

State of Rhode Island Division of Taxation
2022 Modification Worksheet
 Taxable Social Security Income Worksheet



IMAGE ONLY

| Name | Social security number |
|------|------------------------|
| | |

NOTE: Use this worksheet to determine the amount, if any, of your Social Security modification on Schedule M, line 1s.

MODIFICATION FOR TAXABLE SOCIAL SECURITY INCOME WORKSHEET

STEP 1: Eligibility

| | | |
|---|---|------------------------------|
| 1 Enter your date of birth..... | 1 | |
| 2 Enter your spouse's date of birth, if applicable..... | 2 | |
| 3 Enter your Federal AGI from RI-1040 or RI-1040NR, line 1..... | 3 | |
| 4 Enter your Filing Status..... | 4 | |
| 5 Were either you or your spouse born on or before 09/01/1956? If yes, check the box to the right. | 5 | Yes <input type="checkbox"/> |
| 6 Filing status amount. Enter the amount from below that corresponds to your filing status on line 4..... | 6 | |

- Single or head of household - \$95,800
- Married filing separately - \$95,800
- Married filing jointly or qualifying widow(er) - \$119,750

| | | |
|--|---|------------------------------|
| 7 Is your Federal AGI on line 3 less than the filing status amount on line 6? If yes, check the box to the right.. | 7 | Yes <input type="checkbox"/> |
|--|---|------------------------------|

If you answered yes to **both** questions 5 and 7, continue to Step 2.
 Otherwise, **STOP**, you are not eligible for this modification.

STEP 2: Modification Amount

If you AND your spouse, if applicable, were born on or before 09/01/1956, enter 1.0000 on line 12 and skip lines 8 through 10.

| | | |
|---|----|--|
| 8 Amount of social security benefits from Federal Form 1040 or 1040-SR, line 6a..... | 8 | |
| 9 Amount of line 8 attributed to the person born on or before 09/01/1956..... | 9 | |
| 10 Eligible percentage of social security benefits. Divide line 9 by line 8..... | 10 | |
| 11 Taxable amount of social security from Federal Form 1040 or 1040-SR, line 6b..... | 11 | |
| 12 Eligible percentage. Enter the percentage from line 10, or 1.0000, whichever applies..... | 12 | |
| 13 Modification Amount. Multiply line 11 by line 12. Enter here and on Schedule M - page 1, line 1s. | 13 | |