

INTERNATIONAL INFORMATION FORM

To Be Completed By Foreign National Students and Scholars

The information requested below is strictly confidential and will be used for tax withholding and reporting purposes only. This information will allow the University to determine your U.S. residency for federal income tax purposes. The original form will be reviewed and maintained by Tax Administration, Office of the Controller, 333 Waterman Building during your active status at UVM.

PLEASE COMPLETE ALL APPLICABLE QUESTIONS

A. PERSONAL INFORMATION

1. NAME (Last or Family)      First or Personal      Middle	2. COUNTRY OF CITIZENSHIP	3. U.S. SOCIAL SECURITY NUMBER
4. U.S. ADDRESS (Street)	5. ADDRESS IN COUNTRY OF LEGAL RESIDENCE (Street)	
CITY                                  STATE                                  ZIP CODE	CITY                                  COUNTRY                                  POSTAL CODE	
6. PHONE NUMBER (U.S. Residence)	7. COUNTRY that issued Passport      PASSPORT #                                  U.S. Visa # (8 digits)	
8. UVM DEPARTMENT/COLLEGE                                  CAMPUS PHONE	9. SEX/GENDER                                  DATE OF BIRTH	
	Male      Female                                  (Month/Day/Year)	
10. E-MAIL ADDRESS	11. UNIVERSITY STATUS (Check all that apply)	
	Employee                                  Full-Time Student                                  Non-Employee	

B. CURRENT IMMIGRATION CATEGORY

1. Please indicate your current immigration status: (Mark only one box) F-1 Student, sponsored by the University of Vermont F-1 Student of another U.S. institution, with EAD card J-1 Exchange Visitor, sponsored by the University of Vermont J-1 Exchange Visitor, sponsored by another organization	H1B Employee, sponsored by the University of Vermont J-2 Spouse/Dependent, with EAD Card O-1 Person of Extraordinary Ability, sponsored by the University of Vermont TN, sponsored by the University of Vermont Other, please describe:	
2. If you are a J-1 Exchange Visitor, please indicate the applicable J-1 category: (Mark only one box) Student                                  Research Scholar                                  Specialist Professor                                  Short-term Scholar	3. Date of Arrival/First Day in the U.S. in your present immigration status:  (Month/Day/Year)	4. Period End Date/Completion by Date, on your current immigration form (DS-2019, I-20, I-797):  (Month/Day/Year)
5. Projected departure date/last day of physical presence in the U.S. in this status:  (Month/Day/Year)	6. Have you attended, or are you currently attending, another U.S. educational institution?      No      Yes If 'Yes, Name of Institution: Period of Attendance:                                  through	

C. U.S. IMMIGRATION HISTORY      (Please check box      IF this is your first time in the U.S. or you have no prior US presence to report.)

List **all** periods of stay in F, J, M or Q visa status in the U.S. since 1987, **plus** any other U.S. presence in non-F/J/M/Q status during the current and prior 2 calendar years.

Date of Entry to U.S.	Date of Exit from U.S.	Visa/Immigration Status	J-1 Category (if J-1 status)	Purpose of Stay	Did you claim income tax treaty benefits?
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No
____/____/____	____/____/____	_____	_____	_____	____ Yes ____ No

D. U.S. FEDERAL INCOME TAX RESIDENCY STATUS DETERMINATION (RESIDENT ALIEN or NONRESIDENT ALIEN)

**Calendar Year** - For U.S. federal income tax purposes, an individual is considered to be in the U.S for a “calendar year” if he or she is present during one or more days between the period of January 1 - December 31.

**Exempt Individual** - An individual who is *exempt* from taking the Substantial Presence Test for determining tax residency status. An Exempt Individual’s days of physical presence in the U.S. do not count toward the Substantial Presence Test. Status as an ‘Exempt Individual,’ for the purposes of the Substantial Presence Test, does **not** equate to an exemption from paying federal income taxes.

STEP 1

Exempt Individual

I am a STUDENT on an F-1 or J-1 visa, AND I have been in the U.S. as a student for no more than 5 calendar years.

I am a PROFESSOR, SHORT-TERM SCHOLAR, RESEARCH SCHOLAR, or SPECIALIST on a J-1 visa AND I have been in the U.S. as a Professor, Short-Term Scholar, Research Scholar or Specialist for no more than two calendar years during the seven year period ending with the current calendar year.

If you marked either box, you are considered a **NONRESIDENT ALIEN** for federal income tax purposes this tax year. Skip Step 2. Complete Sections E (by checking the second box) and F.

If you did **not** mark either box, complete STEP 2.

STEP 2

Substantial Presence Test

The **Substantial Presence Test** involves a calculation of the number of days that you have been (or will be) physically present in the U.S. For purposes of this calculation, DO NOT include in your calculation any days that you are or were present in the U.S. as:

- A Student, or dependent of an F or J student-category visa, during the first 5 calendar years that you are/were present in the U.S.
- A J-1 (non-student category), or dependent of a J-1 (non-student category), during the first 2 calendar years of the past 6 calendar years.

**Example:** If you arrived in the U.S. for the first time on September 1, 2010, as an F-1 student and you have been in the U.S. since that date, do not include in your calculation any days that you were present in the U.S. for the first 5 calendar years (2010, 2011, 2012, 2013, 2014). For this example, you would begin to count the number of days of physical presence in the U.S. from January 1, 2015, until the present.

**Example:** If you arrived in the U.S. for the first time on August 15, 2013, as a J-1 Research Scholar and you have been in the U.S. since that date, do not include in your calculation any days that you are or were present in the U.S. for the first two calendar years (2013 and 2014). For this example, you would begin to count the number of days present in the U.S. from January 1, 2015, until the present.

	YEAR	NUMBER OF DAYS IN U.S.			CALCULATION OF SUBSTANTIAL PRESENCE
Current Year			x	1	=
1st Preceding Year			x	1/3	=
2nd Preceding Year			x	1/6	=
TOTAL					

If TOTAL < 183, OR the number of Current Year days < 31, you **do not** meet the Substantial Presence Test and are a **NONRESIDENT ALIEN** for federal income tax purposes this tax year. Complete Sections E (by checking the second box) and F.

If TOTAL >= 183, AND the number of Current Year days >= 31, you **do** meet the Substantial Presence Test and are a **RESIDENT ALIEN** for federal income tax purposes this tax year. Complete Sections E (by checking the first box) and F.

E. SUMMARY OF RESIDENCY STATUS FOR FEDERAL INCOME TAX PURPOSES

I certify that I am a **RESIDENT ALIEN** for federal income tax purposes this tax year, since I meet the Substantial Presence Test in Section D, Step 2.

I certify that I am a **NONRESIDENT ALIEN** for federal income tax purposes this tax year since I am either an Exempt Individual described in Section D, Step 1, or I do not meet the Substantial Presence Test in Section D, Step 2. Nonresident Alien employees are restricted in the manner in which federal income taxes are withheld from their wage or salary. Nonresident Aliens must elect ‘Single’ marital status on IRS Form W-4, regardless of actual marital status. The number of personal withholding allowances on Line 5 is generally limited to “1,” and individuals (except students from India) must identify themselves as “Nonresident Alien” or “NRA” on the dotted line of Line 6 to comply with IRS federal withholding guidelines. Nonresident Aliens may not claim ‘Exempt’ on line 7 of Form W-4. In the absence of a Form W-4 completed in accordance with restricted withholding requirements applicable to Nonresident Aliens, federal income taxes will be withheld at the default rate of ‘single’ marital status and zero personal withholding allowances. I will make an appointment with Tax Administration, 656-0679, 237 Waterman Building, to execute IRS Form 8233, Exemption from Withholding, and accompanying statement, if I am eligible for and wish to pursue an exemption from federal income tax withholding, pursuant to an income tax treaty between the U.S. and my country of residence.

F. CERTIFICATION

I declare under penalties of perjury that the information provided above is true and accurate. If I receive an extension of my visa status, or if my visa/immigration status changes, I will notify the Office of International Education, B-162 Living/Learning Center, (802)656-4296, and Tax Administration, 237 Waterman Building, Burlington, VT 05405, (802)656-0679.

SIGNATURE

DATE

\*\*For Tax Administration’s Use\*\*

(Revised 03/2019)

Residency Status	Residency Status Change Date	Tax Rate	Tax Treaty Expiration Date	Treaty Dollar Limit	FICA Expiration Date	Certification/Date
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