

prepares  
Tuition Deduction, Form 8863

Primary Taxpayer Name  
\_\_\_\_\_

Primary Taxpayer SSN  

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**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 \$199.00 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:	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 \$199.00 Tax e-form base fee charge which I authorized on Page 1 of my Tax e-form.	cardholder's signature _____
▶	Account Debit:	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 \$199.00 Tax e-form base fee debit which I authorized on Page 1 of my Tax e-form.	account owner's signature _____	

If you received a 2023 Form 1098-T or other tuition statement from your educational institution, please fax the statement(s) along with this worksheet.

**QUALIFIED TUITION & FEES DEFINED**

Qualified Tuition and Fees are amounts paid in 2023 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 2023 for an academic period that begins in the first 3 months of 2024 is eligible for the 2023 deduction/credit.

**ELIGIBLE STUDENTS**

Eligible Students for whom you paid tuition and fees in 2023 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 2023: <input type="checkbox"/>	Check if student, as of Jan 1 2023, 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 2023: <input type="checkbox"/>	Check if student, as of Jan 1 2023, 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 2023: <input type="checkbox"/>	Check if student, as of Jan 1 2023, 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 2023:		
\$ _____	\$ _____	\$ _____

Payments made by taxpayer to school for qualified tuition and fees in 2023 (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 2024:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Adjustments to tuition made by school for a prior year:		
\$ _____	\$ _____	\$ _____
Scholarships, grants, or refunds used to offset tuition in 2023:		
\$ _____	\$ _____	\$ _____