

Education Credits Questionnaire

NOTE: This questionnaire pertains only to post-secondary education. This includes accredited colleges and universities, as well as accredited vocational schools (e.g., adult professional advancement courses). Please provide the following information:

Name of the Student: _____

Name, address and EIN number of the school: _____

Has the HOPE Scholarship or American Opportunity Credit been claimed before for this student?
If so, when [years]? _____

Was the student enrolled at least half-time in the program? _____

Did the student complete the first four years of post-secondary education before 2016? _____

Is the student pursuing a degree? _____

Did the student receive a Form 1098-T from the school? _____

Did the student receive a 1098-T from the school in the prior year? _____

Expenses paid directly to the school (specify, e.g., *tuition, room and board*): _____

Expenses not paid directly to the school (specify: *books, lab materials, computer, etc.*):
