Shared Responsibility Payment Worksheet

(Keep for your records)

2016

Name(s) as shown on return

Tax ID Number

This worksheet is a combination of Steps 2-5, Worksheets A and B, and the Shared Responsibility Payment Worksheet shown in the instructions for Form 8965.

If you or another member of your tax household had neither minimum essential coverage nor a coverage exemption for any month during 2016, use the Shared Responsibility Payment Worksheet, below, to figure your shared responsibility payment.

Complete the monthly columns by placing "X's" in each month in which you or another member of your tax household had neither minimum essential coverage nor a coverage exemption.

Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. Total number of X's in a month. If 5 or more, enter 5												
2. Total number of X's in a month for individuals 18 or over*												
3. One-half the number of X's in a month for individuals under 18*												
4. Add lines 2 and 3 for each month												
5. Multiply line 4 by $695 for each month. If $2,085 or more, enter $2,085 . .												

6. Sum of the monthly amounts entered on line 1 . . . . . _____

7. Enter your household income (see Household income) . . . . . _____

8. Enter your filing threshold (see Filing Thresholds For Most People) . . . . . _____

9. Subtract line 8 from line 7 . . . . . _____

10. Multiply line 9 by 2.5% (.025) . . . . . _____

11. Is line 10 more than $2,085?

☐ **Yes.** Multiply line 10 by the number of months for which line 1 is more than zero

☐ **No.** Enter the amount from line 14 of the Flat Dollar Amount Worksheet

} . . . . . _____

12. Divide line 11 by 12.0 . . . . . _____

13. Multiply line 6 by $223** . . . . . _____

14. Enter the smaller of line 12 or line 13 here and on Form 1040, line 61; Form 1040A, line 38; or Form 1040EZ, line 11. This is your shared responsibility payment . . . . . _____

Rounded amount will carry to main form _____

*For purposes of figuring the shared responsibility payment, an individual is considered under 18 for an entire month if he or she did not turn 18 before the first day of the month. An individual turns 18 on the anniversary of the day the individual was born. For example, someone born on March 1, 1999, is considered age 18 on March 1, 2017, and therefore, is not considered age 18 for purposes of the shared responsibility payment until April 2017.

**$223 is the 2016 national average premium for a bronze level health plan available through the Martketplace for one individual and should not be changed.