

Student Name _____

Student ID# _____

Academic Year 2020-2021

Untaxed Income Worksheet – Income Year 2018

Untaxed Income Worksheet Calendar Year 2018 <i>(Enter the combined amounts for you and your spouse.)</i>		
Student/Spouse		Parent(s)
\$	Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040 Schedule 3—line 50.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.	\$
\$	Earnings from work under a cooperative education program offered by a college.	\$
Untaxed Income Calendar Year 2018 <i>(Enter the combined amounts for you and your spouse.)</i>		
\$	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—line 28 + line 32.	\$
\$	Child support received for any of your children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040—line 2a.	\$
\$	Untaxed portions of IRA distributions and pensions from IRS Form 1040—lines (4a minus 4b). Exclude rollovers . If negative, enter a zero here.	\$
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veteran's non education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income, such as workers compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1-line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed social security benefits, supplemental security income, Workforce innovation and Opportunity Act educational benefits, on base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$
\$	TOTAL UNTAXED INCOME	\$

Student Signature _____

Date _____

Parent Signature _____

Date _____