

Student Information Worksheet

2018

▶ Keep for your records

Name of Student	Social Security Number
-----------------	------------------------

Part I – Student Status

- 1 Was this person a student during 2018? Yes No
- 2 What kind of school did the student attend during 2018? (Check all that apply.)
- a Elementary c College (postsecondary) e Military academy
- b High school (secondary) d Vocational school f Not applicable
- 3 Did the student receive scholarships or other education assistance? Yes No

Part II – College Student Information

- 1 Did the student complete the first 4 years of postsecondary education as of 1/1/2018? Yes No NA
- 2 Was this student enrolled at an eligible education institution during 2018? Yes No NA
- 3 Was this student enrolled in a program that leads to a degree, certificate, or credential? Yes No NA
- 4 Was this student taking courses as part of a postsecondary degree program or to acquire or improve job skills? Yes No NA
- 5 Did this student take at least one-half the normal full-time workload for one academic period? Yes No NA
- 6 Has this student been convicted of a felony for possessing or distributing a controlled substance? Yes No NA
- 7 Is this student an eligible dependent of the taxpayer? Yes No NA
- 8 In how many prior years has an American Opportunity Credit been claimed for this student? . . ▶ _____
- 9 In how many prior years has a Hope Credit been claimed for this student ▶ _____

Part III – Education Credit and Deduction Qualifications (Determined based entries in Part II)

- 1 Is this student qualified for the American Opportunity Credit? Yes No
- _____
- _____
- 2 Is this student qualified for the Lifetime Learning Credit? Yes No
- _____
- _____
- 3 Is this student qualified for the Tuition and Fees Deduction? Yes No
- _____
- _____

Part IV – Educational Institution and Tuition Summary

	Received 2017 1098T with Box 2 filled and box 7 checked?			
School Name EIN	Address (number, street, apt no., city, state, and ZIP Code)	Tuition paid	Scholar- ships or grants	On Form 1098-T
				Yes <input type="checkbox"/> No <input type="checkbox"/>
If a foreign address: foreign province/state: _____ Postal code: Country: _____				Yes <input type="checkbox"/> No <input type="checkbox"/>
If a foreign address: foreign province/state: _____ Postal code: Country: _____				Yes <input type="checkbox"/> No <input type="checkbox"/>
Totals				

Are all School Employer Identification Numbers (EIN) known? (School EIN's must be entered in the program to claim the American Opportunity Credit) Yes No

Part V – Education Assistance (Scholarships, Fellowships, Grants, etc.)

	Total	Taxable	Tax-free
1 Educational assistance that is always tax-free:			
a Veteran or employer assistance from Form 1098-T Worksheets . . .	_____		
b Other veteran assistance or certain Indian tribal payments	_____		
c Other tax-free employer-provided assistance	_____		
d Total	_____		_____
2 Scholarships, fellowships, and grants not reported on Form W-2:			
a Scholarships and grants from Part IV above	_____		
b Other scholarships, fellowships and grants	_____		
c Total	_____		
3 Scholarship reported in 2018 not allocable to 2018 expense	_____		
4 Amount required to be used for other than qualified education expenses	_____		
5 Subtract line 3 and 4 from line 2c.	_____		
6 Total qualified education expenses from Part VI below.	_____		
7 If student is a candidate for a degree, enter the amount used for qualified education expenses, otherwise, enter -0-.	_____		_____
8 Subtract line 7 from line 5.		_____	
9 Taxable part. Add lines 4 and 8.		_____	
10 Tax-free educational assistance. Add lines 1d and 7			_____

Part VI – Education Expenses

Description	Total	Amount eligible for					
		American Opportunity Credit	Lifetime Learning Credit	Tuition and Fees Deduction	Qualified Higher Education Expense for 529 Plan	Qualified Higher Education Expense for ESA	Qualified Higher Education Expense for US Bonds
Expenses:							
1 Tuition paid from Part IV and qualified elementary and secondary tuition. Paid to institution as a condition of enrollment:	_____						
2 Fees	_____						
3 Books, supplies, equipment Paid to other than institution or not a condition of enrollment:	_____						
4 Books, supplies, equipment	_____						
5 Other course-related . . .	_____						
6 Room and board	_____						
7 Special needs expenses . .	_____						
8 Computer expenses	_____						
9 QTP or ESA contribution . .	_____						
10 Academic tutoring	_____						
11 Uniforms.	_____						
12 Transportation	_____						
13 Total qualified expenses . .	_____						
Adjustments:							
14 Refunds	_____						
15 Tax-free assistance	_____						
16 Deducted on Sched A	_____						
17 Used for credit or deduction	_____						
18 Used for exclusion	_____						
See tax help							
19 Total adjustments.	_____						
20 Adjusted qualified expenses	_____						

Part VII – Education Credit or Deduction Election

1	Elect credit or deduction which results in best tax outcome	<input type="checkbox"/>
2	Elect the American Opportunity Credit	<input type="checkbox"/>
3	Elect the Lifetime Learning Credit	<input type="checkbox"/>
4	Elect the tuition and fees deduction	<input type="checkbox"/>
5	Not applicable	<input type="checkbox"/>

Part VIII – Qualified Tuition Program (Section 529 Plan)

	For Purposes of Regular Tax	For Purposes of 10% Additional Tax
1	Enter the total distributions from this QTP during 2018	
2	Enter the amount of adjusted qualified education expenses attributable to this QTP:	
a	Qualified Elementary and Secondary Education Expenses	
b	Qualified Elementary and Secondary Education Expenses applied	
c	Adjusted Qualified Higher Education Expenses	
d	Adjusted Qualified Higher Education Expenses applied	
3	Total qualified education expenses attributable to this QTP	
4	Excess distributions. Subtract line 3 from line 1. If line 4 is greater than zero, complete lines 5 through 8.	
5	Total distributed earnings from Form 1099-Q box 2	
6	Fraction. Divide line 3 by line 1.	
7	Multiply line 5 by line 6.	
8	Earnings taxable to recipient. Subtract line 7 from line 5.	

Part IX – Education Savings Account (ESA)

	For Purposes of Regular Tax	For Purposes of 10% Additional Tax
1	Total Education Savings Account (ESA) distributions from Form 1099-Q.	
2	Qualified Elementary and Secondary Education Expenses	
3	Qualified Elementary and Secondary Education Expenses applied	
4	Subtract line 3 from line 1.	
5	Adjusted Qualified Higher Education Expenses	
6	Qualified Higher Education Expenses applied to ESA distributions	
7	Excess distributions. Subtract line 6 from line 4.	
8	Distributions taxable to recipient	

Part X – Series EE and I U.S. Savings Bonds Issued After 1989

1	Total proceeds from U.S. Savings Bonds cashed during 2018 for this student	
2	Adjusted Qualified Higher Education Expenses	
3	Qualified Higher Education Expenses applied to exclusion of U.S. bond interest	
4	Interest included in line 1	
5	Name and address of eligible educational institution(s) attended:	
	Institution Name	Institution Name
	Street address	Street address
	City	City
	State	State
	Zip Code	Zip Code