

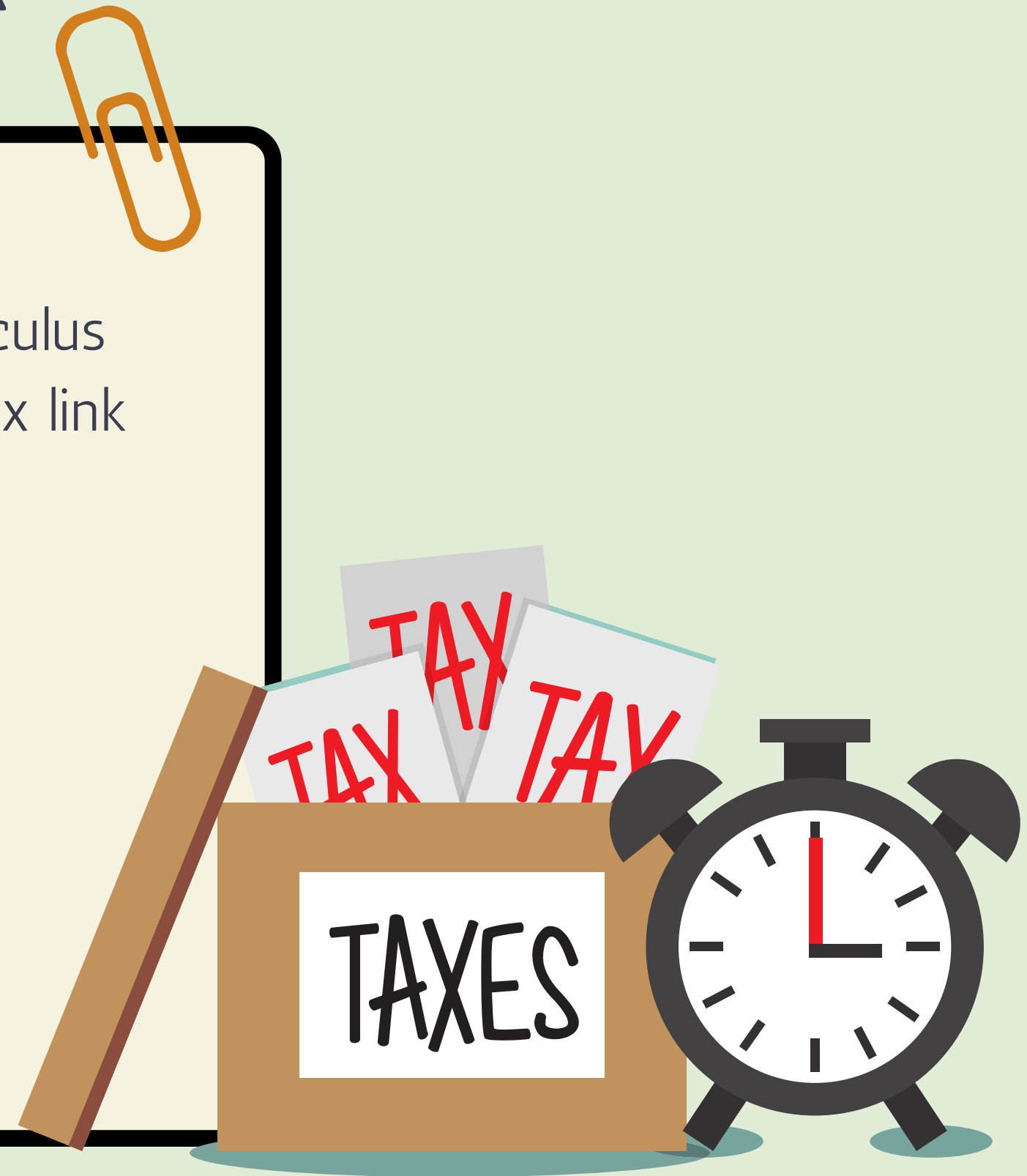


ISO TAX TOWN HALL

Understanding Tax Filing for 2022

WHAT WE WILL COVER

1. Who has to file?
2. Difference between Sprintax & Sprintax Calculus
3. Filing support for non-resident aliens: Sprintax link & webinar schedule
4. Filing support for resident aliens
5. Individual Taxpayer Identification Numbers (ITINs)
6. Frequently asked questions
7. Contact information
8. Questions



WHO HAS TO FILE?

Anyone who was in the US during the 2022 calendar year. Regardless of whether you have earned income during your time in the US, if you are a nonresident in the US, you will still need to file what's known as a **Form 8843, "Statement for Exempt Individuals and Individuals With a Medical Condition"**.

3 things that every US international student and J-1 visa holder needs to know about American taxes:

- Every US international student and J-1 visa holder has a **tax filing requirement**.
- It doesn't matter if you have not earned income. You must still file your documents before the deadline.
- If you don't comply with your tax obligations, you may encounter complications when applying for US visas in the future.

Form 8843	Statement for Exempt Individuals and Individuals With a Medical Condition For use by alien individuals only. ▶ Go to www.irs.gov/Form8843 for the latest information. For the year January 1—December 31, 2018, or other tax year , 2018, and ending , 20 .	OMB No. 1545-0074 <div style="font-size: 2em; font-weight: bold; text-align: center;">2018</div> Attachment Sequence No. 102
Department of the Treasury Internal Revenue Service	beginning	Last name
Your first name and initial	Your U.S. taxpayer identification number, if any	
Fill in your addresses only if you are filing this form by itself and not with your tax return	Address in country of residence	Address in the United States
Part I General Information		
1a Type of U.S. visa (for example, F, J, M, Q, etc.) and date you entered the United States ▶ b Current nonimmigrant status. If your status has changed, also enter date of change and previous status. See instructions.		
2 Of what country or countries were you a citizen during the tax year?		
3a What country or countries issued you a passport?		
3a Enter your passport number(s) ▶		
4a Enter the actual number of days you were present in the United States during: 2018 2017 2016		
b Enter the number of days in 2018 you claim you can exclude for purposes of the substantial presence test ▶		
Part II Teachers and Trainees		
5 For teachers, enter the name, address, and telephone number of the academic institution where you taught in 2018 ▶		

DIFFERENCE BETWEEN SPRINTAX (FILING) AND SPRINTAX CALCULUS

SPRINTAX




- Software program used by non-resident aliens to file taxes for the 2022 calendar year
- Will help you determine if you receive a refund or have to pay taxes

SPRINTAX CALCULUS




- Software used to create the 1042S form that calculates earnings & wages for foreign nationals
- You need this to file taxes in Jan. 2024 for the 2023 earning year

WHAT IS SPRINTAX CALCULUS AND WHERE DO I FIND THE PROFILE LINK?

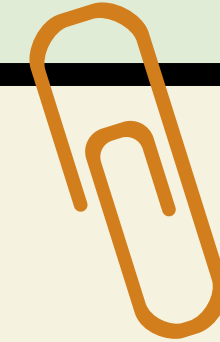
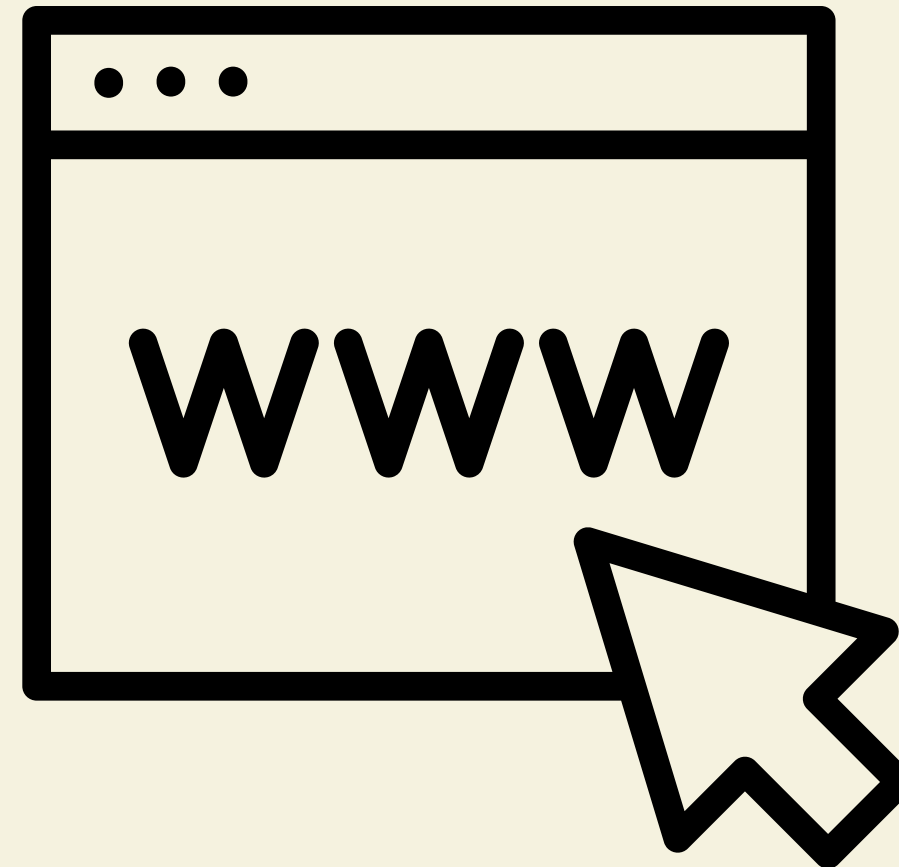
- 
- This is the software that is used to generate your 1042S (Wage Payment for foreign nationals)
 - The University will identify individuals who require a Sprintax profile. If identified, you will receive an email invitation from Sprintax Forms, which will prompt you to activate your account. **The email will come from the address noreply@sprintax.com with the subject line "Welcome to Sprintax Forms System."** Once you activate your account, please complete your Sprintax Forms profile by filling in the online questionnaire.

WHO SHOULD COMPLETE THE SPRINTAX CALCULUS FORMS PROFILE?

- 
- Generally, all foreign nationals who will receive payments from the University should complete a Sprintax Forms profile including but not limited to the following:
 - Visiting professors and research scholars
 - Visiting lecturers receiving honorariums
 - Foreign independent contractors receiving compensation for services or royalty payments
 - Student employees
 - Students receiving stipends for room and board (Please note that qualified scholarships for tuition only are not taxable.)

WHERE CAN I FIND INFORMATION ABOUT SPRINTAX CALCULUS?

On the Payroll
Website!



SUPPORT FOR NON-RESIDENT ALIENS

HOW TO FILE

[Sprintax](#)



OPT/CPT WEBINAR

[Thur., Mar. 16 @ 11am](#)

[Register](#)



SPRINTAX WEBINARS

Tues., Mar. 2 @ 10am

Wed., April 5 @ 2pm

Tues., April 11 @ 12pm

Fri, April 14 @ 12pm

[Register](#)



IMPORTANT TAX INFO

Filing deadline is
Tuesday, April 18.

Non-resident aliens
using SPRINTAX can
file federal taxes for
free. You must pay for
state tax filing.


You do not need a
Social Security
Number or an ITIN to
file the Form 8843.

You will need a Social
Security Number to E-
File.



SUPPORT FOR RESIDENT ALIENS

(Fees may apply)



PHUONG NGUYEN, CPA, MBA, CISA

- Experienced consultant
- Virtual tax/finance advisory services
- Flexible outside of business hours
- Appointments available upon request
- Discounts available for students

[Email](#) | [Linkedin](#) | [Slack](#)



H&R BLOCK

- 921 Genesee Street, Rochester, NY 14611
 - 585-436-0763
- 1000 Hylan Drive, Rochester, NY 14623
 - 585-424-2320

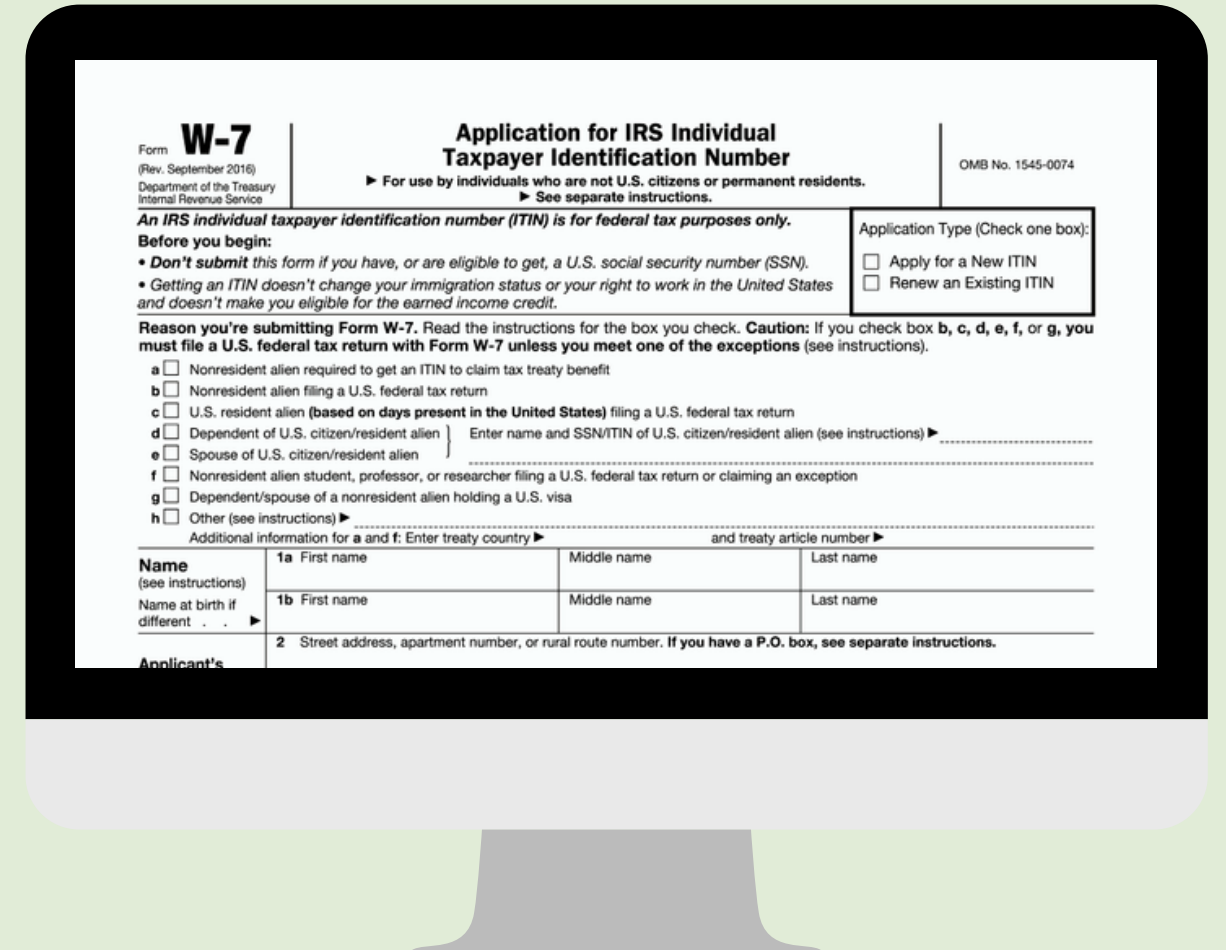


WELKER MOJSEJ & DELVECCHIO

- Certified Public Accountants, LLC
- 1200 Jefferson Road, Suite 300, Rochester, NY 14623
 - 585-292-1041

ITIN

- Individual Taxpayer Identification Numbers (ITINs) are being processed for free through Sprintax.
- [Click here](#) if you have created an account and need to log-in (in the event that you already created a password).
- If you have not created a password, you can simply [request a new activation link here](#).



The image shows a computer monitor displaying the IRS Form W-7, 'Application for IRS Individual Taxpayer Identification Number'. The form is titled 'Form W-7' and 'Application for IRS Individual Taxpayer Identification Number'. It includes instructions for use by individuals who are not U.S. citizens or permanent residents. The form is divided into sections for 'Before you begin', 'Reason you're submitting Form W-7', and 'Additional information for a and f'. The 'Before you begin' section includes a warning not to submit the form if the applicant has a social security number (SSN) and a note that getting an ITIN doesn't change immigration status. The 'Reason you're submitting Form W-7' section includes checkboxes for various categories: Nonresident alien required to get an ITIN to claim tax treaty benefit, Nonresident alien filing a U.S. federal tax return, U.S. resident alien (based on days present in the United States) filing a U.S. federal tax return, Dependent of U.S. citizen/resident alien, Spouse of U.S. citizen/resident alien, Nonresident alien student, professor, or researcher filing a U.S. federal tax return or claiming an exception, Dependent/spouse of a nonresident alien holding a U.S. visa, and Other (see instructions). The 'Additional information for a and f' section includes fields for the applicant's name (first, middle, last) and address (street, apartment number, or rural route number). The form also includes a box for 'Application Type (Check one box):' with options for 'Apply for a New ITIN' and 'Renew an Existing ITIN'.

FAQ



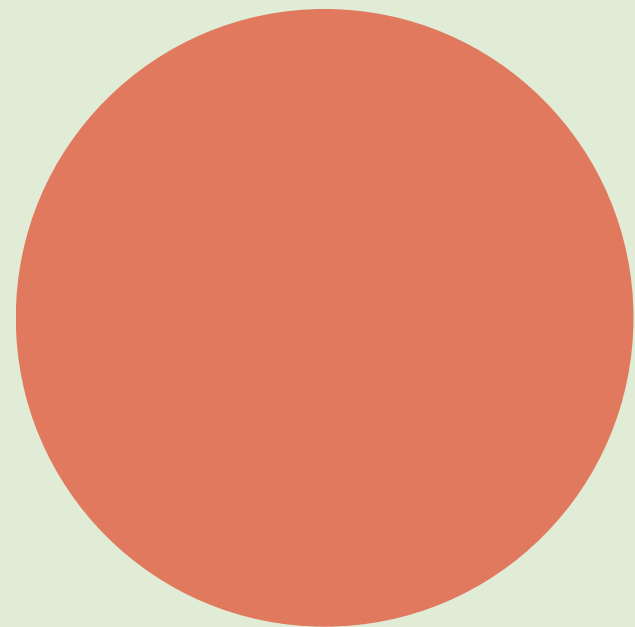
IS FILING WITH SPRINTAX FREE?

Filing non-resident alien federal taxes is free with use of the link on Slide 8. However students must pay for individual state tax filing on their own.

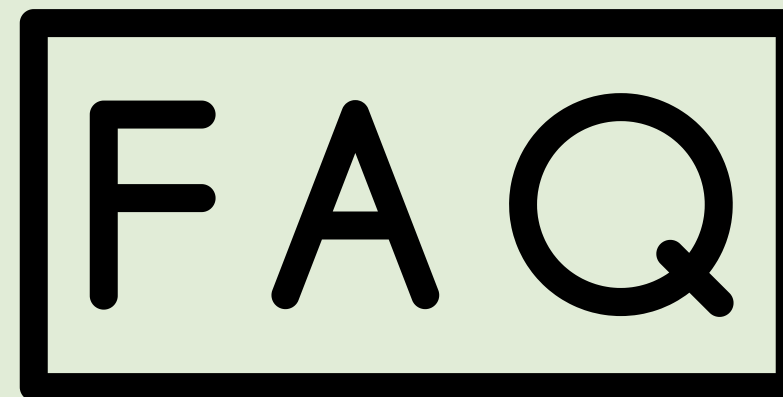


CAN I USE SPRINTAX IF I AM A RESIDENT ALIEN?

Sorry, the answer is no. There are resources available for students who are considered residents.



**I'M A GRAD STUDENT WITH A
FELLOWSHIP/ ASSISTANTSHIP
WHO IS CONCERNED ABOUT
TAXES THAT I MIGHT OWE
BASED ON MY STIPEND.**



[Click here](#) to view a resource page that was
developed by the Payroll & Tax Compliance Office.
[Click here](#) for tax info for graduate students.

TAX RESOURCES

hello @sprintax.com for 24 / 7
live chat help

[Sprintax Youtube Videos](#) 

tax@iso.rochester.edu for ISO
support





[Click to watch](#)

