

2023 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	Start
Education Expense Credit Learn More	Start
Teacher Recruitment and Retention Credit Learn More	Start
Qualified Caregiving Expense Credit Learn More	Start
Other State Tax Credit Learn More	Start
Disabled Person Home Purchase or Retrofit Credit Learn More	Start
Adoption of a Foster Child Credit Learn More	Start
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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YesNo

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 \$3,163 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.

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)

3,163

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

Total Contribution amount (see QEE-SSO1)

3,163

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 2022 tax return to help you track your credits.

Make any necessary adjustments below to accurately reflect the credit amounts available on your 2023 tax return. Credit Code Types are required.

Year and Name of Credit (e.g., 2020 Adoption Credit)	Credit Code Type	2023 Carry Forward Credit	Years Left	OR	Unlimited Years
	No Entry				<input type="checkbox"/>
	No Entry				<input type="checkbox"/>
	No Entry				<input type="checkbox"/>
	No Entry				<input type="checkbox"/>

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.

Once done, you will 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.

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 & Credits section in order to take a deduction for your GOAL contribution as "additional state income taxes paid."