

## 2021 Tips for Claiming the QEE Credit as an Individual, using H&R Block

Although we cannot provide you with official tax advice regarding the credit, for your convenience, we are providing information for claiming the credit using H&R Block.

**In the Credits section of the State Taxes section, select 'Other Credits' then add the 'Qualified education expense credit'**

The screenshot shows the H&R Block software interface. At the top, there are four tabs: 'Overview', 'Federal', 'State' (which is selected and underlined), and 'File'. Below the tabs are five icons representing different sections: 'Your Info', 'Income', 'Credits' (highlighted with a green circle), 'Taxes', and 'Wrap-Up'. Below these icons is a large heading: 'Let's Find the Credits You Deserve.' Underneath this heading is a sub-heading: 'We used what you've told us so far to customize the Georgia topics below.' There are three expandable categories listed: 'Family Credits' (with a house icon), 'Common Personal Credits' (with a house icon), and 'Other Credits' (with a storefront icon). An orange arrow points to the 'Other Credits' category. Each category has a dropdown arrow on the right side.

This screenshot shows the 'Other Credits' section. It features a dark green button labeled 'Add' which is circled in orange. To the right of the button is the text: 'Qualified education expense credit' followed by 'For preapproved student scholarship organization donations' and a link that says 'Learn more'.

**Select 'The current year' box unless you have a QEE credit from a prior year that you did not claim. Credits may be carried forward for up to five years.**

The screenshot shows the 'Qualified Education Expense Credit' form. At the top left, it says 'IT-QEE-TP2'. The main heading is 'Qualified Education Expense Credit'. Below the heading is the text: 'Please tell us if you're claiming the credit for:'. There are two checkboxes: the first is checked and labeled 'The current year', and the second is unchecked and labeled 'Carryforward from a prior year'.

Select the appropriate choices, then fill in each field, referencing your Form IT-QEE-SSO1 mailed to you by GRACE following receipt of your contribution. This example uses \$2,500 as the contribution amount.

This credit is for your pre-approved donation to a student scholarship organization (SSO). First let's make sure you qualify.

Was the contribution designated for a particular person?

Yes

No

Did you receive a confirmation letter (Form IT-QEE-SSO1) from the SSO?

Yes

No

Great news, you qualify! Now, enter these amounts.

Contribution amount

\$2,500

This is the "Amount of Contribution" listed on your SSO1 Form mailed to you by GRACE

Pre-approved credit amount

\$2,500

This is the "Preapproved Amount of Credit" listed on your SSO1 Form & on your approval letter from the GA DOR

*From your approved Form IT-QEE-TP1*

If you can't claim the full credit this year, tell us the amount you want to claim. (This is uncommon.)

[Why would I claim less than my full credit?](#)

Education Expense Credit amount to claim this year

\$2,500

Georgia requires you to e-file your return since you're claiming this credit. Keep your Form IT-QEE-SSO1 with your records, since Georgia might ask for it later.

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**Note: If you did not reach the \$10,000 maximum in SALT (state and local) tax deductions, you may deduct your contribution (up to the \$10,000 SALT cap) on your Federal return. These would qualify as "additional state income taxes paid."**