

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'

The screenshot shows the H&R Block software interface. At the top, there are four tabs: 'Overview', 'Federal', 'State' (which is selected and underlined), and 'File'. Below the tabs are five icons representing different sections: 'Your Info', 'Income', 'Credits' (highlighted in green), 'Taxes', and 'Wrap-Up'. Below these icons is a large heading: 'Let's Find the Credits You Deserve.' Underneath this heading is a sub-heading: 'We used what you've told us so far to customize the Georgia topics below.' There are three expandable categories listed: 'Family Credits' (Qualified caregiving expenses, foster child adoption), 'Common Personal Credits' (Low income credit, credit for tax paid to other states), and 'Other Credits' (Qualified education expense, National Guard, other less common credits). An orange arrow points to the 'Other Credits' category.

This screenshot shows the 'Other Credits' section. It features a dark green button labeled 'Add' which is circled in orange. To the right of the button is the text: 'Qualified education expense credit' followed by 'For preapproved student scholarship organization donations' and a link to '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.

The screenshot shows the 'Qualified Education Expense Credit' form. At the top left, it says 'IT-QEE-TP2'. The main heading is 'Qualified Education Expense Credit'. Below the heading is the text: 'Please tell us if you're claiming the credit for:'. There are two checkboxes: 'The current year' (which is checked) and 'Carryforward from a prior year' (which is unchecked).

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.

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)

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.

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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."