

STEP 1 – Federal return – claim the charitable deduction

The screenshot shows the 'Federal Taxes' section of a tax software interface. The main heading is 'Let's enter your donations one at a time'. Below this, there is a question 'Who did you donate to in 2014?' with a text input field containing 'Apogee Georgia School Choice Scholarsh' and a note '(Enter one charity at a time)'. A blue arrow points from a callout box 'Enter Apogee Georgia School Choice Scholarship Fund' to the input field. Below the input field is a link 'What qualifies as a charity?'. The next section is 'What did you donate?' with four options, each with an 'Add' button: 'Items (clothes, furniture, cars, etc.)', 'Money (cash, check, credit/debit card payments, payroll deductions)', 'Stock (ESPPs, RSUs, private stock, common stock)', and 'Mileage and travel expenses (Mileage, parking, out-of-pocket expenses)'. A blue arrow points from a callout box 'Select Add Money' to the 'Add' button for the 'Money' option.

STEP 1a – enter in the amount you funded to Apogee

The screenshot shows the 'Federal Taxes' section of a tax software interface. The main heading is 'Tell us about the money you gave to Apogee Georgia School Choice Scholarship Fund'. Below this, there is a question 'How often you gave' with three radio button options: 'One time' (selected), 'Multiple times, same amount', and 'Multiple times, different amounts'. Below the options is a horizontal line. Below the line is a question 'Amount of Donation' with a text input field containing '2,500'. The input field is circled in red. At the bottom, there are two buttons: 'Back' and 'Done with This Donation'.

Once you hit Done ... this is what you should see...

Wages & Income   **Deductions & Credits**   Health Insurance   Other Tax Situations   Federal Review   Smart Check

## Review All Your Charities

Here's what we have so far. You can **Edit** or **Delete** charities you've already entered, or add a new one.

CHARITY NAME	AMOUNT	
Apogee Georgia School Choice Scholarship Fund	\$2,500.00	<a href="#">Edit</a> <a href="#">Delete</a>
<b>Total</b>	<b>\$2,500.00</b>	

[+ Add Another Charity](#)

When you're finished, select **Done with Charitable Donations**.

[Back](#) [Done with Charitable Donations](#)

Once you've completed your Federal Return, it will be time to start your State return. Below is the first place you will see related to the Tax credit:

Personal Info   Federal Taxes   **State Taxes**   Review   File

Prepare State   Your State Returns   State Review

## Take a look at Georgia credits and taxes

These are different than federal tax breaks. You may be able to save some money if you can claim any of them. There might also be Georgia taxes that apply to you.

**Personal, home and family credits**

- Low Income Tax Credit [Learn More](#) [Start](#)
- Georgia Homebuyer Credit [Learn More](#) [Start](#)
- Education Expense Credit [Learn More](#) [Start](#)**
- Qualified Caregiving Expense Credit [Learn More](#) [Start](#)
- Other State Tax Credit [Learn More](#) [Start](#)
- Disabled Person Home Purchase or Retrofit Credit [Learn More](#) [Start](#)

**This is the one!**

Complete this page, confirming you received an SSO1 form. You will not have received a TP1 from the DOR as they no longer send those out. Instead, you should've received an approval letter from the DOR in the mail. If you received an SSO1 tax credit receipt from Apogee, that is evidence enough that you were approved.

## Did You Receive Preapproval for the Education Expense Credit?

This credit requires preapproval by Georgia.

To get the credit, you'll need to have already received form QEE-TP1 from the Department of Revenue, and form QEE-SSO1 from the student scholarship organization.

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SELECT YES

Yes No

Next up is Additional Info related to the Tax credit

## Additional Info for the Education Expense Credit

Tell us the information below and we'll help you get the credit if you qualify. [Explain This](#)

- I deducted my contribution on my federal return, and need to add it back on my Georgia return. (We'll handle that)
- I received contribution confirmation (form QEE-SSO1) from the student scholarship organization.
- I didn't make a contribution for the direct benefit of any dependents.

Check the boxes

**Note:** Don't enter credits received from a passthrough entity here. Enter all Schedule K-1 credits on the **Business and K-1 Credits** screen.

Preapproved contribution amount (see QEE-TP1) 2,500

Enter in Amt approved on the DOR approval letter

Total Contribution amount (see QEE-SSO1) 2,500

Enter in Amt actually paid to Apogee

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Continue

The next section would only apply to those of you who that may have participated in the past but who were unable to utilize the full extent of the approved and funded credit. The vast of majority of us will be selecting “no” but if you are unsure about what to do here, in the event you need to say “yes, please feel free to contact Apogee and we will be happy to help guide you through that process.

## Georgia Credit Carryforwards

In Georgia, most credits are limited to your tax liability and they are not refundable.

If you are not able to take the full amount of your credit in a previous year, you may be able to take the credit in later years until you use it up or time runs out.

[Georgia Credits with Carryforward Provisions](#)

**Do you have any Georgia credit carryforwards?**

- Yes, I have carryforward credits to enter
- No, I don't have any carryforward credits

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Continue

After hitting Continue, you should see a screen similar to this:

## Take a look at Georgia credits and taxes

Education Expense Credit [Learn More](#)

\$2,500

Edit

These are different than federal tax breaks. You may be able to save some money if you can claim any of them. There might also be Georgia taxes that apply to you.

### Personal, home and family credits

Low Income Tax Credit [Learn More](#)

Start

Georgia Homeowner Credit [Learn More](#)

Start

This should complete the process of successfully claiming your Apogee tax credit. If you should have any additional questions, please feel free to contact Apogee at any time.