

2023 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

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



Then click Add next to Additional credits

Add

Additional credits

Low and no emission vehicle, rural hospital, and business credits
[Learn more](#)

Click the Add Credit button and select Next

Vehicle, Rural Hospital, and Other Miscellaneous and Business Credits

Click Add Credit to tell us about your other credits.

If you add one of these credits, you must e-file your Georgia return.

+ Add Credit

Credit Code

Credit Used

< Back

Next >

Under Enter Credit Information, select 125 – Qualified education expense credit from the dropdown

GASCH2

Enter Credit Information

Credit type

Choose

Note, the 125 – Qualified education expense credit is listed last (not in sequential order)

148 - Life Sciences Manufacturing Job Tax Credit

149 - Historic Rehabilitation Credit for Historic Homes and Other Certified Structure below \$300K

124 - Qualified Conservation Credit

125 - Qualified education expense credit

Choose

Once the credit is selected, click Next

GASCH2

Enter Credit Information

Credit type

125 - Qualified education expense credit

In the table below, download and complete the form for the credit you're claiming. Name your attachments as shown in the **PDF File Name** column. We'll ask you to attach the completed PDF when you file your return.

Credit Name	PDF File Name	Credit Form Link
125 – Qualified education expense credit	IT-QEE-SSO1	https://dor.georgia.gov

If you claim any of these credits, you'll have to e-file your return with Georgia. You can't mail in a paper return with these credits.

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Next >

On the Business Credit Details screen, fill in each field, referencing the email from GOAL containing your Form IT-QEE-SSO1. This example uses \$2,500 as the GOAL contribution amount.

Business Credit Details

Enter the following information to compute the amount of your Unused Credit:

If this is for a Qualified Education Expense please use Individual Name

 DELETE

Company/Individual Name

John Doe

Primary taxpayer name

Select FEIN or SSN Type

SSN

Will always be SSN unless filing as C-Corp or Other Business Entity

EIN/SSN

111223333

Primary taxpayer's full social security number

Cert Number

987654321

Credit certificate number found in your DOR approval letter, GOAL email, or SSO1 Form

Amount

\$2,500

The amount of your tax credit contribution

Do you have credits left over from last year?

☐ Yes

☒ No

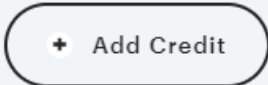
For this question, select 'No' unless you have a QEE credit from a prior year that you did not claim. Credits may be carried forward for up to five years.

Then click Next. You will see your credit amount listed next to the credit code.

Vehicle, Rural Hospital, and Other Miscellaneous and Business Credits

Click Add Credit to tell us about your other credits.

If you add one of these credits, you must e-file your Georgia return.

 + Add Credit

Credit Code

Credit Used

125

\$2,500



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 enter the contribution in the Federal deductions section for state and local taxes in order to take a deduction for your GOAL contribution as "additional state income taxes paid."