**Provide Tuition related details as applicable. Add additional Info Sheet if you have more than 2 students. Provide all 1098-T form(s).   
*Note: This is not for K-12 Education***

|  |  |  |
| --- | --- | --- |
| **Student Info** | **Student #1** | **Student #2** |
| Student Name (First Name, Middle Initial, Last Name) | Click or tap here to enter text. | Click or tap here to enter text. |
| Was the student enrolled as a full-time student at a school for any part of 5 calendar months during the tax year? | Click or tap here to enter text. | Click or tap here to enter text. |
| Was the student enrolled in more than one college during the tax year? If yes, provide the number of college(s). | Click or tap here to enter text. | Click or tap here to enter text. |
| Was the student enrolled in a degree or certificate program? | Click or tap here to enter text. | Click or tap here to enter text. |
| Provide the total years of postsecondary education completed before 2023. | Click or tap here to enter text. | Click or tap here to enter text. |
| Did the student take at least half the normal full-time workload for at least one academic period that began in 2023? | Click or tap here to enter text. | Click or tap here to enter text. |
| Has the student been convicted of felony for possessing or distributing controlled substance as of end of 2023? | Click or tap here to enter text. | Click or tap here to enter text. |
| **Education Expenses** | **Student #1** | **Student #2** |
| Did you pay additional Tuition and fees that were not reported on 1098T? If yes, provide the amount and provide the supporting documents | Click or tap here to enter text. | Click or tap here to enter text. |
| Provide the amount you had spent on purchasing course material, supplies, equipment not required to be purchased from the school | Click or tap here to enter text. | Click or tap here to enter text. |
| Provide the amount you had spent on purchasing course materials, supplies, equipment from school | Click or tap here to enter text. | Click or tap here to enter text. |
| Were there any Tuition reimbursements and refunds of the tuition fee paid? If yes, provide the amount and details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Provide Room and Board expenses (only if enrolled at least half-time). List with details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Any amount paid for Computer Technology, equipment, Internet Access and Special needs expenses? List with details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Was any of the tuition or expenses paid from Qualified Tuition program or Coverdell education savings account? If yes, provide details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Are there any scholarships/grants paid that was not entered on 1098T? Provide details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Any fellowships received not reported on 1098T? Provide details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Are there any other tax-free payments received as education assistance? Provide details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Was any of the scholarship received, was for teaching, research and other services? If yes, provide the type of service and the amount received. | Click or tap here to enter text. | Click or tap here to enter text. |
| Was any of the scholarship amount used towards Room and Board, Travel, Purchase of materials not required by school, research or clerical help? If yes, provide details. | Click or tap here to enter text. | Click or tap here to enter text. |
| Do you have any student loan interest paid during the tax year? If yes, provide the 1098E document. | Click or tap here to enter text. | Click or tap here to enter text. |

**Additional Info:**

Click or tap here to enter text.