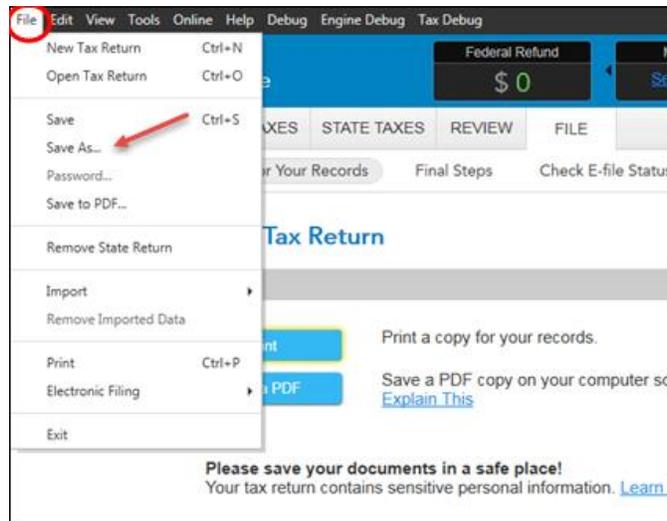
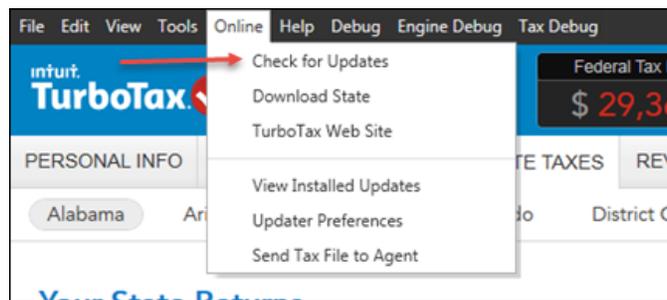


2014 Idaho State Amend Instructions for CD/Download Users:

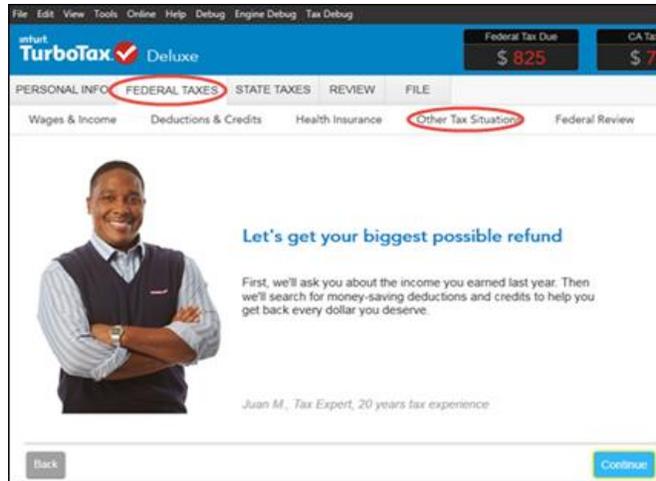
- 1) Select and open your return.
- 2) Select **File** and **Save As** “Amended 2014 return” before you update TurboTax to preserve your original return.



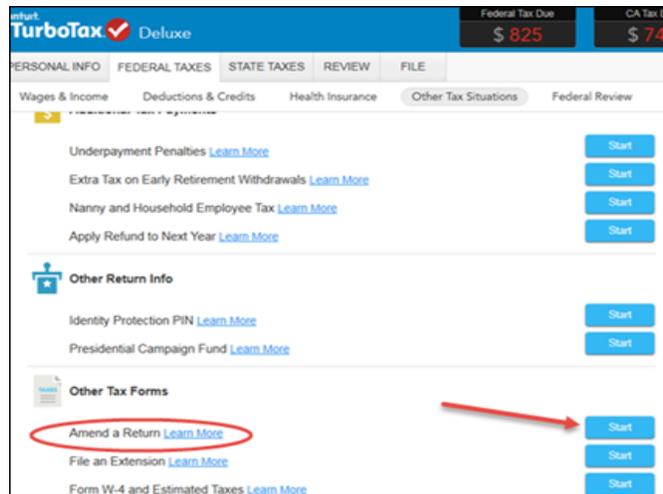
- 3) Select **Online** and **Check for Updates**.



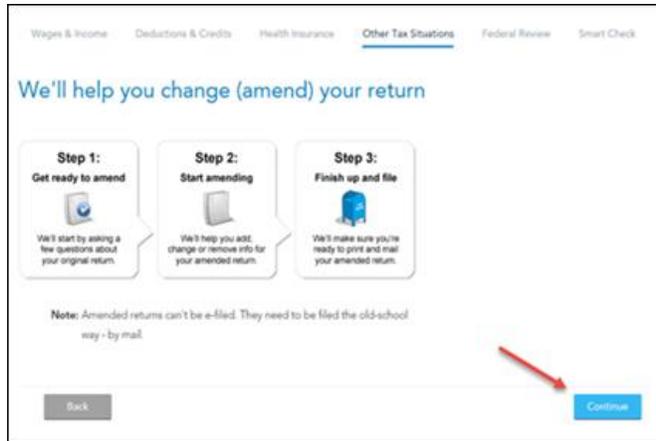
- 4) Go to **Federal Taxes** tab (if using the Home and Business Product, go to the **Personal** tab) and then select the **Other Tax Situations** tab.



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

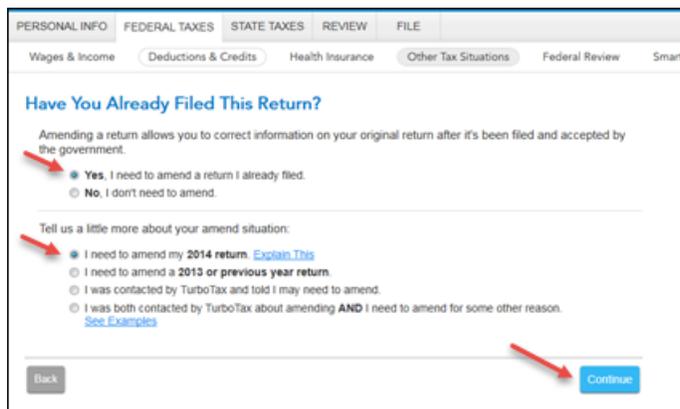


- 6) On the **We'll Help you change (amend) your return** screen, click **Continue**.

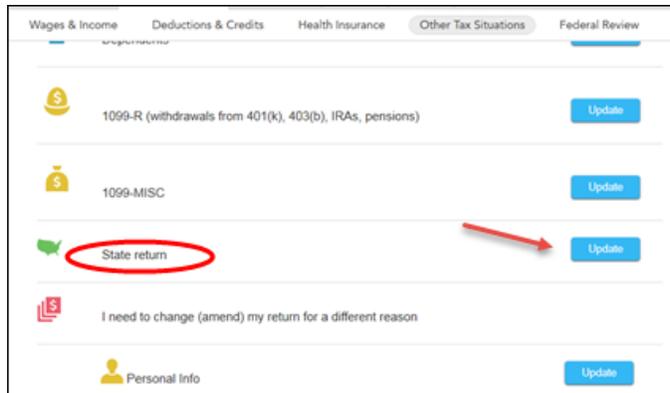


7) On the **Have You Already Filed This Return?** screen, select **Yes, I need to amend a return I already filed.**

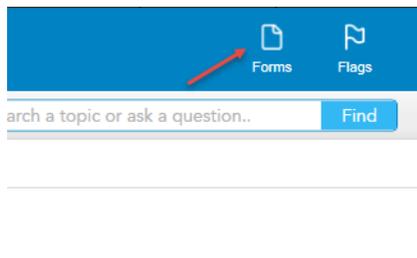
Also select **I need to amend my 2014 return**, then click **Continue.**



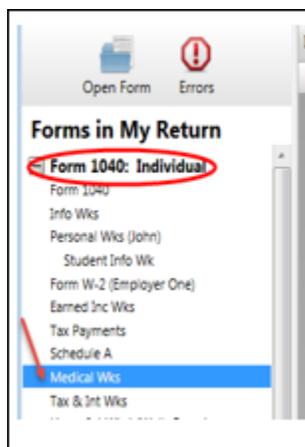
8) On the **Do you need to change anything else?** screen, scroll down to **State return** and click the **Update** button.



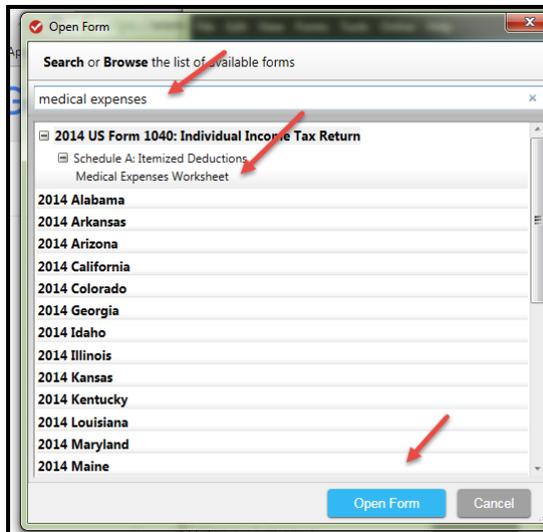
9) We will now take you to the actual forms in order to make the changes. Select **Forms** in the upper right-hand corner of the program.



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



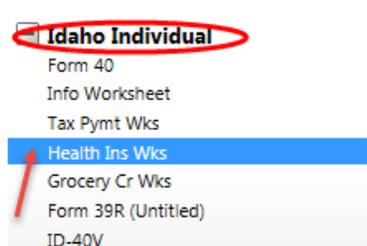
11) If you don't see the Medical Wks in the list, go to **Open Form** (above **Forms in My Return**). Enter **medical expenses** and click **Open Form**. Then click on **Medical Expenses Worksheet**.



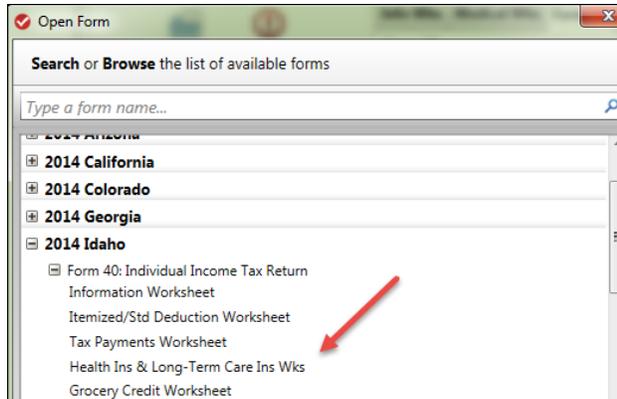
12) Now you'll see the federal Medical Expense worksheet. **Write down** the amount from **Line 2b**, which is the health insurance premium amount from your 1095-A.

| Schedule A Line 1 | | Medical Expenses Worksheet | | 2014 | |
|---------------------------------------|---|----------------------------|---------------------------------------|-----------------------|--|
| | | | | Keep for your records | |
| Name(s) Shown on Return Joey Smith | | | Social Security Number 321-65-4987 | | |
| 1 | Prescription medications..... | | 1 | | |
| 2 | Health insurance premiums: | | | | |
| a | Premiums other than self-employed health insurance or reported on a 1095-A..... | | 2a | | |
| b | From Form(s) 1095-A - net of adjustments..... | | b | 1,200.00 | |
| | Taxpayer's portion of 1095-A premiums (total less spouse)..... | 1,200.00 | | | |
| | Spouse's portion of 1095-A premiums, enter the amount for the spouse, the remaining goes to the taxpayer..... | | | | |

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**.



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.

The screenshot shows the 'Health Insurance and Long-Term Care Insurance Deduction Limitations Worksheet' for 2014. The form includes fields for Name as Shown on Return (JOEY SMITH) and Social Security No. (321-65-4987). Below these fields, there are instructions and a table with four lines. Line 1 has a value of 1,200. Line 2 is blank. Line 3 has a value of 0. Line 4 is blank.

| | | |
|---|----|--------|
| 1. Amount claimed for health insurance costs on federal Form 1040, Schedule A | 1. | 1,200. |
| 2. Amount claimed for longterm care insurance on federal Form 1040, Sched A | 2. | |
| 3. Additional medical expenses claimed on federal Form 1040, Schedule A | 3. | 0. |
| 4. Total medical expenses. Add lines 1, 2 and 3 | 4. | |

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.

The screenshot shows the same worksheet as above, but with a context menu open over Line 1. The menu includes options like Cut, Copy, Paste, Add Supporting Details..., Override (circled in red), Mark As Estimated, QuickZoom, Data Source, and About Fed Sched A health insur. The value '1,200' is visible in the cell for Line 1.

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 39R Line 18 & 19 or Form 39NR Line 18 & 19 | | 2014 |
|--|---|------------------------------------|
| Name as Shown on Return JOEY SMITH | | Social Security No. 321-65-4987 |
| Use this worksheet to calculate your Health Insurance and Long-Term Care Insurance deduction. If you did not itemize your deductions for Idaho, leave lines 1-6 blank and skip lines 8, 12 & 13. | | |
| 1. | Amount claimed for health insurance costs on federal Form 1040, Schedule A | |
| 2. | Amount claimed for longterm care insurance on federal Form 1040, Sched A | |
| 3. | Additional medical expenses claimed on federal Form 1040, Schedule A | 1,200. |
| 4. | Total medical expenses. Add lines 1, 2 and 3 | |
| 5. | Ages 65 and over enter 7.5% of federal adjusted gross income. If under age 65, enter 10% of federal adjusted gross income | 5,000. |
| 6. | Medical expense deduction allowed on federal Form 1040, Schedule A (Line 4 less Line 5) if less than zero, enter zero | 0. |
| HEALTH INSURANCE | | |
| 7. | Enter the total amount paid for health insurance | |
| 8. | Portion of health insurance deduction allowed on federal Form 1040, Schedule A. Enter the lesser of line 1 or line 6 | 0. |
| 9. | Enter total health insurance costs deducted elsewhere on the federal return | |

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
Idaho Individual Income Tax Return
2014
For calendar year 2014, or fiscal year beginning _____, ending _____ SMIT

Amended Return, check the box See instructions for the reasons for amending and enter the number (If selecting reason 4, Other, enter explanation below line 60 on page 2)

Your first name and initial: SUSIE Q Last name: SMITH Your social security no.: xxx-xx-xxxx Spouse's first name and initial: 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."*

| Amended Return Only. Complete this section to determine your tax due or refund. | | | |
|---|--|----|-----|
| 57 | Total tax due (line 52) or overpayment (line 53) on this return..... | 57 | -96 |
| 58 | Refund from original return plus additional refunds..... | 58 | 78 |
| 59 | Tax paid with original return plus additional tax paid..... | 59 | |
| 60 | 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.

Social Security No.
056-12-3456

n Care Insurance deduction . If
and skip lines 8, 12 & 13.

Schedule A 1. 2,300.

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

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE

Wages & Income Deductions & Credits Health Insurance Other Tax Situations Federal Review

Let's get your biggest possible refund

First, we'll ask you about the income you earned last year. Then we'll search for money-saving deductions and credits to help you get back every dollar you deserve.

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

Wages & Income Deductions & Credits Health Insurance Other Tax Situations Federal Review

Presidential Campaign Fund [Learn More](#) Start

Other Tax Forms

Amend a Return [Learn More](#) Update

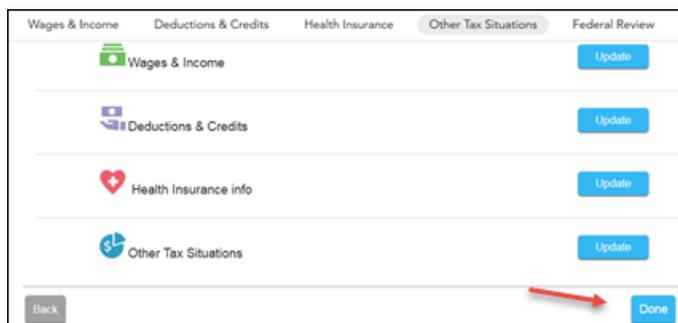
File an Extension [Learn More](#) Start

Form W-4 and Estimated Taxes [Learn More](#) Start

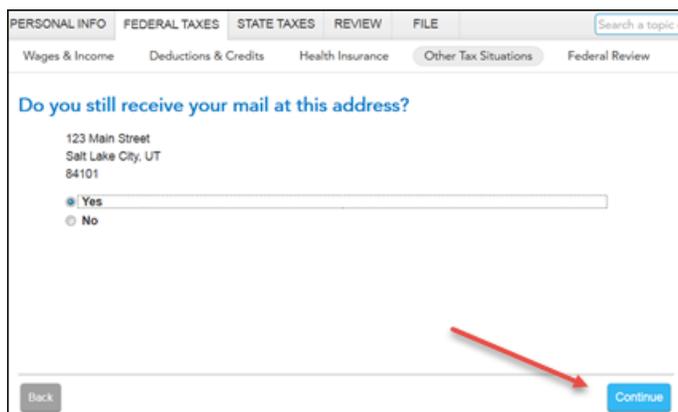
Miscellaneous Tax Forms [Learn More](#) Start

Back Done with Other

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



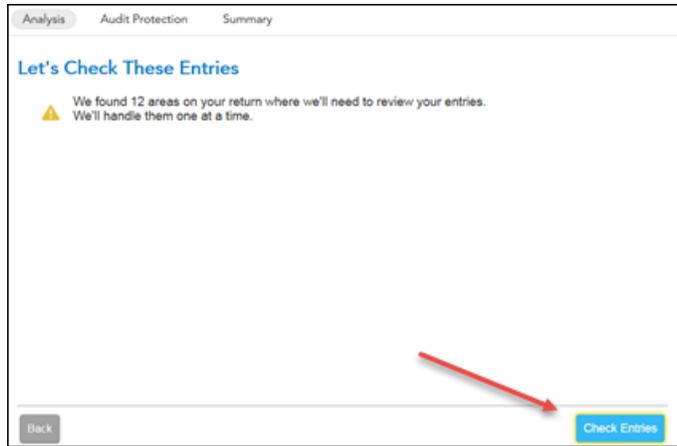
29) On the **Do you still receive your mail at this address?** Screen, review info and select **Continue**.



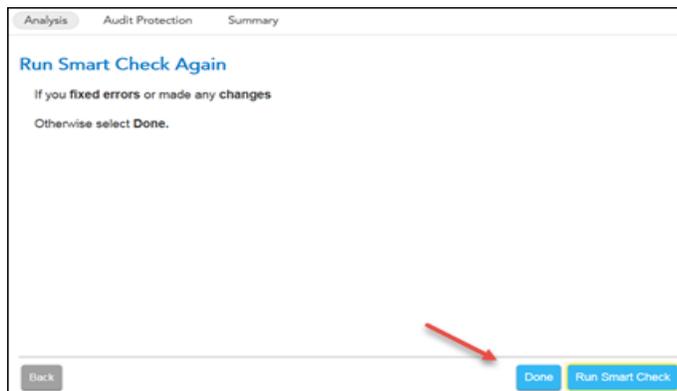
30) On the **Why did you need to amend your return?** screen, click **Continue**. This is for a federal amended return. You have already entered the information for Idaho

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.

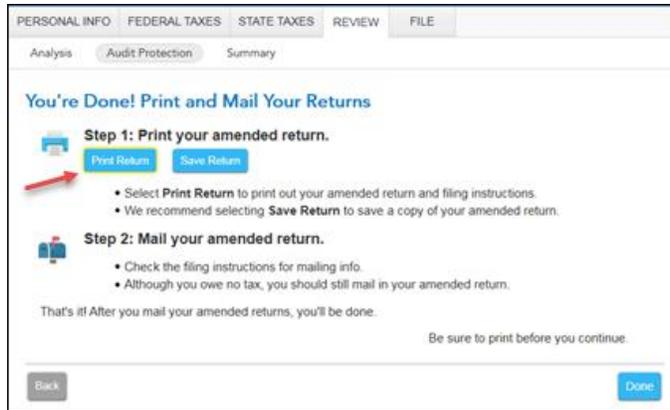


33) On the **Run Smart Check Again** screen, select **Done**.

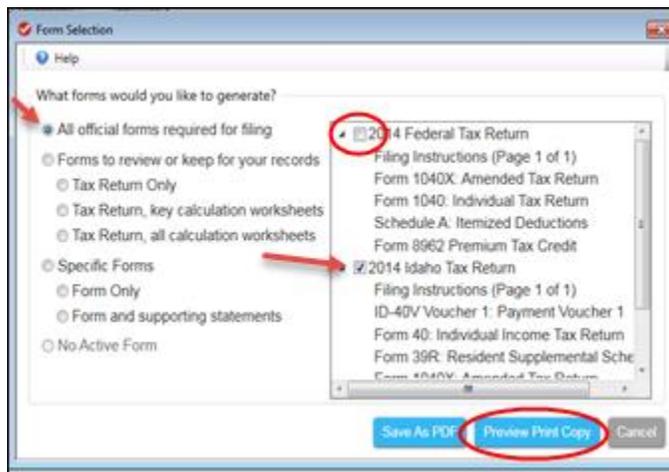


34) On **Your Amended Return Summary** screen, just click **Continue**. This screen is referring to a federal return amendment, and this amended return is just for your state return.

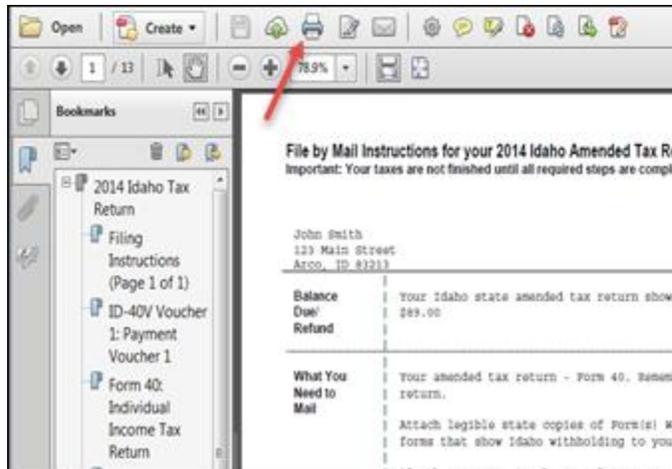
35) You are now ready to print your return to file. On the **You're Done! Print and Mail Your Returns**, select **Print Return**.



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**.



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



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.