



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 RESENCE" 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: _____