

# UW1123

## UWS 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 – Milwaukee		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 To From		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 ( <b>Not United States</b> )				
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. <b>Proceed to Section 3.</b>					

**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.**  NO -- Proceed to Section 4.  
Date of Green Card \_\_\_\_\_ Proceed to Section 5.

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

**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(DATE FROM I-20 Section 5 or IAP66 Section 3 or DS-2019 Section 3) _____	C. Anticipated date of departure from the USA _____
D. Detail the number of days you <b>were</b> physically present in the United States by calendar year. The term "calendar year" refers to the period January 1 to December 31.			
<b>Column 1</b> Calendar Year in USA (e.g., 19__ or 20__)	<b>Column 2</b> INS Visa Type (e.g., F-1/student)	<b>Column 3</b> Specific dates present. (For example, 01/01/XX - 12/31/XX).	<b>Column 4</b> 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: _____			

**E. 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 **NON-RESIDENT 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 F 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 **NON-RESIDENT 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 F below.

**F. 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.  
All others include all days in all 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	=	(G1)
Last calendar year _____	_____	÷	3	=	_____
Two years ago _____	_____	÷	6	=	_____
<b>TOTAL of Column 4</b>					<b>(G2)</b>

**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 G1 and G2) = **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:

PERMANENT RESIDENT OR APPLICANT                       RESIDENT ALIEN                       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 _____
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