2020 Tips for Claiming the QEE Credit as an Individual, using H&R Block

Although we cannot provide you with official tax advice regarding the credit, for your convenience, we are providing information for claiming the credit using H&R Block.

In the Credits section of the State Taxes section, select ‘Other Credits’ then choose ‘Qualified education expense credit’

Select ‘The current year’ box unless you have a QEE credit from a prior year that you did not claim. Credits may be carried forward for up to five years.
Select the appropriate choices, then fill in each field, referencing email that GOAL sent you containing your Form IT-QEE-SSO1 (“SSO1 Form”). This example uses $2,500 as the GOAL contribution amount.

This credit is for your pre-approved donation to a student scholarship organization (SSO). First let's make sure you qualify.

Was the contribution designated for a particular person?
- Yes
- No

Did you receive a confirmation letter (Form IT-QEE-SSO1) from the SSO?
- Yes
- No

Great news, you qualify! Now, enter these amounts.

**Contribution amount**

$2,500

This is the “Amount of Contribution” listed on your SSO1 Form (GOAL tax receipt)

**Pre-approved credit amount**

$2,500

This is the “Preapproved Amount of Credit” listed on your SSO1 Form (GOAL tax receipt)

If you can’t claim the full credit this year, tell us the amount you want to claim. (This is uncommon.)

**Why would I claim less than my full credit?**

**Education Expense Credit amount to claim this year**

$2,500

Georgia requires you to e-file your return since you’re claiming this credit. Keep your Form IT-QEE-SSO1 with your records, since Georgia might ask for it later.

Note: If you did not reach the $10,000 maximum in SALT (state and local) tax deductions, you may deduct your GOAL contribution (up to that $10,000 SALT cap). In this situation, please see these H&R Block instructions for taking a deduction for your GOAL contribution as “additional state income taxes paid.”