

Student Information Worksheet

2015

▶ 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 2015? Yes No
- 2 What kind of school did the student attend during 2015? (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 1/1/2015? Yes No NA
- 2 Was this student enrolled at an eligible education institution during 2015? 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 2014 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
1 Educational assistance that is always tax-free:			
a Veteran or employer assistance from Form 1098-T Worksheets	_____		
b Other veteran assistance	_____		
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 2015 not allocable to 2015 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						Qualified Elementary and Secondary Expense for ESA
		American Oppor- tunity Credit Not Qualified	Lifetime Learning Credit Not Qualified	Tuition and Fees Deduct- ion 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	
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	_____	0.	0.	0.				
See tax help								
19 Total adjustments.	_____	0.	0.	0.				
20 Adjusted qualified expenses	_____	0.	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 2015 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