

Georgia Department of Revenue Tutorial on Online Applications for Education Tax Credits

With Additional Information
By GRACE Scholars

The next three slides were prepared by GRACE
Scholar based on information supplied by the
Georgia Department of Revenue

Using the Online Approval System

- Go to *Georgia Tax Center* at <https://gtc.dor.ga.gov>.
- If you have previously filed a Georgia income tax return, you should be already registered, but you will need to *Sign Up for Online Access*
- GTC has *How To Videos* to help you with *Online Access and Registration* – see next slide

Locating *How To Videos*

- To locate video on signing up for Online Access follow this path:
Instructions/Videos > How To Videos > Registration and Login > Sign Up for Online Access
- To locate video on *Registration*, follow same path as above and choose *Registration* instead of *Sign up for Online Access*.

Starting an Online Application

- To apply for an education tax credit, login to your personal GTC account
- On your personal home screen, locate “My Accounts,” click on your ID (SSN with only last four digits showing), and a new screen will appear
- On the new screen, locate the “I Want To” menu at left and click on “Submit QEE Credit Form”

The remainder of this presentation
was prepared by the Georgia
Department of Revenue

Enter all required fields on the Qualified Education Expense Credit application . Yellow fields signify fields that are required to complete application.

QEE-TP1 Preapproval Form

Step 1: Click to enter contributor information.

Choose your filing status. *****Your filing status is required. You must chose one.**

Individual Filing Single or Head of Household

Individual Filing A Joint Married Joint Return

Individual Filing Married Separate Return

C Corporation or Trust

Subchapter S Corporation for Georgia Purposes, Partnership, or Limited Liability Company

Enter taxpayer information.

Taxpayer ID Type Taxpayer ID

First Name or Name of Entity MI

Last Name if Individual Suffix

Address

City State ZIP

Enter contributor information.

Calendar year in which contribution will be made:

Tax year end of contributor:

Contact Person

Phone Number

OK Cancel

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All fields have been completed in its entirety when all fields are GREEN. Click OK to continue the electronic application process.

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Menu
Home
Back
Help
Log Off
RunDate: 05-Jan-2012
Submit
Cancel
Attachments Add

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QEE-TP1 Preapproval Form

Step 1: Click to enter contributor information.

Choose your filing status.

Individual Filing Single or Head of Household
 Individual Filing A Joint Married Joint Return
 Individual Filing Married Separate Return
 C Corporation or Trust
 Subchapter S Corporation for Georgia Purposes, Partnership, or Limited Liability Company

Enter taxpayer information.

Taxpayer ID Type: Social Security # [dropdown] Social Security #: 123-45-6789
First Name or Name of Entity: JOHN MI [dropdown]
Last Name if Individual: DOE Suffix [dropdown]
Address: 314564
City: ATLANTA State: GEORGIA [dropdown] ZIP: 3000

Enter joint information.

ID: 987-65-4321
First Name: JOANE MI: D
Last Name: DOE Suffix: [dropdown]

Enter contributor information.

Calendar year in which contribution will be made: 2012
Tax year end of contributor: 31-Dec-2012 [calendar icon]
Contact Person: JOHN
Phone Number: (222) 222-2222

OK Cancel

Internet 100%

Enter intended Contribution amount and designated SSO. Click OK to continue the electronic application process.

The screenshot displays the 'OEE-TP1 Preapproval Form' interface. On the left is a navigation menu with options: Home, Back, Help, Log Off, Data: tap, RunDate: 04-Jan-2012, Submit, Cancel, Attachments, and Add. The main content area shows the following steps:

- Step 1: Click to enter contributor information.
Year end of contributor: 12/31/2012, Contribution year: 2012
- Step 2: Click to enter contributor amounts.

A modal dialog titled 'Enter contribution information.' is open, containing the following fields:

- Amount of the Contribution the taxpayer intends to make: 2,500.00
- Name of scholarship organization: (dropdown menu)
- Taxpayer I.D.# of scholarship organization: (text input field)

At the bottom of the dialog are 'OK' and 'Cancel' buttons. The 'OK' button is circled in red.

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Check the box required to submit the completed pre-approval form on behalf of the taxpayer. Type in the taxpayer's name in the required field.

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Menu
Home
Back
Help
Log Off
RunDate: 05-Jan-2012

Submit
Cancel

Attachments Add


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OEE-TP1 Preapproval Form

Step 1: Click to enter contributor information.
Year end of contributor: 12/31/2012, Contribution year: 2012

Step 2: Click to enter contributor amounts.
Amount of contribution \$2500

Step 3: Click to give applicant consent.

Read and approve the application consent below.

Applicant certifies that all information contained above is true to his/her best knowledge and belief and is submitted for the purpose of obtaining preapproval from the Commissioner.

Submit my Qualified Education Expense Credit Preapproval Form

Applicant Name

OK Cancel

Menu

- Home
- Back
- Help
- Log Off

RunDate: 05-Jan-2012

Submit

Cancel

Attachments Add



QEE-TP1 Preapproval Form

Step 1: Click to enter contributor information.

Year end of contributor: 12/31/2012, Contribution year: 2012

Step 2: Click to enter contributor amounts.

Amount of contribution \$2500

Step 3: Click to give applicant consent.

Applicant approved form information.

Step 4: Click to attach your QEE-TP1.

Select a file to attach

Type **Required** QEE-TP1 Form

Description

Browse...

Save Cancel

Attach the required, signed, physical copy of the QEE Credit application (Form IT-QEE-TP1).

Menu

- Home
- Back
- Help
- Log Off
- RunDate: 05-Jan-2012

Submit

Cancel

Attachments

✓ QEE-TP1 Preapproval Form

✓ Step 1: Click to enter contributor information.

Year end of contributor: 12/31/2012, Contribution year: 2012

✓ Step 2: Click to enter contributor amounts.

Amount of contribution \$2500

✓ Step 3: Click to give applicant consent.

Applicant approved form information.

! Step 4: Click to attach your QEE-TP1.

Select a file to attach

Type: QEE-TP1 Form

Description: QEE APPLICATION

C:\Documents and Settings\labharper\Desktop\svc-docuteam@dor.ga.gov_20110719_151514.pdf

Browse...

Save Cancel



Review attached documents before final submission.

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Menu

- Home
- Back
- Help
- Log Off


RunDate: 05-Jan-2012

Submit

Cancel

Attachments Add

SVC-
docuteam@dor.ga... ✗
QEE APPLICATION



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QEE-TP1 Preapproval Form

- Step 1: Click to enter contributor information.**
Year end of contributor: 12/31/2012, Contribution year: 2012
- Step 2: Click to enter contributor amounts.**
Amount of contribution \$2500
- Step 3: Click to give applicant consent.**
Applicant approved form information.
- Step 4: Click to attach your QEE-TP1.**
Attachment completed

Review your request and click Submit on the left navigation bar to continue.

Read statement before submitting the request.

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Menu

Home

Back

Help

Log Off

RunDate: 05-Jan-2012

Submit

Cancel

Attachments Add

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QEE APPLICATION



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QEE-TP1 Preapproval Form

Step 1: Click to enter contributor information.

Year end of contributor: 12/31/2012, Contribution year: 2012

Step 2: Click to enter contributor amounts.

Amount of contribution \$2500

Step 3: Click to give applicant consent.

Applicant approved form information.

Step 4: Click to attach your QEE-TP1.

Attachment completed

Review y
the le

You are about to submit a request. A completed request does not mean the requested changes have been made; rather it means your request was received by the system and is awaiting approval. Not all requests are approved.

Are you sure you want to submit this request?

Yes

No

Done

Internet

10

Confirmation page

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Menu

[Home](#)
[Back](#)
[Help](#)
[Log Off](#)
RunDate: 05-Jan-2012

[Ok](#)

[Print Confirmation](#)



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Confirmation

Request Information

Lgcn	ALEFFUNDINC
Status	Pending...
Confirmation Number	1-856-754-144
Taxpayer Name	ALEF FUND, INC.
Federal Employer ID #	28-2919210
Request Title	Qualified Education Expense Credit Preapproval Form
Submitted	05-Jan-2012

Your confirmation number is **1-856-754-144**.

Your request has been submitted and will be processed in the order that it was received.

If you have any questions, please contact us at 1-877-GADOR11 (1-877-423-6711).

Done

Internet

10

Return to Main Screen.

Menu


- Home
- Help
- Log Off
- RunDate: 05-Jan-2012

View

- My Profile
- All Accounts

I Want To

- Add Access to Another Account
- Register New Tax Account
- Update Registration Info
- Make Multiple Payments
- Submit Documentation
- Submit Power of Attorney
- Upload File
- Designate Responsible Parties
- Submit QEE Credit Form
- Transfer Film Tax Credit



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Mailing Address Edit 1440 SPRING ST NW
ATLANTA GA 30309-2832

Business Location Add
Address

Accounts⁰ Requests¹ E-Messages Letters

My Accounts⁰

My Accounts Filter

Id	Account Type	Name	Frequency	Address	Balance
----	--------------	------	-----------	---------	---------

ALEF FUND, INC.

Federal Employer ID # 26-2919210
 Balance \$0.00

Names and Addresses

Legal Name ALEF FUND, INC.
 DBA Name Add
 Mailing Address Edit 1440 SPRING ST NW
 ATLANTA GA 30309-2832
 Business Location Add
 Address

Accounts **Requests** E-Messages Letters

Search

Requests from 06-Nov-2011				Change Date	Confirmation Number	Defaults	Filter
Submitted	Processed	Account	Id	Period	Title	Status	Confirmation #
05-Jan-2012	05-Jan-2012				Qualified Education Expense Credit Preapproval Form	Completed	1-856-754-144

Click on the “Requests” tab. You will see the submitted QEE application along with the Request Status and Confirmation #.

Click on the “Letters” tab. You will see the DOR pre-approved letter for all submitted QEE applications.

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Additional Information

- The Dept. of Revenue will no longer re-print or re-issue approval letters. Because the process is now completely automated, approval letters will be mailed directly to the taxpayer from DOR's internal system. Taxpayer should make sure that a correct address is on file before applying for the credit. Additionally, letters can now be viewed and printed by taxpayers and SSOs via GTC.
- If a taxpayer does not make his or her contribution within the 60-day window following receipt of the approval letter, the taxpayer will need to re-apply for the tax credit credit.

If you have questions regarding the online applications for education tax credits, you can contact the DOR Tax Credits & Incentives Unit at 1-877-423-6711. Ask for help with “Qualified Education Expense Credit applications.”