



# MISSISSIPPI STATE UNIVERSITY

## INTERNATIONAL TAX QUESTIONNAIRE

### PERSONAL INFORMATION

LAST/FAMILY NAME: \_\_\_\_\_ FIRST NAME: \_\_\_\_\_ MIDDLE INITIAL: \_\_\_\_\_

I.T.I.N or U.S. SOCIAL SECURITY NUMBER: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

MSU ID NUMBER: \_\_\_\_\_ FIRST DATE OF ENTRY INTO THE U.S. \_\_\_\_\_

- ETHNICITY:
- WHITE
  - BLACK OR AFRICAN AMERICAN
  - HISPANIC OR LATINO
  - ASIAN
  - AMERICAN INDIAN OR ALASKA NATIVE
  - NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER
  - OTHER: \_\_\_\_\_

### UNITED STATES TEMPORARY RESIDENCE

U.S. STREET ADDRESS: \_\_\_\_\_ HOME PHONE NUMBER: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

### PERMANENT FOREIGN ADDRESS

STREET ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_

POSTAL CODE: \_\_\_\_\_ PROVIDENCE/REGION: \_\_\_\_\_ COUNTRY: \_\_\_\_\_

### INCOME INFORMATION

- TYPE OF INCOME:
- EMPLOYMENT
  - SCHOLARSHIP/FELLOWSHIP
  - INDEPENDENT CONTRACTOR
  - OTHER: \_\_\_\_\_

EMPLOYING DEPARTMENT: \_\_\_\_\_ HIRE DATE: \_\_\_\_\_

JOB TITLE: \_\_\_\_\_ FIRST DATE OF EMPLOYMENT IN U.S.: \_\_\_\_\_

### INTERNATIONAL VISA INFORMATION

PASSPORT NUMBER: \_\_\_\_\_ VISA NUMBER: \_\_\_\_\_

PASSPORT EXP. DATE: \_\_\_\_\_ VISA ISSUE DATE: \_\_\_\_\_ VISA EXP. DATE: \_\_\_\_\_

COUNTRY OF RESIDENCE (FOR TAX PURPOSES): \_\_\_\_\_

ANTICIPATED DATE OF DEPARTURE: \_\_\_\_\_

IMMIGRATION STATUS:

- F-1 STUDENT  
     UNDERGRADUATE     GRADUATE     POST GRADUATE
- J-1  
     01 – STUDENT  
     02 – SHORT TERM SCHOLARS  
     05 – PROFESSOR  
     12 – RESEARCH SCHOLAR  
     OTHER: \_\_\_\_\_
- J-2 SPOUSE OR CHILD OF EXCHANGE VISITOR
- H-1 TEMPORARY EMPLOYEE
- OTHER: \_\_\_\_\_

PRIMARY ACTIVITY:

- 01 – STUDYING IN DEGREE PROGRAM                       07 – CONDUCTING RESEARCH  
 02 – STUDYING IN NON-DEGREE PROGRAM                       08 – TRAINING  
 03 – TEACHING     09 – DECORATING SPECIAL SKILLS  
 04 – LECTURING     10 – CLINICAL ACTIVITIES  
 05 – OBSERVING     11 – TEMPORARY EMPLOYEE  
 06 – CONSULTING     12 – HERE WITH SPOUSE  
 99 – OTHER (PLEASE SPECIFY) \_\_\_\_\_

**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 U.S. UNDER ASYLUM STATUS?  YES  NO
- D. ARE YOU CURRENTLY PRESENT IN THE U.S. UNDER REFUGEE STATUS?  YES  NO
- E. ARE YOU CURRENTLY PRESENT IN THE U.S. UNDER A TEMPORARY PROTECTED STATUS?  YES  NO

**REQUIRED DOCUMENTATION**

PLEASE PROVIDE THE FOLLOWING DOCUMENTATION THAT APPLIES TO YOUR STATUS:

- J-1 STUDENT/TEACHER/RESEARCHER: DS-2019
- F-1 STUDENT: I-20 FORM
- H1: FORM I-797A
- LEGAL PERMANENT RESIDENT: GREEN CARD
- IF APPLIED FOR PERMANENT RESIDENT: COPY OF I-551 STAMP FROM PASSPORT/INS LETTER STATING APPROVAL
- PRESENT UNDER ASYLUM, REFUGEE, OR TEMPORARY PROTECTED STATUS: COPY OF INS LETTER STATING STATUS
- COPY OF I-94 (FRONT AND BACK)
- COPY OF CURRENT STATUS VISA
- COPY OF PASSPORT

**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.)

CALENDER YEAR (EX. 2013)	PERIODS YOU WERE PHYSICALLY PRESENT IN THE U.S. (EX 3/24/13-12/31/13)	TOTAL DAYS PRESENT IN THE U.S.	VISA TYPE	PURPOSE OF ENTRY

**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 ABOVE TO MAKE THIS DETERMINATION. IMPORTANT: YOU MAY HAVE BEEN PHYSICALLY PRESENT IN THE U.S. (AS INDICATED ABOVE) 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 \_\_\_\_\_

**TAX TREATY STATEMENT**

IS THERE A TAX TREATY BETWEEN THE U.S. AND YOUR COUNTRY OF RESIDENCE?  YES  NO

IF YES, PLEASE SIGN THE TAX EXEMPTION FORM ([IRS FORM 8233](#) OR [IRS FORM W-9](#)) AND RETURN WITH OTHER REQUIRED DOCUMENTATION.

**CERTIFICATION OF INFORMATION**

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

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**INTERNAL USE ONLY:  
RESIDENT STATEMENT FOR TAX PURPOSES**

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

**RESIDENT ALIEN** FOR TAX PURPOSES     **NON-RESIDENT ALIEN** FOR TAX PURPOSES

1. IF ANY OF THE ABOVE QUESTIONS (A-E) ARE ANSWERED YES, PAYEE IS CONSIDERED A RESIDENT ALIEN FOR TAX PURPOSES. YOU MAY SKIP PHYSICAL PRESENCE INFORMATION AND SUBSTANTIAL PRESENCE TEST. CHECK RESIDENT ALIEN IN BOX PROVIDED ABOVE.
  
2. IF THE 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), THE PAYEE IS A RESIDENT ALIEN FOR TAX PURPOSES, CHECK RESIDENT ALIEN IN BOX ABOVE. IF THE 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), THE PAYEE IS A NON-RESIDENT ALIEN FOR TAX PURPOSES, CHECK NON-RESIDENT ALIEN IN BOX ABOVE.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_