

Higher Education Expenses (for Form 8863)

Attach all Forms 1098-T. Also include a calendar year financial (not academic) transcript for each institution attended. This transcript should clearly show amounts billed, amounts paid, and the dates of each billing/payment.

Student Name:	<hr/>		
Graduate Student?	Undergrad Year?	<hr/>	
Full-time Student?	Terms Attended	<hr/>	
	Spring	Fall	
Books	<hr/>	Parking Permit	<hr/>
Lab Fees	<hr/>	Other Fees	<hr/>
Special Equipment	<hr/>	Supplies	<hr/>
Other (describe)	<hr/>		
	<hr/>		

Student Name:	<hr/>		
Graduate Student?	Undergrad Year?	<hr/>	
Full-time Student?	Terms Attended	<hr/>	
	Spring	Fall	
Books	<hr/>	Parking Permit	<hr/>
Lab Fees	<hr/>	Other Fees	<hr/>
Special Equipment	<hr/>	Supplies	<hr/>
Other (describe)	<hr/>		
	<hr/>		

Education Expense Notes

If not included on the financial transcript be sure to include amounts for lab, parking, and other fees as well as books and other required equipment and supplies (special software, paper, etc.). *Do not include room and board expenses or other personal items (dorm furnishings, etc.) !*

Education credits require additional due diligence *and are a highly audited area*. Please provide complete and accurate information. And please be prepared to answer follow up questions for each student/credit being claimed.

It is important to know what year of undergraduate education each student was completing. Is it the student's first year? Or their fifth? Which terms were attended? Full or part time? Again, please complete all necessary information.