

Department of the Treasury
Internal Revenue Service
Name (last or last name)**▶ Attach to Form 1040, 1040A, or 1040NR.**
▶ Information about Form 8962 and its separate instructions is at www.irs.gov/form8962.

Your social security number

Read
the instructions **Part 1: Annual and Monthly Contribution Amount**

1 Family Size: Enter the number of exemptions from Form 1040 or Form 1040A, line 6d, or Form 1040NR, line 7d	1
2a Modified AGI: Enter your modified AGI (see instructions) 2a	2a
2b Enter total of your dependent's modified AGI (see instructions) 2b	2b
3 Household income: Add the amounts on lines 2a and 2b	3
4 Federal Poverty Line: Enter the federal poverty amount as determined by the family size on line 1 and the federal poverty table for your state of residence during the tax year (see instructions). Check the appropriate box for the federal poverty table used: <input type="checkbox"/> A (House) <input type="checkbox"/> B (Travel) <input type="checkbox"/> C (Other 48 states and DC)	4
5 Household income as a Percentage of Federal Poverty Line: Divide line 3 by line 4. Enter the result rounded to a whole percentage (for example, for 1.832 enter the result as 183, for 1.833 enter as 184) (See instructions for special rules.)	5
6 Is the result entered on line 5 less than or equal to 100%? <input type="checkbox"/> Yes, Continue to line 7. <input type="checkbox"/> No, You will not be eligible to receive PTC. If you received advance payment of PTC, see the instructions for how to report your excess advance PTC requirement amount.	6
7 Applicable figure: Using your line 5 percentage, locate your "applicable figure" on the table in the instructions	7
8a Annual Contribution for Health Care: Multiply line 7 by line 7 8a	8a
8b Monthly Contribution for Health Care: Divide line 8a by 12. Round to whole dollar amount 8b	8b

Part 2: Premium Tax Credit Claim and Reconciliation of Advance Payment of Premium Tax Credit

- 9** Do you share a policy with another taxpayer or get married during the year and want to use the alternative calculation? (see instructions) Yes, Skip to Part 4, Shared Policy Worksheet, or Part 5, Alternative Calculation for Year of Marriage. No, Continue to line 10.
- 10** Do all forms 1064 for you or household include coverage for January through December with no changes in monthly amounts shown on lines 21-26, column A and B? Yes, Continue to line 11. Compute your annual PTC. Skip lines 12-20. No, Continue to lines 12-20. Compute your monthly PTC and continue to line 24.

Annual Calculation	A. Premium Amount (Form 1065-A, line 35A)	B. Annual Premium Amount of ROLP (Form 1065-A, line 35B)	C. Annual Contribution Amount (Line 8a)	D. Annual Maximum Premium Assistance (Subtract C from B)	E. Annual Premium Tax Credit Allowed (Smaller of A or D)	F. Annual Advance Payment of PTC (Form 1065-A, line 35C)
11 Annual Total						
Monthly Calculation	A. Monthly Premium Amount (Form 1065-A, line 21-22, column A)	B. Monthly Premium Amount of ROLP (Form 1065-A, line 21-22, column B)	C. Monthly Contribution Amount (Amount from line 8b or alternative/burdened monthly contribution)	D. Monthly Maximum Premium Assistance (Subtract C from B)	E. Monthly Premium Tax Credit Allowed (Smaller of A or D)	F. Monthly Advance Payment of PTC (Form 1065-A, line 21-22, column C)
12 January						
13 February						
14 March						
15 April						
16 May						
17 June						
18 July						
19 August						
20 September						
21 October						
22 November						
23 December						

24 Total Premium Tax Credit: Enter the amount from line 11 E or add lines 12 E through 23 E and enter the total here	24
25 Advance Payment of PTC: Enter the amount from line 11 F or add lines 12 F through 23 F and enter the total here	25
26 Net Premium Tax Credit: If line 24 is greater than line 25, subtract line 25 from line 24. Enter the difference here and on Form 1040, line 69; Form 1040A, line 40; or Form 1040NR, line 69. If you elected the alternative calculation for marriage, enter zero. If line 24 equals line 25, enter zero. Stop here. If line 25 is greater than line 24, leave this line blank and continue to line 27	26

Part 3: Repayment of Excess Advance Payment of the Premium Tax Credit

27 Excess Advance Payment of PTC: If line 25 is greater than line 26, subtract line 24 from line 25. Enter the difference here	27
28 Repayment Limitation: Using the percentage on line 3 and your filing status, locate the repayment limitation amount in the instructions. Enter the amount here	28
29 Excess Advance Premium Tax Credit Repayment: Enter the smaller of line 27 or line 28 here and on Form 1040, line 46; Form 1040A, line 29; or Form 1040NR, line 44	29