

## TEMPLE UNIVERSITY

### Alien Information Collection Form

The information requested below is strictly confidential and will be used for tax withholding and reporting purposes only. This information will allow the University to determine your U.S. residency status for tax purposes and is not associated with immigration or visa classification.

PLEASE COMPLETE ALL APPLICABLE QUESTIONS

#### A. PERSONAL INFORMATION

NAME (Last or Family)	First or Personal	Middle	COUNTRY OF CITIZENSHIP	SOCIAL SECURITY NUMBER
U.S. ADDRESS (Street)			ADDRESS IN HOME COUNTRY (Street)	
CITY	STATE	ZIP CODE	CITY	COUNTRY
PHONE NUMBER (Home)			(PHONE)	
UNIVERSITY STATUS (check all that apply)			UNIVERSITY DEPARTMENT/COLLEGE	
<input type="checkbox"/> Employee <input type="checkbox"/> Full-time Student <input type="checkbox"/> Non-Employee			Have you attended or are you currently attending another U.S. educational institution? If yes,	
			Name of Institution	
			Period of Attendance	

#### B. DEFINITIONS

Because some of the language on this form may be confusing, before you begin to complete the questions below, please read the following definitions:

**CALENDAR YEAR:** For U.S. tax purposes, a person is considered to be in the U.S. for a "calendar year" if he or she is present during one or more days between the period of January 1 - December 31. For example, if you are present in the U.S. from December 15 - 31, you are in the U.S. for one full calendar year, even though you are only here for 17 days.

**ORIGINAL DATE OF ENTRY TO THE U.S.:** You may enter and leave the U.S. many times during the period of your study or research in the U.S. (for vacation, holidays or summer break.) The original date of entry to the U.S. in your current visa status is the first date that you arrived in the U.S. to begin your study, teaching, research, etc., not the last date that you entered the U.S.

**VISA STATUS OR VISA TYPE:** When completing this form, all questions concerning "visa type" or "visa status" refer to the category of visa that you hold. Your "visa status" or "visa type" is marked on the I-94 card stapled into your passport. For example, if you are a student, your visa status may be F-1 or J-1. Please note: If you have applied for a change of status after entry into the U.S., your visa type and visa status will be different. For tax purposes, indicate your current visa status.

**FORM I-20:** A Form I-20 is a white form which is sent to all F-1 students by Temple; it lists the details of your program of study in the U.S.

**FORM IAP-66:** A Form IAP-66 is a pink form which is given to all J-1 visaholders by Temple; it lists the details of your program in the U.S. There are several categories of J-1 visas which are issued; the category of your J-1 visa is stated in section 4 of the Form IAP-66. For example, section 4 of the Form IAP-66 will state whether you are a J-1 student, J-1 teacher, J-1 researcher, etc.

**FORM I-94:** A Form I-94 is your Arrival/Departure card (the small white card stapled in your passport). The date written on this card is the date on which your permission to stay in the U.S. expires; if "D/S" is written on your card, use the expiration or completion date found on your Form I-20 or IAP-66.

#### C. CURRENT IMMIGRATION CATEGORY

My current visa type is: (mark only one box)	Original date of entry to U.S. on current visa type:
<input type="checkbox"/> Permanent Resident/Immigrant (Complete Sections E and F; do not complete Section C or D)	When does your permission to stay in the U.S. expire? (Use the date found on your Form I-20, IAP-66 or I-94)
<input type="checkbox"/> F-1 Student <input type="checkbox"/> H1-B Employee	
<input type="checkbox"/> J-1 Student <input type="checkbox"/> B-1 Visitor	
<input type="checkbox"/> J-1 Teacher, Researcher, or Trainee <input type="checkbox"/> Other: _____	
Estimated Date of Departure from U.S.	Have you ever been in the U.S. under a different type of visa? If yes,
	When _____ Visa Type _____

**D. RESIDENT ALIEN/NONRESIDENT ALIEN DETERMINATION**

<b>STEP 1</b>	<input type="checkbox"/> I am a <b>STUDENT</b> on an F-1 or J-1 visa AND I have been in the U.S. for a total of five or fewer calendar years as a Student.  <input type="checkbox"/> I am a <b>TEACHER, SPECIALIST, or PROFESSOR</b> on a J-1 visa AND I have been in the U.S. for a total of less than two of the past six calendar years as a Teacher, Specialist or Professor.  <b>If you marked either box, you are a NONRESIDENT ALIEN for tax purposes. Complete Box E and F, do not complete Step 2.</b>  <b>If you <u>did not</u> mark either box, complete STEP 2.</b>																									
<b>STEP 2</b>  <b>SUBSTANTIAL PRESENCE TEST</b>	<p><b>This Step 2 involves a calculation of the number of days that you have been physically present in the U.S. For purposes of this calculation, <u>DO NOT include in your calculation any days that you are or were present in the U.S. as:</u></b></p> <ul style="list-style-type: none"> <li>• A Student, or dependent of a Student, on an F-1, J-1, or M-1 visa (during the first five calendar years that you are present in the U.S.)</li> <li>• A Teacher, Specialist, or Professor, or dependent of a Teacher, Specialist, or Professor, on a J-1 visa (during the first two calendar years of the past six calendar years that you are present in the U.S.)</li> </ul> <p><b>Example:</b> If you arrived in the U.S. for the first time on August 15, 1992, as a J-1 researcher and you have been in the U.S. since that date, do not include in your calculation the days that you are or were present in the U.S. for the first two calendar years (1992 and 1993). If you have no days in a calendar year to include in your calculation, enter a "0" (zero) on the line for "Number of Days in U.S." For this example, you would only include the number of days present in the U.S. from January 1, 1994, until the present.</p> <p><b>Example:</b> If you arrived in the U.S. for the first time on September 1, 1990, as an F-1 student and you have been in the U.S. since that date, do not include in your calculation the days that you are or were present in the U.S. for the first five calendar years (1990, 1991, 1992, 1993, and 1994). If you have no days in a calendar year to include in your calculation, enter a "0" (zero) on the line for "Number of Days in U.S." For this example, you would begin to count the number of days present in the U.S. from January 1, 1995.</p> <table style="width:100%; margin-top: 20px;"> <thead> <tr> <th style="width:30%;"></th> <th style="width:15%; text-align: center;">YEAR</th> <th style="width:15%; text-align: center;">NUMBER OF DAYS IN U.S.</th> <th style="width:10%;"></th> <th style="width:10%; text-align: center;">CALCULATION FOR SUBSTANTIAL PRESENCE</th> </tr> </thead> <tbody> <tr> <td>Current Year</td> <td style="text-align: center;">199</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">X 1 =</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>1ST Preceding Year</td> <td style="text-align: center;">199</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">X 1/3 =</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>2ND Preceding Year</td> <td style="text-align: center;">199</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">X 1/6 =</td> <td style="text-align: center;">_____</td> </tr> <tr> <td></td> <td></td> <td></td> <td style="text-align: center;"><b>TOTAL</b></td> <td style="text-align: center;">_____</td> </tr> </tbody> </table> <p style="margin-top: 10px;"><b>If the Total is less than 183 days; you are a NONRESIDENT ALIEN for tax purposes.</b>  <b>If the Total is equal to or greater than 183 days; you are a RESIDENT ALIEN for tax purposes.</b></p>		YEAR	NUMBER OF DAYS IN U.S.		CALCULATION FOR SUBSTANTIAL PRESENCE	Current Year	199	_____	X 1 =	_____	1ST Preceding Year	199	_____	X 1/3 =	_____	2ND Preceding Year	199	_____	X 1/6 =	_____				<b>TOTAL</b>	_____
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2ND Preceding Year	199	_____	X 1/6 =	_____																						
			<b>TOTAL</b>	_____																						

**E. SUMMARY OF RESIDENCY STATUS FOR TAX PURPOSES**

<input type="checkbox"/> I certify that I am a lawful <b>PERMANENT RESIDENT</b> or <b>IMMIGRANT ALIEN</b> . Return this form to the University official who requested the form.  <input type="checkbox"/> I certify that I am a <b>RESIDENT ALIEN</b> for tax purposes based upon Section D above. Return this form to the University official who requested the form.  <input type="checkbox"/> I certify that I am a <b>NONRESIDENT ALIEN</b> for tax purposes based upon Section D above.  <p><b>Employees:</b> Deliver this form in person to the Personnel Department; due to the possibility of an exemption from taxation based on an income tax treaty, you must schedule an appointment to complete additional tax forms (call Data Management to schedule an appointment). <u>Failure to complete any required additional forms will result in the automatic withholding of tax at the maximum rates.</u></p> <p><b>Students and Nonemployees:</b> Return this form to the University official who requested the form.</p>
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**F. CERTIFICATION**

<p>I declare under penalties of perjury that the information provided above is true and correct. If I receive an extension of my visa status or if my visa/immigration status changes, I will notify the Personnel Department.</p> <div style="text-align: center; margin-top: 20px;"> <p>_____</p> <p>SIGNATURE</p> </div> <div style="text-align: right; margin-top: 20px;"> <p>_____</p> <p>DATE</p> </div>
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