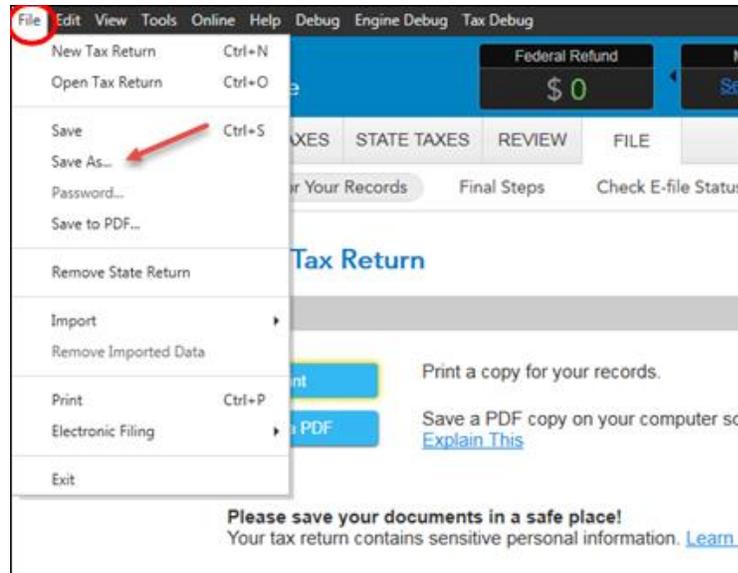
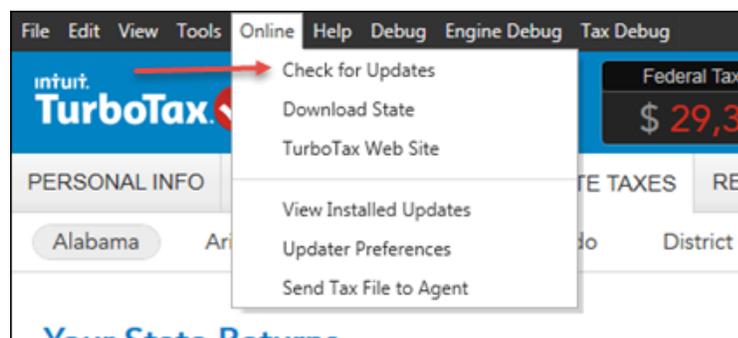


2018 Oregon State Amend Instructions for TurboTax CD/Download

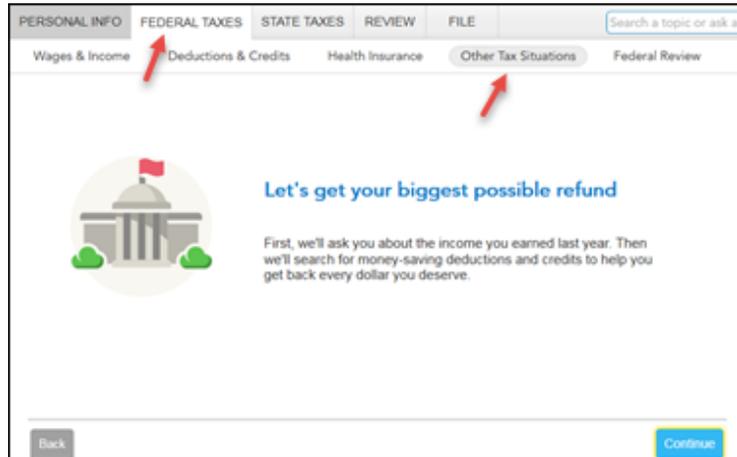
- 1) Select and open your return.
- 2) Select **File** and **Save As** "Amended 2018 return" before you update TurboTax to preserve your original return.



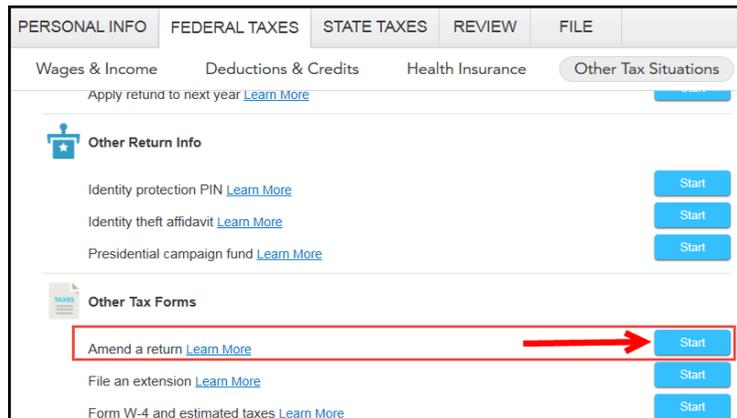
- 3) Select **Online** and **Check for Updates**.



- 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**.

Wages & Income | Deductions & Credits | Health Insurance | **Other Tax Situations** | Federal Review | Smart Check

We'll help you change (amend) your return

Step 1: Get ready to amend
We'll start by asking a few questions about your original return.

Step 2: Start amending
We'll help you add, change or remove info for your amended return.

Step 3: Finish up and file
We'll make sure you're ready to print and mail your amended return.

Note: Amended returns can't be e-filed. They need to be filed the old-school way - by mail.

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

- 2) On the **Did you already file your return?** screen, select **Yes, I've already filed my return**. Also select **I was contacted by TurboTax and told I may need to amend for some other reason**, then click **Continue**.

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

Did you already file your return?

If you've already filed, amending your return will allow you to correct any info on your original return after it's been accepted by the government.

Yes, I've already filed my return.
 No, I haven't filed my return yet.

Tell us a little more about your amend situation:

I need to amend my 2017 return.
 I need to amend a 2015 or previous year return.
 I was contacted by TurboTax and told I may need to amend due to the tax extenders in the Bipartisan Budget Act. [Learn more](#).
 I was contacted by TurboTax and told I may need to amend for some other reason.

OK, we'll walk you through each of your amend situations, one at a time.

We'll start with the amend situation that TurboTax contacted you about. Once we've taken care of that, we'll ask you to make your other changes and finish your amended return.

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

- 3) On the **Tell Us Which Returns You Want to Amend** screen, select **I want to amend only my federal or only my state return**. Select **Amend my Iowa return**. Then select **Continue**.

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE ANALYSIS & ADVICE

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

Tell Us Which Returns You Want to Amend

We recommend you amend both your **federal and state** returns. That's because both the IRS and your state will want to know why you amended your return.

I want to amend **both** my federal and state returns.

I want to amend only my federal **or** only my state return.

[When is it OK to amend only one return?](#)

Are you sure you want to amend only one return?

We strongly recommend amending both your federal and state returns.

If you're sure about amending only one return, select the return you want to amend:

Amend my federal return

Amend my Oregon return

Back Continue

- 4) Scroll to the bottom of the **What do you need to change on your return?** screen, and select **Update** next to State Return.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE

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

What do you need to change on your return?

[Why did the refund monitor just change to \\$0?](#)

Select **Update** to add, correct or remove something on your original return.

W-2 Update

Tax extenders (PMI, tuition & fees, home energy, canceled debt, electric vehicles) Update

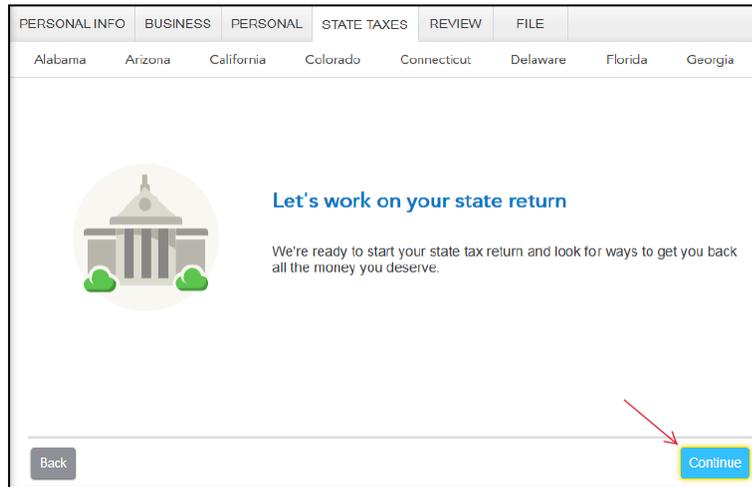
[Learn More](#)

State return Update

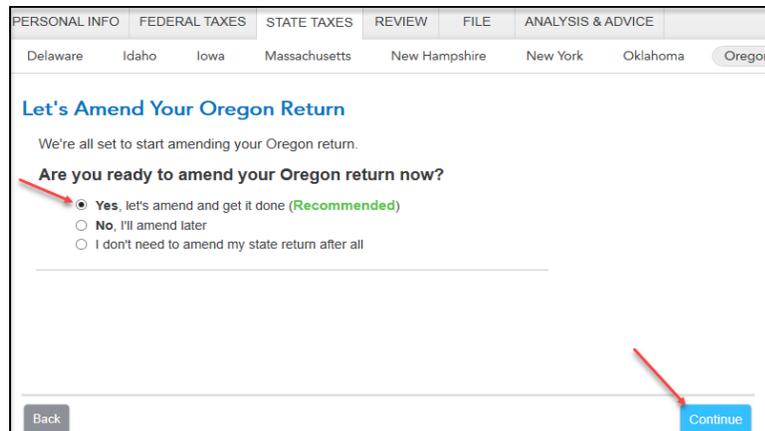
Nevermind, I don't need to amend. Cancel

Back Done

- 5) On the **Let's work on your state return** screen, select **Continue**. Select your Oregon return to **Edit**, and **Continue** on the **Your 2018 Oregon Return** screen.



- 6) On the **Let's Amend Your Oregon Return**, select **Yes, let's amend and get it done**. Then select **Continue** and **Continue** on the **Additional Information** screen.



- 7) On the **About Your Oregon Amended Return** screen, type the following explanation: **“The originally filed Oregon return overstated the amount reported on Schedule OR-A, Itemized Deductions, Line 5, state and local income tax. The amended return corrects the state and local income taxes and correctly reports Oregon income tax due.”** Then, select **Continue**.

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Idaho Iowa Oklahoma Oregon

About Your Oregon Amended Return

Explain why you're amending your Oregon return in the space below. Indicate the return line numbers and the reason for each change. If your filing status has changed, explain why.

The originally filed Oregon return overstated the amount reported on Schedule OR-A, Itemized Deductions, Line 5, state and local income tax. The amended return corrects the state and local income taxes and correctly reports Oregon income tax due.

Back Continue

- 8) On the **Confirm Your Previous Oregon Refund or Tax Paid** screen, confirm the previous refund or payment. Then, select **Continue**.

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Idaho Iowa Oklahoma Oregon

Confirm Your Previous Oregon Refund or Tax Paid

Before we complete your amended return, confirm your refund you **originally** received, or the tax you paid. Leave **blank** if none.

Oregon Refund Received With Previously Filed 2018 Return

Oregon Payment Made With Previously Filed 2018 Return

Back Continue

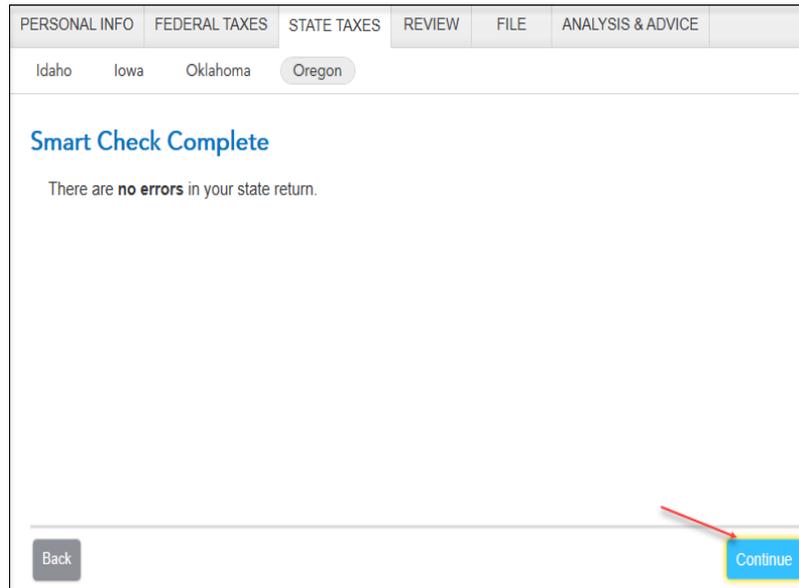
- 9) On the **Let's Make Sure You're Ready to Review** screen, select **Yes, I've entered everything and let's review**. Then, select **Continue**.

The screenshot shows a web interface with a navigation bar at the top containing tabs for PERSONAL INFO, FEDERAL TAXES, STATE TAXES, REVIEW, FILE, and ANALYSIS & ADVICE. Below the navigation bar, there are buttons for Idaho, Iowa, Oklahoma, and Oregon, with Oregon selected. The main heading is "Let's Make Sure You're Ready to Review". A green checkmark icon is followed by the text: "So far so good! We've now covered the main part of your Oregon amended return. Unless you have additional state amend info to enter, we're ready to move on and review." Below this is the question "Have you entered all of your state amend info?" with two radio button options: "Yes, I've entered everything and let's review" (which is selected) and "No, I still have state amend info to enter [How would I know this?](#)". At the bottom left is a "Back" button, and at the bottom right is a "Continue" button, which is highlighted with a red arrow.

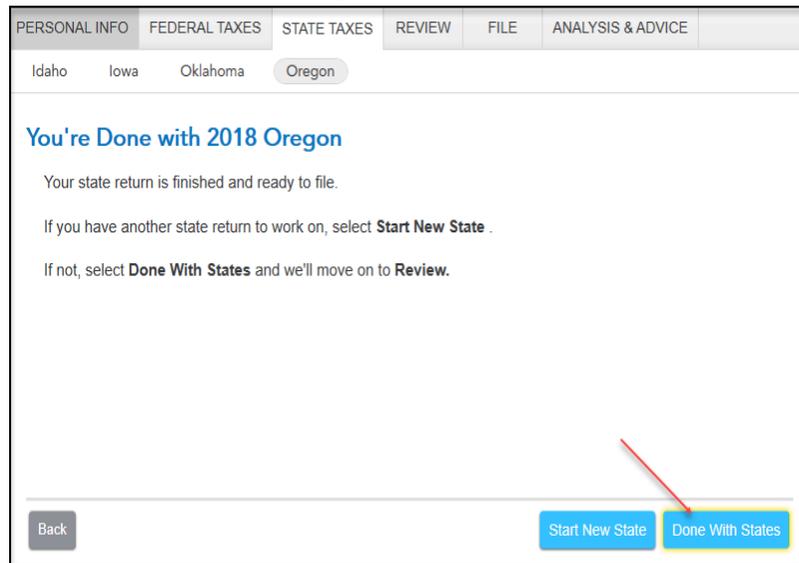
- 10) On the **Your 2018 Oregon taxes are ready for us to check** screen, select **Let's check it over**. and complete all final state review questions, if any.

The screenshot shows a web interface with a navigation bar at the top containing tabs for PERSONAL INFO, FEDERAL TAXES, STATE TAXES, REVIEW, FILE, and ANALYSIS & ADVICE. Below the navigation bar, there are buttons for Idaho, Iowa, Oklahoma, and Oregon, with Oregon selected. The main heading is "Your 2018 Oregon taxes are ready for us to check". Below the heading is a message: "If you changed anything on your federal taxes, it's a good idea to click through your state taxes again. [Why would I do this?](#)" and a yellow button labeled "Go over Oregon again". There are four sections, each with an icon, a title, a "Learn More" link, and a description: "General Info" (Residency status) with a "Start" button; "Income" (Retirement income, college savings plans and other state tax differences) with a "Start" button; "Credits and taxes" (Payments, credits and taxes) with a "Start" button; and "Other situations" (Extension, estimated payments and contributions) with an "Edit" button. At the bottom left is a "Back" button, and at the bottom right is a "Let's check it over" button, which is highlighted with a red arrow.

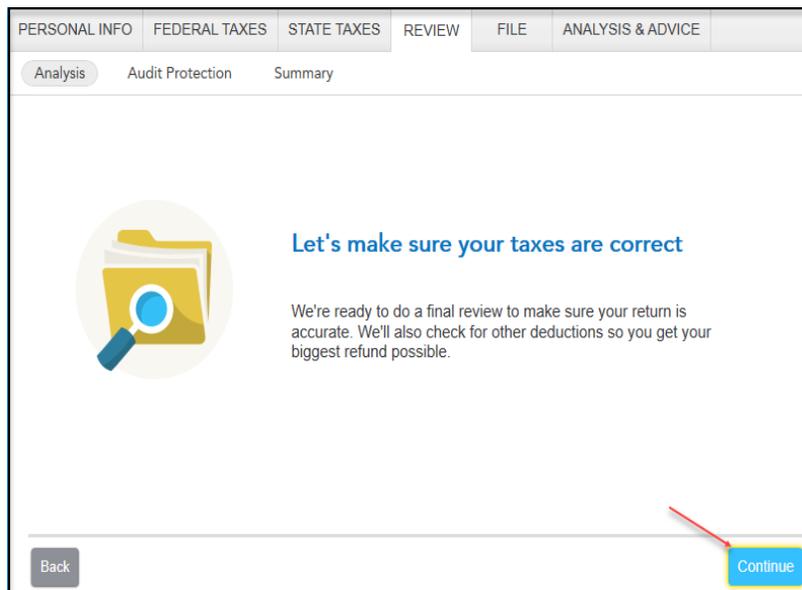
11) On the **Smart Check Complete** screen, select **Continue**.



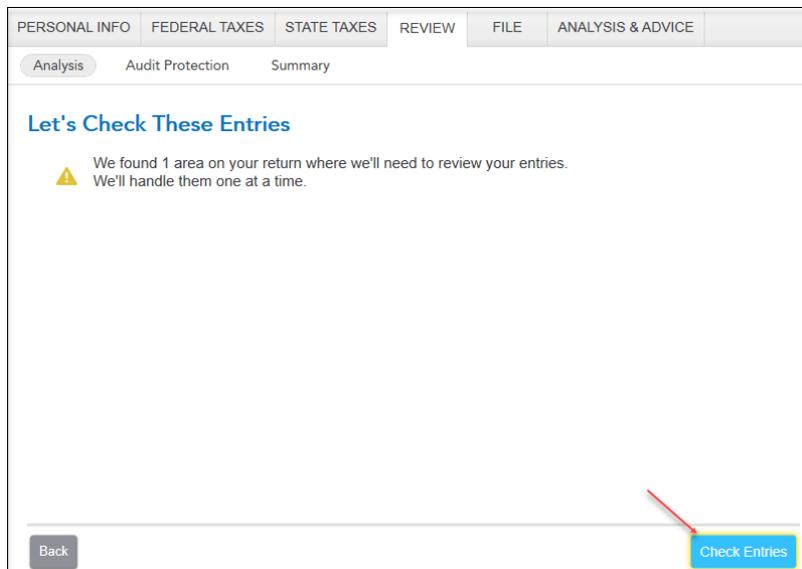
12) On the **You're Done with 2018 Oregon** screen, select **Done With States**.



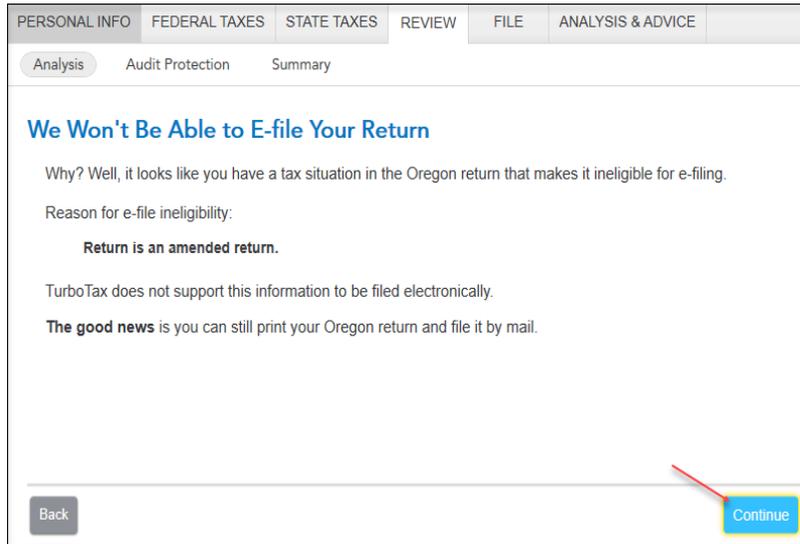
13) On the **Let's make sure your taxes are correct** screen, select **Continue**.



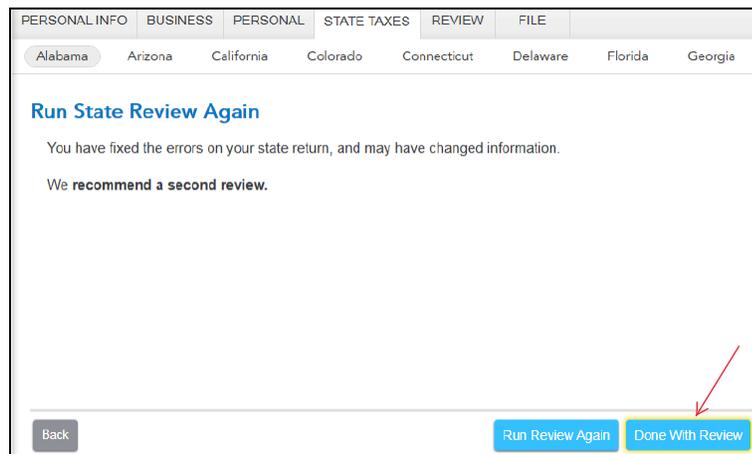
14) On the **Let's Check These Entries** screen, select **Check Entries**



15) On the **We Won't Be Able to E-file Your Return** screen, select **Continue**.



16) On the **Run State Review Again** screen, select **Done with Review**.



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

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Analysis Audit Protection Summary

You're Done! Print and Mail Your Returns

Step 1: Print your amended return.

Print Return **Save Return**

- Select **Print Return** to print out your amended return and filing instructions.
- We recommend selecting **Save Return** to save a copy of your amended return.

Step 2: Mail your amended return.

- Check the filing instructions for mailing info and refund or payment amount.
- Expect your refund by check in 8-20 weeks, or include a check or money order for the balance due with your amended return.

That's it! After you mail your amended returns, you'll be done.

Be sure to print before you continue.

Back **Done**

18) On the **Form Selection** window, select **All official forms required for filing**, check the box for **your Oregon return**. Then, select **Preview Print Copy**.

Form Selection

Help

What forms would you like to generate?

All official forms required for filing

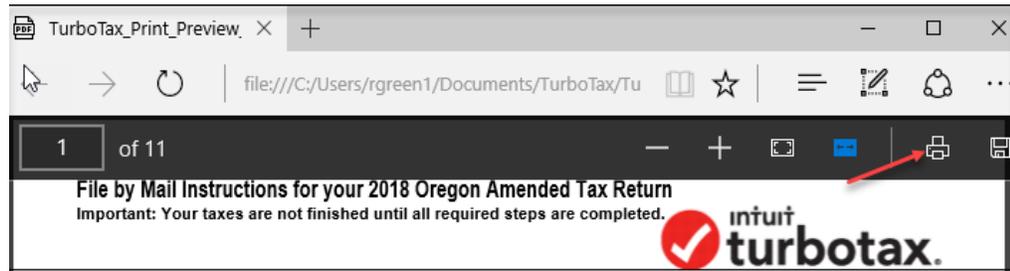
2018 Oregon Tax Return

- Filing Instructions (Page 1 of 1)
- Form OR-40-V: Income Tax Payment Voucher
- Form OR-40: Individual Income Tax Return (Resid)
- Schedule OR-A: Oregon Itemized Deductions
- Form OR-10: Underpayment of Oregon Estimated
- Form OR-10-AI: Annualized Income Worksheet
- Form 1040: Individual Tax Return

We recommend 'Adobe Acrobat Reader DC' to view or print a PDF.
Don't have it? Download for free from [Adobe](#)

Save As PDF **Preview Print Copy** **Cancel**

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



20) After printing your return, follow the File by Mail Instructions for you 2018 Oregon Amended Tax Return:

- Mail the amended return along with the balance due to:
Oregon Department of Revenue
P.O. Box 14720
Salem, OR 97309-0463
- Be sure to print out an extra copy to keep for your files.