2021 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 add the ‘Qualified education expense credit’

Let’s Find the Credits You Deserve.

We used what you've told us so far to customize the Georgia topics below.

- **Family Credits**
  - Qualified caregiving expenses, foster child adoption

- **Common Personal Credits**
  - Low income credit, credit for tax paid to other states

- **Other Credits**
  - Qualified education expense, National Guard, other less common credits

Add

Qualified education expense credit
For preapproved student scholarship organization donations
Learn more

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.

Qualified Education Expense Credit

Please tell us if you're claiming the credit for:

- [x] The current year
- [ ] Carryforward from a prior year
Select the appropriate choices, then fill in each field, referencing your email from GOAL containing your Form IT-QEE-SSO1. This example uses $2,500 as the GOAL contribution amount.

<table>
<thead>
<tr>
<th>Was the contribution designated for a particular person?</th>
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</thead>
<tbody>
<tr>
<td>☐ Yes</td>
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<tr>
<td>☐ No</td>
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<tr>
<th>Did you receive a confirmation letter (Form IT-QEE-SSO1) from the SSO?</th>
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<tr>
<td>☐ Yes</td>
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<tr>
<td>☐ No</td>
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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) |

From your approved Form IT-QEE-TP1

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.”