

# Student Information Worksheet

**2016**

▶ 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 2016? . . . . .  Yes  No
- 2 What kind of school did the student attend during 2016? (Check all that apply.)
- |  |  |  |  |
|--|--|--|--|
| a <input type="checkbox"/> Elementary              | c <input type="checkbox"/> College (postsecondary) | e <input type="checkbox"/> Military academy          |  |
| b <input type="checkbox"/> High school (secondary) | d <input type="checkbox"/> Vocational school       | f <input checked="" type="checkbox"/> Not applicable |  |

## Part II – College Student Information

- 1 Did the student complete the first 4 years of postsecondary education as of 1/1/2016? . . . . .  Yes  No  NA
- 2 Was this student enrolled at an eligible education institution during 2016? . . . . .  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 2015 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"/>	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"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If a foreign address: foreign province/state: _____ Postal code: _____ Country: _____					
Totals . . . . .					

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

	Total	Taxable	Tax-free
<b>1</b> Educational assistance that is always tax-free:			
<b>a</b> Veteran or employer assistance from Form 1098-T Worksheets . . . . .	_____		
<b>b</b> Other veteran assistance or certain Indian tribal payments . . . . .	_____		
<b>c</b> Other tax-free employer-provided assistance . . . . .	_____		
<b>d</b> Total . . . . .	_____		_____
<b>2</b> Scholarships, fellowships, and grants not reported on Form W-2:			
<b>a</b> Scholarships and grants from Part IV above . . . . .	_____		
<b>b</b> Other scholarships, fellowships and grants . . . . .	_____		
<b>c</b> Total . . . . .	_____		
<b>3</b> Scholarship reported in 2016 not allocable to 2016 expense . . . . .	_____		
<b>4</b> Amount required to be used for other than qualified education expenses		_____	
<b>5</b> Subtract line 3 and 4 from line 2c. . . . .	_____		
<b>6</b> Total qualified education expenses from Part VI below. . . . .	_____	0.	
<b>7</b> If student is a candidate for a degree, enter the amount used for qualified education expenses, otherwise, enter -0-. . . . .			_____
<b>8</b> Subtract line 7 from line 5. . . . .		_____	
<b>9</b> Taxable part. Add lines 4 and 8. . . . .		_____	
<b>10</b> Tax-free educational assistance. Add lines 1d and 7 . . . . .			_____

**Part VI – Education Expenses**

Description	Total	Amount eligible for					
		American Opportunity Credit  Not Qualified	Lifetime Learning Credit  Not Qualified	Tuition and Fees Deduction  Not Qualified	Qualified Higher Education Expense for 529 Plan  Not Applicable	Qualified Higher Education Expense for ESA  Not Applicable	Qualified Higher Education Expense for US Bonds  Not Applicable
<b>Expenses:</b>							
<b>1</b> Tuition paid from Part IV . . . . . Paid to institution as a condition of enrollment:	_____						
<b>2</b> Fees . . . . .	_____						
<b>3</b> Books, supplies, equipment Paid to other than institution or not a condition of enrollment:	_____						
<b>4</b> Books, supplies, equipment	_____						
<b>5</b> Other course-related . . . . .	_____						
<b>6</b> Room and board . . . . .	_____						
<b>7</b> Special needs expenses . . . . .	_____						
<b>8</b> Computer expenses . . . . .	_____						
<b>9</b> QTP or ESA contribution . . . . .	_____						
<b>10</b> Academic tutoring . . . . .	_____						
<b>11</b> Uniforms . . . . .	_____						
<b>12</b> Transportation . . . . .	_____						
<b>13</b> Total qualified expenses . . . . .	_____						
<b>Adjustments:</b>							
<b>14</b> Refunds . . . . .	_____						
<b>15</b> Tax-free assistance . . . . .	_____						
<b>16</b> Deducted on Sched A . . . . .	_____						
<b>17</b> Used for credit or deduction	_____						
<b>18</b> Used for exclusion . . . . .	_____	0.	0.	0.			
<b>See tax help</b>							
<b>19</b> Total adjustments. . . . .	_____	0.	0.	0.			
<b>20</b> Adjusted qualified expenses	_____	0.	0.	0.	0.	0.	0.

**Part VII – Education Credit or Deduction Election**

1	Elect credit or deduction which results in best tax outcome . . . . .	<input checked="" 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	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 2016 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