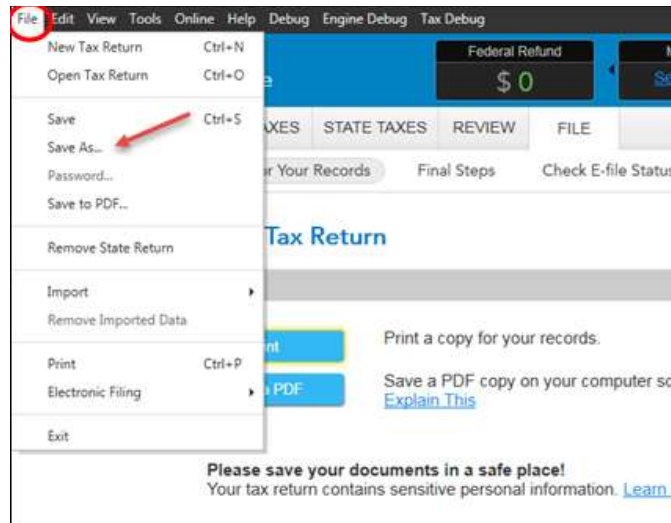
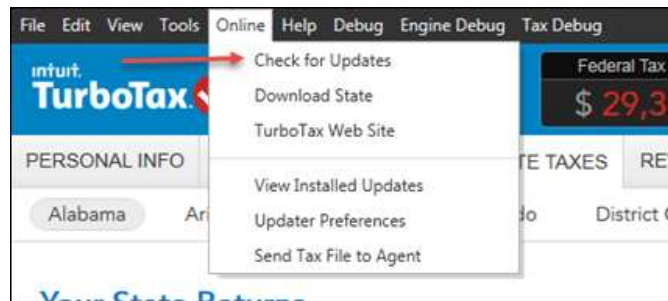


2015 New York Amend Instructions for TurboTax CD/Download:

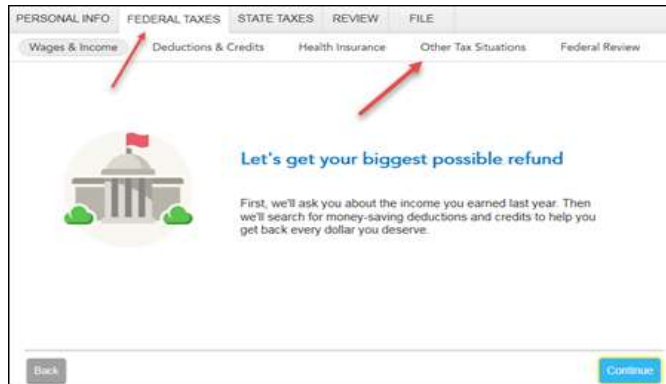
- 1) Select and open your return.
- 2) Select **File** and **Save As** “Amended 2015 return” before you update TurboTax to preserve your original return.



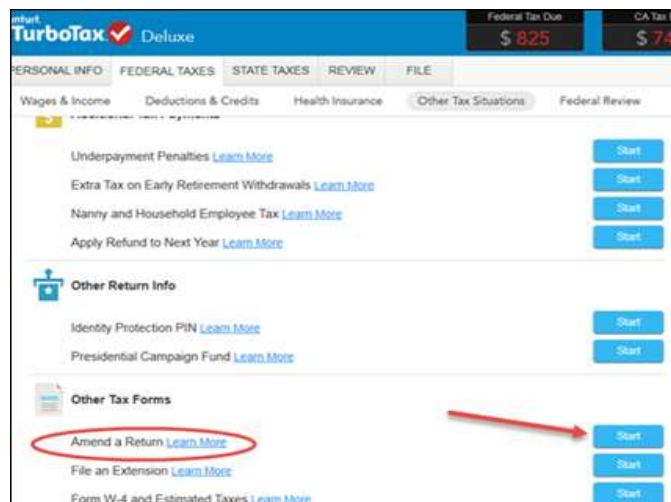
- 3) Select **Online** and **Check for Updates**.



- 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.

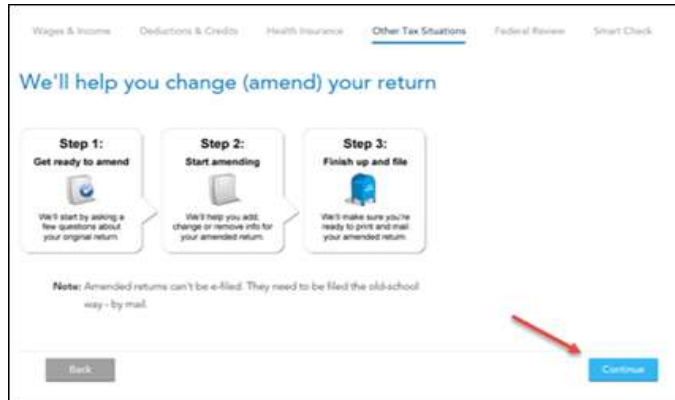


- 5) On the **Other Tax Situations** screen, scroll down to **Other Tax Forms** and next to **Amend a Return**, select the **Start** button.



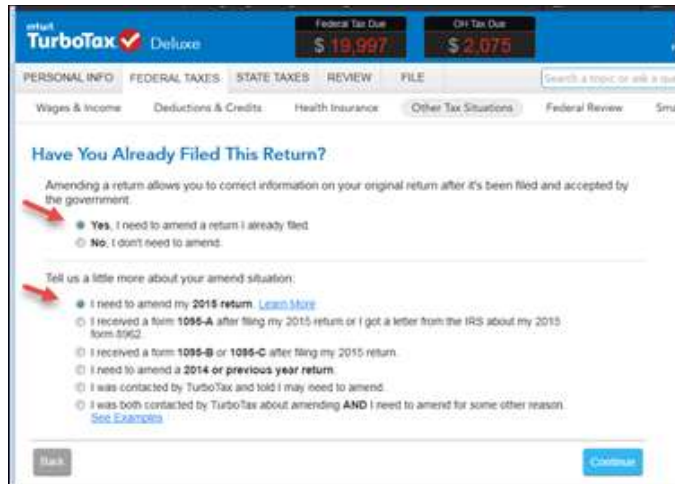
Start to Amend Your Return:

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

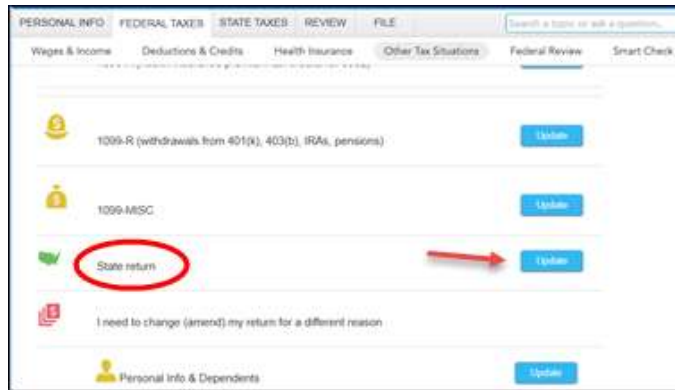


- On the **Have You Already Filed This Return?** screen, select **Yes, I need to amend a return I already filed.**

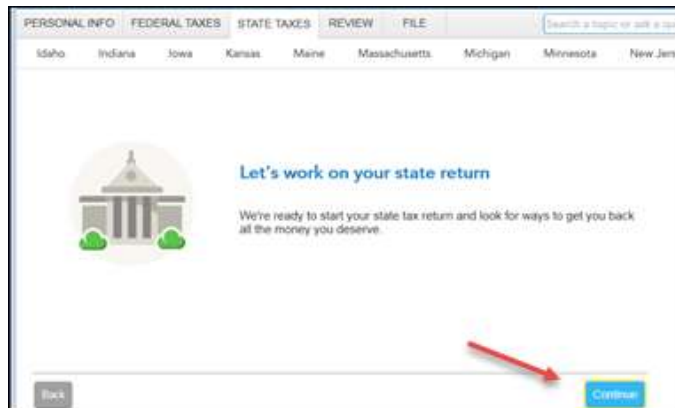
Also select **I need to amend my 2015 return**, then click **Continue.**



- On the **What do you need to change on your return?** screen, scroll down and select **Update** next to **State return.**



4. On the **Let's work on your state return** screen, select **Continue**.



5. On the **Your State Return** screen, select **Edit** next to **New York**.



6. On the **Your 2015 New York Return** screen, select **Continue**.



7. On the **Let's Amend Your New York Return** screen, select **Yes, let's amend and get it done**, then select **Continue**.



8. On the **Amended Income Tax Return** screen, select '**Neither of these reasons apply**', then select **Continue**.

Amended Income Tax Return

Complete an amended return only **after** you have filed the original return.

If you filed a form to amend your federal return, you must also file a form to amend your New York return, unless the changes do not affect your state taxes.

Select the situations that apply to this amended return:

- Protective Claim** - Claiming a refund on an amended return based on unresolved issues involving the New York State Department of Taxation and Finance (This is not common) [Learn More](#)
- NOL Carryback** - Filing an amended return due to a net operating loss carryback
- Neither of these reasons apply

9. Now select **Review**.

TurboTax Deluxe

PERSONAL INFO FEDERAL TAXES STATE TAXES **REVIEW** FILE

Alabama Connecticut Louisiana Massachusetts Michigan Nebraska New Jersey New York

Amended Nonresident and Part-Year Resident Income Tax Return

The Amended Nonresident and Part-Year Income Tax Return has six pages that will need to be completed. Enter information below to complete Form IT-203-X pages 1 and 2. When complete, click Continue to move forward to additional pages. Complete this form only **after** you have filed the original return.

Form IT-203-X New York State • New York City • Resident • 2015
Amended Nonresident and Part-Year Resident Income Tax Return 2015
 For the year January 1, 2014, through December 31, 2015, or for the year beginning and ending

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

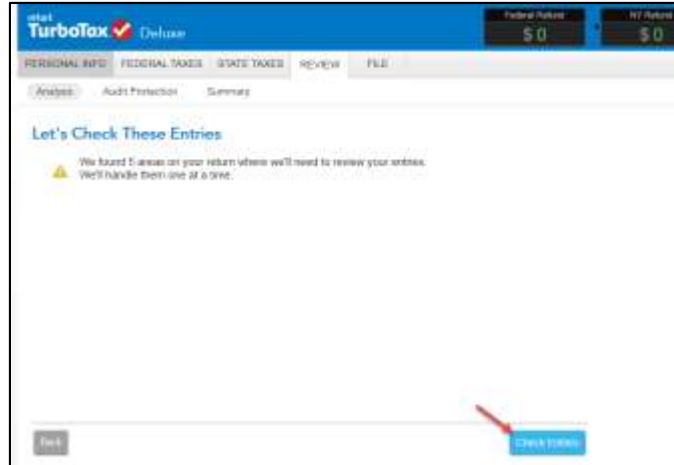
PERSONAL INFO FEDERAL TAXES STATE TAXES **REVIEW** FILE

Analysis Audit Protection Summary

Let's make sure your taxes are correct

We're ready to do a final review to make sure your return is accurate. We'll also check for other deductions so you get your biggest refund possible.

11. On the **Let's Check These Entries** screen, select **Check Entries**.



12. On the **Check This Entry** screen for the IT-201-X, select **File Amend Fed Rtn-No.** Then select **Continue.**

Check This Entry

IT-201-X Pg 1-2: Did you file an amended federal return? must be entered

No entry
 File Amend Fed Rtn - Yes
 File Amend Fed Rtn - No

Taxpayer's Permanent Home Address (In and street or rural route) Apartment No. School District Code No. 544

City, Village or Post Office State NY ZIP Code

Decedent Information

Taxpayer's date of death _____
 Decedent's date of death _____

A. Filing status -- then one box

1 Single
 2 Married filing joint return (enter spouse's social security no. above)
 3 Married filing separate return (enter spouse's social security no. above)
 4 Head of household (with qualifying person)
 5 Qualifying widow(er) with dependent child

B. Did you Remove your Deductions on your 2015 federal income tax return? Yes No

C. Can you be claimed as a dependent on another taxpayer's federal return? Yes No

D. Did you file an amended federal return? Yes No

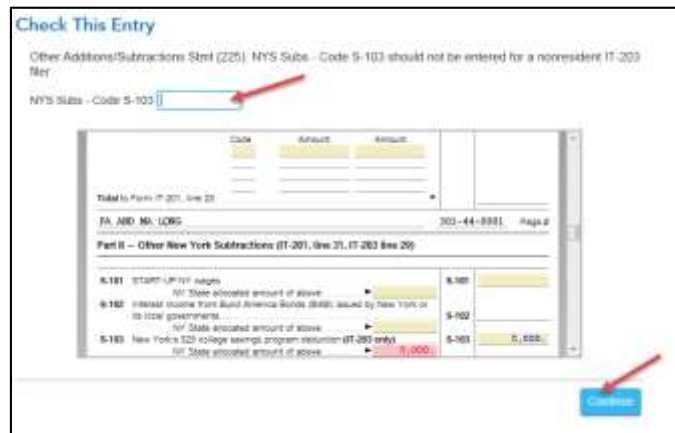
Continue

13. On the next **Check This Entry** screen, **Select 'Other'** and enter this explanation "**Removed 529 college savings account**". Then, select **Continue.**

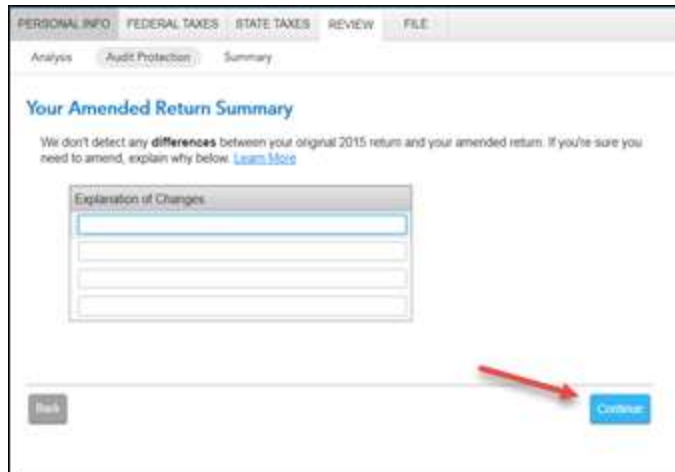


14. On the next **Check this Entry** screen, remove amount in the NYS Subs- Code S-103 box as it should not be entered for a non-resident. The box should be blank. Then select **Continue**.

Informational Note: When you leave the entry blank and select continue, it will remove the amount in red located in the left column. It will not remove the amount located in blue in the right column. This is correct.



15. On the **Your Amended Return Summary**, just select **Continue**. This screen is only for Federal amended returns, and you are just amending your state return.



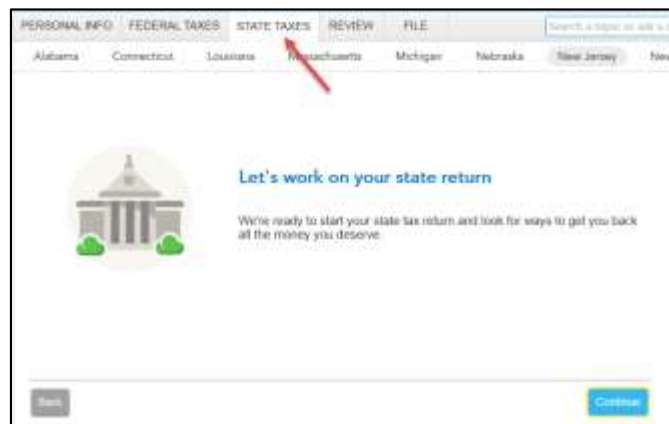
NOTE: If you are not a resident of New Jersey or Connecticut, skip to Step 21.

If you are a resident of another state and would like to amend your resident state return, please call us using the phone number in the email from TurboTax and tell the representative you're calling about "2015 New York: Nonresident 529 College Plan"

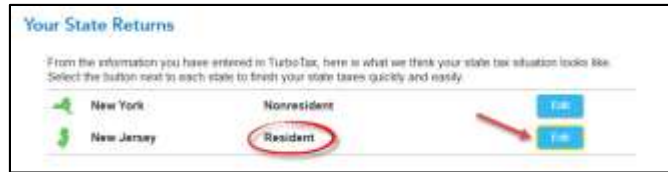
*****For Residents of New Jersey and Connecticut*****

As a resident of New Jersey or Connecticut: In addition to amending your non-resident New York return you will also need to amend your resident state return.

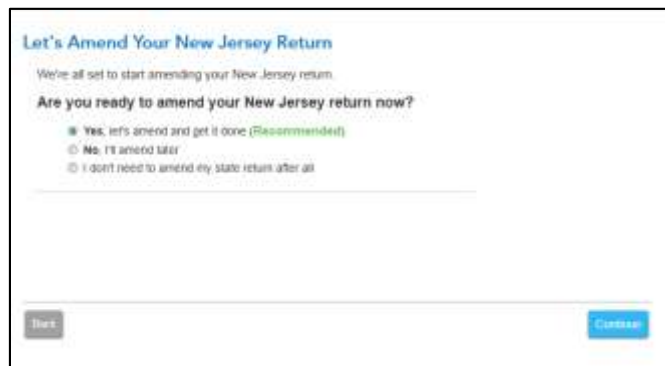
16. To amend your New Jersey or Connecticut resident return, simply go to **State Taxes**



17. Select **Edit** on your resident state

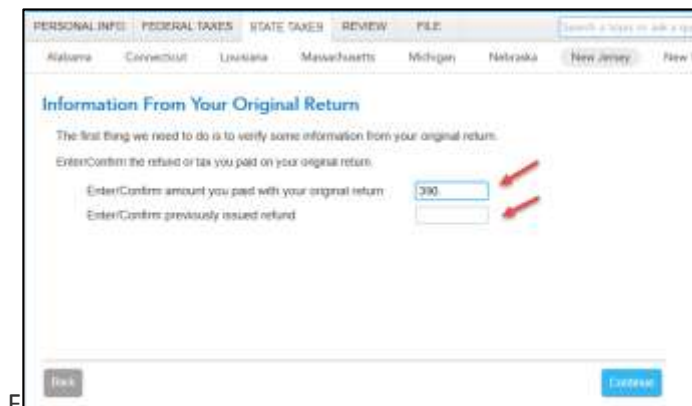


18. On **Let's Amend Your New Jersey/Connecticut Return** Select **Yes**, then select **Continue**



19. On the **Information From Your Original Return (New Jersey)** screen or **Tell Us About Your Original Refund or Balance Due (Connecticut)** screen, you will be asked to confirm the amount you paid with your original return.

Then select **Continue**.

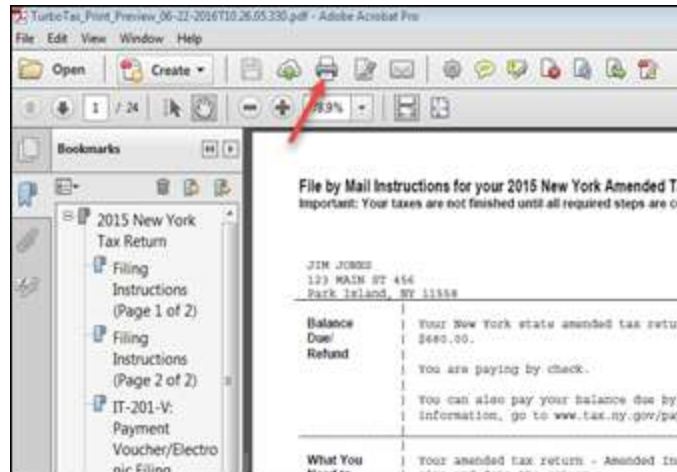


20. On the **Amended Tax Return Statement** screen, you will type, ***"This return is being amended to reflect a change of 'other state taxes paid'."***

21. You are now ready to print your return to file. On the **Nicely Done!** Screen Print your NJ or CT amended state returns, if applicable. Then select **Continue** and proceed to e-file your amended New York return.

22. In the **Form Selection** window, select **All official forms required for filing**. Then, **uncheck** your federal return. Then select **Preview Print Copy**.

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



24. After printing your return,

- The instruction letter will indicate any balance due that you need to pay or refund that you will receive.
- If you have any other state returns that need to be amended, the instructions will tell you where to mail your return. (Note: You will not be instructed to mail your New York return if you file it electronically.)
- Be sure to print out an extra copy to keep for your files.