


GOA2TAX Form Data Entry Guidelines

The scholarship, human resources (HR), and accounts payable (A/P) departments at each MAU have the responsibility to collect and enter the following information. These guidelines should be followed when documenting procedures and processes for each particular department. If there is a need to change or add additional fields, the MAU should bring the proposal to the NRA work team for discussion and approval.

The GOA2TAX form should be completed once the GOAINTL form is completed and it is determined that the individual is going to receive a payment.

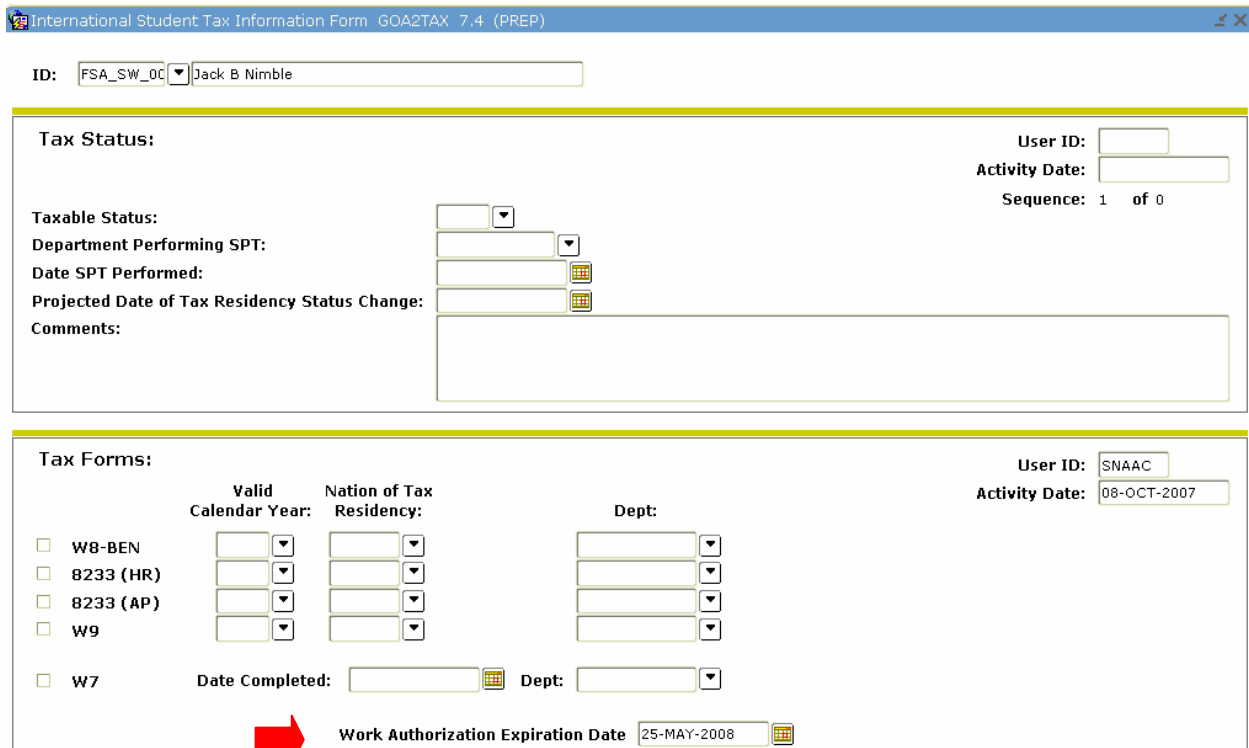
This form can be accessed by typing GOA2TAX in the direct access box or from the GOAINTL form by selecting Tax Information (GOA2TAX) under the Options menu. The underlying table for the form is GOB2TAX.

Creating a new sequence or inserting a new record:

Once the form has been saved you will not be able to make changes to the taxable status, department performing SPT, date SPT performed, or projected date of tax residency change without creating a new sequence. You can do this by selecting Insert under the Record drop down menu or clicking . The comments field and all fields in the Tax Forms box will only contain the most recent information; history will not be able to be viewed.

Human Resources Only - When tax documents are received, complete the following:

1. Work Authorization Expiration Date – Enter the work authorization date as per the employment authorization document (EAD) or the I-94 for F-1's and J-1's.



International Student Tax Information Form GOA2TAX 7.4 (PREP)

ID: Jack B Nimble

Tax Status:

Taxable Status:

Department Performing SPT:

Date SPT Performed:

Projected Date of Tax Residency Status Change:

Comments:


User ID:

Activity Date:

Sequence: 1 of 0

Tax Forms:

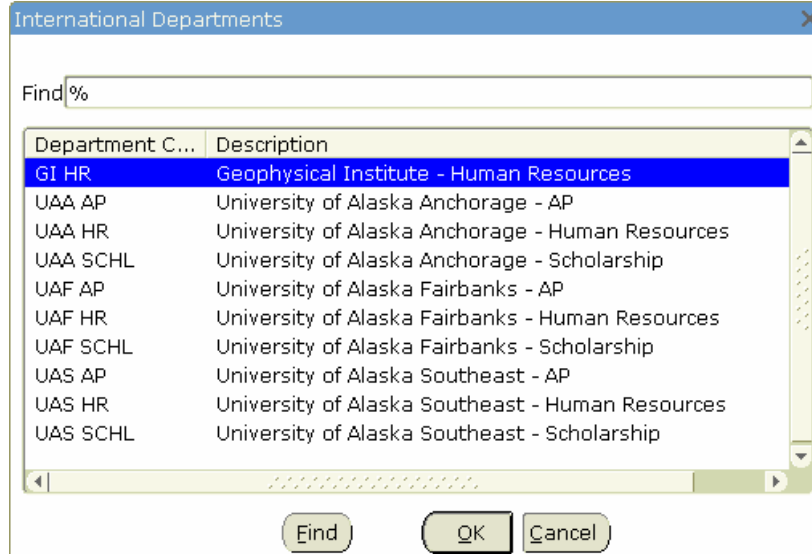
	Valid Calendar Year:	Nation of Tax Residency:	Dept:
<input type="checkbox"/> W8-BEN	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> 8233 (HR)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> 8233 (AP)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> W9	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> W7	Date Completed: <input type="text"/>	Dept: <input type="text"/>	

 Work Authorization Expiration Date

GOA2TAX Form Data Entry Guidelines

All – When Substantial Presence Test (SPT) is performed, complete the following:

1. Tax Status box:
 - a. Taxable Status – Enter either NRA (nonresident alien) or RA (resident alien) based on the outcome of the SPT.
 - b. Department Performing SPT – Select your department from the drop down menu.



- c. Date SPT performed – Enter the date that the SPT was performed. This date should coincide with the date on the International form or Tax Status Determination Form (TSDF).
- d. Projected Date of Tax Residency Status Change – Enter the date that the foreign national’s tax residency status is expected to change. If they are currently an NRA, this would be the date they are expected to become and RA. If they are an RA, this would be the date they are expected to become an NRA, if applicable.
Notes: They may not revert back to an NRA. A/P should use a date of 31-DEC-2099 for short-term visitors.
- e. Comments – Enter any relevant comments. Please include your Banner ID and date after all comments as the activity date will not update when comments change. *Example:* Expected to leave before tax residency changes – SNAAC 08-Oct-07.

International Student Tax Information Form GOA2TAX 7.4 (PREP)

ID: Jack B Nimble

Tax Status:

Taxable Status: Nonresident Alien

Department Performing SPT: University of Alaska Fairbanks - Accounts Payable

Date SPT Performed:

Projected Date of Tax Residency Status Change:

Comments:

User ID:

Activity Date:

Sequence: 1 of 1

GOA2TAX Form Data Entry Guidelines

All – When a new tax form is received, complete the following:

1. Tax Forms box:
 - a. W8-BEN – Check box if a W8-BEN is on file, select calendar year it is valid for, select the nation of tax residency, and select your department from the drop down menu. **Note: A W8-BEN is used by nonresident aliens to claim tax treaty benefits on scholarships/fellowships and royalties.**
 - b. 8233 (HR) – Check box if an 8233 is on file, select the calendar year it is valid for, select the nation of tax residency, and select your department from the drop down menu. **Note: An 8233 is used by nonresident alien (NRA) employees to claim tax treaty benefits on compensation (dependent personal services).**
 - c. 8233 (AP) – Check box if an 8233 is on file, select the calendar year it is valid for, select the nation of tax residency, and select your department from the drop down menu. **Note: An 8233 is used by nonresident alien (NRA) non-employees to claim tax treaty benefits on compensation (independent personal services).**
 - d. W9 – Check box if a W9 is on file, select the calendar year it is valid for, select the nation of tax residency, and select your department from the drop down menu. **Note: A W9 is used by resident alien (RA) employees to claim tax treaty benefits on compensation (dependent personal services).**
 - e. W7 – Not currently being used.

International Student Tax Information Form GOA2TAX 7.4 (PREP)

ID: Jack B Nimble

Tax Status: User ID:

Activity Date:

Sequence: 1 of 1

Taxable Status: Nonresident Alien

Department Performing SPT: University of Alaska Fairbanks - Accounts Payable

Date SPT Performed:

Projected Date of Tax Residency Status Change:

Comments:

Tax Forms: User ID:

Activity Date:

	Valid Calendar Year:	Nation of Tax Residency:	Dept:
<input checked="" type="checkbox"/> W8-BEN	<input type="text" value="2007"/>	<input type="text" value="NO"/> Norway	<input type="text" value="UAF SCHL"/> University of Alaska Fairbanks - Scholarship
<input checked="" type="checkbox"/> 8233 (HR)	<input type="text" value="2007"/>	<input type="text" value="NO"/> Norway	<input type="text" value="UAF HR"/> University of Alaska Fairbanks - Human Resources
<input checked="" type="checkbox"/> 8233 (AP)	<input type="text" value="2005"/>	<input type="text" value="NO"/> Norway	<input type="text" value="UAF AP"/> University of Alaska Fairbanks - Accounts Payable
<input type="checkbox"/> W9	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> W7	Date Completed: <input type="text"/>	Dept: <input type="text"/>	

Work Authorization Expiration Date