**Congressional Data Book Key for Tax Year 2015**

The first eight fields are self explanatory (i.e., Return Count, Form 1040EZ, Form 1040A Returns with Exemptions). They provide counts for each of the named fields.

The remaining items (below) correspond to fields on the Form 1040 or on the Form 1040 Schedule A. The abbreviation “Ret.” identifies the number of returns with a value in the field being described, and the abbreviation “Amt.” identifies the total dollars for that field. The fields are defined below by showing which line item they correspond to on the Form 1040 or Schedule A. The Ret. and Amt. fields for each line item are shown below on a single line to conserve space.

Tax Year 2015 Form 1040 and Schedule A are available at

Form 1040: <http://core.publish.no.irs.gov/forms/public/pdf/f1040--2015-00-00.pdf>

Form 1040, Schedule A:

<http://www.irs.gov/pub/irs-prior/f1040sa--2015.pdf>

Form 8962: <http://core.publish.no.irs.gov/forms/public/pdf/f8962--2015-00-00.pdf>

Form 8888: <http://core.publish.no.irs.gov/forms/public/pdf/f8888--2015-00-00.pdf>

**Form 1040 Fields**

* **Total Exemption Amt**: 42 Multiply $4,000 by the number of exemptions.
* **Wages Ret./Amt**.: 7 Wages, salaries, tips, etc. Attach Form(s) W-2
* **Taxable Interest Ret./Amt**.: 8a Taxable interest. Attach Schedule B if required
* **Tax Exempt Interest Ret./Amt**.: 8b Tax-exempt interest…
* **Taxable Dividends Ret./Amt**.: 9a Ordinary dividends. Attach Schedule B….
* **State Refund Ret./Amt**.: 10 Taxable refunds, credits, or offsets of state ….
* **Schedule C Prof./Loss Ret./Amt**.: 12 Business income or (loss). …
* **Capital Gain/Loss Ret./Amt**.: 13 Capital gain or (loss)…
* **Taxable IRA Dist. Ret./Amt**.: 15b IRA distributions… Taxable amount
* **Taxable Pension Ret./Amt**.: 16b Pensions and annuities… Taxable amount
* **Farm Prof./Loss Ret./Amt**.: 18 Farm income or (loss). Attach Schedule F
* **Unemployment Comp. Ret./Amt**.: 19 Unemployment compensation
* **Tax. Soc. Sec. Ret./Amt**.: 20b Social security benefits…. Taxable amount
* **Student Interest Ded. Ret./Amt**.: 33 Student loan interest deduction
* **S.E. Health Ded. Ret./Amt**.: 29 Self-employed health insurance deduction
* **Keogh Pay. Ret./Amt**.: 28 Self-employed SEP, SIMPLE, and qualified plans
* **Alimony Paid Ret./Amt**.: 31a Alimony paid
* **Adjustments Ret./Amt**.: 36 Add lines 23 through 35
* **Total Itemized Ded. Ret./Amt**.: 40 Itemized deductions (from Schedule A)
* **Child Tax Credit Ret./Amt**.: 52 Child tax credit
* **Child Care Cred. Ret./Amt**.: 49 Credit for child and dependent care expenses.
* **Ed Credit Ret./Amt**.: 50 Education credits from Form 8863, line 19
* **For. Tax Credit Ret./Amt**.: 48 Foreign tax credit.
* **Gen. Bus. Cred. Ret./Amt**.: 54a Other credits…. Form 3800
* **Total Stat. Credit Ret./Amt**.: 55 Add lines 48 through 54. These are your ….

**Form 1040 Fields - Continued**

* **S.E. Tax Ret./Amt**.: 57 Self-employment tax. Attach Schedule SE
* **Tax Retir. Plan Ret./Amt**.: 59 Additional tax on IRAs….
* **Healthcare Cov. Ind. Ret.:** 61 Health care, Full Year Coverage Indicator.
* **Healthcare Pmt. Ret./Amt.:** 61 Health care: Individual Responsibility Payment.
* **Income Tax Ret./Amt**.: 47 Add lines 44, 45 and 46
* **Total Tax Ret./Amt**.: 63 Add lines 56 through 62. This is your total tax
* **Withholding Ret./Amt**.: 64 Federal income tax withheld from Forms W-2 ….
* **Alt. Min. Ret./Amt**.: 45 Alternative minimum tax….
* **Est. Tax Pay. Ret./Amt**.: 65 2014 estimated tax payments…
* **EITC Ret./Amt**.: 66a Earned income credit (EIC)
* **Total Payments Ret./Amt**.: 74 Add lines 64, 65, 66a and 67 through 73 …
* **Refund Ret./Amt**.: 75 If line 74 is more than line 63….
* **Balance Due Ret./Amt**.: 78 Amount you owe. Subtract line 74 from line 63…

**Form 1040 Schedule A Fields**

* **Med./Dent. Exp. Ret./Amt**.: 4 Subtract line 3 from line 1. If line 3 is ….
* **State and Loc. or Sales Tax Ret./Amt**.: 5 State and Local or Sales Tax
* **Real Estate Tax Ret./Amt**.: 6 Real estate taxes
* **Taxes Paid Ret./Amt**.:9 Add lines 5 through 8
* **Interest Paid Ret./Amt**.: 10 Home mortgage interest and points ….
* **Total Interest Paid Ret./Amt**.: 15 Add lines 10 through 14
* **Contribution Ret./Amt**.: 19 Add lines 16 through 18

**Form 8962 Premium Tax Credit (PTC)**

* **Total Premium Tax Credit Ret./Amt:** Line 24
* **Advance Payment of PTC Ret./Amt:** Line 25

**Form 8888 Allocation of Refund (Including Savings Bond Purchases)**

* **Bond Purch. Ret./Amt:** Total of Lines 4, 5a and 6a, to use part of refund to buy up to $5,000 in paper series I savings bonds.