

## Written Segment (10 points possible)

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Class Period: \_\_\_\_\_

### **Short-Answer Written Synthesis**

*Instructions: Complete these three written reflection questions. Answer in full sentences using accurate tax vocabulary.*

#### **Question 1: The W-4 Direct Cause & Effect (3 pts)**

Explain how an employee's choices on Form W-4 when hired directly determine whether they receive a refund check or owe additional money when they file Form 1040 on Tax Day.

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#### **Question 2: Mandatory Threshold vs. Voluntary Refund Misconception (4 pts)**

Your coworker Taylor earned \$4,000 this year and had \$300 in federal tax withheld (W-2 Box 2). She says: "I earned under \$14,600, so filing taxes is a waste of time and I'm throwing my W-2 in the trash." Explain why Taylor is technically right about mandatory filing laws, but why throwing away her W-2 costs her \$300.

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### **Question 3: Tracing W-2 Source Data to Form 1040 Lines (3 pts)**

Identify the two most critical boxes on an employer-issued Form W-2. Name each box, state what financial information it contains, and specify the exact line on Form 1040 where that information must be entered.

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ELL Sentence Stems:

1. *"Form W-4 controls my paycheck because..."*
2. *"Taylor does not HAVE to file, BUT if she files she gets..."*
3. *"W-2 Box 1 goes to Line \_\_\_\_\_ and Box 2 goes to Line \_\_\_\_\_."*

# Assessment Rubric

| Criteria                   | Total Pts | Exemplary (Full) (3)                                                                                                | Developing (Partial) (2)                                                                  | Unsatisfactory (None) (1)                                            |
|----------------------------|-----------|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>Q1: W-4 Link</b>        | 3         | Explains W-4 paycheck withholding and links withholding level to 1040 refund or tax owed.                           | Mentions withholding, but incompletely connects it to refund vs. balance owed.            | Confuses W-4 with W-2 or gives inaccurate explanation.               |
| <b>Q2: Taylor Scenario</b> | 4         | Explains earnings under standard deduction waive mandatory filing, but voluntary filing recovers \$300 withholding. | States to file for refund, but misses distinction between mandatory and voluntary filing. | Incorrectly states filing is mandatory or ignores financial penalty. |
| <b>Q3: Data Mapping</b>    | 3         | Correctly maps Box 1 to Line 1z and Box 2 to Line 25a.                                                              | Identifies Box 1 and Box 2, but swaps or omits 1040 line numbers.                         | Incorrect W-2 boxes or missing 1040 lines.                           |