

Modified AGI Worksheets for Form 8962

(Keep for your records)

2016

Name(s) as shown on return

Tax ID Number

Taxpayer's Modified AGI Worksheet - Line 2a

- 1. Enter your adjusted gross income (AGI)* from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37 1. _____
2. Enter any tax-exempt interest from Form 1040, line 8b; Form 1040A, line 8b; or Form 1040NR, line 9b 2. _____
3. Enter any amounts from Form 2555, lines 45 and 50, and Form 2555-EZ, line 18 3. _____
4. Enter the excess, if any, of Form 1040, lines 20a over 20b; or Form 1040A, lines 14a over 14b 4. _____
5. Add lines 1 through 4. Enter here and on Form 8962, line 2a 5. _____

Dependents' Combined Modified AGI Worksheet - Line 2b

- 1. Enter the AGI* for your dependents from Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4; and Form 1040NR, line 37 1. _____
2. Enter any tax-exempt interest for your dependents from Form 1040, line 8b; Form 1040A, line 8b; Form 1040EZ, the amount written to the left of the line 2 entry space; and Form 1040NR, line 9b 2. _____
3. Enter any amounts for your dependents from Form 2555, lines 45 and 50, and Form 2555-EZ, line 18 3. _____
4. Enter for each of your dependents the excess, if any, of Form 1040, lines 20a over 20b; and Form 1040A, lines 14a over 14b 4. _____
5. Add lines 1 through 4. Enter here and on Form 8962, line 2b 5. _____

Worksheet 2. Household Income as a Percentage of the Federal Poverty Line

- 1. Enter the amount from line 3 of Form 8962 1. _____
2. Enter the amount from line 4 of Form 8962 2. _____
3. Multiply the amount on line 2 by 4.0 3. _____
4. Is the amount on line 1 more than the amount on line 3?
• Yes. The amount on line 1 above is more than 400% of the Federal poverty line. Enter 401 here and on line 5 of Form 8962.
• No. Divide the amount on line 1 above by the amount on line 2 above. Do not round; instead multiply this number by 100 (to express it as a percentage) and then drop any numbers after the decimal point. Enter the result here and on line 5 of Form 8962. For example, for 0.9984, enter the result as 99; for 1.8565, enter the result as 185; for 3.997, enter the result as 399* 4. _____