

Education Credits

Name: _____

Provide all Form(s) 1098-T

Student's first and last name: _____

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? Yes

Was the student enrolled at least half-time for at least one academic period that began in 2022 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential?

Did the student complete the first four years of post-secondary education before 2022?

Was the student convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance?

Is the student pursuing a degree?

Number of years the American Opportunity Credit has been claimed for this student _____

	2022	2020
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution	_____	_____
ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution	_____	_____
Tax-free education assistance received in 2022 allocable to the academic period	_____	_____
Tax-free education assistance received in 2023 (and before 2022 return is filed) allocable to the academic period	_____	_____
Refunds of qualified education expenses paid in 2022 if the refund is received before the 2022 return is filed	_____	_____

Did the student receive Form 1098-T from this institution for 2022? Yes No

Did the student receive Form 1098-T from this institution for 2021 with box 7 checked? Yes No

EIN _____

Educational Institution Name _____

Street _____

City _____ State _____ ZIP _____

Student's first and last name: _____

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? Yes

Was the student enrolled at least half-time for at least one academic period that began in 2022 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential?

Did the student complete the first four years of post-secondary education before 2022?

Was the student convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance?

Is the student pursuing a degree?

Number of years the American Opportunity Credit has been claimed for this student _____

	2022	2020
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution	_____	_____
ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution	_____	_____
Tax-free education assistance received in 2022 allocable to the academic period	_____	_____
Tax-free education assistance received in 2023 (and before 2022 return is filed) allocable to the academic period	_____	_____
Refunds of qualified education expenses paid in 2022 if the refund is received before the 2021 return is filed	_____	_____

Did the student receive Form 1098-T from this institution for 2022? Yes No

Did the student receive Form 1098-T from this institution for 2021 with box 7 checked? Yes No

EIN _____

Educational Institution Name _____

Street _____

City _____ State _____ ZIP _____