

Instructions for Entering the Oregon Kicker Refund

TurboTax automatically handles state income tax refunds from the prior year when you prepared your federal and state returns using TurboTax. However, if the refund comes as a result of a future event (like the Kicker Refund), then you need to enter that refund information into TurboTax so it can properly account for the refund.

Using TurboTax, entering the Kicker Refund is easy. The example below assumes that you prepared your 2006 federal and Oregon returns using TurboTax.

1. Start your 2007 return and allow TurboTax to transfer your 2006 tax information.
2. In the Income section of Federal Taxes, select State and Local Refund (see Screen 1). Your Oregon income tax refund from last year (\$145 in this example) is already entered by TurboTax. Select the Revisit button or the Start button for this item (it varies depending on whether you've already visited the topic).

TurboTax Premier

Personal Info | **Federal Taxes** | Federal Review | State Taxes | Print & File

Federal Refund: **\$3,721**

Income | Deductions & Credits | Other

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Your Income

Select **View List** to open the full list of topics for each group. You can visit a specific topic in a group, or select **Visit All** to walk through an entire group.

Category	2006 Amount	2007 Amount	Action
Wages and Salaries Form W-2			View List
Import Your Tax Info Get your info from your financial institution(s) or software			View List
Interest and Dividends Forms 1099-INT, 1099-DIV, 1099-OID			View List
Other Common Income 1099-Misc, state/local refunds, 1099-G			Close List
State and Local Refunds on 1099-G Learn More	\$0	\$145	Revisit
Other Income on 1099-G Learn More	\$0	(not visited)	Start
Income from Form 1099-MISC Learn More	\$0	(not visited)	Start
Property Profits (Income from Selling a Home) Learn More	\$0	(not visited)	Start
Visit All			
Investment Income 1099-B or broker statements			View List

Screen 1: Select State and Local Refunds to enter your Kicker Refund.

3. TurboTax displays the refund that it transferred from your 2006 OR tax return (see Screen 2). At this point, TurboTax still does not know about your Kicker Refund. Therefore, in response to "Is this information correct?", answer No.

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Federal Refund: **\$3,594**

Income | Deductions & Credits | Other

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Review Your Refund Information

We've **transferred** the following **state and local refund** information from your **2006** return.

State or Local ID	Oregon
2006 Tax Refund	\$145
Amount Applied to 2007	\$0
Amount Paid With Return	\$0
Amount Paid With Extension	\$0
2006 Estimated Tax Paid in 2007	\$0
Total of All Withholding and Payments for 2006 Oregon Tax	\$4,900

Is this information correct?

? [Learn more about this topic](#)

◀ Back Yes No

Screen 2: Here is the information that TurboTax knows about before the Kicker Refund.

- On the next TurboTax interview screen, enter the total of your Oregon tax refund plus the Kicker Refund you received in 2007. In this example, we used a regular tax refund of \$145 (as shown on the previous screen) and \$875 as the Kicker Refund for a total of \$1020.

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Personal Info | **Federal Taxes** | Federal Review | State Taxes | Print & File

Federal Refund: **\$3,594**

Income | Deductions & Credits | Other

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Enter Refund Information

Tell us the following about the state or local income tax refund **received** or **applied** in 2007: [Explain This](#)

State or Locality: Oregon

Total Refund Received in 2007: 1,020

Tax Year of Refund: 2006

I applied all or part of this refund to my 2007 taxes: ☐ Yes ☒ No

? [Learn more about this topic](#)

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Screen 3: This screen shows the TOTAL tax refund (including Kicker).

5. If you have no other income tax refunds, you're basically done other than confirming the additional tax information TurboTax needs to determine if the refunds are taxable (see Screen 4). Fortunately for returning customers, TurboTax already has all the information needed to do this. We just ask you to confirm the information (because the state may have adjusted your return or you may have filed an amended return).

TurboTax Premier

Personal Info | Federal Taxes | Federal Review | State Taxes | Print & File

Federal Refund: **\$3,594**

Income | Deductions & Credits | Other

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Let's See if Your Refunds are Taxable

Now that we've gathered your **state and local refund** amounts, we'll ask you a few questions to see if **any portion** of your **total refund** is **taxable**.

Get Answers

- Find Tax Help
- Using TurboTax
- View Tax Summary
- TurboTax Support
- Community
- Live Tax Advice
- Send Us Feedback

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Screen 4: TurboTax now determines if your refunds are taxable.

6. If the information from your 2006 return is correct (see Screen 5), press Yes.

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Federal Taxes
Federal Review
State Taxes
Print & File

Federal Refund
Income
Deductions & Credits
Other

\$3,594

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Information From Your 2006 Return

Review the following information from your **2006 federal return**.

Get Answers
Find Tax Help
Using TurboTax
View Tax Summary
TurboTax Support
Community
Live Tax Advice
Send Us Feedback

Form 1040

Filing status	Married filing jointly
Additional exemptions for blindness or age 65 or over	0
Dependent of someone else	No
Adjusted gross income	\$81,567
Itemized deductions or standard deduction	\$20,619
Deduction for exemptions	\$9,900
Regular tax	\$6,690
Alternative minimum tax (AMT)	\$0
Tax after credits	\$5,590

Schedule A

Medical and dental	\$0
State and local income tax	\$6,450
Itemized deduction for total taxes	\$10,702
Investment interest deduction	\$0
Total interest	\$8,430
Gifts to charity	\$1,487
Casualty and theft losses	\$0
Job expenses and most miscellaneous deductions	\$0
Other miscellaneous deductions	\$0
Total itemized deductions	\$20,619

Is the above information correct?

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Yes
No

Screen 5: If the information TurboTax captured from last year is correct, select Yes.

- TurboTax then does the computations to figure how much of the refund is taxable. Screen 6 shows this information.

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Federal Refund | **Income** | Deductions & Credits | Other

\$3,594

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Taxable Refund Summary

The amount of your state and local tax refund that is **taxable** on your **federal** return is \$1,020.

Get Answers

- Find Tax Help
- Using TurboTax
- View Tax Summary
- TurboTax Support
- Community
- Live Tax Advice
- Send Us Feedback

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Screen 6: TurboTax shows how much of your refund is taxable.

That's all you need to do for TurboTax to properly determine how much of your total Oregon tax refund is taxable. Even if your deductions were limited last year or you were subject to AMT, TurboTax handles all that for you.

Alternative to Above Steps

If you had a tax refund and a Kicker Refund, you can alternatively enter each one separately and you'll get the same result as above. The choice is yours. The following three screens reflect how you would enter your Kicker Refund as a separate income tax refund.

TurboTax Premier

Personal Info Federal Taxes Federal Review State Taxes Print & File

Federal Refund **\$3,721**

Income Deductions & Credits Other

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State and Local Tax Refund Summary

Here's what we have so far. You can **add**, **edit** (change), or **delete** state or local income tax refunds. Make any necessary **corrections** to the information transferred from your **2006 return**.

State or Locality	Year	Refund Amount
Oregon	2006	145. Edit Delete
Total Refunds		145.

[Add Another State or Local Tax Refund](#)

If you have **no other refunds**, select **Done**.

[Learn more about this topic](#)

[Back](#) [Done](#)

Screen 7: Select Add Another State if you want to enter the Kicker Refund separately.

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Federal Refund **\$3,721**

Income Deductions & Credits Other

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Enter Refund Information

Tell us the following about the state or local income tax refund **received** or **applied** in 2007. [Explain This](#)

State or Locality

Total Refund Received in 2007

Tax Year of Refund

I applied all or part of this refund to my 2007 taxes ☐ Yes ☒ No

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Screen 8: Enter the state as Oregon, the Kicker Refund amount and the tax year as 2006.

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Federal Taxes
Federal Review
State Taxes
Print & File

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Other

\$3,594

Search Topics or Forms
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State and Local Tax Refund Summary

Here's what we have so far. You can **add**, **edit** (change), or **delete** state or local income tax refunds.

State or Locality	Year	Refund Amount		
Oregon	2006	145.	Edit	Delete
Oregon	2006	875.	Edit	Delete
Total Refunds		1,020.		

[Add Another State or Local Tax Refund](#)

If you have **no other refunds**, [Learn more about this topic](#)

This is the amount that TurboTax transfers from your last year's return.

This is the Kicker Refund you would enter for the actual amount received (in December 2007).

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Done

Screen 9: This is what the Summary screen shows when you enter the state refunds separately.

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