

**XAVIER
UNIVERSITY
CENTER FOR
INTERNATIONAL
EDUCATION**

**INTERNATIONAL STUDENT AND SCHOLAR SERVICES
TAX WORKSHOP TAX YEAR 2024**



AGENDA ITEMS!

- Paying for Tax Code
- Disclaimer
- Introductory Concepts
- Federal Tax Return Basics
- State Tax Return Basics
- Deadlines
- Sprintax
- Q&A

Payment for Tax Code (Sprintax)

Credit Card payment: \$5

<https://commerce.cashnet.com/CIE>

- Send email confirming payment to skarzynskig@xavier.edu

Cash payment: \$5

- Drop off cash payment to Grace or Megan in the CIE

After making payment for the code, you will receive an email from Grace with your Sprintax code and instructions along with a copy of our slides from the Tax Workshop presentation.

Please note: Those who already paid today will receive their code and email today.

DISCLAIMER

- Xavier University and CIE staff cannot complete or review your tax filings.
- You, as a student, is solely responsible for the proper completion of your tax filings.
- As part of this responsibility, it is highly recommended that you refer to official IRS and state filing instructions.

The aim of this presentation is to provide you with a general understanding of tax principles as they apply to international students and as such, is for information purposes only. Each one of you have a unique tax position and so you are responsible for your own tax determination and compliance. Xavier **does not offer legal, accounting, or tax advice and services**, and recommends students consult a tax advisor for individual tax advice.

INTRODUCTORY CONCEPTS

Nonresident vs resident alien

- F and J students are nonresident aliens for the first 5 years in the US
- J non-students (Scholars) are nonresidents for the first 2 years in the US
- This counts prior history (if you entered the country prior to being a student)
- The A and G visas are always nonresident (ambassadors and other diplomats)
- If you don't fall under any of these categories, you don't have to be here ☺



FEDERAL TAX BASICS

Federal Forms for nonresidents

8843 Statement for Exempt Individuals and Individuals with a Medical Condition
2022
 For use by other individuals only.
 Do not use this form if you are a U.S. citizen or resident alien.

Part I General information

1. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

2. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

3. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

4. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

5. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

6. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

7. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

8. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

9. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

10. If you are a U.S. citizen or resident alien, do you have a dependent child who is a U.S. citizen or resident alien?
 Yes No

1040-NR U.S. Nonresident Alien Income Tax Return
2022
 For use by nonresident alien individuals.
 Do not use this form if you are a U.S. citizen or resident alien.

Part I Personal information

1. Name (last, first, and middle initial)
 Last name: _____ First name: _____ Middle initial: _____

2. Social Security number (SSN) or alien registration number (ARN)
 SSN: _____ ARN: _____

3. Home address (street, city, state, and ZIP code)
 Street: _____ City: _____ State: _____ ZIP: _____

4. Mailing address (street, city, state, and ZIP code)
 Street: _____ City: _____ State: _____ ZIP: _____

5. Telephone number (country code, area code, and number)
 Country code: _____ Area code: _____ Number: _____

6. Date of birth (month, day, and year)
 Month: _____ Day: _____ Year: _____

7. Date of arrival in the United States (month, day, and year)
 Month: _____ Day: _____ Year: _____

8. Date of departure from the United States (month, day, and year)
 Month: _____ Day: _____ Year: _____

9. Date of entry into the United States (month, day, and year)
 Month: _____ Day: _____ Year: _____

10. Date of exit from the United States (month, day, and year)
 Month: _____ Day: _____ Year: _____

11. Date of death (month, day, and year)
 Month: _____ Day: _____ Year: _____

12. Date of filing (month, day, and year)
 Month: _____ Day: _____ Year: _____

13. Date of preparation (month, day, and year)
 Month: _____ Day: _____ Year: _____

14. Date of completion (month, day, and year)
 Month: _____ Day: _____ Year: _____

15. Date of receipt (month, day, and year)
 Month: _____ Day: _____ Year: _____

16. Date of payment (month, day, and year)
 Month: _____ Day: _____ Year: _____

17. Date of refund (month, day, and year)
 Month: _____ Day: _____ Year: _____

18. Date of interest (month, day, and year)
 Month: _____ Day: _____ Year: _____

19. Date of penalty (month, day, and year)
 Month: _____ Day: _____ Year: _____

20. Date of other (month, day, and year)
 Month: _____ Day: _____ Year: _____

1040-NR U.S. Nonresident Alien Income Tax Return
2022
 For use by nonresident alien individuals.
 Do not use this form if you are a U.S. citizen or resident alien.

Part II Income

1. Total amount from Form 1042-S (see instructions) **18**

2. Total amount from Form 1042-S (see instructions) **18**

3. Total amount from Form 1042-S (see instructions) **18**

4. Total amount from Form 1042-S (see instructions) **18**

5. Total amount from Form 1042-S (see instructions) **18**

6. Total amount from Form 1042-S (see instructions) **18**

7. Total amount from Form 1042-S (see instructions) **18**

8. Total amount from Form 1042-S (see instructions) **18**

9. Total amount from Form 1042-S (see instructions) **18**

10. Total amount from Form 1042-S (see instructions) **18**

11. Total amount from Form 1042-S (see instructions) **18**

12. Total amount from Form 1042-S (see instructions) **18**

13. Total amount from Form 1042-S (see instructions) **18**

14. Total amount from Form 1042-S (see instructions) **18**

15. Total amount from Form 1042-S (see instructions) **18**

16. Total amount from Form 1042-S (see instructions) **18**

17. Total amount from Form 1042-S (see instructions) **18**

18. Total amount from Form 1042-S (see instructions) **18**

19. Total amount from Form 1042-S (see instructions) **18**

20. Total amount from Form 1042-S (see instructions) **18**

WHO MUST FILE



Received taxable earnings or income over \$0 in 2024
(received a W2 or 1099 form)

Received a taxable stipend, grant or allowance in 2024
(received a 1042S form)

Everyone must complete Form 8843 – irrespective of
income or days of presence.



TYPES OF INCOME



Other Income?

- ✓ Employment
- ✓ Scholarship covering costs other than tuition and tuition related Expenses (merit-based or athletic scholarships that cover):
 - Room and board
 - Stipend
- ✓ Investment income/Crypto

Other Income?

- ✓ Gambling winnings
- ✓ Focus group – gift card
- ✓ Rental income (over 14 nights)
- ✓ Selling art/design works
- ✓ All reportable



NON TAXABLE INCOME

- Scholarship for ONLY tuition and related expenses (merit-based/Athletics)
- Scholarship received from outside the US
- Money transferred from parents/relatives overseas
- Income 'earned' in their home country (investment income, rent, job before moving to US, etc.)
- Interest on regular savings account



INCOME DOCUMENTS

Income documents nonresidents may receive at the end of the tax year

W2

- ✓ Outlines Wages, Salary, Compensation from the entire year (Employment Earnings)

1042-S

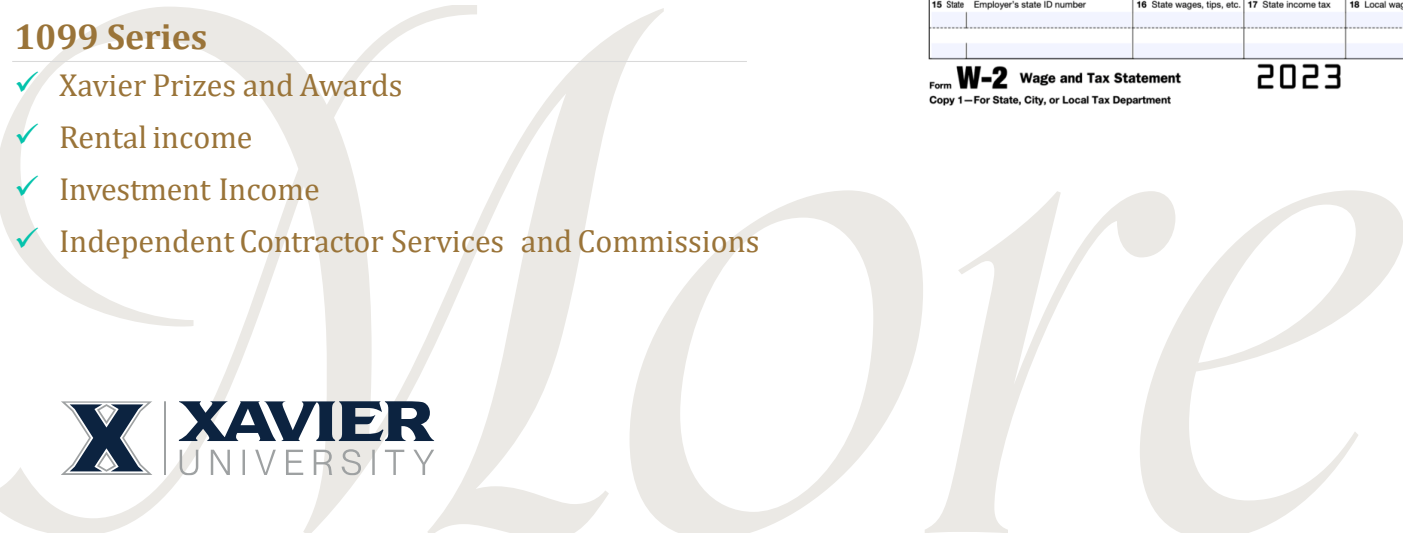
- ✓ Fellowship / Taxable Scholarships / Non-Degree Aid
- ✓ Income exempt by a tax treaty
- ✓ Royalty Payments
- ✓ Prize/Award/Miscellaneous foreign payments

1099 Series

- ✓ Xavier Prizes and Awards
- ✓ Rental income
- ✓ Investment Income
- ✓ Independent Contractor Services and Commissions

22222		a Employee's social security number		OMB No. 1545-0008							
b Employer identification number (EIN)		1 Wages, tips, other compensation		2 Federal income tax withheld							
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld							
		5 Medicare wages and tips		6 Medicare tax withheld							
		7 Social security tips		8 Allocated tips							
d Control number		9		10 Dependent care benefits							
e Employee's first name and initial		Last name		Suff.		11 Nonqualified plans					
						12a					
						12b					
						12c					
12d		13 Statutory employee		Retirement plan		Third-party sick pay					
14 Other											
f Employee's address and ZIP code											
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form **W-2** Wage and Tax Statement **2023** Department of the Treasury—Internal Revenue Service
Copy 1—For State, City, or Local Tax Department



INCOME DOCUMENTS

Income documents nonresidents may receive at the end of the tax year

W2

- ✓ Outlines Wages, Salary, Compensation from the entire year (Employment Earnings)

1042-S

- ✓ Fellowship / Taxable Scholarships / Non-Degree Aid
- ✓ Income exempt by a tax treaty
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- ✓ Xavier Prizes and Awards
- ✓ Rental income
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Form 1042-S Department of the Treasury Internal Revenue Service		Foreign Person's U.S. Source Income Subject to Withholding Go to www.irs.gov/Form1042S for instructions and the latest information.		2022 OMB No. 1545-0096 Copy A for Internal Revenue Service	
1 Income code		2 Gross income		3 Chapter indicator. Enter "3" or "4" 3a Exemption code 4a Exemption code 3b Tax rate 4b Tax rate	
5 Withholding allowance		6 Net income		7a Federal tax withheld	
7b Check if federal tax withheld was not deposited with the IRS because escrow procedures were applied (see instructions) <input type="checkbox"/>		7c Check if withholding occurred in subsequent year with respect to a partnership interest <input type="checkbox"/>		8 Tax withheld by other agents	
9 Overwithheld tax repaid to recipient pursuant to adjustment procedures (see instructions) ()		10 Total withholding credit (combine boxes 7a, 8, and 9)		11 Tax paid by withholding agent (amounts not withheld) (see instructions)	
12a Withholding agent's EIN		12b Ch. 3 status code		12c Ch. 4 status code	
12d Withholding agent's name		12e Withholding agent's Global Intermediary Identification Number (GIIN)		12f Country code 12g Foreign tax identification number, if any	
12h Address (number and street)		12i City or town, state or province, country, ZIP or foreign postal code		12j City or town, state or province, country, ZIP or foreign postal code	
13a Recipient's name		13b Recipient's country code		13c Recipient's address (number and street)	
13d City or town, state or province, country, ZIP or foreign postal code		13e Recipient's U.S. TIN, if any		13f Ch. 3 status code 13g Ch. 4 status code	
13h Recipient's GIIN		13i Recipient's foreign tax identification number, if any		13j LOB code	
13k Recipient's account number		13l Recipient's date of birth (YYYYMMDD)		14a Primary Withholding Agent's Name (if applicable)	
14b Primary Withholding Agent's EIN		15 Check if pro-rata basis reporting <input type="checkbox"/>		15a Intermediary or flow-through entity's EIN, if any	
15b Ch. 3 status code		15c Ch. 4 status code		15d Intermediary or flow-through entity's name	
15e Intermediary or flow-through entity's GIIN		15f Country code		15g Foreign tax identification number, if any	
15h Address (number and street)		15i City or town, state or province, country, ZIP or foreign postal code		16a Payer's name	
16b Payer's TIN		16c Payer's GIIN		16d Ch. 3 status code	
16e Ch. 4 status code		17a State income tax withheld		17b Payer's state tax no.	
17c Name of state		17d State tax identification number, if any		17e State tax identification number, if any	

For Privacy Act and Paperwork Reduction Act Notice, see instructions. Cat. No. 11386R Form 1042-S (2022)

INCOME DOCUMENTS



Income documents nonresidents may receive at the end of the tax year

W2

- ✓ Outlines Wages, Salary, Compensation from the entire year (Employment Earnings)

1042-S

- ✓ Fellowship / Taxable Scholarships / Non-Degree Aid
- ✓ Income exempt by a tax treaty
- ✓ Royalty Payments
- ✓ Prize/Award/Miscellaneous foreign payments

1099 Series

- ✓ Xavier Prizes and Awards
- ✓ Rental income
- ✓ Investment Income
- ✓ Independent Contractor Services and Commissions

VOID CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		FILER'S TIN	OMB No. 1545-2205	Payment Card and Third Party Network Transactions
		PAYEE'S TIN	Form 1099-K	
		(Rev. January 2022)		
		1a Gross amount of payment card/third party network transactions	For calendar year 20__	Copy 1 For State Tax Department
		\$		
		1b Card Not Present transactions	2 Merchant category code	
		\$		
Check to indicate if FILER is a (an):		3 Number of payment transactions	4 Federal income tax withheld	
Payment settlement entity (PSE) <input type="checkbox"/>	Check to indicate transactions reported are:		\$	
Electronic Payment Facilitator (EPF)/Other third party <input type="checkbox"/>	Payment card <input type="checkbox"/>			
	Third party network <input type="checkbox"/>			
PAYEE'S name		5a January	5b February	
Street address (including apt. no.)		\$	\$	
		5c March	5d April	
City or town, state or province, country, and ZIP or foreign postal code		\$	\$	
		5e May	5f June	
PSE'S name and telephone number		\$	\$	
		5g July	5h August	
Account number (see instructions)		\$	\$	
		5i September	5j October	
		5k November	5l December	
		\$	\$	
		6 State	7 State identification no.	8 State income tax withheld
				\$
				\$

Form **1099-K** (Rev. 1-2022) www.irs.gov/Form1099K Department of the Treasury - Internal Revenue Service



1098-T

- ✓ Mostly used to claim education tax credit
- ✓ Significant cause of misfiling for nonresidents
- ✓ **Not relevant for tax nonresidents**
- ✓ Sometimes - all students with an SSN on file with their school will get one, even nonresidents, so it can cause a lot of confusion!

CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number The Institute 123 Connecticut Way Good Place, MA 86753		1 Payments received for qualified tuition and related expenses \$ 48075.00	OMB No. 1545-1574 2021 Form 1098-T	Tuition Statement
FILER'S employer identification no. 000000	STUDENT'S TIN 000-00-0000	2	Copy B For Student This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.	
STUDENT'S name Jeremy Beremy		4 Adjustments made for a prior year \$	5 Scholarships or grants \$ 5000.00	
Street address (including apt. no.) 9 Opal Tree Place		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January-March 2022 <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Boston, MA 02115		8 Checked if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input checked="" type="checkbox"/>	10 Ins. contract reimb./refund \$
Service Provider/Acct. No. (see instr.)		Form 1098-T (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service		

FEDERAL REQUIREMENTS

FORM 8843



<https://www.irs.gov/pub/irs-pdf/f8843.pdf>

STEP
BY
STEP GUIDE

More

LOGGING IN

WELCOME

Create log in (if first time user) and choose your visa type.

sprintax

Sign out →

Please select your VISA:

F1 - Student

• Tax Preparation

Sprintax tax preparation system will help you to determine your tax obligations and any liability or refund due, for the tax years up to and including 2024. Sprintax will then prepare the necessary documents for mailing to the IRS.

Continue

×

Hi there! Got a question?



GETTING STARTED

WELCOME

sprintax

Megan Lindle Tax Year 2024

progress  0%



Before You Start

Documents Needed:

- > Passport
- > US Entry and Exit Dates for current and all past visits to the US
- > All income forms: Final Payslips, W2 Forms, 1042-S and/or 1099
- > Visa/Immigration Status Information
 - Including Form DS-2019 (for J visa holders) or Form I-20 (for F visa holders)
- > Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN).
 - If you do not have an ITIN, Sprintax can help you get one!
 - If you are using Sprintax for State Tax Returns(s) preparation only, you will need a copy of your already prepared Federal Tax Return (for the current and previous years, if you filed any)



Hi there! Got a question?



6

REQUIRED DOCUMENTS

WELCOME

Please Note:

If you believe that you should have received a Form W-2 or Form 1042-S and you have not yet received it, please contact the institution that made payments to you and request the form. The Tax or Payroll Department will provide you with a new copy of the forms.

You should not complete the Sprintax process until you have all of your forms as you may file an incomplete and/or incorrect tax return.



Hi th

Go Back

I Understand

STEP 1

WELCOME

Megan Lindle Tax Year 2024

progress 0%

Welcome to Sprintax!

Hey there, my name is Stacy. I'm going to make your tax affairs real easy.

Sprintax consists of a step-by-step questionnaire that's designed to gather all the information that we need to prepare your tax return.

OK, let's get started. First, please choose the tax year you need a tax return prepared for.



2024
 I want to correct my 2024 tax return I already sent to the IRS

2023
 I want to correct my 2023 tax return I already sent to the IRS

2022
 I want to correct my 2022 tax return I already sent to the IRS

2021
 I want to correct my 2021 tax return I already sent to the IRS

Prior tax years

STEP 2

RESIDENCY DETAILS

sprintax

Justin Credible Tax Year 2022

progress 6%

Residency Status

Residency

Have you been a US citizen, by birth or naturalization, on the last day of 2022?
Yes No

Have you ever been a green card holder?
Yes No

Have you ever applied for US citizenship/ lawful residence?
Yes No

Visiting the US

Were you in the US during the 2022 tax year?
Yes No

When was your first visit to the US?
2020

Are you still in the US?
Yes No

Please provide details below of all your visits to the US starting from 2020.

Visa Type / Status	US Entry Date	US Leave Date
Please Select	From	To
+ Add Visit		

How do I know my info is correct?

Your residency status is determined by the complete history of all your visits to the US including any visits as a student, trainee, tourist and all other entries to the US from 1985 onwards.

Please enter your Visitor Status from your I-20 or DS-2019 in the field above. For more information on your visa or status, click here.

If you're still in the US you can enter your visa expiry date

- Include all information for all visits to the U.S. (tourist visa, student visa, etc.)
- Select "view travel history" on your I-94 record by entering your passport information here: <https://i94.cbp.dhs.gov/home>

I-94 Travel History

View Travel History

Official Website of the Department of Homeland Security

U.S. Customs and Border Protection | I-94 Website | Travel Record for U.S. Visitors

Home | Apply Now | Get Most Recent I-94 | **View Travel History** | View Compliance | Help

Official Site for Travelers Visiting the United States: Apply for or retrieve Form I-94, Request Travel History and Check Travel Compliance

International travelers visiting the United States can apply for or retrieve their I-94 admission number/record (which is proof of legal visitor status) as well as retrieve a limited travel history of their U.S. arrivals and departures.

For instructions on accessing and printing your I-94 using your Alien Registration Number (A number), please [Click here](#).

Para obtener instrucciones sobre como acceder e imprimir su registro de viaje Forma I-94, haga [clic aquí](#).

Visiting the U.S. & Arriving Via a Land Border or Selected Ferry?

A Form I-94 is needed by all visitors except: U.S. Citizens, returning resident aliens, aliens with immigrant visas, and most Canadian citizens visiting or in transit. Travelers will be issued an I-94 during the admission process at the port of entry. If you are traveling via a land border or by ferry from selected ports, you may apply for a provisional I-94 in advance here, saving time while at the port of entry later.

Reference FAQs for specific ferry ports accepting provisional I-94s.

Need to Learn How to Apply for an I-94? Watch this video here

Apply for new I-94

Already Visiting & Need Proof of Visitor Status?

A traveler lawfully admitted (or paroled) into the U.S. may look up their most recent Form I-94 going back to 1983 for most classes of admission (or parole), and indefinitely for certain classes, such as diplomats and those admitted under the Compacts of Free Association. The corresponding Form I-94 may then be printed here. This is considered your lawful record of admission.

If someone requests your admission information, this is the form you would provide.

Get most recent I-94

Need A History Of Your Arrivals & Departures?

How Much Longer May I Remain in the U.S.?

<https://i94.cbp.dhs.gov/home>

1. Select "View Travel History"
2. Input Passport information

STEP 3

VISA DETAILS

sprintax

Justin Credible Tax Year 2022

progress  9%

Visa Details

Residency

Please provide details of your current US visa.

Visa type	Visa issue date
<input type="text" value="FI - Student"/>	<input type="text" value="02/03/2020"/>

Visa expiry date	Date you first entered the US
<input type="text" value="02/10/2025"/>	<input type="text" value="08/19/2020"/>

Approximate date you permanently left / intend to permanently leave the US.

<input type="text" value="05/15/2023"/>	Country of Citizenship
	<input type="text" value="Ghana"/>

Country of Residence before you entered the US

i

Have you changed your visa during 2022?

Yes No

You are here

- 1 RESIDENCY
 - Residency Status
 - **Visa Details** →
- 2 GETTING TO KNOW YOU
- 3 LET'S TALK MONEY
- 4 OFFSET YOUR EXPENSES
- 5 ABOUT YOUR COLLEGE
- 6 STATE TAXES
- 7 REVIEW
- 8 FINALIZING

STEP 4

ABOUT YOU

sprintax

Justin Credible Tax Year 2022

progress  15%

About You

Getting To Know You

Please note that the Sprintax system only accepts English / Latin alphabet letters.

You are here

- RESIDENCY
- 2 GETTING TO KNOW YOU
 - About You →
- 1 LET'S TALK MONEY
- 1 OFFSET YOUR EXPENSES
- 1 ABOUT YOUR COLLEGE
- 1 STATE TAXES
- 1 REVIEW
- 1 FINALIZING

First name

Justin

Middle name

Last Name

Credible

Occupation

Student

Date of Birth

05/01/1983

NOTE: Occupation is your principal activity in the US such as student, teacher, trainee, or your official designation as employed or self-employed if you have an occupation such as doctor, manager, engineer, etc.

Did you have US income (wages, scholarships, or other payments) in 2022?

Yes No

Do you have a US tax identification number (ITIN/SSN)?

Yes No

Are you a full time student in a US educational institution or full time intern/trainee in US?

Yes No

Are you a degree candidate in a US educational institution?

Yes No

Are you OPT/CPT program participant? [What is OPT / CPT](#)

Yes No

At any time during 2022, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

Yes No

STEP 5

YOUR ADDRESS

sprintax

Justin Credible Tax Year 2022

progress 18%

Your address

Getting To Know You

Please note that the Sprintax system only accepts English / Latin alphabet letters.

You are here

- RESIDENCY
- GETTING TO KNOW YOU
 - About You
 - Your address** →
 - Marital Status
- LET'S TALK MONEY
- OFFSET YOUR EXPENSES
- ABOUT YOUR COLLEGE
- STATE TAXES
- REVIEW
- FINALIZING

US Address

Home Address (outside the US)

3800 Victory Parkway	584 one way street
Resident hall A Apartment	Address (county, province)
Cincinnati	kumasi
Ohio	Ghana
45207	5488

Choose the address which will appear on the return(s), and will be used for correspondence and any refund check:

US Address Home Address (outside the US)

Is this your billing address?

Yes No

Passport

Passport issued by

56845455	Ghana
----------	-------

Phone number

United States (+1)	Ghana (+233)
5137454374	Home phone number

STEP 6

MARITAL STATUS

sprintax

Justin Credible Tax Year 2022

progress  18%

Marital Status

Getting To Know You

Please note that the Sprintax system only accepts English / Latin alphabet letters.

You are here

- RESIDENCY
- 2 GETTING TO KNOW YOU
 - About You
 - Your address
 - Marital Status →
- 1 LET'S TALK MONEY
- 1 OFFSET YOUR EXPENSES
- 1 ABOUT YOUR COLLEGE
- 1 STATE TAXES
- 1 REVIEW
- 1 FINALIZING

Can you be claimed as a dependent on someone else's US tax return?
Yes No

Were you married on the last day of 2022?
Yes No

STEP 7

INCOME DOCUMENT
PREPARATION **sprintax**

Justin Credible Tax Year 2022
progress  27%

Income Documents

Let's Talk Money

Your Income Documents

You are here

- RESIDENCY
- GETTING TO KNOW YOU
- LET'S TALK MONEY
 - Income Documents →
- OFFSET YOUR EXPENSES
- ABOUT YOUR COLLEGE
- STATE TAXES
- REVIEW
- FINALIZING

Tell us about the income documents you received in 2022.

- For each unique form that you received select "+add document" to enter the information into the system.
- If you have received a form with multiple identical copies from one employer, please treat it as one form.
- You may enter as many of each different form as necessary.
- DO NOT combine information from different forms, enter each form separately.

Income document type	Quantity
income document	number
+ Add Document	

NOTE: If you have more than 200 payment forms of a single type please contact our 24/7 Live Chat for help with organizing your Tax Return(s) which will be prepared offline. Please note that additional charges for tax preparation and consultation may apply.



STEP 8

DOCUMENT UPLOAD

W-2


sprintax

Justin Credible Tax Year 2022

progress 30%

If your original W-2 does not have amounts in boxes 16-20 on two rows, do not enter any information on the second row below.

Upload a scan or photo of your income document
The uploaded file should contain only one page!



Drag your file here to start uploading.

OR

[Browse files](#)

You are here

- RESIDENCY
- GETTING TO KNOW YOU
- LET'S TALK MONEY
 - Income Documents
 - W-2 forms [1] →
- OFFSET YOUR EXPENSES
- ABOUT YOUR COLLEGE
- STATE TAXES
- REVIEW
- FINALIZING

Select employer type

Please Select

122-45-6789 Employee's social security number		OMB No. 1545-0008	
b Employer identification number (EIN)		1 Wages, tips, other compensation	2 Federal income tax withheld
e Employer's name, address, and ZIP code		3 Social security wages	4 Social security tax withheld
Company Name		5 Medicare wages and tips	6 Medicare tax withheld
Address		7 Social security tips	8 Allocated tips
City	State/Province	ZIP/Postal code	
d Control number		9	10 Dependent care benefits
e Employee's first name and initial		11 Nonqualified plans	
Last name	Suff.	Instructions for box 12	
3800 Victory Parkway		13	
Cincinnati	Ohio	45207	
f Employee's address and ZIP code		Box 12 instructions	
Employer's state ID number		16 State wages, tips, etc.	17 State income tax
18 Local wages, tips, etc.		19 Local income tax	
20 Locality name			

Form **W-2 Wage and Tax Statement 2022** Department of the Treasury—Internal Revenue Service

STEP 9

DOCUMENT UPLOAD
1042-S

Note: Box 17b will probably be empty on your 1042-S. Sprintax will not let you continue without filling in that box. The number for box 17b is:

510648389

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Upload a scan or photo of your income document
The uploaded file should contain only one page!

Drag your file here to start uploading.
OR
Browse files

You are here

- RESIDENCY
- GETTING TO KNOW YOU
- LET'S TALK MONEY
 - Income Documents
 - W-2 forms [1]
 - 1042 S [1] →
 - Other Income
- OFFSET YOUR EXPENSES
- ABOUT YOUR COLLEGE
- STATE TAXES
- REVIEW
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Type of entity
College, University or other Educational institution

Form **1042-S** Foreign Person's U.S. Source Income Subject to Withholding 2022 OMB No. 1545-0098

1 Income code 15000	2 Gross income 15000	3 Chapter indicator Foreign 4 0	12a Recipient's U.S. TIN, if any 123-45-6789	13f Ch. 3 status code DO
4a Exemption code 00	4b Tax rate 00.00	4c Tax on 00.00	13g Ch. 4 status code DO	13h LOI code number, if any
5 Withholding allowance 0	6 Net income 0	7a Federal tax withheld 0	13i Recipient's account number	13j Recipient's date of birth (YYYYMMDD)
7b Check if federal tax withheld was not deposited with the IRS because escrow procedures were applied (see instructions)	7c Check if withholding occurred in subsequent year with respect to a partnership interest	8 Tax withheld by other agents 0	14 Primary Withholding Agent's Name (if applicable)	14b Primary Withholding Agent's EIN
9 Overwithheld tax repaid to recipient pursuant to adjustment procedures (see instructions)	10 Total withholding credit (combine boxes 7a, 8, and 9)	11 Tax paid by withholding agent (amounts not withheld) (see instructions)	14c Check if pre-rata basis reporting	15a Intermediary or flow-through entity's EIN, if any
12a Withholding agent's EIN 06-5512255	12b Withholding agent's name XU	12c Withholding agent's Global Intermediary Identification Number (GIIN)	15b Ch. 3 status code	15c Ch. 4 status code
12d Country code	12e Foreign tax identification number, if any	12f Address (number and street) 3800 victory parkway Cincinnati OH 45207	15d Intermediary or flow-through entity's name	15e Intermediary or flow-through entity's GIIN
12g City or town, state or province, country, ZIP or foreign postal code	12h Recipient's name Justin Credible	12i Recipient's country code Ghana	15f Country code	15g Foreign tax identification number, if any
12j City or town, state or province, country, ZIP or foreign postal code	12k Address (number and street) 3800 Victory Parkway Cincinnati OH 45207	12l City or town, state or province, country, ZIP or foreign postal code	15h Address (number and street)	15i City or town, state or province, country, ZIP or foreign postal code
12m Payer's name Justin Credible	12n Payer's TIN	12o Payer's GIIN	15j State income tax withheld 0	15k Payer's state tax no. 454454544
12p State income tax withheld	12q Payer's state tax no.	12r Name of state Ohio	15l	15m

Form 1042-S 2022

STEP 10

OTHER INCOME

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Other Income

Let's Talk Money

Income not reported elsewhere

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 - Other Income** →
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Did you receive any other income from US sources that is not reported on your W-2

Yes No



STEP 11

ADDITIONAL TAX
INFO

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Additional Tax Info

Let's Talk Money

Other taxes and payments

You are here

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 - 1042 S [1]
 - Other Income
 - **Additional Tax Info** →
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Did you make any estimated tax payments during 2022 which you paid directly to the IRS yourself and not through your employer?

Yes No

Did you make any estimated tax payments to the state tax office during 2022 which you paid yourself and not through your employer?

Yes No

Did you file any forms requesting an extension to file a tax return with the IRS?

Yes No

Did you file any forms requesting an extension to file a tax return with the State Tax office?

Yes No

Previous US tax returns

Have you filed a US federal tax return before?

Yes No

Have you filed a state tax return before?

Yes No

STEP 12

ACADEMIC EXPENSES

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progress  76%

Academic Expenses

Offset Your Expenses

If you have used part of your taxable scholarship (as reported on your 1042-S form) to cover expenses incurred in 2022, please, provide us with the details. We will use these to maximize your tax refund. The questions in this section are not mandatory so you can leave some or all of them blank if they're not applicable.

Please note that you have to keep all receipts for your expenses in case of an audit.

Student loan interest deduction

Did you pay interest on a qualified student loan?

Yes No

You are here

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- GETTING TO KNOW YOU
- LET'S TALK MONEY
- ④ OFFSET YOUR EXPENSES
 - Academic Expenses →
- ③ ABOUT YOUR COLLEGE
- ③ STATE TAXES
- ③ REVIEW
- ③ FINALIZING

STEP 13

OTHER EXPENSES

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progress  85%

Other Expenses

Offset Your Expenses

Please provide us with details of any expenses you incurred in 2022. We will use these to maximise your tax refund. Please note that the questions in this section are not mandatory so you can leave some or all of them blank as appropriate.

Please note that you have to keep all receipts for your expenses in case of an audit; reimbursements received from your employer may affect your tax treaty benefits and the final balance on your tax return.

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Charitable contributions

For any charitable donations made by either cash or check and regardless of the amount or form of property donated, you must keep records.

For cash donations, an appropriate record would be a bank or credit card statement or a written statement from the charity stating the name of the charity, amount of the donation and the date on which it was made.

Charitable contributions paid by check or cash

\$

Charitable contributions paid by another means

\$

Health Insurance payments

Did you receive 1095-A form?

Yes No

I received Forms 1095-B or 1095-C: You do not need to provide information or a copy of 1095-B or 1095-C to us or to the IRS. You do not need these forms in order to file your tax return, you only have to keep them for your records.

Form 1095-A: If you are expecting to receive a Form 1095-A, you should wait to file your 2022 income tax return until you receive it. Sprintax can help you with the preparation of your return offline. To prepare your return offline we will need you to finalize your account on Sprintax and email us with your 1095-A form.

STEP 14

COLLEGE DETAILS

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progress 85%

College Details

About Your College

Please complete the following information exactly as shown on your Form DS-2019 or I-20.

You are here

- RESIDENCY
- GETTING TO KNOW YOU
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- OFFSET YOUR EXPENSES
- ABOUT YOUR COLLEGE**
 - College Details →
- STATE TAXES
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University/college details

(DS2019 or see School Information section on your I-20)

State

Name of University

Address

City

Zip code

Phone

Program director details

(DS2019 - Box 7 or see School Information section on your I-20)

State

Name of advisor

Address

City

Zip code

Phone

Course / program details

Name of University

Course Type

Major

STEP 15

LIVING IN THE US

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Justin Credible Tax Year 2022

progress  91%

Living in the US

State Taxes

Please provide details of each state you lived in during 2022. You should also include any periods spent outside the US (if applicable).

Note that if you are not able to list the periods you were outside the US during 2022 correctly you may need to review and change the entry and exit dates you have entered on the step "Residency status".

See Example

Entry date	Exit date	State	Type of accomodation	Type of visit
01/01/2022	12/31/2022 	Ohio	 Dormitory	 Tempor... 

You are here

-  RESIDENCY
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 -  Transferring your data
 -  Living in the US 
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STEP 16

OHIO RESIDENCY DETERMINATION

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Justin Credible Tax Year 2022

progress  93%

Ohio Residency determination

State Taxes

You are here

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- STATE TAXES**
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 - Living in the US
 - Ohio Residency determination →
- REVIEW
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Are you in the State of Ohio for temporary purpose?

Yes No

Sprintax Resources

<https://blog.sprintax.com/f1-visa-tax-return-guide-international-students>

If you don't have a SSN...

- If you need to file your taxes this year but do not have a Social Security Number, you will need to apply for an ITIN. The best way to apply for an ITIN is in person at the Cincinnati IRS office (550 Main St. Cincinnati, OH, 45202).
- **How to Apply:**
- Complete Form W-7/W-7(SP) ([About Form W-7, Application for IRS Individual Taxpayer Identification Number | Internal Revenue Service](#))
 - You can pay Sprintax to help you fill out the W-7 form, but you do not have to.
- Request an ITIN Support Letter from the CIE office
- Schedule an appointment at the Cincinnati IRS office by calling 1-844-545-5640
- Bring the required documents to the appointment. Documents must be original and unexpired.
 - Form W-7
 - [Proof of identity and foreign status](#)
- For more information, please click on this link: [IRS Courseware - Link & Learn Taxes](#)
 - Please note: it is possible to apply for an ITIN by mail. However, this will require you mailing your passport and other immigration documents which may get lost in the mail, may be delayed in returning to you, or may be damaged in the process. For these reasons, we do not recommend applying for an ITIN by mail.

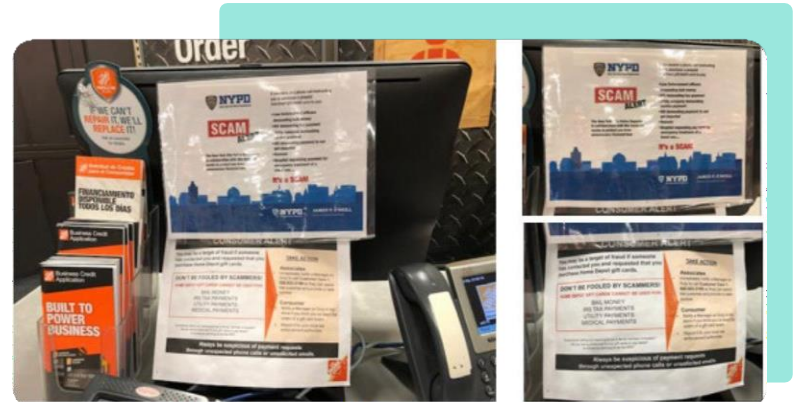
TAX SCAMS



- ✓ Use caution and common sense
- ✓ IRS would never ask for personal details without proper communication
- ✓ IRS are not seeking to penalize anyone – they just want to make sure that the fair and correct taxes are paid on time

Tax scams generally have the same format (internationally!)

- ✓ Money Owed
- ✓ “Instant” payment will make the problem go away
- ✓ Voucher/prepaid credit card reference preferred payment option



OOPS! FORGOT TO FILE?



- ✓ Don't panic!
 - but do set the record straight

- ✓ Never filed...
 - ✓ Catch up
 - Can back file at any stage
 - Can only claim a refund for previous 3 years

- ✓ Misfiled...
 - 1040X - Amended US Individual Income Tax Return
 - Simple form, similar to 1040



Implications of not filing

- ✓ Nonresidents are required to comply with all US laws, including IRS & filing tax forms (even if only 8843).
- ✓ Remaining compliant is part of maintaining visa status in the US.
- ✓ Not filing could **affect future immigration status** (like H1B, LPR)
- ✓ Fines, penalties and interest can accrue if the IRS are owed
- ✓ Might be missing out on a refund!

