

2014 Federal 1040 Amend Instructions for TurboTax Online and CD/Download versions:

These steps are for taxpayers who received a Form 1095-A in 2014, didn't enter the 1095-A information on their 2014 tax return and need to amend their 2014 with the correct information.

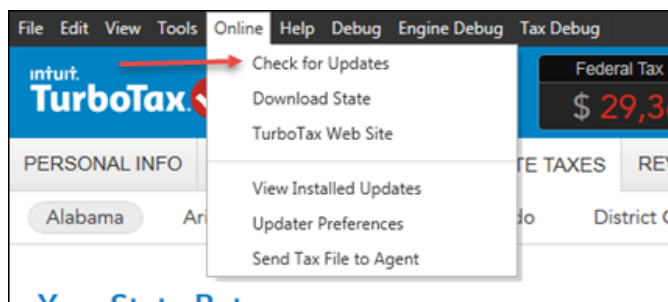
You may have received a letter from the IRS asking for Form 8962, which is related to the information on Form 1095-A.

NOTE: If you used **TurboTax online** to file your 2014 tax return, you will need to download the CD version in order to amend your return. Follow these steps to download:

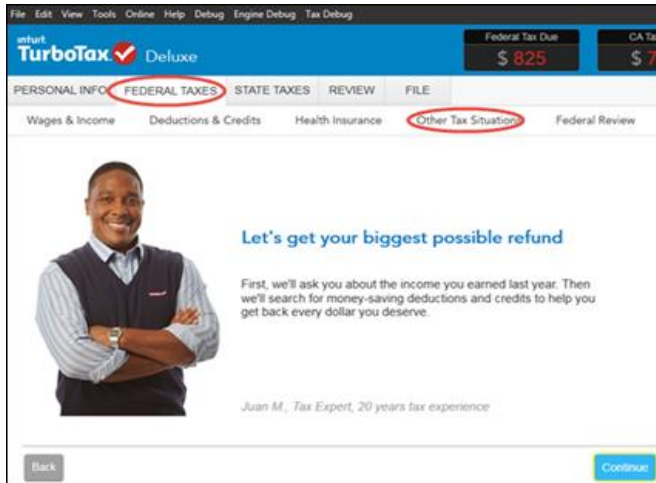
- a. Sign into the TurboTax online account that you used to file your 2014 return.
- b. Click 2014 in the Tax Timeline (You may first need to click "Load my Timeline" in the lower-right corner).
- c. In the **Some things you can do** section, click the **Amend (change) 2014 return** link.
- d. The next screen will instruct you to **Download your .tax file**. Click **Download your .tax file** and save the file to your desktop or other easy-to-find location. Don't try to open it yet.
- e. Next, click **Download TurboTax Desktop**. This takes you to a page where you can download the windows software that corresponds to the tax year you need.
- f. Then install **TurboTax CD/Download (Desktop) 2014**.

Following these instructions with TurboTax CD/Download (Desktop):

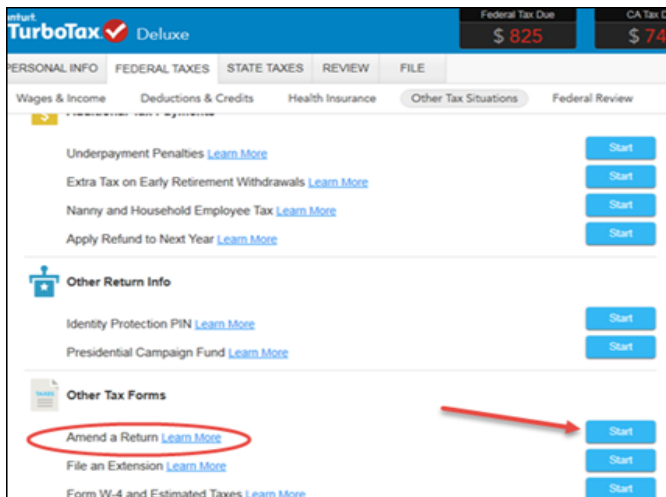
- 1) Open your return, then select **Online** and **Check for Updates**.



- 2) Select the **Federal Taxes** tab (in the TurboTax Home and Business edition, select the **Personal** tab), then select the **Other Tax Situations** tab.

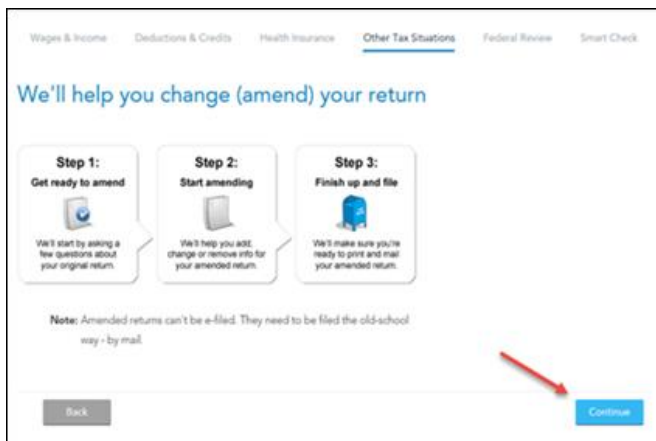


3) On the **Other Tax Situations** screen, scroll down to **Other Tax Forms**, and next to **Amend a Return**, click the **Start** button.



Begin Amending Your Return

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



2) On the **Have You Already Filed This Return?** screen, indicate **Yes, I need to amend a return I already filed.** Also Indicate **I need to amend my 2014 return,** then click **Continue.**

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

Have You Already Filed This Return?

Amending a return allows you to correct information on your original return after it's been filed and accepted by the government.

Yes, I need to amend a return I already filed.
 No, I don't need to amend.

Tell us a little more about your amend situation:

I need to amend my 2014 return. [Explain This](#)
 I need to amend a 2013 or previous year return.
 I was contacted by TurboTax and told I may need to amend.
 I was both contacted by TurboTax about amending **AND** I need to amend for some other reason. [See Examples](#)

[Back](#) [Continue](#)

3) On the **What do you need to change on your return** screen, scroll down and next to **Health Insurance Info**, click the **Update** button.

I need to change (amend) my return for a different reason

Personal Info [Update](#)

Wages & Income [Update](#)

Deductions & Credits [Update](#)

Health Insurance info [Update](#)

Other Tax Situations [Update](#)

4) Answer the question on the **Did you all have health insurance coverage in 2014?** screen.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE

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

Did you all have health insurance coverage in 2014?

Coverage includes insurance through work, Medicaid, Medicare, VA, and others. [What else counts?](#)

We all had health insurance coverage all year.
 None of us had it at any point.
 We were partially covered.

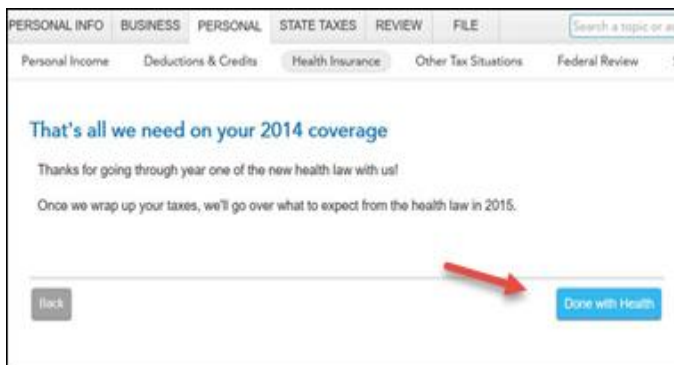
[What if none of these options seem right?](#)
[Why are you asking?](#)

Great, you've met the new requirement for everyone to have health insurance in 2014.

[Back](#) [Continue](#)

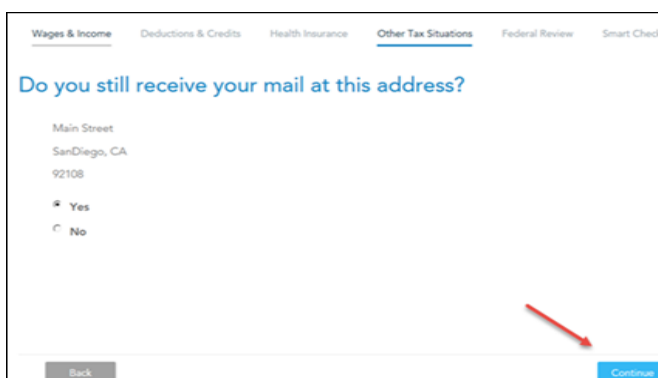
5) Continue to answer Health Insurance questions which will include entering the information from your Form 1095-A.

6) The **That's all we need to continue your 2014 coverage** screen will be the last Health Insurance screen. Click **Done with Health**.

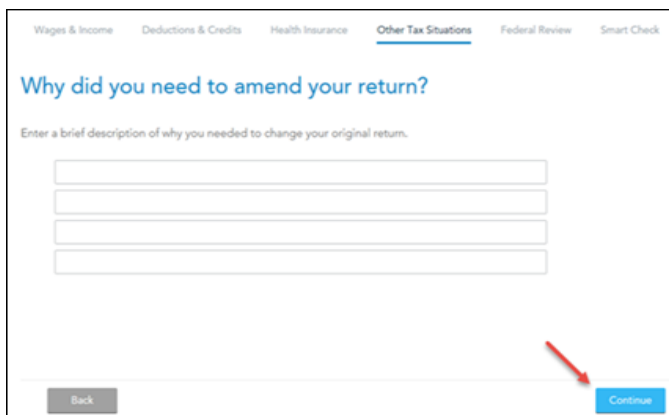


7) You are back to the **Do you need to change anything else?** screen. Scroll all the way down and select **Done**.

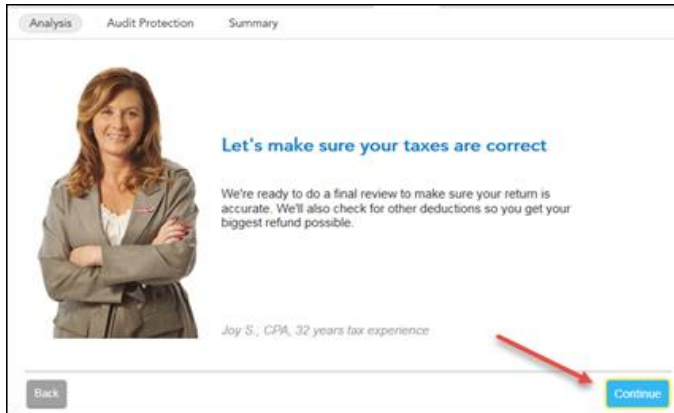
8) On the **Do you still receive your mail at this address,** answer the question and click **Continue**.



9) On the **Why did you need to amend your return?** Screen, enter *"Responding to attached IRS letter"* and then click **Continue**.



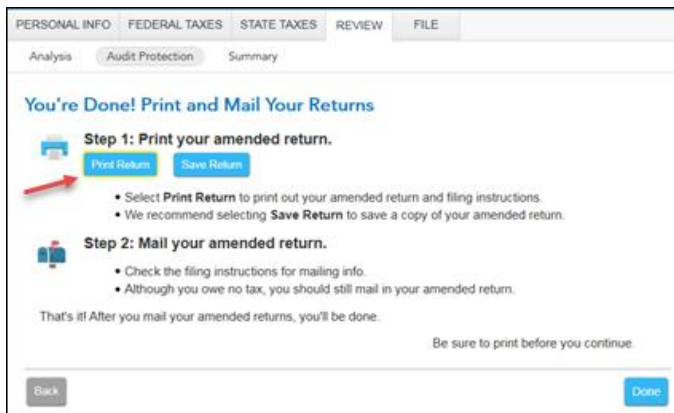
10) On the **Let's make sure your taxes are correct** screen, click **Continue** and complete all final review questions, if any.



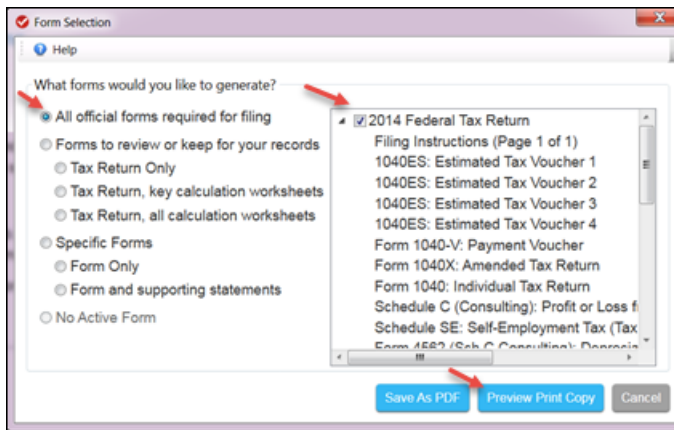
- 11) If you see a **Looks like you haven't entered your 1095-A yet** screen, just click **Continue**.
- 12) After you have completed your final review, click **Continue**.

Print and Mail your Amended Return to the IRS

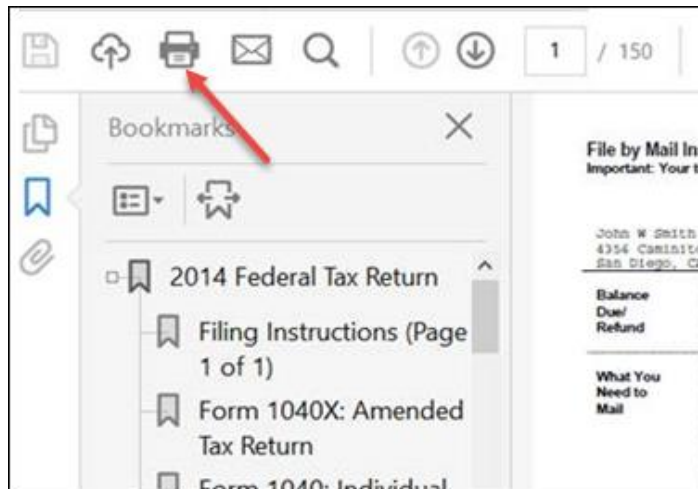
- 13) You are now ready to print your return to file. On the **You're Done! Print and Mail Your Returns** screen, click **Print Return**.



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



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



After printing your return,

- The instruction letter will indicate any balance due that you need to pay or refund that you will receive.
- Mail the amended return to the address on the IRS letter. If there is no address on the letter, mail to the address on the instructions from TurboTax that you just printed out.
- **BE SURE TO INCLUDE A COPY OF THE IRS LETTER THAT YOU RECEIVED WITH YOUR AMENDED RETURN.**
- Also print out an extra copy of the amended return to keep for your files.