

Student Information Worksheet

2017

► Keep for your records

Name of Student	Social Security Number
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Part I – Student Status

- 1 Was this person a student during 2017? ☐ Yes ☐ No
- 2 What kind of school did the student attend during 2017? (Check all that apply.)

a ☐ Elementary b ☐ High school (secondary)	c ☐ College (postsecondary) d ☐ Vocational school	e ☐ Military academy f ☐ Not applicable
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- 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 1/1/2017? ☐ Yes ☐ No ☐ NA
- 2 Was this student enrolled at an eligible education institution during 2017? ☐ 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

School Name EIN	Address (number, street, apt no., city, state, and ZIP Code)	Tuition paid	Scholar- ships or grants	On Form 1098-T	Received 2016 1098T with Box 2 filled and box 7 checked?
				Yes ☐ No ☐	Yes ☐ No ☐
If a foreign address: foreign province/state: _____ Postal code: _____ Country: _____				Yes ☐ No ☐	Yes ☐ No ☐
				Yes ☐ No ☐	Yes ☐ No ☐
If a foreign address: foreign province/state: _____ Postal code: _____ Country: _____				Yes ☐ No ☐	Yes ☐ No ☐
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 2017 not allocable to 2017 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	Qualified Elementary and Secondary Expense for ESA
Expenses:								
1 Tuition paid from Part IV . . . 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.	☐
2	Elect the American Opportunity Credit	☐
3	Elect the Lifetime Learning Credit	☐
4	Elect the tuition and fees deduction	☐
5	Not applicable	☐

Part VIII – Qualified Tuition Program (Section 529 Plan)

	For Purposes of Regular Tax	For Purposes of 10% Additional Tax
1 Total Qualified Tuition Plan (QTP) distributions from Form 1099-Q		
2 Adjusted Qualified Higher Education Expenses		
3 Qualified Higher Education Expenses applied to QTP distributions		
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 2017 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 State Zip Code	City State Zip Code