Credit Worksheet	

If you had a Federal Schedule A (Itemized Deductions), continue with Step 15. If you did not have a Federal Schedule A, skip down to Step 20.

15) If there is not an amount on Line 1, enter the amount you wrote down from the Federal Medical Wks on Line 1.



- 16) If there is an amount already on Line 1, you will need to override that amount. Write down the amount currently on Line 1.
- 17) Right mouse click on Line 1 and select Override.
- 18) **Add** the amount you wrote down from the Federal Medical Wks to the amount originally on this field. Delete the original amount in that field and replace it with the new amount.

1	Jse this worksheet to calculate your Health Insurance and Long-Term Care Insura you did not itemize your deductions for Idaho, leave lines 1-6 blank and skip lines	ance d s 8, 12	leduction . If 2 & 13.	Ε	
1.	Amount claimed for health insurance costs on federal Form 1040 ,Schedule A	1.	2 200		
2.	Amount claimed for longterm care insurance on federal Form 1040, Sched A.	2.	Cut		Ct
3.	Additional medical expenses claimed on federal Form 1040 ,Schedule A	3.	Com		0
4.	Total medical expenses. Add lines 1, 2 and 3.	4.	Сору		0
5.	Ages 65 and over enter 7.5% of federal adjusted gross income. If under age		Paste		C
	65, enter 10% of federal adjusted gross income.	5.			
6.	Medical expense deduction allowed on federal Form 1040, Schedule A.		Add Com	a antina Dataila	0
	(Line 4 less Line 5) If less than zero, enter zero	6.	Add Sup	porting Details	C C
			Override	$\mathbf{>}$	C
	HEALTH INSURANCE				
7.	Enter the total amount paid for health insurance	7.	Mark As	Estimated	F
8.	Portion of health insurance deduction allowed on federal Form 1040,		QuickZo	om	
	Schedule A. Enter the lesser of line 1 or line 6.	8.			
9.	Enter total health insurance costs deducted elsewhere on the federal return	9.			
10.	Idaho health insurance deduction allowed. Line 7 less lines 8 and 9. Enter		Data Sou	urce	
	this amount on Form 39R, line 18 or Form 39NR, Line 18, Column A	10.			
	FOR FORM 43 FILERS ONLY COMPLETE LINES A THROUGH E		About Fe	ed Sched A health ins	ur
Α.	Total Idaho income from Form 43, line 20	A.			

19) Continue to Line 22.

If you did not have a Federal Schedule A (Itemized Deductions), continue with Step 20.

20) If there is not an amount on Line 7 on the Idaho Health Insurance Worksheet, enter the amount that you wrote down from the Federal Medical Wks, Line 2b and enter on Line 7.

Form 39F Line 18 & or Form 39N Line 18 &	 Health Insurance and Long Insurance Deduction Limitation Keep for your records R 	-Term Care 2014 ns Worksheet s
ame as Shown (JOEY SMITH	in Return	Social Security No. 321-65-4987
Use this wo you did not	rksheet to calculate your Health Insurance and Lon itemize your deductions for Idaho, leave lines 1-6 t	ng-Term Care Insurance deduction . If blank and skip lines 8, 12 & 13.
1. Amount c	aimed for health insurance costs on federal Form 1	1040 ,Schedule A 1.
2. Amount c	aimed for longterm care insurance on federal Form	n 1040, Sched A 2.
3. Additional	medical expenses claimed on federal Form 1040,	,Schedule A 3. 1,20
4. Total med	cal expenses. Add lines 1, 2 and 3	4.
 Ages 65 a 	nd over enter 7.5% of federal adjusted gross incom	ne. If under age
65, enter	10% of federal adjusted gross income	5, 00
6. Medical e	pense deduction allowed on federal Form 1040, So	chedule A.
(Line 4 le	ss Line 5) If less than zero, enter zero	6.
HEALTH	NSURANCE	
7. Enter the	total amount paid for health insurance	
8. Portion of	health insurance deduction allowed on federal Forr	m 1040,
	A Enter the lesser of line 1 or line 6	•
Schedule	A. Enter the leader of time 1 of time of	····· 0.

- 21) If there is an amount already on Line 7, add the amount you wrote down from the Federal Medical Wks to the amount on this field.
- 22) Click on Form 40 under Idaho Individual



23) On **Idaho Form 40**, choose **Other, Attach an explanation**. The number 4 will then show in the box.

Form 40	Individual Income Tax Return	2014	
	beginning, ending	SMIT	E
See instructions for the reaso (If selecting reason 4, Other,	ons for amending and enter the number enter explanation below line 60 on page 2)		Odv (No entry) Federal Audit
Your first name and initial SUSIE Q	Last name SMITH	Your social security no.	Net Operating Loss Carryback Federal Amended
Spouse's first name and initial	Last name	Spouse's social security no.	Other - Attach an explanation

24) Scroll down Idaho Form 40, **to Amend Return Reason Statement** (at the bottom of the 2nd page.) Enter: "The original return did not include the health insurance premiums from Form 1095-A as a medical expense. This amended return includes those insurance premiums."

7	Total tax due (line 52) or overpayment (line 53) on this return	57	-96
8	Refund from original return plus additional refunds.	58	78
59	Tax paid with original return plus additional tax paid	59	
50	Amended tax due or refund. Add lines 57 and 58 and subtract line 59	60	-18
	Amended Return Reason Statement		
	THE ORIGINAL RETURN		

25) Now return to the **Step-by-Step** process in the upper right-hand corner of the program.



26) Select the Federal Taxes tab and Other Tax Situations.



27) On the Other Tax Situations screen, scroll down and select Update next to Amend a return.



28) On the **Do you need to change anything else?** screen, scroll down and select **Done**.



29) On the **Do you still receive your mail at this address?** Screen, review info and select **Continue**.

PERSONAL INFO	FEDERAL TAXES	STATE TAXES	REVIEW	FILE		Search a topic	D
Wages & Income	Deductions &	Credits Hea	Ith Insurance	Other Tax S	ituations	Federal Review	
Do you still	receive your	mail at thi	s address	?			
123 Main Salt Lake 84101	Street City, UT						
 Yes No 							
				-			
Back						Continue	

- *30)* On the **Why did you need to amend your return?** screen, click **Continue.** This is for a federal amended return. You have already entered the information for Idaho
- 31) On the Let's make sure your taxes are correct screen, select Continue.
- 32) On the **Let's Check These Entries** screen, select **Check Entries.** You may have a few additional questions to answer regarding your Idaho amended return.



33) On the Run Smart Check Again screen, select Done.



- 34) On **Your Amended Return Summary** screen, just click **Continue**. This screen is referring to a federal return amendment, and this amended return is just for your state return.
- 35) You are now ready to print your return to file. On the You're Done! Print and Mail Your Returns, select Print Return.



36) In the Form Selection window, select All official forms required for filing, uncheck the box for 2014 Federal tax return and check the box for your Idaho return. Then, select Preview Print Copy.

Help		
What forms would you like to generate? All official forms required for filing Forms to review or keep for your records Tax Return Only Tax Return, key calculation worksheets Specific Forms Form Only Form and supporting statements No Active Form	■ 2014 Federal Tax Return Filing Instructions (Page 1 of 1) Form 10402: Amended Tax Return Form 10402: Individual Tax Return Schedule A: Itemized Deductions Form 8962 Premium Tax Credit ■ 2014 Idaho Tax Return Filing Instructions (Page 1 of 1) ID-40V Voucher 1: Payment Voucher 1 Form 40: Individual Income Tax Return Form 39R: Resident Supplemental Sche Come 4040V Amended Tax Datum	 a b c c

37) On the Print Preview screen, select the Printer Icon to print your forms.

	Open 🛛 🔁 Create • 🛛 🗎			
(2) ● 1 / 13 14 (2) ● ● ● Ast ● □ (2)				
0	Bookmarks (1)	1		
2	E • 8 0 0	File by Mail Instructions for your 2014 Idaho Amended Tax Important: Your taxes are not finished until all required steps are comp		
4	P Filing	John Smith 123 Main Street Arco, ID 00213		
	(Page 1 of 1) D-40V Voucher 1: Payment Voucher 1	Balance Due/ Refund	Your Idabo state amended tax return shows \$89.00	
	 Form 40: Individual Income Tax Return 	What You Need to Mail	<pre>Tour amended tax return - Porm 40. Hemend Teturn. Attach legible state copies of Porm(s) M. forms that show idaho withholding to your </pre>	

38) After printing your return,

- The instruction letter will indicate any balance due that you need to pay or refund that you will receive.
- The instructions will also tell you the address to mail your return.
- Be sure to print out an extra copy to keep for your files.