

**THE UNIVERSITY OF ARIZONA
INTERNATIONAL TAX QUESTIONNAIRE**

BOX 1: PERSONAL INFORMATION

LAST / FAMILY NAME	FIRST NAME	MIDDLE INITIAL	I.T.I.N. OR U.S. SOCIAL SECURITY NUMBER
DATE OF BIRTH	FIRST DATE OF ENTRY INTO THE U.S.	STUDENT IDENTIFICATION NUMBER	

BOX 2: UNITED STATES TEMPORARY RESIDENCE

U.S. STREET ADDRESS	HOME PHONE NUMBER	EMAIL
CITY	STATE	ZIP CODE

BOX 3: PERMANENT FOREIGN ADDRESS

STREET ADDRESS	CITY	CITY POSTAL CODE
PROVINCE/REGION	REGION POSTAL CODE	COUNTRY

BOX 4: INCOME INFORMATION

TYPE OF INCOME: EMPLOYMENT SCHOLARSHIP/FELLOWSHIP INDEPENDENT CONTRACTOR OTHER: _____	ESTIMATED ANNUAL INCOME: \$ _____
EMPLOYING DEPARTMENT(S)	JOB TITLE(S)
PRIMARY JOB DUTIES (TEACHER/RESEARCHER ETC.)	DEPARTMENT PHONE NUMBER
UNIVERSITY OF ARIZONA HIRE DATE	FIRST DATE OF EMPLOYMENT IN THE U.S.

BOX 5: INTERNATIONAL VISA INFORMATION

CURRENT INS VISA CLASSIFICATION (CHECK ONE)	VISA NUMBER _____	EXP. DATE _____
<input type="checkbox"/> F-1 STUDENT <input type="checkbox"/> UNDERGRADUATE <input type="checkbox"/> GRADUATE <input type="checkbox"/> POST GRADUATE		
<input type="checkbox"/> J-1 (LIST CATEGORY INDICATED ON THE FORM IAP66, SECTION 4) <input type="checkbox"/> J-1 SUB-TYPE: (CHOOSE ONE)	<input type="checkbox"/> PRIMARY PURPOSE: _____	
01- STUDENT 02- SHORT TERM SCHOLARS 03- TRAINEES-NON MEDICAL 04- TEACHERS	05- PROFESSORS 06- SPECIALISTS 07- ALIEN PHYSICIANS 08- RESEARCH SCHOLARS	<input type="checkbox"/> IF ACQUIRING TRAINING, LIST TYPE OF TRAINING PROFESSIONAL TECHNICAL BUSINESS
H1B1 SPECIALTY OCCUPATION 0-1 ALIEN OF EXTRAORDINARY ABILITY IN SCIENCES, ARTS, EDUCATION TN (TREATY N.A.F.T.A.) CANADIAN OR MEXICAN CITIZEN PROFESSIONAL	<input type="checkbox"/> DEPENDENT VISA (Must be employment authorized) J-2 SPOUSE/DEPENDENT OF J-1 VISITOR OTHER INS CLASSIFICATION (LIST STATUS) _____	
COUNTRY ISSUING PASSPORT	PASSPORT NUMBER	PASSPORT EXPIRATION DATE
COUNTRY OF RESIDENCE (FOR TAX PURPOSES)	ANTICIPATED DATE OF DEPARTURE FROM THE U.S.	

BOX 6: DOCUMENTS TO ATTACH TO THIS FORM

PLEASE ATTACH TO THIS FORM, PHOTOCOPIES OF ALL THE DOCUMENTS LISTED BELOW WHICH APPLY TO YOUR STATUS:

⇒ J-1 STUDENT/TEACHER/RESEARCHER: DS-2019 (FORMERLY IAP-66) CERTIFICATE OF ELIGIBILITY	⇒ LEGAL PERMANENT RESIDENT: (GREEN CARD)
⇒ F-1 STUDENT: I-20 FORM , CERTIFICATE OF ELIGIBILITY	⇒ IF APPLIED FOR, COPY OF I-551 STAMP FROM YOUR PASSPORT OR INS LETTER STATING APPROVAL
⇒ H1B1 AND O: FORM I-797A	⇒ IF PRESENT IN THE U.S.A. UNDER ASYLUM, REFUGEE, OR TEMPORARY PROTECTED STATUS: A COPY OF THE INS LETTER STATING YOUR STATUS.
⇒ TN: CANADA, I-94 / MEXICO, I797A	
⇒ COPY OF I-94 FRONT AND BACK	
⇒ COPY OF CURRENT STATUS VISA	
⇒ COPY OF PASSPORT	

***** MAIL FORM AND REQUIRED DOCUMENT COPIES TO: UNIVERSITY OF ARIZONA - FSO/OPERATIONS, PO BOX 3310, TUCSON, AZ 85722-3310. OR, RETURN IN PERSON TO THE UNIVERSITY SERVICES BUILDING, 4TH FLOOR, ROOM 402.**

******* PLEASE COMPLETE SIDE ONE AND SIDE TWO OF THIS FORM. SIGNATURE IS REQUIRED IN BOX 13**

BOX 7: DETERMINATION OF RESIDENCE FOR TAX PURPOSES

- A) PERMANENT RESIDENT: ARE YOU A LAWFUL U.S. IMMIGRANT OR PERMANENT RESIDENT WHO POSSESSES AN ALIEN REGISTRATION CARD (GREEN CARD)? YES NO
- B) PERMANENT RESIDENT APPLICANT: HAVE YOU APPLIED FOR PERMANENT RESIDENT STATUS AND RECEIVED AN "I-551" STAMP IN YOUR PASSPORT OR INS LETTER STATING APPROVAL OF YOUR APPLICATION? YES NO
- C) ARE YOU CURRENTLY PRESENT IN THE UNITED STATES UNDER ASYLUM STATUS? YES NO
- D) ARE YOU CURRENTLY PRESENT IN THE UNITED STATES UNDER REFUGEE STATUS? YES NO
- E) ARE YOU CURRENTLY IN THE UNITED STATES UNDER A TEMPORARY PROTECTED STATUS? YES NO

IF YOU ANSWERED YES TO ANY OF THE ABOVE QUESTIONS, (A-E), YOU ARE CONSIDERED A **RESIDENT ALIEN** FOR TAX PURPOSES, YOU MAY SKIP BOX 8 AND 9, CHECK RESIDENT ALIEN IN BOX 10. IF YOU ANSWERED NO TO ALL OF THE ABOVE QUESTIONS, YOU MUST COMPLETE THE ENTIRE FORM TO DETERMINE IF YOU ARE A RESIDENT OR NON-RESIDENT ALIEN FOR TAX PURPOSES.

BOX 8: PHYSICAL PRESENCE INFORMATION

PLEASE INDICATE THE NUMBER OF DAYS YOU WERE PHYSICALLY PRESENT AT ANY TIME IN THE U.S.
(If additional space is required, please attach a separate sheet.)

CALENDAR YEAR (Example 1999)	PERIOD(S) WHEN YOU WERE PHYSICALLY PRESENT IN THE U.S. LIST THE DATES BELOW (EXAMPLE 3/12/98 TO 12/31/98)	TOTAL DAYS PRESENT IN THE U.S.	VISA TYPE	PURPOSE OF ENTRY

BOX 9: SUBSTANTIAL PRESENCE TEST

FOLLOWING IS THE "SUBSTANTIAL PRESENCE TEST" WHICH IS USED TO DETERMINE IF YOU ARE A RESIDENT OR NON-RESIDENT ALIEN FOR TAX PURPOSES. USE THE INFORMATION PROVIDED BY YOU IN BOX 8 TO MAKE THIS DETERMINATION. IMPORTANT: YOU MAY HAVE BEEN PHYSICALLY PRESENT IN THE U.S. (AS INDICATED IN BOX 8) BUT THESE DAYS DO NOT COUNT AS "DAYS OF PRESENCE" FOR PURPOSES OF THE SUBSTANTIAL PRESENCE TEST IF YOU WERE AN "EXEMPT INDIVIDUAL" ON THOSE DAYS. **IN GENERAL**, F AND J STUDENT VISA HOLDERS ARE "EXEMPT INDIVIDUALS" FOR THE FIRST FIVE CALENDAR YEARS OF PRESENCE IN THE U.S. ALSO, J TEACHER OR TRAINEE VISA HOLDERS ARE "EXEMPT INDIVIDUALS" FOR THE FIRST TWO CALENDAR YEARS OF PRESENCE IN THE U.S. THERE ARE VARIOUS EXCEPTIONS TO THESE RULES.

DAYS OF PRESENCE - (DO NOT COUNT DAYS THAT YOU WERE AN "EXEMPT INDIVIDUAL")

- 1.) CURRENT YEAR: _____ NUMBER OF DAYS _____ X 1 = _____
- 2.) LAST YEAR: _____ NUMBER OF DAYS _____ X 1/3 = _____
- 3.) TWO YEARS AGO: _____ NUMBER OF DAYS _____ X 1/6 = _____
- 4.) TOTAL _____

IF YOUR DAYS OF PRESENCE IS 31 OR MORE IN THE CURRENT YEAR (LINE 1 ABOVE), AND THE TOTAL DAYS OF PRESENCE IS 183 OR MORE (LINE 4 ABOVE), YOU ARE A RESIDENT ALIEN FOR TAX PURPOSES, CHECK RESIDENT ALIEN IN BOX 10 BELOW. IF YOUR DAYS OF PRESENCE IS LESS THAN 31 IN THE CURRENT YEAR (LINE 1 ABOVE), OR THE TOTAL DAYS OF PRESENCE IS LESS THAN 183 (LINE 4 ABOVE), YOU ARE A NON-RESIDENT ALIEN FOR TAX PURPOSES, CHECK NON-RESIDENT ALIEN IN BOX 10 BELOW.

BOX 10: RESIDENT STATEMENT FOR TAX PURPOSES

UNDER INTERNAL REVENUE SERVICE DEFINITIONS, FOR U.S. TAX PURPOSES ONLY (THIS HAS NO EFFECT ON YOUR IMMIGRATION STATUS), I AM CONSIDERED A:

RESIDENT ALIEN FOR TAX PURPOSES

NON-RESIDENT ALIEN FOR TAX PURPOSES

BOX 11: SOURCE OF FUNDING

IF THE SOURCE OF YOUR FUNDING IS FROM A COUNTRY OTHER THAN THE U.S., IT IS POSSIBLE THAT YOU WILL BE EXEMPT FROM U.S. TAX. PLEASE CHECK THE APPROPRIATE BOX(S) BELOW TO INDICATE THE SOURCE OF YOUR FUNDING. *IF YOU CHECK "COUNTRY OTHER THAN THE U.S.", BE PREPARED TO PROVE THE SOURCE OF YOUR FUNDING.*

UNITED STATES

OTHER THAN THE UNITED STATES

BOX 12: TAX TREATY STATEMENT

IS THERE A TAX TREATY BETWEEN THE UNITED STATES AND MY COUNTRY OF RESIDENCE. YES NO

IF THE ANSWER IS "YES", AND YOU ARE ELIGIBLE FOR THE TAX TREATY EXEMPTION, THE APPROPRIATE FORM WILL BE GENERATED AFTER RETURNING THIS COMPLETED QUESTIONNAIRE TO THE FINANCIAL SERVICES PAYROLL OFFICE. YOU MUST RETURN TO FINANCIAL SERVICES PAYROLL OFFICE TO SIGN THE TAX EXEMPTION FORM (8233 OR W-9) PRIOR TO RECEIVING THE BENEFIT. THE 8233/W-9 FORMS ARE AVAILABLE FOR SIGNATURE THREE BUSINESS DAYS AFTER THIS COMPLETED QUESTIONNAIRE AND THE APPROPRIATE DOCUMENT COPIES ARE RECEIVED IN THE FINANCIAL SERVICES PAYROLL OFFICE.

BOX 13: CERTIFICATION OF INFORMATION

I CERTIFY THAT TO THE BEST OF MY KNOWLEDGE, ALL OF THE INFORMATION I HAVE PROVIDED ON THIS FORM IS TRUE AND CORRECT.

SIGNATURE _____ DATE _____