

UW1123

UW Service Center ALIEN TAX INFORMATION REQUEST

All non-USA citizens who receive compensation **MUST** complete this form
IN ITS ENTIRETY to determine residency status for tax purposes.

B. USA Social Security Number (Leave blank if applied for or unknown)

SECTION 1. PERSONAL INFORMATION

A. Family Name (Surname) First Middle		C. Date of Birth (mm/dd/yyyy)	
D. United States Street Address		E. USA Home Telephone Number ()	
F. United States City State ZIP Code	G. Email Address		
H. Name of employing department at University of Wisconsin		I. Appointment Title	J. Are you a degree candidate? <input type="checkbox"/> Yes <input type="checkbox"/> No
K. Were you employed in USA before coming to University of Wisconsin? <input type="checkbox"/> Yes <input type="checkbox"/> No	L. Name of previous employer	M. Dates From To	N. Did you use treaty benefits? <input type="checkbox"/> Yes <input type="checkbox"/> No

SECTION 2. IMMIGRATION & ALIEN TAX INFORMATION

A. Country of citizenship	B. Country of permanent residence (Not United States)
C. Country Issuing Passport	D. Passport Number
E. Current INS Visa Type (Check appropriate box below) <input type="checkbox"/> USA Permanent Resident or Permanent Resident Applicant. Proceed to Section 3.	

If you check F-1, H-1, J-1 or Other--proceed to Section 3.

F-1 INS Visa Type:

- F-1 Student
 F-1 Student (post graduation practical training with student status and employment authorization)

Has this been authorized on your I-20?
 Yes No
Dates authorized on your EAD Card:
From: _____
To: _____

H-1 INS Visa Type:

- H-1 Distinguished Worker
Dates authorized on your I-797:
From: _____
To: _____

J-1 INS Visa Type:

- J-1 Student
 J-1 Student (post graduation academic training with student status and employment authorized by: _____)

J-1 Teacher or Trainee (non student)
Insert the following from IAP66, Section 4 or DS 2019 Section 4
Exchange Visitor Category

Subject/Field Code Remarks

Other INS Visa Type:

- Other INS Visa Type(List):

If you check any of these boxes, your residency status is derived from and dependent on the F-1 or J-1 visa holder's status. Proceed to Section 3.

Spousal INS Visa Type:

- F-2 Spouse/Dependent of F-1
 J-2 Spouse/Dependent of J-1 Student
Dates authorized on your EAD Card:

From: _____

To: _____

- J-2 Other-Spouse/Dependent of J-1 Teacher or Trainee (non-student)
Dates authorized on your EAD Card:

From: _____

To: _____

SECTION 3. GREEN CARD TEST --

A. **PERMANENT RESIDENT:** Are you a lawful USA immigrant or permanent resident who possesses an Alien Registration Card ("Green Card")?
 YES -- You are a RESIDENT ALIEN for tax purposes. Date of Green Card _____ Proceed to Section 5.
 NO -- Proceed to Section 4.

B. **PERMANENT RESIDENT APPLICANT:** Have you applied for Permanent Resident status and received an "I-551" stamp in your passport or an INS letter stating approval of your application?
 YES -- You are a RESIDENT ALIEN for tax purposes. Date of Application approval _____ Proceed to Section 5.
 NO -- Proceed to Section 4.

C. **PERMANENT RESIDENT APPLICANT:** Have you applied for Permanent Resident Status, but not received approval yet? Complete the following and Proceed to Section 4.
 YES Date that you applied: _____ Do you have an Employment Authorization (EAD) card?
 YES Dates Authorized: From: _____ To: _____
 NO NO

(OVER)

SECTION 4. SUBSTANTIAL PRESENCE CALCULATION -- See explanation in IRS Publication 519

A. Date of first USA entry ever _____ INS Visa Type during first USA entry _____	B. Expiration date of current status (DATE FROM I-20 Section 5 or IAP66 Section 3 or DS-2019 Section 3) _____		
C. Detail the number of days you were physically present in the United States by calendar year. The term "calendar year" refers to the period January 1 to December 31.			
Column 1 Calendar Year in USA (e.g., 19__ or 20__)	Column 2 INS Visa Type (e.g., F-1/student)	Column 3 Specific dates present. (For example, 01/01/XX - 12/31/XX).	Column 4 Number of days physically present
Current calendar year _____	_____	_____	_____
Last calendar year _____	_____	_____	_____
Two years ago _____	_____	_____	_____
Three years ago _____	_____	_____	_____
Four years ago _____	_____	_____	_____
Five years ago _____	_____	_____	_____
Six years ago _____	_____	_____	_____
If you were ever in the U.S. on any F or J visa prior to these years, please list the dates: _____			

D. Complete the following ONLY if you are a J-1, J-2, F-1 or F-2 visa holder.

F-1 OR J-1 STUDENT or F-2 OR J-2 SPOUSE:

- I was physically present in the USA as a student, trainee, or teacher for any part of five or fewer calendar years **OR** I am the F-2 or J-2 spouse of this individual. Therefore I am a **NONRESIDENT ALIEN** and exempt from the Substantial Presence Test for tax purposes. Proceed to Section 5.
- I was physically present in the USA as a student, trainee, or teacher for more than five calendar years **OR** I am the F-2 or J-2 spouse of this individual. Proceed to Section E below.

J-1 TEACHER OR TRAINEE (NON-STUDENT) or J-2 SPOUSE:

- I was **never** physically in the USA within the six calendar years preceding the current year **OR** I was physically present in the USA as a student, trainee, or teacher for **only one calendar year** within the six calendar years preceding the current year **OR** I am the J-2 spouse of this individual. Therefore, I am a **NONRESIDENT ALIEN** and exempt from the Substantial Presence Test for tax purposes. Proceed to Section 5.
- I was physically in the USA for any part of two or more of the preceding six calendar years **OR** I am the J-2 spouse of this individual. Proceed to Section E below.

E. SUBSTANTIAL PRESENCE TEST

Student visa holders do not include days present in the first five calendar years that you were here.
Non-student J-1 or J-2 visa holders do not include days present in the first 2 years of the preceding six calendar years.

Column 1 Calendar Year in USA (e.g. 20__)	Column 2 Number of days physically present	Divided by	Column 3 Calculation Factor	=	Column 4 Computation For Substantial Presence Test (Col 2 divided by Col 3)
Current calendar year _____	_____	÷	1	=	_____ (E1)
Last calendar year _____	_____	÷	3	=	_____
Two years ago _____	_____	÷	6	=	_____
TOTAL of Column 4					_____ (E2)

RESULTS OF SUBSTANTIAL PRESENCE TEST:

A person who has been in the USA 31 days or more in the current calendar year, **AND** 183 days or more in combined current and two prior calendar years (see Lines E1 and E2) = **Meets Substantial Presence Test.**
 A person not meeting both of the above requirements = **Does not meet Substantial Presence Test.**

BASED ON THE ABOVE RESULTS:

- I have **MET THE SUBSTANTIAL PRESENCE TEST.** Therefore, I am a **RESIDENT ALIEN** for tax purposes. Proceed to Section 5.
- I have **NOT MET THE SUBSTANTIAL PRESENCE TEST.** Therefore, I am a **NONRESIDENT ALIEN** for tax purposes. Proceed to Section 5.

SECTION 5. CERTIFICATION OF INFORMATION

For tax purposes, I am a:		
<input type="checkbox"/> PERMANENT RESIDENT OR APPLICANT	<input type="checkbox"/> RESIDENT ALIEN	<input type="checkbox"/> NONRESIDENT ALIEN
I certify that to the best of my knowledge, all of the information I have provided above is true, correct and complete.		
Date _____	Signature _____	Office Telephone Number _____