

UNIVERSITY OF MASSACHUSETTS TAX INFORMATION SHEET

All non-U.S. citizens who receive compensation/scholarships/fellowships from the University must complete this form. The information provided is used to determine status for participation in tax treaties and/or for purposes of withholding of U.S. income taxes from paychecks. It is NOT used for immigration purposes.

I. PERSONAL INFORMATION

A. Family name	First name	Middle name (If Any)	B. U.S.Social Security Number
C. Street Address in U.S.			D. Home phone number
E. City	State	Zip Code	F. Work phone number :
G. E-mail Address:			H: Student ID# (if applicable):

II. VISA INFORMATION FOR TAX PURPOSES

CURRENT VISA TYPE: (please circle type below)
 Permanent Resident Card (green card) ****Card Expires**** _____
 U.S. Permanent Resident with green card or with an I-551 stamp in passport or with approval letter, you are a Resident Alien for tax purposes. *(If you are a Permanent Resident, you do not need to complete the remainder or the reverse side of this form).* **** PLEASE SIGN REVERSE SIDE****

<input type="checkbox"/> F-1 student <input type="checkbox"/> F1 student on Practical Training <input type="checkbox"/> F-2 spouse/dependent of F-1 <input type="checkbox"/> J-1 student <input type="checkbox"/> J-1 student on Academic Training <input type="checkbox"/> J-2 spouse/dependent of J-1 Student	<input type="checkbox"/> J-1 non-student (please list category from IAP-66 Section 4) <input type="checkbox"/> J-2 spouse/dependent of non-student <input type="checkbox"/> H-1 B visa holder _____ <input type="checkbox"/> EAD card _____ <input type="checkbox"/> Other: please specify _____
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III. What is your country of citizenship? _____
 What country were you in and paying taxes prior to coming to US _____
 What is the end date on your I-20 form? mm/____ dd/____ yyyy _____
 What is the end date on your DS2019 form? mm/____ dd/____ yyyy _____

PLEASE COMPLETE OTHER SIDE OF FORM

The following forms are used by Human Resources to verify your status for tax purposes

Permanent Resident – Either Green Card or Valid EAD with approval letter for residency or a passport showing a stamp stating “Processed for I-551”
F-1 Student: I-20 and I-94; if on practical training, either an EAD or authorization on reverse of I-20
J-1 Student: DS2019 and I-94; if on academic training, letter of authorization
J-1 Non Student: form DS2019 and I-94
J-2 Spouse with employment permission: EAD and I-94
H-1B: I-94 and I-797
IN: I-94 and photo identification

Passport number: _____ Current Visa Type _____

Please indicate entry and departure dates in the United States

Entry - mm/dd/yyyy	Departure - mm/dd/yyyy	Visa Type	J-1 Category
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

B) Please indicate change dates in your Visa status.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

V. RESIDENCE STATEMENT FOR TAX PURPOSES

I certify that, to the best of my knowledge, all of the information I have provided is true, accurate and complete.

Signature: _____

Date: _____