

Glacier Quick Guide

You will receive an email similar to the one below. Please read and follow the directions



Wed 9/26/2018 3:59 PM

support@online-tax.net

Payments from University of Massachusetts

To Sean Martin

Cc Sean Martin

Dear Sean Martin,

The Internal Revenue Service (IRS), the U.S. government tax authority, requires University of Massachusetts to collect information from all non-U.S. citizens and non-permanent resident aliens to determine the appropriate rate of tax withholding and reporting for any payments that may be made to such individuals.

You have received this email because you may receive payments from University of Massachusetts. For your convenience, University of Massachusetts allows you to provide the required information and complete the necessary forms via the Internet from any web-accessed computer using the GLACIER Online Tax Compliance System. The information and forms must be provided prior to any payment so that the correct tax withholding and reporting decisions are made; failure to do so may result in the maximum rate of tax withholding and/or delayed payment. Information provided to GLACIER is transmitted and stored securely and will only be used by University of Massachusetts for purposes of tax withholding and reporting.

Employees will be unable to complete Glacier until you arrive in the U.S. You will need to complete Glacier once you have entered the U.S.

You must access GLACIER and provide the requested information within 10 days of arriving. If you do not provide the requested information within 10 days, the maximum amount of U.S. tax will be withheld from any payments made to you.

To login to GLACIER, follow the steps below:

Click on the following web link: <http://www.online-tax.net> ; if the link does not automatically open, simply open your Internet Browser (preferably Internet Explorer) and enter the website address <http://www.online-tax.net>.

Click on the GLACIER logo to enter the website.

At the login screen, enter your temporary access information from below; you will be required to select a new UserID and Password at the time of first access to GLACIER.

UserID: U7PUZWDX

Password: 9A3FRGH3

Website from link in email



Click on the Image Above to Enter GLACIER
or [Login Now](#)

GLACIER supports [Internet Explorer](#), [FireFox](#) (On Windows or MAC platforms), and Apple Safari.
Javascript must be enabled to use GLACIER.

Please direct any questions about using GLACIER to: support@online-tax.net

GLACIER is a product of Arctic International LLC.
For more information about other Nonresident Alien Tax Compliance Products and
Services visit www.arcticintl.com

Copy login information from email

Welcome to GLACIER Nonresident Alien Tax Compliance

To access GLACIER, please enter the following information:

UserID:

Password:

[Forgot Login?](#)

If you have forgotten your UserID and/or Password, please select **Forgot Login?** An email will be sent to the email address in your **GLACIER** Individual Record.

GLACIER supports Internet Explorer, FireFox (On Windows or MAC platforms), and Apple Safari. Javascript must be enabled to use GLACIER. Please direct any questions about using GLACIER to: support@online-tax.net GLACIER is a product of Arctic International LLC

Create your own login information

Update GLACIER Login Information

Individual Record Account Creation Successful!

Please create your own new UserID and Password for all future logins to GLACIER.

UserID:(Must be 8-30 alphanumeric characters)

Password: (Must be 8-20 alphanumeric characters)

re-enter password

Login using the information you just created

Welcome to **GLACIER Nonresident Alien Tax Compliance**

To access GLACIER, please enter the following information:

You have successfully created your GLACIER account. If you wish to access GLACIER now, you must login using the UserID and Password that you just created.

UserID:

Password:

[Forgot Login?](#)

If you have forgotten your UserID and/or Password, please select **Forgot Login?** An email will be sent to the email address in your **GLACIER** Individual Record.

GLACIER supports Internet Explorer, FireFox (On Windows or MAC platforms), and Apple Safari. Javascript must be enabled to use GLACIER. Please direct any questions about using GLACIER to: support@online-tax.net GLACIER is a product of Arctic International LLC

Select Create/Update Record

Welcome to GLACIER for University of Massachusetts

Sean Martin, What Would You Like To Do Today?

- Create/update/view my Individual Record**
- Complete my U.S. tax return using GLACIER Tax Prep
- Learn about General U.S. Tax Issues and FAQs
- Change my GLACIER Login Information**
- Exit GLACIER**

Determining Relationship

You may only select one option. If you fail to select a box or select the wrong box then Glacier will not generate the correct tax forms and you will have to do this entire process over.

What does each type mean in terms of receiving payment from UMass?

- Faculty/Staff - Does not apply/Do not select
- Post Doc. or Clinical Resident or Visiting Scholar - Does not apply/Do not select
- Graduate Teaching or Research Assistants - Does not apply/Do not select
- Student Worker - Does not apply/Do not select
- Student - For Foreign Nationals being paid Scholarship/Fellowship earnings. This is an award made to assist students in the pursuit of their studies or research, with no requirement for service, performance, or pursuit of additional training.
- Guest Speaker - ALL Honorarium payments
- Consultant - Providing service as an independent contractor
- Artist/Performer - Performer
- Industrial Royalty Recipient - Royalty
- Copyright Royalty Recipient - Royalty
- Other - Prizes or awards

Relationship

What is your relationship with University of Massachusetts?

Please check all that apply:

- Faculty/Staff
- Post Doc. or Clinical Resident or Visiting Scholar
- Graduate Teaching or Research Assistant
- Student/Graduate Worker (not including above)

- Student - Non Worker (Scholarship)
- Non Working Fellow

- Guest Speaker
- Consultant

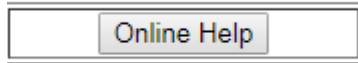
- Artist/Performer

- Industrial Royalty Recipient

- Copyright Royalty Recipient

- Other

Note that at any time you can click the Online Help button in the lower right corner for assistance. Do not contact Sean Martin or the department who is paying you since legally we are not allowed to provide assistance



Type of Income

Choose the type of payments that will be received (What you see on this page depends on the selection from previous page)

- Compensation/Wages - Does not apply/Do not select
- Honoraria or Guest Speaker Fee – Lecturer, guest chef, etc.... ALL Honorarium payments
- Consulting Fee – service fee
- Industrial Royalty – royalty fee
- Copyright Royalty – royalty fee
- Prize – a prize
- No Income includes courtesy appointments and visiting scholars without salary

Personal Information

If you do not have an ITIN or SSN and do not wish to apply for one you still must select "I would like to apply for an ITIN". Glacier does not have a I do not wish to apply option (the results will still be correct by selecting this options)

Campus – Amherst AP

Personal Information

Please Enter and/or Verify the Following Information

* Indicates Required Field

First Name/Personal Name *:

Sean

Middle Name:

Last Name/Surname/Family Name *:

Martin

Email Address:

smartin@umass.edu

U.S.-Issued Social Security Number (SSN) or
Individual Taxpayer Identification Number (ITIN)

OR

(Employees and Student Workers)

I do NOT have a U.S.-issued SSN or ITIN; I would like to apply for an SSN

I have applied for an SSN, and I have not yet received the number

(Guest Speakers, Consultants, Non-Service Scholarship/Fellowship and Royalty Recipients)

I do NOT have a U.S.-issued SSN or ITIN; I would like to apply for an ITIN

I have applied for an ITIN, and I have not yet received the number

Foreign Tax Identification Number, if any:

Emplid/Department ID:

Second Email Address:

Campus:

Select

US Mailing Address

If you have a US Address please fill in here otherwise select I do not live in the USA

U.S. Address

Please enter your U.S. mailing address and telephone numbers

Street Address 1:

Street Address 2:

City:

State:

Zip/Postal Code:

(XXXXX or XXXXX-XXXX)

Home Phone Number:

(XXX-XXX-XXXX)

Work/Department Phone Number:

(XXX-XXX-XXXX)



I DO NOT currently live in the U.S. / I DO NOT have a U.S. mailing address

Foreign Address

Permanent Foreign Address

Please enter your permanent foreign mailing address:

* Indicates Required Field

Street Address 1*:

 (Do Not enter a P.O. Box number)

Street Address 2:

 (Do Not enter a P.O. Box number)

City*:

Postal Code:

Country*:

Province:

 (Canada Only)

Enter your Permanent Foreign Address. All individuals present in the U.S. under a nonimmigrant immigration status (e.g., F, J, M, Q, H-1B, TN, B, A, G) MUST include an address OUTSIDE the U.S. for which they consider to be their Permanent Foreign Address. You may wish to use the address of a parent or relative, if applicable. If you are a Permanent Resident Alien from China, please include your last known address in China.

Citizenship & Tax Residence

Do not select the United States even if you know you qualify as a resident alien for tax. Glacier will determine this in coming steps for you. Selecting it now will only mess up your results as this is asking about your main tax residence

Country of Citizenship / Tax Residence

Please select the appropriate country:

Country of Citizenship:

Please Select

If you are a citizen of two countries, please select the country under whose documents you entered the U.S. If you are a dual citizen of the U.S. and another country, for U.S. tax purposes, you are treated as a citizen of the U.S. Please contact the Institution Administrator as soon as possible.

Country of Tax Residence:

Please Select

Although you may pay tax in the U.S., your Country of Tax Residence CANNOT be the U.S. Your Country of Tax Residence is generally the country to which you owe tax on your "worldwide" income. Typically, your Country of Tax Residence is the same as your Country of Permanent Residence; however, if you have lived in a country other than your Country of Permanent Residence immediately before coming to the U.S. to study/work, you may have established Tax Residency in that country.

Immigration Status

Only select UMass if your visa is sponsored by UMass, otherwise select the appropriate choice

ESTA (Electronic System for Travel Authorization) is not an immigration status. ESTA is the program in which you apply for a visa waiver, visa waiver is an immigration status

Note: J-1 visa holders must select the appropriate sub-category of the J-1 to ensure the proper tax forms will generate. The sub-category can be found on your DS-2019 form

Immigration Status

What is the sponsoring institution?

Please indicate the Institution that sponsored (or will sponsor) your current U.S. immigration status (as indicated on your official immigration documentation).

- University of Massachusetts
- Other Institution
- No Sponsoring Institution Required (e.g., B-1, B-2, WB, WT, etc)

What is your current U.S. immigration status?

Please indicate your current U.S. immigration status. If you have not yet arrived in the U.S., indicate your anticipated immigration status; if you have already returned to your home country, indicate the immigration status on which you were last present in the U.S.

Current Immigration Status

Please Select

If you are in J status, select the primary purpose as indicated in Section 4 of Form DS-2019.
If you are from Canada and do NOT have a visa or Form I-94, select "B-1 Visitor".
If your immigration status is not listed, select "Other Immigration Status or Purpose".

Time Spent in the USA

Enter the arrival date into the US for this current visa and the expiration date/departure date (prior visa information will be entered later). This visit means your arrival for the purpose listed on the I-20, DS-2019, etc. It does not mean the most current arrival in the US or your first ever arrival in the US.

Permission to stay date expires: This is the date your visa expires. This date is from your I-94, etc. Do not use the date on the "US Visa" stamp in the passport nor the expiration date of the passport itself.

Departure date: The date you plan leave the US for good (at least relating to this visa). If you are unsure, make an approximation

Time Spent in the U.S.

How long will you be in the U.S. during this visit?

Original (or anticipated) Date of Entry to the U.S.:

DD ▼ MM ▼ YYYY ▼

If you have not yet entered the U.S., indicate your anticipated date of arrival to the U.S.; please note that you may not enter a date more than 30 days in advance. You may enter and leave the U.S. many times during the period of your overall visit to the U.S. (e.g., for vacation, holidays or summer break). The ORIGINAL date of entry to the U.S. on your current immigration status is the FIRST date you arrived in the U.S. to begin your study, teaching, research, other activities, etc. and, regardless of whether you have changed institutions, transferred, received a new visa sticker in your passport, or returned to the U.S. from vacation, holiday or summer break.

Date Permission to stay in the U.S. Expires

DD ▼ MM ▼ YYYY ▼

Use the date from Form I-20 (If F status), Form DS-2019 (if J status) or Form I-94 (if other status)

Estimated or Actual Date of Final Departure from the U.S.:

DD ▼ MM ▼ YYYY ▼

Immigration Status (cont.)

Select appropriate choice

Immigration Status

Have you changed your immigration status since you arrived in the U.S. for this visit?

- My current immigration status is the SAME as the immigration status under which I originally entered the U.S. for this visit--I have NOT changed my immigration status.
- My current immigration status is DIFFERENT than the immigration status under which I originally entered the U.S. for this visit--After entering the U.S. for this visit, I changed my immigration status.



If a change did occur the following page will appear, if not you will not see this page

Original Immigration Status

When did you change your immigration status?

- I have changed my immigration status **ONLY ONE TIME** since I originally entered the U.S for this visit.
(for example, you originally entered the U.S. for this visit as an F-1 Student on August 1, 2014. On September 22, 2017, while remaining in the U.S., your immigration status changed to H-1B.) DO NOT COMPLETE YELLOW SHADED AREA
- I have changed my immigration status **MORE THAN ONE TIME** since I originally entered the U.S. for this visit.
(for example, you originally entered the U.S. for this visit as a B-2 Tourist on May 25, 2014. On August 1, 2014, while remaining in the U.S., you changed your immigration status to F-1 Student. Then, on September 22, 2017, while remaining in the U.S., your immigration status changed to H-1B.) COMPLETE YELLOW SHADED AREA

I Originally Entered the U.S. on:		September 1, 2018
I Originally Entered the U.S. Under Immigration Status:		Please Select ▼
I Changed My Original Immigration Status on:	DD ▼	MM ▼
		YYYY ▼
I Again Changed My Immigration Status to:		Please Select ▼
The SECOND TIME I Changed My Immigration Status on:	DD ▼	MM ▼
		YYYY ▼
My Current Immigration Status is:		WB-Waiver for Business

Days Present in the USA

Never enter 0 in the “days not present” box

Days present is from the arrival date, or January 1 of the current year, through today

Enter ALL prior visits to the USA under ANY visa type if this isn't the first time coming to the USA

Years do not need to be entered in chronological order, but there cannot be a 'blank' row between two lines with information

Use the drop down boxes to select year and immigration status

If you have more visits than the space allowed, click the ONLINE HELP button in the lower right hand corner and contact Glacier. They will be able to assist you to determine which visits have the most tax impact.

Days Present In the U.S.

How long have you been present in the US?			
Following is a SUMMARY of the TOTAL NUMBER OF DAYS you may have been present in the U.S. based on your date of arrival. Please complete the boxes below to indicate any days YOU LEFT the U.S. to return to your home country or to visit a third country.			
Calendar Year	Immigration Status Held During Each Calendar Year	Estimated Total Number of Days Present in the U.S. During each Calendar Year	LESS Number of Days You Left the U.S. (Enter the number of days you LEFT the U.S. during this visit)
2018	WB-Waiver for Business	26 Days	Less <input type="text"/> Days NOT present in U.S.
Have you ever been to the U.S. PRIOR to this visit?			
<input checked="" type="radio"/> This is the FIRST time I have ever been to the U.S. (for any reason, under any immigration status).			
<input type="radio"/> I have previously visited the U.S. (information regarding all PRIOR visits MUST be entered below).			
For each CALENDAR YEAR between 1986 and your date of arrival that you were previously present in the U.S., please select the calendar year of each Prior Visit and the corresponding Immigration Status and Total Number of Days associated with each Immigration Status. You MUST include ALL Prior Visits to the U.S.			
DO NOT include in the boxes below any information about your current visit as shown above			
ENTER Calendar Year (the years do not need to be entered in chronological order)	Immigration Status Held During Each Calendar Year (If you held more than one Immigration Status during the a Calendar year, enter each Immigration Status separately)	ENTER the Approximate Total Number of Days Present in the US During each Calendar Year	
Please Select ▼	Please Select ▼	<input type="text"/>	Days
Please Select ▼	Please Select ▼	<input type="text"/>	Days
Please Select ▼	Please Select ▼	<input type="text"/>	Days

Tax Residency Summary

If Glacier determines you are a Resident Alien for tax purposes they will let you know on the page after this one

Tax Residency Status Summary

How long have you been present in the U.S.?

Following is a SUMMARY of the TOTAL Number of Days you have indicated you were present in the U.S. Please ensure that the information below is correct. If you need to add additional Prior Visits and/or subtract days that you left the U.S., click on <BACK to re-enter or update the information.

Calendar Year	Immigration Status Held During Each Calendar Year	Approximate Total Number of Days Present in the U.S. During each Calendar Year
2018	WB Waiver for Business	27

Tax Treaty Review

Tax Withholding and Tax Treaty Exemption Review

GLACIER is now reviewing applicable Tax Withholding Rates and any possible Tax Treaty Exemption.

Click Next> to continue.

Treaty Verification

Review the information and accept or decline based on the information provided

Tax Treaty Exemption Verification

GLACIER has made the following tax treaty exemption determination

Review of Income Tax Treaty Exemption for Honoraria or Guest Speaker Fee

Based on the information entered, the U.S.-Canada Income Tax Treaty allows an exemption from tax withholding for your Honoraria or Guest Speaker Fee.

Article VII of the U.S.-Canada Income Tax Treaty allows an exemption for Unlimited Time Period for your Honoraria or Guest Speaker Fee.

The possible tax treaty exemption applies to an Unlimited Dollar Amount of your Honoraria or Guest Speaker Fee.

Would you like to claim an exemption from tax withholding?

- Yes, I would like to claim an exemption from tax withholding for my Honoraria or Guest Speaker Fee ; I understand that I must meet any qualifications listed above.
- No, I DO NOT want to claim an exemption from tax withholding for my Honoraria or Guest Speaker Fee.

Note: A nonresident alien who receives income in the U.S. generally must pay tax and report that income in both the U.S. and his or her home country. If you are eligible and do claim a tax treaty exemption, you must still file a U.S. federal tax return. Also, you may be required to report and/or pay additional tax on your U.S. income in your home country; you should check with the tax authorities in your home country for any applicable tax reporting or payment requirements.

Tax Treaty Exemption Info (IF accepting a treaty)

Complete the following info as it does have an impact on the treaty you are accepting

Tax Treaty Exemption Information

To claim a tax treaty exemption, please enter the following additional information

*Indicates Required Field

Passport Number* :

Please enter the description of the services provided* :

(for example, research scholar of advanced macroeconomic analysis or student working at university bookstore)

Please enter the estimated total Honoraria or Guest Speaker Fee expected to be paid during the calendar year* :

\$ (Please do NOT enter commas)

Tax Summary Report

Summary of your information as determined by Glacier

PLEASE note that the required forms/documents listed here are not a complete list of required documents to become a UMass vendor. These documents are required per the IRS for payment backup. Please contact the department paying you for a complete list of required documents

Tax Summary Report

Based on the information provided, GLACIER has made the following determination

Name: = **Martin, Sean**

Tax Residency Status: = **Nonresident Alien for U.S. Tax Purposes**

Tax Residency Status Change Date: = **July 1, 2019 to Resident Alien**

Tax Residency Status Start Date: = **January 1, 2019 to Resident Alien**

Tax Treaty Exemption Status (Independent Compensation): = **Exempt**

Tax Treaty Time Limit (Independent Compensation): = **Unlimited Time Period**

Tax Treaty Dollar Limit (Independent Compensation): = **Unlimited Dollar Amount**

Applicable Tax Withholding Rate = **30 Percent**
(If Tax Treaty Not Applicable or Forms Not Submitted)
(Independent Compensation):

FICA Tax Status: = **Not Applicable**

FICA Tax Start Date: = **Not Applicable**

Forms Required: = **Tax Summary Report**
Form W-8BEN
Honoraria Statement
Form 8233

Document Copies Required: = **I-94 / I-94W Card**
Visa Sticker/Stamp (in passport)

View & Print Forms

Review for accuracy, print and submit if correct

DO NOT PRINT DOUBLE SIDED – The IRS will not accept double sided forms

AFTER PRINTING THE FORMS YOU MUST CLICK NEXT OR THE INFORMATION YOU ENTERED WILL NOT BE SUBMITTED!!!!

If you do not have a W8 BEN listed in the forms and were not notified you are a Resident Alien, please go back and verify the information entered is correct.

View and Print Forms

GLACIER has generated the following Tax Summary Report and Forms

Please review each form to ensure that the information is accurate and spelled correctly.

Click on <Print Forms> to view and print each form. Adobe Acrobat Reader is required (see below).

AFTER VIEWING THE FORMS IN ADOBE ACROBAT READER, YOU MUST CLOSE THE WINDOW SHOWING THE FORMS--DO NOT CLOSE YOUR INTERNET CONNECTION.

Tax Summary Report
Honoraria Statement
Form W-8BEN
2018 Form 8233
Tax Information

To download Adobe Acrobat Reader, simply click the yellow icon and follow the installation instructions.



Trouble Printing Forms / Forms Come Up Blank?

Submitting Forms – IMPORTANT

You MUST submit ALL of your forms to the department who is paying you. As noted above the forms listed in Glacier are just for the IRS side of things and additional forms will be required to meet the Immigration requirements as well as University requirements. While you may send your forms to the address listed in the Glacier summary, it is **HIGHLY** suggested you only send them to the department paying you to ensure they have all of the required forms and send them to the correct places once everything is in their hands. Sending things piece by piece to various locations only increases the risk that something gets misplaced or forgot about since they are waiting on additional paperwork.

Click Next, your information still isn't saved

Finishing And Saving Your Individual Record

Congratulations! You have completed your Individual Record

To complete and submit your Individual Record, please follow the directions below:

- Review, sign and date each of the Required Forms (as printed from the previous screen);
- Photocopy each of the Required Documents (as indicated on the Tax Summary Report);
- Submit the Required Forms and Required Documents to the Institution Administrator at the address below; and
- Click on Next> to properly exit GLACIER and save your Individual Record.

If any information in your Individual Record changes, you must log in to GLACIER and update your Individual Record--The information in the updated Individual Record will be automatically provided to the Institution Administrator.

Your Individual Record must be complete and all Required Forms and Required Documents submitted before any payment is made to you by University of Massachusetts. If your Required Forms and Required Documents are NOT submitted in a timely fashion, the maximum amount of U.S. tax may be withheld from any payments made to you.

Please submit all Required Forms and Required Documents within 10 days to the Institution Administrator at the following address:

PLEASE SEND DOCUMENTS TO THE DEPARTMENT PAYING YOU, NOT DIRECTLY TO SEAN. These are only part of the documents required in order to receive payment!

~~Sean Martin
Travel
University of Massachusetts
Umass Amherst
100 Venture Way
Hadley, MA 01035
413-555-1434 Telephone
smartin@umass.edu~~

PLEASE SEND DOCUMENTS TO THE DEPARTMENT PAYING YOU, NOT DIRECTLY TO SEAN. These are only part of the documents required in order to receive payment!

The information on this screen will be printed as an Instruction Page with your Tax Summary Report.

SAVING – If you do not hit exit then you did not save your information!!!!!!

Exiting GLACIER

Congratulations! You have completed/updated your Individual Record.

Thank you for using GLACIER!

If you have any questions or need any additional assistance, please contact your Institutional Administrator.

Exit and Save my Individual Record
Select other activities to perform

You can log back into Glacier after your information has been saved but it must be saved first