

## 1040A BUSINESS RULES UPDATES FOR TAX YEAR TY2015

This document lists all updates to the 1040A Business Rules version TY2015v3.1

### 01/03/2016 UPDATES

| Rule Number  | Rule Text  | Error Category | Severity | Rule Status |
|--------------|--|----------------|----------|-------------|
| F1040A-430   | Form 1040A, Line 16 'EducatorExpensesAmt' must be equal to zero if an amount is entered.   | Incorrect Data | Reject   | Disabled    |
| F1040A-431   | Form 1040A, Line 19 'TuitionAndFeesDedAmt' must be equal to zero if an amount is entered.  | Incorrect Data | Reject   | Disabled    |
| F8917-001    | Each 'StudentSSN' on Form 8917, Line 1b must not be equal to 'StudentSSN' on Form 8863, Line 21.   | Incorrect Data | Reject   | Active      |
| F8917-003    | If Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' is greater than 65000 and filing status of the return is ["Single" or "Head of Household" or "Qualifying widow(er) with dependent child" (element 'IndividualReturnFilingStatusCd' has the value 1 or 4 or 5)], then Line 6 'TuitionAndFeesDedAmt' must be less than 2001. | Incorrect Data | Reject   | Active      |
| F8917-004    | If Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' is less than 65000 and filing status of the return is ["Single" or "Head of Household" or "Qualifying widow(er) with dependent child" (element 'IndividualReturnFilingStatusCd' has the value 1 or 4 or 5)], then Line 6 'TuitionAndFeesDedAmt' must be less than 4001.    | Incorrect Data | Reject   | Active      |
| F8917-005    | If Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' is greater than 130000 and filing status of the return is "Married filing jointly" (element 'IndividualReturnFilingStatusCd' has the value 2), then Line 6 'TuitionAndFeesDedAmt' must be less than 2001.  | Incorrect Data | Reject   | Active      |
| F8917-006    | If Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' is less than 130001 and filing status of the return is "Married filing jointly" (element 'IndividualReturnFilingStatusCd' has the value 2), then Form 8917, Line 6 'TuitionAndFeesDedAmt' must be less than 4001.  | Incorrect Data | Reject   | Active      |
| F8917-007    | Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' must be less than 160001, if filing status of the return is "Married filing jointly" (element 'IndividualReturnFilingStatusCd' has the value 2).  | Incorrect Data | Reject   | Active      |
| F8917-008    | Form 8917, Line 5 'TuitionAndFeesDedIncmLessCrAmt' must be less than 80001, if filing status of the return is ["Single" or "Head of Household" or "Qualifying widow(er) with dependent child" (element 'IndividualReturnFilingStatusCd' has the value 1 or 4 or 5)].   | Incorrect Data | Reject   | Active      |
| F8917-010    | Form 8917, Line 6 'TuitionAndFeesDedAmt' must be equal to Form 1040A, Line 19 'TuitionAndFeesDedAmt'.  | Data Mismatch  | Reject   | Active      |
| F8917-011-01 | Each 'StudentSSN' on Form 8917, Line 1b must be equal to 'PrimarySSN' or 'SpouseSSN' in the Return Header or any 'DependentSSN' on Line 6c(2) of the return.   | Incorrect Data | Reject   | Active      |
| F8917-013    | If Form 8917 is present in the return, then Line 3, 'TotalIncomeAmt' must be equal to Form 1040A, Line 15 'TotalIncomeAmt'.  | Incorrect Data | Reject   | Active      |

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|-------------|--|----------------|----------|-------------|
| F8917-014   | Form 8917 must not be present in the return. | Incorrect Data | Reject   | Disabled    |