



UNIT 8 • TAXES • LESSON 8.3

# Filing Your Taxes: Student Work Rubric

Use alongside the Grading Sheet. Circle one level per row; the level descriptions describe the whole packet.

| Criterion                                 | 4 • Exemplary                                                                                                     | 3 • Proficient                                                                                           | 2 • Developing                                                                         | 1 • Beginning                                                   |
|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <b>Reading the W-2</b>                    | Pulls every value from the correct box on the first pass; explains receive vs. file clearly.                      | Pulls all key values (Boxes 1, 2, 17) correctly; receive vs. file mostly clear.                          | Finds some values but confuses boxes (e.g. Box 2 vs. Box 17).                          | Cannot locate values on the W-2 without help.                   |
| <b>Form accuracy (1040 &amp; 540 2EZ)</b> | All 10 lines correct on both returns, including both settle-up amounts (\$170 refund, \$35 owed).                 | Both returns complete; 1–2 line errors, but settle-up logic applied correctly.                           | One return substantially correct; the other incomplete or with repeated errors.        | Forms largely blank or values placed on wrong lines throughout. |
| <b>Process</b>                            | Works each line in order; uses taxable income (not gross) in the tables; subtraction set up correctly both times. | Follows the line order; one process slip (e.g. order of subtraction) that is self-corrected or isolated. | Skips steps or looks up gross wages in the tax table; carries errors without noticing. | No visible process; answers appear without supporting steps.    |
| <b>Interpretation</b>                     | Explains precisely how a federal refund and state bill coexist: two systems, two withholding estimates.           | States refund = own money back and owe = underpaid; explanation of the split is partial.                 | Labels refund/owe correctly but can't explain why they differ.                         | Confuses refund with free money or owe with a penalty.          |
| <b>Money Move plan</b>                    | Names a specific W-2 storage spot AND a free CA filing option with a personal reason.                             | Names both a spot and a free option; reason is generic.                                                  | Names one of the two (spot or option).                                                 | Blank or off-topic.                                             |

**SUGGESTED CONVERSION (RUBRIC + 30-PT GRADING SHEET)**

|                          |                   |
|--------------------------|-------------------|
| 18–20 rubric • 27–30 pts | <b>Exemplary</b>  |
| 14–17 rubric • 22–26 pts | <b>Proficient</b> |
| 10–13 rubric • 16–21 pts | <b>Developing</b> |
| Below 10 • below 16 pts  | <b>Beginning</b>  |

**Behavior over recall:** a student who follows the right process with one arithmetic slip is closer to real-world readiness than one who copies the right answer. Weight Process and Interpretation when rows disagree.

Rubric total (out of 20): \_\_\_\_\_ Grading sheet (out of 30): \_\_\_\_\_ Level: \_\_\_\_\_