

Student Expenses Worksheet

1098-T

Tuition Paid (Box 1)	\$
Scholarships (Box 5)	\$
Net Tuition Expenses (Tuition - Scholarships)	\$
At Least Half Time Student?	
Graduate Student?	
Institution TIN:	
Did you have any scholarship income not reported on Form 1098-T?	

This worksheet is for calculating the American Opportunity and Lifetime Learning education credits.

Please provide best estimate of expenses not reported on Form 1098-T. If scholarship amount is greater than total expenses, it may be considered taxable income. If this is the case, reported expenses can reduce the amount of scholarship income taxed.

The following are **NOT** qualified expenses:

- Housing/Room & Board.
- Transportation and/or parking passes.
- Meal Plan.
- Materials that are not required for class.

Qualified Education Expenses

Textbooks	
Lab Equipment	
Required Class Materials	
Other (List Below)	
Total Qualified Expenses:	

Required Questions (Yes/No)	
Has the American Opportunity credit been claimed for 4 prior tax years?	
Was the student enrolled at least half-time?	
Was the student convicted, before the end of the tax year, of a felony for possession or distribution of a controlled substance?	
Did the student complete the first 4 years of postsecondary education before the end of the tax year?	
Total Expenses (Tuition + Qualified Expenses):	