

**prepares**  
**Tuition Deduction, Form 8863**

Primary Taxpayer Name

Primary Taxpayer SSN

 -  - 

**800-TAX REFUND will use this worksheet to figure your Tuition & Fees Deduction and/or prepare your Federal Form 8863 (Education Credit). Our fee to figure your Tuition & Fees Deduction and/or prepare your Federal Form 8863 is \$50.00, which will be added to the Tax e-form base fee. If you do not qualify for the deduction or credit on your Federal or State tax return, you will not be charged.**

## Payment Authorization

Choose  
how to  
pay for  
this  
service:

► Credit/  
Debit  
Card :  
  
► Account  
Debit :

I authorize 800-TAX REFUND, Inc. to charge an additional amount of \$50.00 for the preparation of one to two Federal tax forms produced by this worksheet, to the credit/debit card account indicated on Page 1 of my Tax e-form. This amount is in addition to the Tax e-form base fee charge which I authorized on Page 1 of my Tax e-form.

I authorize 800-TAX REFUND, Inc. to initiate an additional debit amount of \$50.00 for the preparation of one to two Federal tax forms produced by this worksheet, from the depository account indicated on Page 1 of my Tax e-form. This amount is in addition to the Tax e-form base fee debit which I authorized on Page 1 of my Tax e-form.

cardholder's  
signature \_\_\_\_\_

account  
owner's  
signature \_\_\_\_\_

If you received a 2024 Form 1098-T or other tuition statement from your educational institution, please fax the statement(s) along with this worksheet.

## QUALIFIED TUITION &amp; FEES DEFINED

Qualified Tuition and Fees are amounts paid in 2024 for tuition and fees required for the student's enrollment at any accredited college, university, vocational school, or other post-secondary (after high school) institution. It does not matter whether the expenses were paid in cash, by check, by credit card, or with borrowed funds. Expenses paid on behalf of the student by someone other than the student (such as a relative) are treated as paid by the student. Also, expenses paid (or treated as paid) by a student who is claimed as a dependent on your tax return are treated as paid by you.

Qualified Tuition and Fees do not include amounts paid for:

- room and board, insurance, medical expenses, health fees, transportation, or other similar personal living expenses
- course-related books, supplies, or equipment, unless required by the institution as a condition of enrollment
- any course involving sports, games, or hobbies, unless such course is part of the student's degree program

Qualified Tuition and Fees paid in 2024 for an academic period that begins in the first 3 months of 2025 is eligible for the 2024 deduction/credit.

## ELIGIBLE STUDENTS

Eligible Students for whom you paid tuition and fees in 2024 include yourself, your spouse (if married filing joint), and your dependents:

- |                       |  |  |
|-----------------------|--|--|
| A. Student Name _____ | Check if student was at least a half-time student for at least one academic period in 2024: <input type="checkbox"/> | Check if student, as of Jan 1 2024, had not completed the first 4 years of postsecondary education: <input type="checkbox"/> |
| B. Student Name _____ | Check if student was at least a half-time student for at least one academic period in 2024: <input type="checkbox"/> | Check if student, as of Jan 1 2024, had not completed the first 4 years of postsecondary education: <input type="checkbox"/> |
| C. Student Name _____ | Check if student was at least a half-time student for at least one academic period in 2024: <input type="checkbox"/> | Check if student, as of Jan 1 2024, had not completed the first 4 years of postsecondary education: <input type="checkbox"/> |

## PAYMENTS AND ADJUSTMENTS (do not complete if faxing Form 1098-T or tuition statement)

Student A.

Student B.

Student C.

Amounts billed by school for qualified tuition and fees in 2024:

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Payments made by taxpayer to school for qualified tuition and fees in 2024 (not including scholarships, or grants):

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Check this box if the amount on line 1 or 2 includes expenses for an academic period beginning the first 3 months of 2025:

☐
☐
☐

Adjustments to tuition made by school for a prior year:

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Scholarships, grants, or refunds used to offset tuition in 2024:

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_