

Instructions for Individuals to Complete the University of Alaska Taxable Status Determination Form (TSDF)

A University of Alaska department has sent you the attached form [University of Alaska Taxable Status Determination Form (TSDF)] to be completed and faxed back to the specific department. This needs to be done as soon as possible and definitely before the event in which this form has been requested. The purpose of these instructions is to help you understand why we ask for this information and to assist you in completing the form.

Why are you being asked to complete this form?

- The U.S. Internal Revenue Service (IRS) has different tax regulations for U.S. citizens or permanent residents versus non-U.S. citizens. When a University of Alaska department wishes to pay an individual's travel expenses (airfare, hotel, per diem, etc.), personal services, royalty fees, or provide an honorarium, tax issues arise if that individual is not a U.S. citizen or permanent resident. [We have different procedures to use if we are paying a non-U.S. business, company, corporation, or partnership.]
- The information you provide, along with departmental information completed at the bottom of the form, will help us determine if any of the payments being made directly to you or on your behalf (such as airline tickets) are taxable for nontaxable and make a determination on the availability of tax treaty benefits.
- We thank you in advance for assisting us in meeting our legal requirements!

Instructions for completing this form:

Listed below are line-by-line instructions to assist you in completing this form. We ask that the dates be noted in the month/day/year format. For example, for January 31, 2006, you would write 01/31/2006. If you are completing the form prior to coming to the U.S., you may not be able to supply all the information requested. If you are in the U.S. when you complete the form, you will have I-94 information and an arrival date. We have noted this difference in the instructions below. If there is confusion over what is requested, please send an email to your departmental contact.

Document #: To be completed by the University of Alaska department that provided you with this form.

Date: The date you complete the form (month/day/year format).

SECTION A. General Instructions

Name: Please print your last name or surname, first name, and middle initial, in that order.

UA ID #: If you have been an employee or student of the University of Alaska in the past, you are welcome to enter your UA ID# here. If you do not remember your UA ID#, we will fill that line in on your behalf.

Birth date is self-explanatory in month/day/year format.

Check the box for Male or Female. This may make you smile, but often we are not as familiar with naming conventions used in other countries or first names used for men or women. We want to address you correctly, and this will help.

Mailing address, phone numbers, primary language, and email are self-explanatory.

U.S Identification numbers: If you have a U.S. social security number (SSN) or U.S. individual taxpayer identification number (ITIN), we may ask that you check the box and provide the number. If you received a number in the past but do not remember what it is and no longer have the identification document, please write a sentence stating that fact on the form. Someone from the University of Alaska will contact you via email.

Emergency Contact Information is self-explanatory.

SECTION B. Tax Residency Information

Citizen of [country]: Usually the country that issued your passport.

Nation of Birth: In what country were you born?

What country did you live in prior to coming to the U.S.? And Dates of Residence in that country? This question is asked as it may have an effect on which tax treaty benefits may be available to you.

Date of First Entry into the U.S. in any visa category (month/day/year format): If you do not know the exact date, make your best estimate. If you have come into the U.S. under a visa waiver, then travel across the border is generally as a B-1 (for business purposes) or B-2 (for tourist purposes) category.

General I-94 Information: We ask that if you are entering the U.S. under a visa waiver, that you tell the staff at the border that you are entering for business purposes and that you request an I-94 card. The I-94 card is a white card which will have your entry date stamped on it, what visa type you are using handwritten, and how long you may stay in the U.S. When you enter the U.S., it will be stapled outside your passport, or in the case of Canadian citizens, stapled to the Form I-20 or DS-2019 if applicable.

Current Entry I-94 Date (month/day/year format):

- If you are currently in the U.S., you will have your I-94 card. We ask here for the date stamped on the I-94 card.
- If you are completing this form but have not yet entered the U.S., leave this information blank. We ask that you provide the information after entering the U.S.
- If you are completing this form but will not be traveling to the U.S., write in 'N/A' or not applicable.

Current I-94 Expiration:

- If you are currently in the U.S., the I-94 you received is marked D/S (for duration of status) or will state a specific date (when you must leave the U.S.). Check the box if your I-94 is marked D/S or provide the specific expiration date if it is noted.
- If you are completing this form but have not yet entered the U.S., leave this information blank. We ask that you provide this information after entering the U.S.
- If you are completing this form but will not be traveling to the U.S., write in 'N/A' for not applicable.

Form I-20 or DS-2019 valid from ... to ...: If you have a Form I-20, these dates are shown in item #5; and on the DS-2019 they are shown in item #3.

Passport # and Country of Issue are self-explanatory. If you are a dual citizen, please provide the information for the passport that is on your current visa documentation.

Expiration Date (month/day/year format): The expiration date of your passport. If it appears that your passport has expired, there may be an extension date on the following page in your passport.

U.S. Visa Type: Check the appropriate box for the visa type you already have or the visa type for which you have applied. If you have a visa type or requested a visa type other than those listed, check the box for "Other Type" and write in the visa type. Enter the expiration date of the visa if you have already received this visa. If you have a J visa, check the box for the category noted on your DS-2019 and the expiration date. If you are in an 'Other' category, please write it in on the provided line. Once you receive your visa, provide that information to the department.

If your country of origin is one of the listed countries for the Visa Waiver program then assume a VW visa.

http://www.alaska.edu/hr/procedures/PDF/nra.nra.visa_waiver_program.pdf)

Arrival and Departure Information into the U.S.: We need information for each time you have traveled to the U.S. within the last 7 years. For each trip, we ask that you enter your arrival and departure dates, as well as the visa type and purpose of that trip. You may need to review your passport to help you complete this information. If you

have multiple trips into the U.S., too many to fit on the lines on the form, please write them on a separate piece of paper and note that they are attached.

If you cannot remember the exact dates of your U.S. travel, please enter the approximate month/year and estimate how many days you were in the U.S. for that specific trip. We still need to know your visa type and purpose.

If you have multiple entries in the U.S. on a visa waiver (such as many of our Canadian, Mexican, European, and Japanese visitors often do) please list the year and the total number of days in the U.S. for each type of activity. For example, 2005 10 days tourist, 2004 5 days tourist. **[Please note that shopping is considered a tourist activity, not for business purposes!]**

Check the box if ... If you have traveled to the U.S. under a visa type of F, J, M, L, or Q, prior to 7 years ago, we will need that travel information (attach a separate piece of paper if necessary). For example, if you are completing this form in calendar year 2006, you would list any travel before calendar year 1999.

SECTION C. Certification. You must sign and date this form.

The University of Alaska department hosting your University of Alaska association will provide you with a fax number in order for you to submit this completed form. They will forward your completed form to a nonresident alien tax specialist (NRAT) who may contact you for additional information.

**On behalf of each University of Alaska department,
we thank you very, very much for providing this information!**