

**Goal:** To complete Massachusetts taxes using W-2s

**Resources:** [MA Form 1](#), [MA Form 1 Instructions](#), [MA Schedule HC](#), [MA Schedule HC Instructions](#)

**Directions:** Complete Form 1 and Schedule HC by hand using a *pencil*. Bring it to your teacher to check for accuracy. Then filling out another form in **black** pen. Make sure to follow the instructions from the link above. For simplicity, assume the following:

- a. Personal information
  - a. Social Security Number: 123-45-6789. This needs to be on the top of every page.
  - b. Address: 1001 Main St, Boylston, MA 01505
- b. Line 1: You are filing single
- c. Line 2b: no dependents
- d. Line 3: The only money you made is on your W-2
- e. Line 14: you may claim rent from your monthly budget (See previous assignment)
- f. Line 34: you must attempt to estimate what you actually bought in 2017
- g. Data for Schedule HC
  - a. Line 1: Real birthdate
  - b. Line 3: Full-year MCC
  - c. Line 4: Private Insurance
  - d. Line 4f:

Box 1: Company Name	Box 2: Federal ID	Box 3: Subscriber #
SuperHealthy Company	444-55-6666	3141592654

- h. Sign and date Form 1

**Reflection Prompts**

- Compare the Federal 1040 form with Form 1 from MA
- How has these two projects changed your perspective on doing taxes?
- What are your thoughts on taxes in general?
- What new vocabulary did you need to know from Form 1?

**Submit:**

- (1) Physical Form 1 and Schedule HC to Swenson or scan them and submit via Classroom.
- (2) Write a reflection that compares your experiences with Federal and State taxes.

**Applied Math  
Taxachusetts**

Name \_\_\_\_\_

Date \_\_\_\_\_

**Rubric**

A: Exceptional	Proficient Plus: submit a spreadsheet with more definitions specifically for Mass Taxes. Reflection is insightful.
B: Proficient	Data is accurate. Organization is clean. Reflection is clear and detailed.
C: Basic	Some missing or inaccurate data
D: Developing	Significant portions are missing from sheets.
F: Inadequate	Incomplete by missing most information.