

2023 STUDENT INFORMATION WORKSHEET INDIVIDUAL (FORM 1040)

Name _____

Date _____

The IRS requires certain documentation to claim deductions and tax credits related to education expenditures for you and your dependents. To claim these deductions and tax credits, complete this worksheet for each student included in your tax reporting.

Provide a copy of Form 1098-T with this completed worksheet.

Student Name	School Name

Yes / No

1. Did the student attend school at any time during the tax year? _____
2. Did the student complete the first 4 years of postsecondary education as of the end of the tax year? _____
3. Did the student enroll at a university institution during the tax year? _____
4. Did the student enroll in a program that leads to a degree, certificate, or other credential? _____
5. Did the student take courses as part of a postsecondary program or to acquire or improve job skills? _____
6. Did the student take at least one-half the normal full-time workload for one academic period? _____
7. Has the student been convicted of a felony for possessing or distributing a controlled substance? _____
8. Were education expenses paid for an academic period beginning in 2023 or first 3 months of 2024? _____
9. What portion of the expenses were paid with tax exempt funds? _____
10. Was a distribution from a Coverdell ESA or Qualified Tuition Program used to pay expenses? _____
11. Was an education tax credit claimed for the student for the previous 4 tax years? _____

Comments: