

2021 Tips for Claiming the QEE Credit as an Individual, using TurboTax

Although we cannot provide official tax advice regarding the credit, for your convenience, we are providing information for claiming the credit using TurboTax.

On the State Taxes screen, select 'Start' next to Education Expense Credit

Take a look at Georgia credits

These are different than federal tax breaks. You may be able to save some money if you can claim any of them. There might also be Georgia taxes that apply to you.

Personal, home and family credits

Low Income Tax Credit [Learn More](#)

Start

Georgia Homebuyer Credit [Learn More](#)

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 Education Expense Credit [Learn More](#)

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Qualified Caregiving Expense Credit [Learn More](#)

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Other State Tax Credit [Learn More](#)

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Disabled Person Home Purchase or Retrofit Credit [Learn More](#)

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Adoption of a Foster Child Credit [Learn More](#)

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National Guard Life Insurance [Learn More](#)

Start

On the "Did You Receive Preapproval for the Education Expense Credit" screen, select 'Yes'

Did You Receive Pre-approval for the Education Expense Credit?

This credit requires pre-approval by Georgia.

To get the credit, you'll need to have already received form QEE-TP1 from the Department of Revenue, and form QEE-SSO1 from the student scholarship organization.

Note: The Georgia Department of Revenue requires electronic filing for income tax in which series 100 tax credits are generated, allocated, claimed, utilized, or included in any manner.

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Yes

No

On the "Additional Info for the Education Expense Credit" screen, select all appropriate boxes and fill in both fields, referencing your email from GOAL containing your Form IT-QEE-SSO1. This example uses \$2,500 as the GOAL contribution amount. Then select 'Continue.'

Additional Info for the Education Expense Credit

Tell us the information below and we'll help you get the credit if you qualify. [Learn More](#)

- I did not deduct my contribution as charitable donations on my federal return.
- I received contribution confirmation (form QEE-SSO1) from the student scholarship organization.
- I didn't make a contribution for the direct benefit of any dependents.

Do not go to the Business and Individual Credit screen. The credit is to be taken as an individual filer even if payment was made by your pass-through business.

Note: Don't enter credits received from a pass through entity here. Enter all Schedule K-1 credits on the **Business and Individual Credit** screen.

Preapproved contribution amount (see QEE-TP1)

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

Total Contribution amount (see QEE-SSO1)

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

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Only complete the 'Your Georgia Credit Carryforwards' section if you have QEE credits from previous years that you did not claim. Credits may be carried forward for up to five years.

Your Georgia Credit Carryforwards

We have transferred all of your Georgia carryforward credits from your 2020 tax return to help you track your credits.

Make any necessary adjustments below to accurately reflect the credit amounts available on your 2021 tax return. Credit Code Types are required.

Year and Name of Credit (e.g., 2018 Adoption Credit)	Credit Code Type	2021 Carry Forward Credit	Years Left	OR Unlimited Years
<input type="text"/>	No Entry <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="button" value="v"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="button" value="v"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="button" value="v"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="checkbox"/>

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[Done](#)

Select 'Done' and you will now see the Education Expense Credit amount on the State Taxes screen. The Business and Individual Credit amount is a sum of all the credits you are taking.

Take a look at Georgia credits

Education Expense Credit [Learn More](#)

\$2,500

Edit

Business and Individual Credit [Learn More](#)

\$2,500

Edit

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 [TurboTax instructions](#) for taking a deduction for your GOAL contribution as “additional state income taxes paid.”

Note that you may be required to enter your DOR Certificate Number, which is provided in the email from GOAL containing your SSO1 Form.