

2017 Forms 8863 & 8917 - Education Cr & Ded

TS	1	F	2	ST	3																
Student's SSN		Student's First Name				Student's Last Name															
4		5				6					Yes	No									
23	Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of 4 times in any prior years? If "No," continue to line 24; if "Yes," the student does not qualify for AOTC.										7	8									
24	Was the student enrolled at least half-time for at least one academic period that began in 2017 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary education credential? If "Yes," continue to line 25; if "No," the student does not qualify for AOTC.										9	10									
25	Did the student complete the first 4 years of post-secondary education before 2017? If "No," continue to line 26; if "Yes," the student does not qualify for AOTC.										11	12									
26	Was the student convicted before the end of 2017 of a felony for possession or distribution of a controlled substance? If "Yes," the student does not qualify for AOTC; if "No," choose which benefit is most beneficial.										13	14									
Years AOTC taken		15	Pursuing a degree?		16	2016			2017												
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution										17											
ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution										18											
Tax-free education assistance received in 2017 allocable to the academic period										19											
Tax-free education assistance received in 2018 (and before 2017 return is filed) allocable to the academic period										20											
Refunds of qualified education expenses paid in 2017 if the refund is received before the 2017 return is filed										21											
8863																					
12-23																					
Education benefit being claimed for this student										22	AOTC	23	LLC	24	Tuition and fees deduction						
Educational Institution EIN										25											
Educational Institution Name										26											
Street										27											
City										28											
U.S. ONLY State, ZIP										29	30										
Foreign ONLY Province/State, Country, Postal Code										31					32	33	Yes	No			
Did the student receive Form 1098-T from this institution for 2017?										34											35
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?										36											37
8867 Due diligence requirements																					
5 In addition to your notes, list any documents that you relied on. Additional entries for this section can be made on the 8867 screen.																					
38	1098-T		39	Receipts		40	School Transcripts		Other		41										
11	Did the taxpayer provide substantiation, such as Form 1098-T and receipts, for the qualified tuition and related expenses for the claimed AOTC?										42										
Complete this section only ONCE per return on the first screen																					
Adjustment to modified adjusted gross income										43											
44	Taxpayer is a dependent of another, but that person is not claiming the exemption or education credit																				
45	Make the American Opportunity Credit NOT refundable																				

2017 Additional Education Institutions

Educational Institution EIN	1				
Educational Institution Name	2				
Street	3				
City	4				
U.S. ONLY State, ZIP	5	6			
Foreign ONLY Province/State, Country, Postal Code	7		8	9	
Did the student receive Form 1098-T from this institution for 2017?				Yes	No
				10	11
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?					
				12	13

Educational Institution EIN	14				
Educational Institution Name	15				
Street	16				
City	17				
U.S. ONLY State, ZIP	18	19			
Foreign ONLY Province/State, Country, Postal Code	20		21	22	
Did the student receive Form 1098-T from this institution for 2017?				Yes	No
				23	24
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?					
				25	26

Educational Institution EIN	27				
Educational Institution Name	28				
Street	29				
City	30				
U.S. ONLY State, ZIP	31	32			
Foreign ONLY Province/State, Country, Postal Code	33		34	35	
Did the student receive Form 1098-T from this institution for 2017?				Yes	No
				36	37
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?					
				38	39

Educational Institution EIN	40				
Educational Institution Name	41				
Street	42				
City	43				
U.S. ONLY State, ZIP	44	45			
Foreign ONLY Province/State, Country, Postal Code	46		47	48	
Did the student receive Form 1098-T from this institution for 2017?				Yes	No
				49	50
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?					
				51	52

Educational Institution EIN	53				
Educational Institution Name	54				
Street	55				
City	56				
U.S. ONLY State, ZIP	57	58			
Foreign ONLY Province/State, Country, Postal Code	59		60	61	
Did the student receive Form 1098-T from this institution for 2017?				Yes	No
				62	63
Did the student receive Form 1098-T from this institution for 2016 with box 2 filled in and box 7 checked?					
				64	65

8863
12-23