

## 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.

*\*Note, GOAL has been informed of a rare error that occurs when submitting a Georgia Tax Return through Turbo Tax. This is due to the Qualified Education Donation Tax Credit (different than the GOAL tax credit, the Qualified Education Expense Tax Credit). Please see the note at the bottom of this tax filing guidance or reach out to GOAL with any questions if you are experiencing this issue.*

### 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.

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#### Personal, home and family credits

Low Income Tax Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Georgia Homebuyer Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Education Expense Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Teacher Recruitment and Retention Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Qualified Caregiving Expense Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Other State Tax Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Disabled Person Home Purchase or Retrofit Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
Adoption of a Foster Child Credit <a href="#">Learn More</a>	<input type="button" value="Start"/>
National Guard Life Insurance <a href="#">Learn More</a>	<input type="button" value="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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[< Back](#)

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)

[< Back](#)

[Continue](#)

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
<input type="text"/>	No Entry <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	No Entry <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<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."*

***\*If you experience a TurboTax error:***

GOAL has been informed of a rare error that occurs when submitting a Georgia Tax Return through Turbo Tax. If you receive this error, the software will not allow you to e-File until the issue is resolved.

How to resolve:

If you receive an error about the Qualified Education Donation Tax Credit (different than the GOAL Qualified Education Expense Tax Credit) like the one below, you need to delete the 0 from the field, as it must be blank. The software will not accept a 0 in the box. This will resolve the issue.

Please feel free to reach out if you are experiencing this issue and have questions. We have contacted TurboTax to inform them of this issue and hope to see this resolved in a future software update.

## Check This Entry

Credits Wks: Donation Credit Amount should not be greater than \$, which is the total estimate tax paid check your entry and go back to your federal return if necessary.

Donation Credit Amount

0.

\*\* In claiming a tax credit on your Georgia tax return for Qualified Education Donation credit, you are required to reduce/remove any charitable contribution amounts claimed on your Federal tax return to the extent the amount was allowed as a credit against your Georgia tax. You may instead apply some/all of the Georgia allowed credit amount as "state/local income tax payment" on your Federal Schedule A, up to the maximum allowed limit on your Federal return. To indicate this donation as "state/local income tax payment", go back to your Federal return and enter this amount as "estimate tax" paid, enter same amount below to reconcile your Georgia tax return. See Help

Amount of charitable donation reported on Federal return as "state/local income tax"

0.