

NoRTH & NRVTAP International Tax Clinic

DIY-Taxes using TaxSlayer

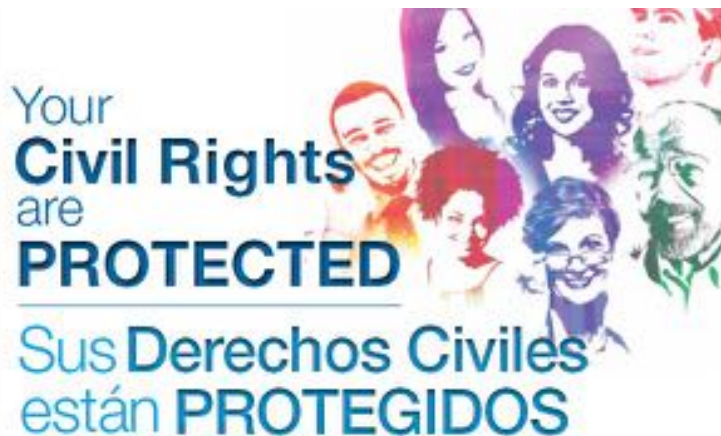
Basic Scenario 3

For NRA NO Tax Treaty

An IRS FSA (Facilitated Self-Assistance) Tax Clinic

This guide is intended to assist in preparing tax year 2022 federal income tax returns for nonresident aliens.

IRS Required Disclosures



In accordance with federal law and the Department of the Treasury – Internal Revenue Service policy, discrimination against taxpayers on the basis of race, color, national origin (including limited English proficiency), disability, sex (in education programs or activities), age or reprisal is prohibited in programs and activities receiving federal financial assistance.

Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service.

De acuerdo con la ley federal y la política del Departamento del Tesoro - Servicio de Impuestos Internos, la discriminación contra los contribuyentes basada en raza, color, origen nacional (incluido el dominio limitado del inglés), discapacidad, género (en los programas educativos o actividades), edad o represalia, está prohibida en los programas o actividades que reciben asistencia financiera federal.

Los contribuyentes con una discapacidad pueden solicitar acomodo razonable y contribuyentes con un dominio limitado del inglés podrán solicitar asistencia con el idioma para tener acceso al servicio.

Operations Director,
Civil Rights Division
Internal Revenue Service
Room 2413
1111 Constitution Avenue, NW
Washington, DC 20224



If a taxpayer believes he or she has been discriminated against, a written complaint should be sent to the address referenced within. For all other inquiries concerning taxpayer civil rights, contact us at the mailing address or e-mail us at edc.civil.rights.division@irs.gov

Do not send tax returns or other tax-related information to the Civil Rights Division office or e-mail address.

Si un contribuyente cree que él o ella ha sido discriminado, debe enviar una queja por escrito al IRS, a la dirección de referencia. Para todas las demás consultas relacionadas a los derechos civiles del contribuyente, comuníquese a la dirección que aparece a la izquierda o envíenos un correo electrónico a edc.civil.rights.division@irs.gov

No envíe declaraciones de impuestos u otra información que no esté relacionada con los derechos civiles, a la oficina de la División de Derechos Civiles o al correo electrónico.

VITA/TCE Free Tax Programs

The mission of these programs is to provide free basic tax return preparation for low-to-moderate income and elderly taxpayers. This also includes taxpayers with disabilities, limited English proficiency and the Military.

Volunteers participating in these programs must sign a Form 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs. These agreements require them to provide high quality service and uphold the highest ethical standards.

While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS-sponsored partners who manage IRS-required site operations and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal property.

To report unethical behavior to IRS, e-mail us at vi.votfax@irs.gov



Programas de Impuestos Gratuitos Ofrecidos por VITA/TCE

El Servicio de Impuestos Internos (IRS, por sus siglas en inglés), patrocina los programas de Asistencia Voluntaria al Contribuyente para la preparación de los Impuestos sobre el ingreso (VITA, por sus siglas en inglés), y el de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE, por sus siglas en inglés).

La misión de estos programas es proporcionar la preparación gratuita de las declaraciones de impuestos sencillas a los contribuyentes de ingresos bajos a moderados y contribuyentes de edad avanzada. Esto incluye también a los contribuyentes con discapacidades, aquellos con dominio limitado del inglés y la milicia.

Aunque el IRS es responsable de proporcionar los requisitos de supervisión para los programas de Asistencia Voluntaria al Contribuyente (VITA) y de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE), estos sitios son operados por socios patrocinados por el IRS que administran las operaciones requeridas por el sitio y los estándares de ética de los voluntarios. Además, es posible que las ubicaciones de estos sitios no estén en la propiedad federal.

Los voluntarios que participan en estos programas, tienen que firmar el Formulario 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs (Acuerdo de los estándares de conducta de los voluntarios de los programas de VITA/TCE), en inglés. Estos acuerdos exigen que ellos proporcionen un servicio de alta calidad y mantengan los más altos estándares éticos.

Para denunciar un comportamiento no ético al IRS, envíenos un correo electrónico a vi.votfax@irs.gov

WARNING!

- The TaxSlayer software is not “smart”!
 - Just because you can create a return that shows a particular amount of tax owed or a refund, or any number in any particular spot, does NOT mean that the return is correct.
- It is your responsibility to correctly prepare your tax return.
 - When you sign to send it in, you are signing under penalties of perjury that the return is true, correct, and complete.
 - We have provided aides to assist you in this process, and opportunities to talk to trained volunteers about how to prepare your return, but ultimately it is up to you to ensure that your return is correct.
 - As an IRS VITA clinic, the volunteers and organizations who assist you are not liable for any incorrect information in your return.
 - If the return you prepare is incorrect, YOU will be responsible for any additional tax, interest, or penalties that you may owe the IRS / MN Department of Revenue.

Tax Process Overview

- **Step 1: Get Organized**

- Gather your income documents
- Confirm your return is in scope

- **Step 2: Prepare Your Return**

- **Option 1: Personalized Guide**

- Create your Personalized Guide using our free tool
- Prepare your return using the personalized guide


- **Option 2: Use general guides**

- Confirm your federal tax residency status for 2022. You can use our free [Am I A Nonresident Alien?](#) tool.
- Determine if you need to file a tax return
- Determine your treaty benefits. You can use our free [What Are My Treaty Benefits?](#) tool.
- Determine which scenario(s) apply to you
- Prepare your return using the basic scenario
- Update your return with any special circumstances scenarios

- **Step 3: File Your Return**

- E-file your return
- Paper file (if you can't e-file)

Create a personalized guide and you'll only get the steps and pages that you need to prepare and file your federal and state tax returns!



You should be here in the tax process

Have you confirmed your federal tax residency?

Macalester tax clients should have used GLACIER and GTP to confirm that you are NRA for tax purposes. You can only use TaxSlayer software if your NRA for tax.

If you want to you can also access same information about tax residency after creating an account at this special NRA tax site, <https://www.nrvtap.com/>, by using their Am I Nonresident Alien tool, <https://tools.nrvtap.com/aminra>.

Select Tax Year

2022

Enter Your Visits

Please enter the entry and exit dates, along with the visa you held for that visit, for **all** of your visits to the United States. If you do not enter all of your lifetime visits and your correct visa information, then the results provided in this tool may not be accurate. You can view your travel history at (<https://i94.cbp.dhs.gov/i94/#/home>).

Your most recent visit can have no exit date, if you are still present in the US on that same visit (the calculation will use today's date as the exit date).

Visa	Entry Date	Exit Date	
F-1 Student	08/08/2020	05/31/2022	Remove Visit
F-1 Student	08/23/2022	MM/DD/YYYY	Remove Visit

[Add another visit](#)

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

Number of days **Present in 2022**: 282

Number of days **Present in 2021**: 365

Number of days **Present in 2020**: 146

Number of days **Exempt in 2022**: 282

Note: You are required to file Form 8843 to report your Exempt days for 2022.

We strongly recommend that you print your results or take screenshots for reference.

2023.02.03
Print Results

Have you checked your treaty benefits? Are you in the right basic scenario?

Select Visa	Select Country of Tax Residency	Select Federal Tax Residency
<input type="text" value="F-1 Student"/>	<input type="text" value="Italy"/>	<input type="text" value="Nonresident Alien"/>
Did you receive dividends from U.S. Corporations	Did you have capital gains from sales of U.S. stocks	
<input type="text" value="No"/>	<input type="text" value="No"/>	
<input type="button" value="Check Treaty Benefits"/>	<input type="button" value="Clear Treaty Benefits"/>	

You are not eligible for any treaty benefits for scholarships or fellowships under (Code 16)

You are not eligible for any treaty benefits for wages under (Code 20)

Use the guide for **Basic Scenario 3** to prepare your return.

We strongly recommend that you print your results or take screenshots for reference.

Basic Scenario #3 Details

- This scenario is intended to assist in federal tax return preparation for nonresident aliens who **do not** have treaty benefits for wages or scholarships:
 - May have wage income
 - This would be reported on a W-2
 - May have scholarship or fellowship income
 - This would be reported on a form 1042-S form with income code 16
 - May have filed a federal and state income tax return last year
 - May have received a state income tax refund
 - May have paid additional state income tax
- If this scenario doesn't represent your basic situation, please go back to the main website and choose a different scenario, or use our personalized guide tool to create your customized guide.

Special Circumstances Scenarios

- We have broken out our state tax return preparation into separate guides. We have guides for the following states:
 - Minnesota, Pennsylvania, North Carolina, California, Maryland
- The following scenarios are intended to expand the federal and state tax return preparation process for nonresident aliens who have the following special circumstances:
 - Minnesota Property Tax Refund
 - Working in multiple states
 - Investment transactions – Interest, Dividends, Capital Gains
 - Wage Income with No 1042-S, or Your Treaty Benefits DO NOT MATCH
 - Scholarship or Fellowship Income Not Reported on a 1042-S
 - Charitable Contributions
 - Student Loan Interest
 - Dependents
 - IRA/401(k) Distributions
- If one or more of these special circumstances applies to you, **FIRST** complete this basic scenario, and **THEN** complete the guides for any special circumstances that apply.

Out of Scope Income & Situations

- Income over \$73,000 Note: this is a software limit, and you won't be able to prepare a return if your income is over this amount.
 - We have access to another free software package that does not have an income limit but does have other restrictions. Contact us at taxassistance@nrvtap.com and we will determine if it would work for you, and provide access if it does.
- Some state income tax returns. We support MN, CA, PA, NC, and MD returns. The software supports all of the other states, but we can't help you do them
- Treaty benefits for income types other than wages, scholarships, dividends, and capital gains
- Capital gains. We provide a guide for entering transactions for stock and mutual fund sales, but cannot provide assistance with this type of income at our appointments.
- Self-employment Income (1099-NEC or 1099-MISC)
- Income earned outside of the U.S.
- Amended returns
- Prior Year (2021 or earlier) Returns. The software only does 2022 returns.
- Cryptocurrency
- If you have a type of income that is out of scope you can still use TaxSlayer to prepare your return, but we will not be able to provide guidance about the out of scope income.
- You can find reference materials for preparing your federal return / reporting out of scope income here:
 - <https://www.irs.gov/>

Basic Scenario 3 Steps

1. Create TaxSlayer account
2. Prepare Federal Return
 - Enter Personal Information
 - Enter wage information
 - Enter scholarship information
 - Enter state tax refund / additional amounts paid
3. Prepare State return – See Special Circumstances Guide for List of supported states
4. Adjust return as needed using special circumstances guide(s)
5. Review return
6. File return

Access TaxSlayer Software

Go to NRV TAP Member Site, Step 2

To access the special Macalester TaxSlayer program, please use this link only - any other link and you will pay to file your taxes.

<https://www.taxslayer.com/v.aspx?rdr=/vitafsa&source=TSUSATY2022&sidn=30011096>

5 - Prepare your return using a basic scenario

Basic Scenario 1: Students from India +

Basic Scenario 2: Treaty Benefits +

Basic Scenario 3 - No Treaty Benefits +

[Click Here to Access the TaxSlayer Software](#)

Accessing TaxSlayer – Make sure the link takes you here.

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.

CONTINUE

Note: The first series of steps you need to do all in one go, so don't stop until we say that you can save and exit.

Do NOT go to the main TaxSlayer website.

Your only option on that site will be to pay for your return.

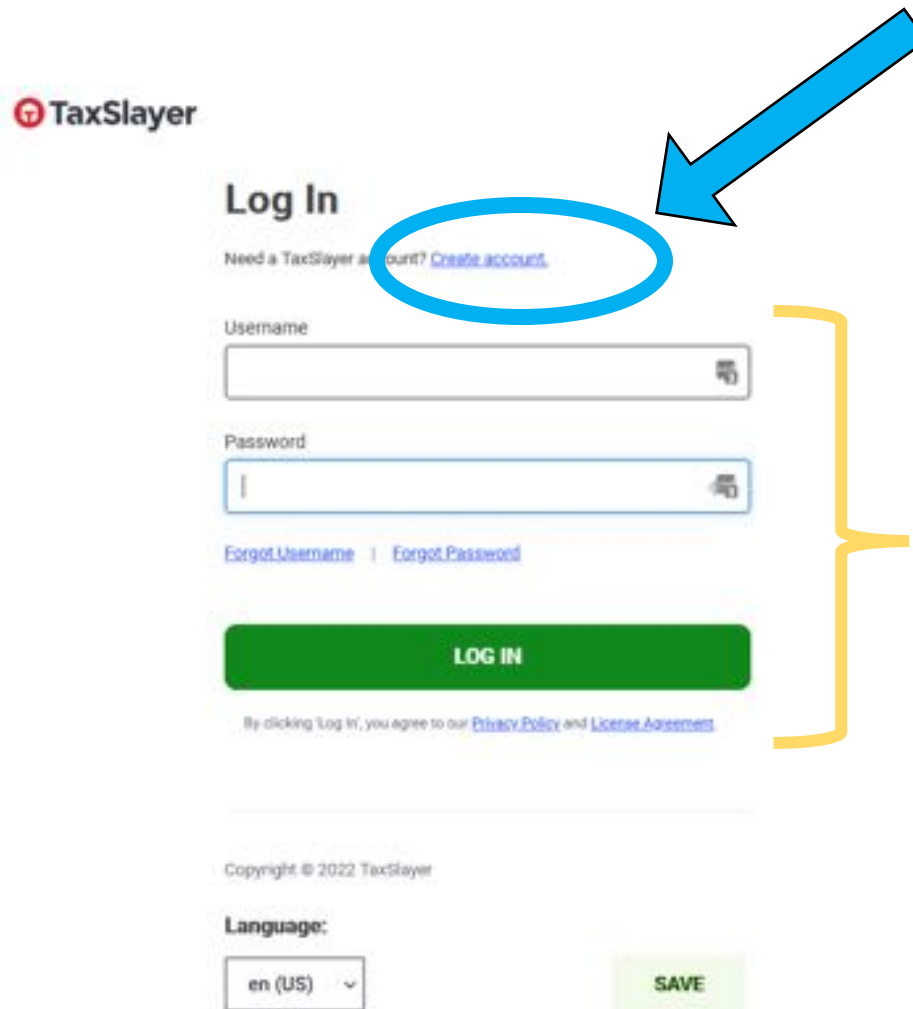
You MUST use the link in the member section of the NRV TAP website.

To access the special Macalester TaxSlayer program, please use this link only - any other link and you will pay to file your taxes.

<https://www.taxslayer.com/v.aspx?rdr=/vitafsa&source=TSUSATY2022&sidn=30011096>

You will not be charged a fee if you are using the proper link.

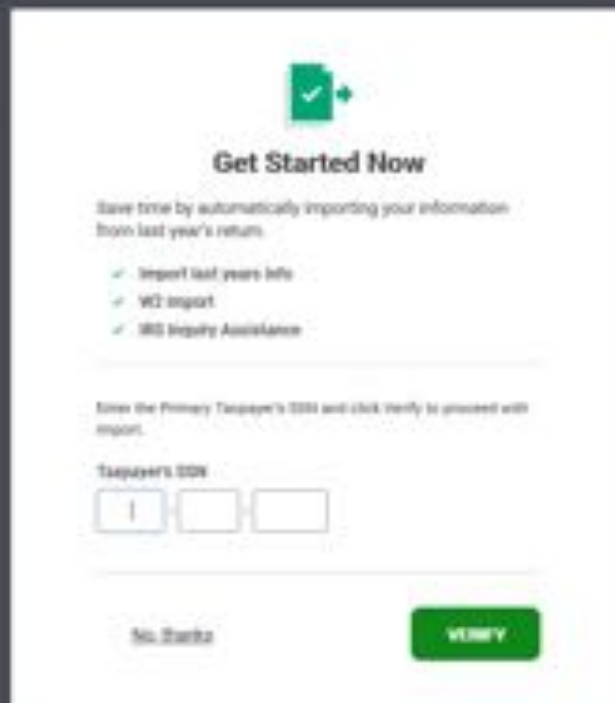
Creating your TaxSlayer account



The screenshot shows the TaxSlayer login interface. At the top left is the TaxSlayer logo. Below it is the 'Log In' heading. A blue circle highlights the text 'Need a TaxSlayer account? [Create account.](#)' with a blue arrow pointing to it from the right. Below this are input fields for 'Username' and 'Password', each with a small icon on the right. Under the password field are links for 'Forgot Username' and 'Forgot Password'. A large green button labeled 'LOG IN' is centered below the inputs. A yellow bracket on the right side of the page groups the login fields and the 'LOG IN' button. At the bottom, there is a copyright notice 'Copyright © 2022 TaxSlayer', a 'Language:' section with a dropdown menu showing 'en (US)', and a green 'SAVE' button.

If you used TaxSlayer last year you can enter your same username and password

If you used TaxSlayer last year, you can enter your SSN/ITIN to copy your prior year information over.



The image shows a screenshot of the TaxSlayer website's 'Get Started Now' screen. At the top, there is a green checkmark icon with a plus sign. Below it, the heading 'Get Started Now' is displayed. The text 'Save time by automatically importing your information from last year's return.' is followed by a list of three items: '✓ Import last years info', '✓ V02 Import', and '✓ IRS Inquiry Assistance'. A horizontal line separates this from the next section, which says 'Enter the Primary Taxpayer's SSN and click verify to proceed with import.' Below this, there is a label 'Taxpayer's SSN' and three input boxes for the SSN. At the bottom, there is a 'No Thanks' link and a green 'VERIFY' button.

If this is your first time using TaxSlayer you won't get this screen

Creating your TaxSlayer account



Create your account.

Already have an account? [Log in](#)

Email address

! Email address is required.

Username

Password

✓ No prohibited characters

- ☐ At least 8 characters long
- ☐ Must contain at least one upper and one lower case letter
- ☐ One number
- ☐ One special character

Confirm password

! Please confirm your password.

Mobile phone (recommended)

CREATE ACCOUNT

By clicking 'Create Account', you agree to our [Privacy Policy](#) and [License Agreement](#).

Recommend entering your mobile phone number if you have one.

It will be required for e-filing.

If this is your first time using TaxSlayer complete the required fields to create an account

If you entered a phone number you'll get a verification code

Note: Codes can take several minutes to show up on your phone



Check your phone

Enter the verification code we sent you to verify.

We sent a code to:
(xxx)xxx-xx36

Enter the 6-digit code

[Resend Verification Code](#)

[Skip](#)

If you skip you should get an email asking you to verify your account that way.

Language:

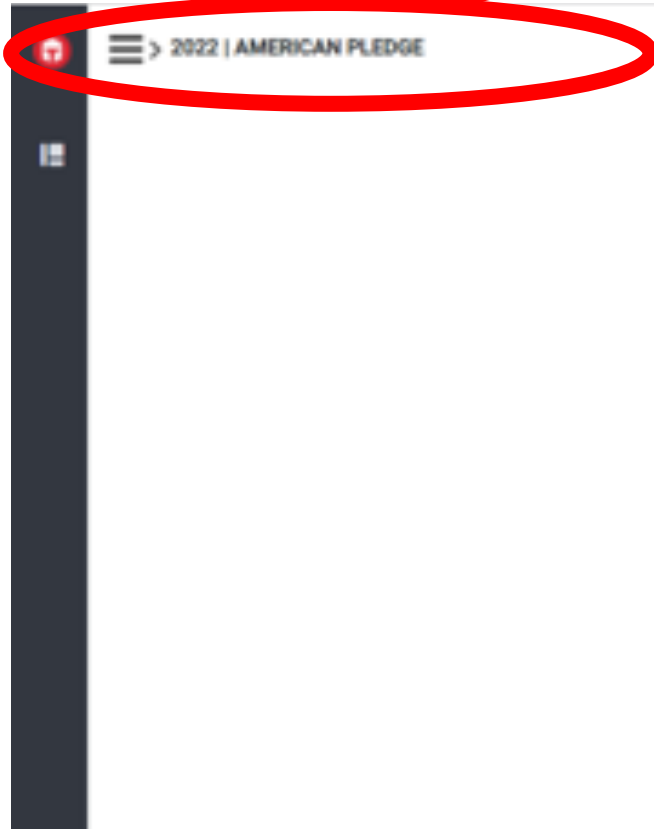
Enter the code, or you can skip and do it later if needed.



SAVE

VERIFY

Note: You should see 2022 American Pledge on the top left of your screen. If it has something else this means that you are not in the free version of the software. Contact [ISP](#) and we'll walk you through fixing the issue.



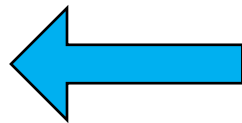
Help & Support ?



**Success! Your TaxSlayer
account has been created.**

Now, let's keep going.

CONTINUE



Personalize your TaxSlayer experience

Before you get started, please review the following disclosure. Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of tax return information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your tax return information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

Please review the information below and sign to agree to the terms and conditions.

Use of Information

As permitted by law, we may use the information you provide to address questions submitted to our customer or technical support systems; to send updates or security alerts; to provide notification of related tax return preparation products or services, or product enhancements; to monitor and investigate fraud, identity theft, and other illegal activity; and to personalize and improve our services.

Note that if you are not eligible for the Free File product, you may switch to a commercial product which may include offers for additional related products and services. By signing below, you allow us to use your information to show you additional products or services (if applicable) or to provide tax reminders or helpful tax tips. These offers may come from us or a service

PRINT

Ensure the details below are accurate:

Full Name

Date

01/23/2023



I am filing a joint return with my spouse.

REMIND ME LATER

Leave blank!

It's not a big problem if you do sign, you'll just get "offer" emails from TaxSlayer if you do

You might get this screen.

We haven't verified it for 2022, but it might save you a little time if you want to try! If you do that you'll need to figure out where to rejoin the guide. If you skip then just go to the next page.

Want to get a head start on your Tax Return?

Easily import your personal information by uploading a pdf of last year's tax return.



Drag and Drop PDF here, or
click to upload

You may upload 1 PDF file (up to 5 MB).



Skip

VIEW RESULTS

If you have multiple first or last names and they can't fit into this field, enter all that you can. If you filed a return last year, you should use whatever you entered for that return.

Personal Information

Taxpayer's Information

Primary taxpayer first name

NRVTAP

Mi

Last name

TaxSupport

Suffix (Jr, Sr, etc.)

SSN *

The IRS requires your Social Security Number for e-filing.

Date of Birth

MM

DD

YYYY

Occupation

First letter of your middle name. If you don't have a middle name just leave blank

BACK

CONTINUE

Personal Information

Taxpayer's Information

Primary taxpayer first name

NRVTAP

MI

Last name

TaxSupport

Suffix (Jr, St, etc.)

SSN *

The IRS requires your Social Security Number for e-filing.

Date of Birth

MM

DD

YYYY

Occupation

BACK

Double-check to make sure you spelled your name correctly, that your SSN/ITIN is correct, and put in your birth date (MM-DD-YYYY) accurately.

These are very common reasons for a return to be rejected during e-filing.

Confirm all boxes, then continue

CONTINUE

Personal Information

What's your mailing address?

Country

United States of America

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

 -

City, town, or post office

State

- Please Select -

Residence Status

- Please Select -

☐ I have a stateside military address.

BACK

Skip

CONTINUE

Use the address of where you are currently living.

If you want, you can designate a different address that is outside of the U.S. to have your refund check sent to. This is done later in the return process.

You can update your address with the IRS/State Dept. of Revenue if/when you move.

Enter Full-Year Resident for now – we will adjust later if necessary

Fill out all boxes, then continue

Additional Information

Taxpayer's Information

Generally, put an "X" in the box if it applies to you.

Check any of these that apply to you:

☐ NRV TAP can be claimed as a dependent on someone else's return.

☐ NRV TAP was over age 18 and a full-time student at an eligible educational institution.

☐ NRV TAP is blind.

☐ NRV TAP is deceased.

☒ NRV TAP wishes to contribute \$3 to the Presidential Election Campaign Fund.

☐ NRV TAP served in a combat zone during the current tax year.

☐ NRV TAP was affected by a natural disaster during the current tax year.

☐ NRV TAP received, sold, exchanged, gifted, or disposed of a digital asset (or financial interest in a digital asset) in the current tax year.

☐ NRV TAP prefers to receive written communications from the IRS in a language other than English.

☐ NRV TAP prefers to receive written communications from the IRS in an accessible format.

✗ Do NOT put a check mark in this box!

Crypto?

At any time during 2022, did you: (a) receive (as a reward, award or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Check to see language options!

BACK

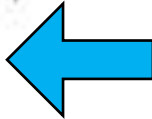
Skip

CONTINUE

What's your filing status? [? Learn more](#)

- ☒ Single
- ☒ Married Filing Jointly
- ☒ Married Filing Separately
- ☒ Head of Household
- ☒ Qualifying Widow(er) with Dependent Children

☐ Nonresident Alien



Need help determining your filing status?

FILING STATUS WIZARD

Do NOT click



Do NOT click 'BACK'

CONTINUE

If you do not see “Nonresident Alien” in the Filing Status section, you have accidentally clicked on a wrong button and are in the wrong software package.

What's your filing status? [Learn more](#)

- ☐ Single
- ☐ Married Filing Jointly
- ☐ Married Filing Separately
- ☐ Head of Household
- ☐ Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

FILING STATUS WIZARD

Nonresident option is missing!

BACK

CONTINUE

Don't see "Non-resident Alien" under Filing Status? Do the following to fix it:

1. Click on the "Save & Log Out" button in the left menu bar.
2. Then log back in using your username/password.
3. In the left menu bar, click on Settings > Transaction History.
4. Select "Chose wrong package" from the drop-down menu.
5. Then click on the "Clear Your Return and Restart" button.
6. Start over your return and read this guide from the beginning!

Transaction History

Account Charges [help](#)

All fees are for the preparation and filing of your return. This includes Printing, Mailing or e-filing, and sales tax (where applicable).

PRINT

Selfe has collected the simplified sales and tax on taxable transactions delivered into Alabama and the tax will be remitted on the customer's behalf to the Alabama Department of Revenue. Selfe's program account number is 00040210261419.

Banking Information [help](#)

No information to display

IRS Payment Information [help](#)

No information to display

Deactivate Tax Return [help](#)

Tax Year 2021 (1/11-12/31/21)

- Please Select -

CLEAR YOUR RETURN AND RESTART

* You will be logged out of your account after deactivating your return.

MY ACCOUNT

What's your filing status? [? Learn more](#)

☐ Single nonresident alien

☐ Married nonresident alien

☒ Qualifying widow(er) with dependent child

If you are single

If you are married

WAIT! This isn't what I wanted!

SHOW RESIDENT OPTIONS

BACK

Must be from Canada, Mexico, India, or S. Korea, have child that is U.S. citizen, have spouse that died in 2020 or 2021, + 4 other criteria.

Email us to discuss if you think you qualify.

CONTINUE

Remember – married is married – it doesn't matter who your spouse is or where they are living! If you are married to someone you must use the married status.

Dependents or Qualifying Person(s)

Do you have children or relatives who rely on you for support and live in your home? If so, you might be able to receive potential tax credits and tax exemptions that could save you money on your tax bill. But before you get too excited, there are some situations when a child's exemption status is a little more complicated. The IRS does have special rules for those situations.

 [Learn more](#)

Do you have any dependents or qualifying person(s) to claim on your return?

Select which applies to you

YES

NO

Notes:

A spouse is never a dependent.


You must be from Canada, Mexico, India, or S. Korea to claim an exemption for your dependent. Your dependent must be a citizen or resident alien for 2022 and have a SSN or ITIN. This is quite unusual.


This scenario answer is NO

If you think your answer should be YES, go ahead and complete your return using this basic scenario, and then see special circumstances guide for dependents for further details and guidance.

IRS Identity Protection PIN

Select which
applies to
you



Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? 

- ☐ Yes, someone on my return received an Identity Protection PIN.
- ☒ No, no one on my return received an Identity Protection PIN.

BACK

CONTINUE

Note: most people will not have received an Identity Protection PIN

Let's do this! #slayit

Now that we know more about you, let's dig into your tax return.

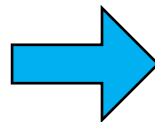


Add your forms quickly with Quick File

If you know which forms you need, easily search and add them to your tax return.




BACK



I don't know which forms I need

CONTINUE

TaxSlayer

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

2022 | AMERICAN PLEDGE

Help & Support

Federal
\$0

Income

W-2

(Most Common Form)

?

Wages and tax statement

BEGIN

1099-G Box 1

?

Unemployment compensation

BEGIN

1099-G Box 2

?

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID

?

Interest income, dividends, and distributions

BEGIN

1099-K

?

Payment card and third party network transactions

BEGIN

1099-MISC

?

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA

?

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses

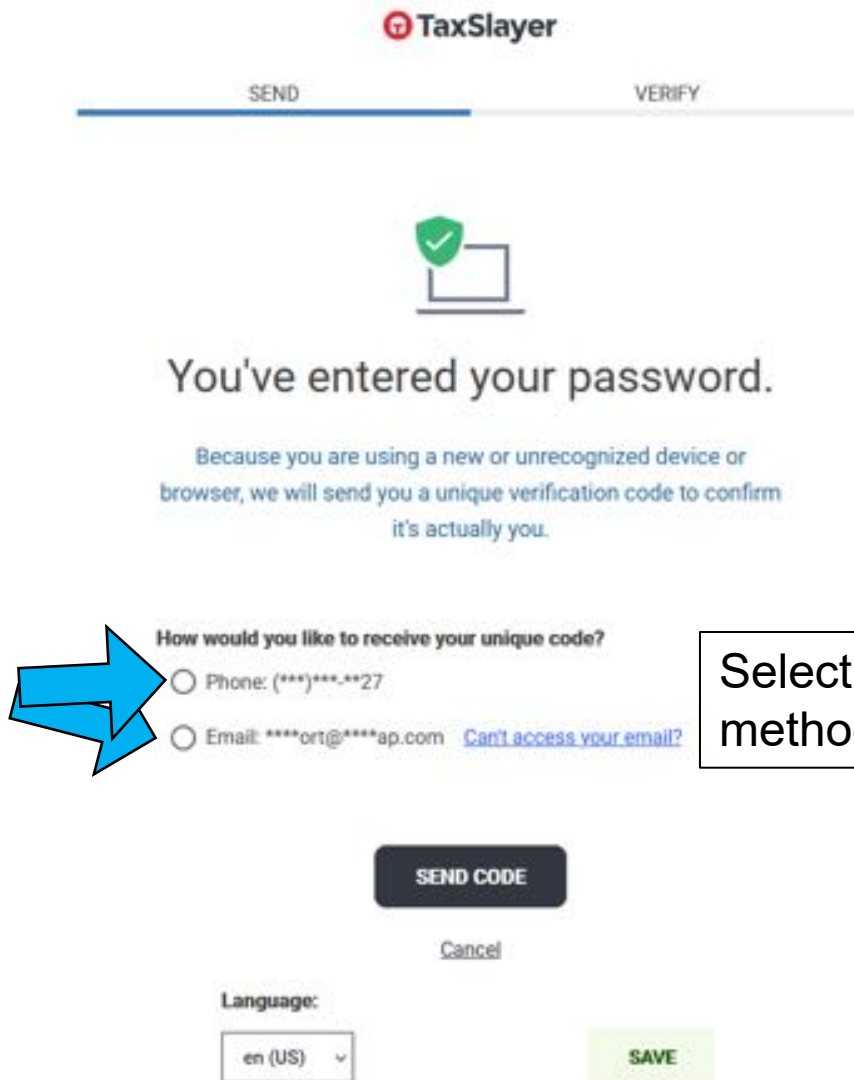
?

May receive Form 1099-B, reported on Schedule D

BEGIN

Note: You are now at the point where you can save and exit the return, and come back later if needed.


When you log back in to TaxSlayer:



The image shows the TaxSlayer login interface. At the top is the TaxSlayer logo. Below it is a progress bar with 'SEND' and 'VERIFY' stages. A green checkmark icon is displayed. The text 'You've entered your password.' is shown, followed by a message: 'Because you are using a new or unrecognized device or browser, we will send you a unique verification code to confirm it's actually you.' Below this is the question 'How would you like to receive your unique code?' with two radio button options: 'Phone: (***)***-**-27' and 'Email: ****ort@****ap.com'. A blue arrow points to the 'Email' option. A link 'Can't access your email?' is next to the email option. Below the options are buttons for 'SEND CODE', 'Cancel', and 'Language: en (US)' with a dropdown arrow. A green 'SAVE' button is at the bottom right.

TaxSlayer

SEND VERIFY



You've entered your password.

Because you are using a new or unrecognized device or browser, we will send you a unique verification code to confirm it's actually you.


How would you like to receive your unique code?

☐ Phone: (***)***-**-27

☐ Email: ****ort@****ap.com [Can't access your email?](#)

SEND CODE

Cancel


Language: en (US) 

SAVE


If you skipped the code before, you'll need to do it when you log back in.

Select which method you prefer

Enter your code



SEND VERIFY



Check your device.

Your unique verification code has been sent to (***)***-**-27.

Enter your verification code

[Did not receive a code? Try again.](#)

VERIFY CODE

Language:

en (US) ▾

SAVE

Note: Codes can take several minutes to show up on your phone

MY ACCOUNT


2022 Tax Return


Welcome back! Let's finish your 2022 tax return.





RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	\$0.00

Entering Personal Information

TaxSlayer 

 My Account

 **Basic Information**

 **Federal**


Income


Deductions


Other Taxes


Payments & Estimates


Miscellaneous Forms



 Health Insurance



 State


 Summary/Print

 E-file

 Mailbox

 Settings 

 Toolbox 

 Log Out

2022 | AMERICAN PLEDGE

Help & Support 

Click on Basic Information

Income

W-2 (Most Common Form)

Wages and tax statement

BEGIN

1099-G Box 1

Unemployment compensation

BEGIN

1099-G Box 2

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID

Interest income, dividends, and distributions

BEGIN

1099-K

Payment card and third party network transactions

BEGIN

1099-MISC

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses

May receive Form 1099-B, reported on Schedule D

BEGIN

RETURN SUMMARY





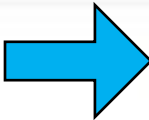
Federal

\$0

2023.02.03

Tax Year 2022 Basic Scenario 3

Basic Information

 Personal Information	EDIT
 Filing Status	EDIT
 Dependents / Qualifying Person	BEGIN
 IRS Identity Protection PIN	BEGIN
1040NR Schedule OI	 BEGIN
BACK	CONTINUE

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Schedule OI



General Information

Dates Entered and Departed the U.S. in Current Year

Income Exempt from Tax

RECORD

RECORD

RECORD

CONTINUE

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Schedule OI - General Information

General Information

Type of 1040NR Entity *

Individual

Individual

Select country, if multiple choose closest connection. Not U.S. – if you are a citizen you are not a nonresident alien, and you are using the wrong form

Country of Citizenship *

India

Country of Residence *

India

Your country of tax residency is the country you lived in prior to coming to the U.S. on your current visa. It is usually the country of your citizenship, but that is not a requirement. A temporary visit (such as for a vacation) to a country does not establish tax residency. It cannot be the U.S.

U.S. Travel Information

Other not listed

Other Not Listed

Studying in another country may not establish tax residency.

Select type of U.S. Visa *

Nonimmigrant Visa

Nonimmigrant Visa

Notes:
This will be the visa on your I-94.
This should be an F/J/M/Q visa.

Select nonimmigrant visa type on the last day of the tax year

F1

Visa type for your most recent U.S. entry: F-1, J-1, etc.

- ☐ Check if you have ever applied for a U.S. Green Card
- ☐ Check if you have ever been a citizen of the U.S.
- ☐ Check here if you have ever had a green card.
- ☒ Check if you have ever changed your Visa Type.

Check box if any apply.
Note: entering green card lottery is not applying for a green card. Winning lottery is!

Nature of Change

F1 to J1 student

Example of what to put IF you changed your visa

Date Changed

8 2020 02 03 2021

Note: Use output from the “Am I A Nonresident Alien” tool for the Days Present boxes.

Days Present in the U.S.
Number of days in the U.S. for 2022.

Number of days in the U.S. for 2021.

Number of days in the U.S. for 2020.

Tax Return Filing Information



Check if you have filed a U.S. income tax return for

Last Year Filed

2021

Form Title

1040NR



Check if you are filing a return for a trust.



Check if you received total compensation over \$250,000.



Check if you used an alternate method to determine the source of the income.

Select Tax Year

2022

Enter Your Visits

Please enter the entry and exit dates, along with the visa you held for that visit, for **all** of your visits to the United States. If you do not enter all of your lifetime visits and your correct visa information, then the results provided in this tool may not be accurate. You can view your travel history at (<https://i94.cbp.dhs.gov/i94/#/home>).

Your most recent visit can have no exit date, if you are still present in the US on that same visit (the calculation will use today's date as the exit date).

Visa	Entry Date	Exit Date
F-1 Student	08/08/2020	05/31/2022
F-1 Student	08/23/2022	MM/DD/YYYY

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

Number of days **Present in 2022**: 282

Number of days **Present in 2021**: 365

Number of days **Present in 2020**: 146

Number of days **Exempt in 2022**: 282

Note: You are required to file Form 8843 to report your Exempt days for 2022.

We strongly recommend that you print your results or take screenshots for reference.

Print Results

Use the GLACIER Tax Summary report for assistance or GTP produced Form 8843, Part I, Line 4a for the days present in the U.S.

If you previously filed a tax return, check box and enter year and form. If you filed a 1040-NR-EZ, enter 1040NR.

Check box if any apply.

Refund Mailing Information

Enter address below if you would like your refund check mailed to an address outside the U.S.

Country

- Please Select -

Address (street number & name)

City, town, or post office

Foreign State or Province

Foreign Postal Code

Enter address if you want a refund check mailed to an address outside of the U.S.

Income Exempt from U.S. Tax

☐ Check if you were subject to tax in a foreign country on U.S. exempt income.

☐ Check if you used an alternate method to determine the source of the income.

Check box if any apply (usually no).

Wages Exempt by a Treaty (includes 1040-NR line 8)

\$

Leave blank!

Real Property Election

Have you ever made an election to treat income from real property located in the United States as effectively connected with a U.S. trade or business under section 871(d)?

☐ Yes

☐ No

Check box if yes, otherwise leave blank. This would be very unusual.

CANCEL

2023.02.03

CONTINUE

Schedule OI



General Information

EDIT

Dates Entered and Departed the U.S. in Current Year

RETURN

Income Exempt from Tax

RETURN

CONTINUE

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Enter the information for your first visit to the U.S. during 2022.
You can enter additional visits after this step.

Schedule OI - Current Year Travel Dates

Date Entered U.S. *

MM DD YYYY

Date Departed U.S.

MM DD YYYY

Enter first date present in U.S. during 2022. Either date you entered during 2022, or 01/01/2022 if you were already here at start of 2022.

If you left the U.S. during 2022 enter the date departed, otherwise leave blank.

CANCEL

CONTINUE

If you have more entry/exit dates during 2022 click here to enter them.

Click here to edit or delete this info.

Schedule OI - Current Year Travel Dates

 Schedule OI Travel Dates

1/1/2022
5/31/2022

...

8/23/2022
N/A

...

When all 2022 visits entered, click continue

CONTINUE

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Schedule OI



General Information

EDIT

Dates Entered and Departed the U.S. in Current Year

EDIT


Income Exempt from Tax


EDIT





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Back to Main Page

TaxSlayer



My Account

Basic Information

Federal


Income


Deductions


Other Taxes


Payments & Estimates


Miscellaneous Forms


Health Insurance


State


Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

2023.02.03

2022 | AMERICAN PLEDGE

Help & Support

Income

W-2 (Most Common Form)

Wages and tax statement

BEGIN

1099-G Box 1

Unemployment compensation

BEGIN

1099-G Box 2

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID

Interest income, dividends, and distributions

BEGIN

1099-K

Payment card and third party network transactions

BEGIN

1099-MISC

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses

May receive Form 1099-B, reported on Schedule D

BEGIN

RETURN SUMMARY

Federal

\$0

Tax Year 2022 Basic Scenario 3

47

Click on Federal Section

TaxSlayer <≡

My Account

Basic Information

Federal

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

2023.02.03

Log Out

2022 | AMERICAN PLEDGE

Help & Support ?

Income

W-2 (Most Common Form) ?

Wages and tax statement

BEGIN

1099-G Box 1 ?

Unemployment compensation

BEGIN

1099-G Box 2 ?

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ?

Interest income, dividends, and distributions

BEGIN

1099-K ?

Payment card and third party network transactions

BEGIN

1099-MISC ?

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA ?

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ?

May receive Form 1099-B, reported on Schedule D

BEGIN

RETURN SUMMARY

Federal

\$0

Click on Miscellaneous Forms

TaxSlayer

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

2022 | AMERICAN PLEDGE

Help & Support

Income

W-2 (Most Common Form)

Wages and tax statement

BEGIN

1099-G Box 1

Unemployment compensation

BEGIN

1099-G Box 2

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID

Interest income, dividends, and distributions

BEGIN

1099-K

Payment card and third party network transactions

BEGIN

1099-MISC

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses

May receive Form 1099-B, reported on Schedule D

BEGIN

Profit or Loss from Business

BEGIN

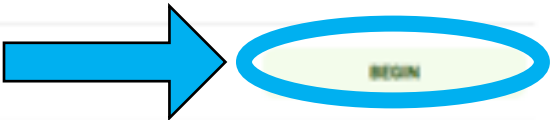
RETURN SUMMARY

Federal

\$0

Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons
Reported on Form 8843



Allocation of Tax Amounts for Individuals in Certain States ⓘ
Reported on Form 8958 (Only for married filing separately and some domestic partnerships)

BEGIN

Application for Automatic Extension of Time to File ⓘ
Applied for on Form 4868

BEGIN

Closer Connection Exception Statement for Aliens
Reported on Form 8840

BEGIN

Initial and Annual Expatriation Statement
Reported on Form 8854

BEGIN

Injured Spouse Allocation ⓘ
Reported on Form 8379

BEGIN

Installment Agreement Request ⓘ
Requested on Form 9465

BEGIN

IRS Identification PIN ⓘ
This is the PIN you need if you received a CP01A notice from the IRS

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer ⓘ
Claimed on Form 1310

BEGIN

Statement of Specified Foreign Financial Assets
Form 8938

BEGIN

Form 8843 Part I - General Information

Type of U.S. Visa/Immigration Status

Select type of U.S. Visa *

Nonimmigrant Visa



Should already be filled out, go back and change under person info schedule OI if incorrect

Nonimmigrant visa type code

F1



Should already be filled out, go back and change under person info schedule OI if incorrect

Date entered U.S.

MM DD YYYY



Date you first ever entered the U.S. on this visa.

Notes:

This will be the visa on your I-94.
This should be the an F/J/M/Q visa.

Visa Change Information

Have you changed your visa type (nonimmigrant status)?

☐ Yes



☒ No

Select Yes or No. Does not copy a "yes" from your personal information you already entered on the schedule OI. If yes, will ask for date of change (new visa date).

Current non-immigrant status



Current visa type (F1, etc)

General Information

Of what country were you a citizen during 2022?

India



Should already be filled out as the country you previously selected. Go back and change under person info schedule OI if incorrect

What country issued you a passport?

- Please Select -



Country that issued your passport. If multiple, the one you used for your student visa.

Passport number

2023.02.03



Current Passport #

Tax Year 2022 Basic Scenario 3

Days in the U.S. in 2022

282

Should already be filled out, go back and change under person info schedule OI if incorrect

Days in the U.S. in 2021

365

Should already be filled out, go back and change under person info schedule OI if incorrect

Days in the U.S. in 2020

146

Should already be filled out, go back and change under person info schedule OI if incorrect

Days in 2022 you claim you can exclude (substantial presence test)

Use GTP produced Form 8843, Part, I, Line 4b for the days you claim you can exclude.

DELETE

CANCEL

Once all information entered

CONTINUE

Note: Use output from the “Am I A Nonresident Alien” tool for the Days Present boxes.

PLEASE REVIEW THE ENTRY AND EXIT DATES, VISAS, AND OTHER INFORMATION YOU ENTERED. IF YOU ARE NOT SURE OF ANY INFORMATION, THEN THE RESULTS PROVIDED IN THIS TOOL MAY NOT BE ACCURATE. YOU CAN VIEW YOUR TRAVEL HISTORY AT (<https://i94.dhs.gov/i94/#/home>).

Your most recent visit can have no exit date, if you are still present in the US on that same visit (the calculation will use today's date as the exit date).

Visa	Entry Date	Exit Date	
F-1 Student	08/08/2020	05/31/2022	Remove Visit
F-1 Student	08/23/2022	MM/DD/YYYY	Remove Visit

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

Number of days Present in 2022: 282

Number of days Present in 2021: 365

Number of days Present in 2020: 146

Number of days Exempt in 2022: 282

Note: Use output from Form 8843 to report your Exempt days for 2022.

We strongly recommend that you print your results or take screenshots for reference.

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information	EDIT
Part II - Teachers and Trainers	BEGIN
Part III - Students	F-1 or J-1 Student visas EDIT
Part IV - Professional Athletes	BEGIN
Part V - Individuals with a Medical Condition	BEGIN

CONTINUE

Form 8843 Part III - Students

Academic institution where you attended

Institution Name *

Institution Phone Number *

Institution Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

Please Select

Enter your school information

Tel 651 696 6992
Director: Aaron Colhapp
1600 Grand Ave
St Paul, MN 55105

Director of Academic Program

Director Name *

Director Phone Number *

Director Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

Please Select

Enter the name and contact information from your I-120 OR of the director of your degree program.

Answer Yes or No

Visa held during 2016

Did you have a visa in this year?

☐ Yes
☒ No

Visa held during 2017

Did you have a visa in this year?

☐ Yes
☒ No

Visa held during 2018

Did you have a visa in this year?

☐ Yes
☒ No

Visa held during 2019

Did you have a visa in this year?

☐ Yes
☒ No

Visa held during 2020

Did you have a visa in this year?

☐ Yes
☒ No

Visa held during 2021

Did you have a visa in this year?

☐ Yes
☒ No

U.S. presence

Were you present in the U.S. as a teacher, trainee, or student for any part of more than 5 calendar years?

☐ Yes
☒ No

During the tax year, did you apply for, or take affirmative steps to apply for, lawful permanent resident status or have an application pending to change your status to that of a lawful permanent resident?

☐ Yes
☒ No

If you were present any other years with an F/J/M/Q visa, say "yes" and enter the visa you held. If you had a different type of visa say "no"

Once all information entered

2023.02.03

DELETE

CANCEL

Tax Year 2022 Basic Scenario

CANCEL

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information	EDIT
Part II - Teachers and Trainers	<div>J-1 Non-Student visas</div> <div>→</div> BEGIN
Part III - Students	EDIT
Part IV - Professional Athletes	BEGIN
Part V - Individuals with a Medical Condition	BEGIN

CONTINUE

Form 8843 Part II - Teachers and Trainers

Academic institution where you taught

Institution Name *

Institution Phone Number *

Institution Address
Country
United States of America

Address (street number & name)

ZIP code

City, town, or post office

State
- Please Select -

Enter your school information

Director of Academic Program

Director Name *

Director Phone Number *

Director Address
Country
United States of America

Address (street number & name)

ZIP code

City, town, or post office

State
- Please Select -

Enter the name and contact information from your DS-2019 OR of the director of your program.

U.S. presence

Were you present in the U.S. for 2 of the 6 prior years?

☐ Yes☒ No

Answer Yes or No

Visa held during 2016

Did you have a visa in this year?

☐ Yes☒ No

Visa held during 2017

Did you have a visa in this year?

☐ Yes☒ No

Visa held during 2018

Did you have a visa in this year?

☐ Yes☒ No

Visa held during 2019

Did you have a visa in this year?

☐ Yes☒ No

Visa held during 2020

Did you have a visa in this year?

☐ Yes☒ No

Visa held during 2021

Did you have a visa in this year?

☐ Yes☒ No

If you were present any other years with an J or Q visa, say "yes" and enter the visa you held. If you had a different type of visa say "no"

DELETE

CANCEL

2023.02.03

Tax Year 2022 Basic Scenario 3

Once all
information
entered

CONTINUE

58

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information

EDIT

Part II - Teachers and Trainers

BEGIN

Part III - Students

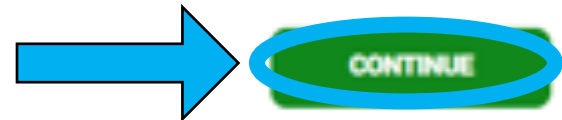
EDIT

Part IV - Professional Athletes

BEGIN

Part V - Individuals with a Medical Condition

BEGIN



Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons

Reported on Form 8843

BEGIN

Allocation of Tax Amounts for Individuals in Certain States

Reported on Form 8958 (Only for married filing separately and some domestic partnerships)

BEGIN

Application for Automatic Extension of Time to File

Applied for on Form 4868

BEGIN

Closer Connection Exception Statement for Aliens

Reported on Form 8840

BEGIN

Initial and Annual Expatriation Statement

Reported on Form 8854

BEGIN

Injured Spouse Allocation

Reported on Form 8379

BEGIN

Installment Agreement Request

Requested on Form 9465

BEGIN

IRS Identification PIN

This is the PIN you need if you received a CP01A notice from the IRS

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer

Claimed on Form 1310

BEGIN

Statement of Specified Foreign Financial Assets

Form 8938

BEGIN

BACK

2023.02.03

Tax Year 2022 Basic Scenario 3

CONTINUE

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Back to Main Page





My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

2022 | AMERICAN PLEDGE

Help & Support 

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2022? 

If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☐ Yes

☐ No

If you can't skip this, select "No" in most cases.

BACK

CONTINUE

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RETURN SUMMARY

Federal \$0

NOT married, skip this section and go to page 69.

Entering Spouse Information

This is **ONLY** if you are married, **AND** your spouse has an ITIN/SSN.

If you are single, or your spouse does not have an ITIN/SSN, **skip this section.**

If your spouse does not have a SSN/ITIN and you enter spouse information, you will have to either file on paper or delete and re-enter all of your tax return information!

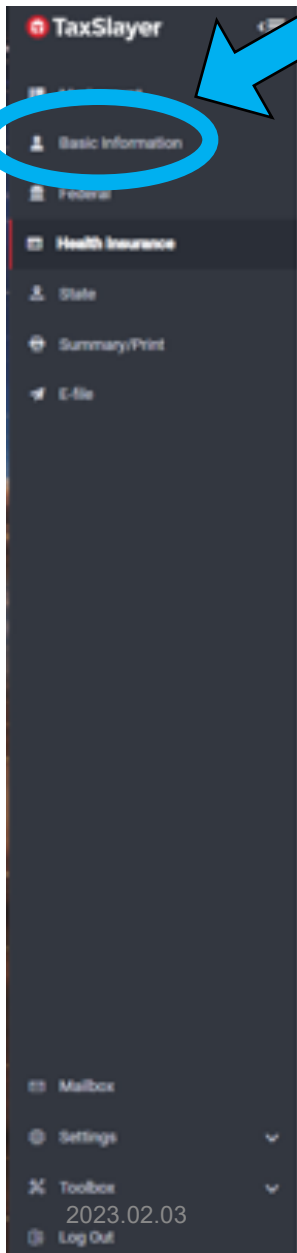
If your spouse does not have a SSN or ITIN, do NOT enter any information about them into your return.

Do NOT click on General Information

The screenshot displays the TaxSlayer 2021 American Pledge interface. On the left is a dark sidebar with navigation links: My Account, Basic Information (with sub-links for Personal Information, Filing Status, Dependents/Qualifying Person, and IRS Identity Protection PIN), Federal, Health Insurance, State, Summary/Print, and E-file. The main content area is titled 'Personal Information' and contains several sections: 'General Information' with an 'EDIT' button, 'Mailing Address' with an 'EDIT' button, 'Phone Number' with an 'EDIT' button, and 'Additional Personal Information' with an 'EDIT' button. A large red arrow points to the 'General Information' button, which is marked with a red 'X'. At the bottom of the main area are 'BACK' and 'CONTINUE' buttons. On the right, a 'RETURN SUMMARY' panel shows 'Federal' with a green '\$356'.

If you do this, the system will not let you e-file your federal return. You will need to delete your tax return and restart to be able to e-file. See the section on filing status for more info about how to clear/restart your return.

Click on Basic Information



Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2022? 

If so, select Yes - you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☐ Yes

☐ No

BACK

CONTINUE

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RETURN SUMMARY

Federal \$0

Click on Personal Information

TaxSlayer <≡

- My Account
- Basic Information**
- Personal Information
- Filing Status
- Dependents/Qualifying Person
- IRS Identity Protection PIN
- Federal
- Health Insurance
- State
- Summary/Print
- E-file

Mailbox

Settings

Toolbox

2023.02.03

Log Out

2022 | AMERICAN FUTURE

Help & Support ?

Basic Information

Personal Information	EDIT
Filing Status	EDIT
Dependents / Qualifying Person	BEGIN
IRS Identity Protection PIN	BEGIN
1040NR Schedule CI	EDIT

BACK CONTINUE

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RETURN SUMMARY

Federal \$0

Personal Information

General Information

Mailing Address

Phone Number

Additional Personal Information

EDIT

EDIT

EDIT

EDIT

BACK

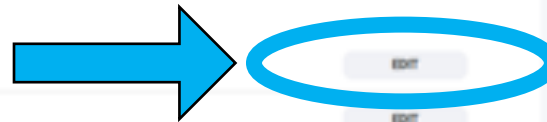
CONTINUE

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RETURN SUMMARY

Federal

\$0



Personal Information

Taxpayer's Information

Primary taxpayer first name

NRVTAP

MI

Last name

TaxSupport

Suffix (Jr, Sr, etc.)

SSN *

The IRS requires your Social Security Number for e-filing.

111-12-3344

Date of Birth

Occupation

Student

Spouse's Information

Spouse first name

MI

Last name

Suffix (Jr, Sr, etc.)

SSN

Date of Birth

Occupation

Enter spouse's information

BACK

CANCEL

CONTINUE

TaxSlayer

My Account

Basic Information

- Personal Information
- Filing Status
- Dependents/Qualifying Person
- IRS Identity Protection PIN

Federal

Health Insurance

State

Summary/Print

E-file

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2022 | AMERICAN PLEDGE

Help & Support

Personal Information

General Information

EDIT

Mailing Address

EDIT

Phone Number

EDIT

Additional Personal Information

EDIT

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$0

Basic Scenario #3 Details - Reminder

- This scenario is intended to assist in federal and Minnesota tax return preparation for nonresident aliens who **do not** have treaty benefits for wages or scholarships:
 - May have wage income
 - This would be reported on a W-2
 - May have scholarship or fellowship income
 - This would be reported on a form 1042-S form with income code 16
 - May have filed a federal and state income tax return last year
 - May have received a state income tax refund
 - May have paid additional state income tax
- We're now going to enter the income information for each of these types of income / documents.

Entering wage income reported on a W-2

If you have this document, not everyone does.

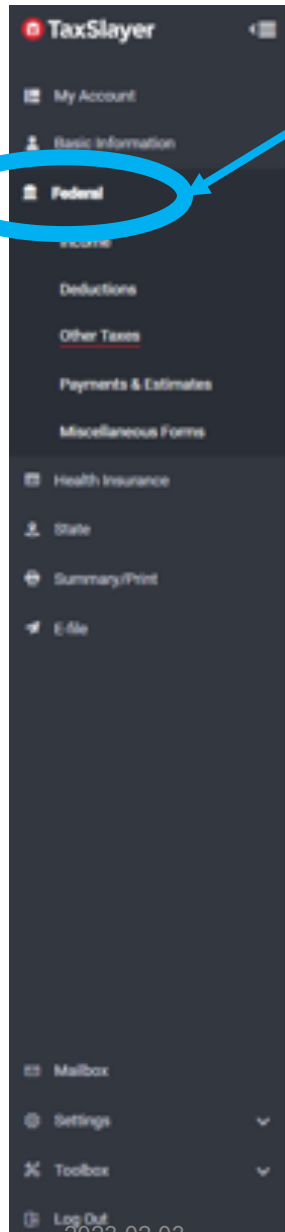
If you do not have a treaty benefit, you should not be receiving wage income on a 1042-S. If you did get wage income on a 1042-S, please use basic scenario 2 to prepare your return.

If you have no wage income, you can skip directly to the section on scholarships [go to pg 72.](#)

Your employer (whoever paid you) will send you this document.

You do not create this document yourself.

Click on Federal Section to enter income



2022 | AMERICAN EDEGE

Help & Support

Other Taxes

Additional Taxes on Qualified Plans and Other Accounts

Reported on Form 5329

BEGIN

Alternative Minimum Tax (AMT)

Reported on Form 6251

BEGIN

Household Employment Taxes

Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT)

Reported on Form 8960

BEGIN

Parents' Election to Report Child's Interest and Dividends

Reported on Form 8814

BEGIN

Repayment of First-Time Homebuyer Credit

Reported on Form 5405

BEGIN

Self-Employment Tax

Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income

Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income

Reported on Form 8615

BEGIN

Tax on Income Not Effectively Connected to US Trade/Business

Reported on Schedule NEC

BEGIN

Transportation Tax

Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)?

BEGIN

BACK

CONTINUE

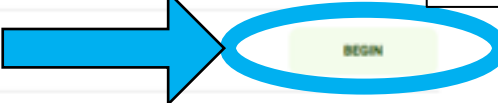
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RETURN SUMMARY

Federal \$0

Income

The federal income section has a long list of potential income forms and types you might have received



W-2 <small>(Most Common Form)</small> ⓘ Wages and tax statement	BEGIN
1099-G Box 1 ⓘ Unemployment compensation	BEGIN
1099-G Box 2 ⓘ State or local income tax refunds, credits, or offsets	BEGIN
1099-INT, DIV, OID ⓘ Interest income, dividends, and distributions	BEGIN
1099-K ⓘ Payment card and third party network transactions	BEGIN
1099-MISC ⓘ Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
1099-R, RRB, SSA ⓘ Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
8915-F Deferred Retirement Income Due to Disaster Relief in a Prior Year	BEGIN
Capital Gains and Losses ⓘ May receive Form 1099-B, reported on Schedule D	BEGIN
Profit or Loss from Business ⓘ Reported on Schedule C	BEGIN
Profit or Loss from Farming ⓘ Reported on Schedule F	BEGIN
Profit or Loss from Rentals and Royalties ⓘ Reported on Schedule E	BEGIN
Scholarships And Fellowship Grants Taxable portion of a scholarship/grant must be included in gross income	BEGIN

Enter W-2 information directly from form.

W-2

Check any of these that apply to you:

Don't worry, most people won't need to check these boxes.

- ☐ This is a corrected W-2
- ☐ This is a substitute W-2
- ☐ This is a railroad W-2

b Employer identification number (EIN) *

c Employer's name *

Country *

Address (number and street) *

ZIP Code *

City *

State *

d Control number - Not required for filing taxes online.

READ THIS BEFORE TYPING:

- If any text is more than 35 characters, abbreviate it!
- Enter the W-2 information EXACTLY as you see it from your paper W-2. Key in what you see.
- Every box on this screen has a letter or number that matches a corresponding box on your paper W-2. (e.g. enter information in box b from your paper W-2 into box b here in the software).
- Scroll down to finish W2 entry
- If you miss any required entries you'll get an error message and the top, and the problem boxes will be outlined in red with the error message.

Continue entering information as it shows on your W-2 form.

Put what is on form, even if not your current address

a Employee's name
NRVTAP TaxSupport

Country *
United States

Address (number and street) *
200 University Ave

ZIP Code * 55455 **City *** Minneapolis **State *** Minnesota

1 Wages, tips, other \$	2 Federal tax withheld \$
3 Social security wages \$	4 Social security tax withheld \$
5 Medicare wages and tips \$	6 Medicare tax withheld \$
7 Social security tips \$	8 Allocated tips \$
9 IRS verification code 	10 Dependent care benefits \$
11 Nonqualified plans \$	Unreported tips \$

12 ?
a - Code

13 ?

☐ Statutory employee

☐ Retirement plan

☐ Third-party sick pay

14 ?
a - Code

Medicare Waiver Payment
\$

Railroad tier 1 wages
\$

Railroad medicare wages
\$

Railroad tier 1 tax withheld
\$

Railroad medicare tax withheld
\$

Make sure to enter the state portion of your W-2!

15 State	Employer's state ID number
<input type="text" value="-- Please Select --"/>	<input type="text"/>
16 State wages, tips, etc.	17 State income tax
<input type="text" value="\$"/>	<input type="text" value="\$"/>
18 Local wages, tips, etc.	19 Local income tax
<input type="text" value="\$"/>	<input type="text" value="\$"/>
20 Locality name	
<input type="text"/>	
<input checked="" type="radio"/> Add another state	

CANCEL

When all info entered,
click continue

CONTINUE

If you have more W-2 Forms to enter

Click here to edit or delete this info.

W-2 Wage Statement

• Add a W-2 Wage Statement

Employee
University of Minnesota 41-6007513

Income \$18,740.00

Tax Withheld \$2,311.00

E

BACK

When all W-2 forms entered, click continue

CONTINUE

Back to Main Page



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Help & Support

Income

W-2 (Most Common Form)

Wages and tax statement

EDIT

1099-G Box 1

Unemployment compensation

BEGIN

1099-G Box 2

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID

Interest income, dividends, and distributions

BEGIN

1099-K

Payment card and third party network transactions

BEGIN

1099-MISC

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses

May receive Form 1099-B, reported on Schedule D

BEGIN

Profit or Loss from Business

Reported on Schedule C

BEGIN

Profit or Loss from Farming

Reported on Schedule F

BEGIN

Profit or Loss from Rentals and Royalties

Reported on Schedule E

BEGIN

Scholarships And Fellowship Grants

Taxable portion of a scholarship/grant must be included in gross income

BEGIN

RETURN SUMMARY

Federal **\$1,733**

This completes entering
wage income

Entering scholarship income reported on a 1042-S

If you have this document, not everyone does.

If you don't have this document, then skip to State Income Tax Refund or Payment section [go to pg 102.](#)

You do not create this document – whoever paid you will send it to you.

Remember this won't show up until ~March 15th.

Click on Payments & Estimates

The screenshot displays the TaxSlayer website interface. On the left is a dark sidebar with navigation links: My Account, Basic Information, Federal (selected), Income (selected), Deduct, Payments & Estimates (circled in blue with a blue arrow pointing to it), Miscellaneous Forms, Health Insurance, State, Summary/Print, E-file, Mailbox, Settings, Toolbox, and Log Out. The main content area is titled 'Income' and lists various tax forms with 'BEGIN' buttons: W-2 (Wages and tax statement), 1099-G Box 1 (Unemployment compensation), 1099-G Box 2 (State or local income tax refunds, credits, or offsets), 1099-INT, DIV, OID (Interest income, dividends, and distributions), 1099-K (Payment card and third party network transactions), 1099-MISC (Miscellaneous income), 1099-NEC (Nonemployee compensation), 1099-R, RRB, SSA (Distributions from pensions, annuities, retirement, IRAs, social security, etc.), 8915-F (Deferred Retirement Income Due to Disaster Relief in a Prior Year), Capital Gains and Losses (May receive Form 1099-B, reported on Schedule D), Profit or Loss from Business (Reported on Schedule C), Profit or Loss from Farming (Reported on Schedule F), Profit or Loss from Rentals and Royalties (Reported on Schedule E), and Scholarships And Fellowship Grants (Taxable portion of a scholarship grant must be included). On the right is a 'RETURN SUMMARY' sidebar showing 'Federal' with a value of '\$1,733'.

2023.02.03

Tax Year 2022 Basic Scenario 3

Payments and Estimates

Federal Estimated Tax Payments ⓘ

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ⓘ

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ⓘ

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ⓘ

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ⓘ

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes ⓘ

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2023 Estimated Tax Payments ⓘ

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ⓘ

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

IRC 1341 Repayment Amount ⓘ

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

Foreign Partner's Information Statement of Sec. 1446 Withholding Tax

Form 8805

BEGIN

Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests

Form 5288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

BEGIN

BACK

CONTINUE

Enter 1042-S information directly from form.

Form 1042-S Foreign Person's U.S. Income Subject to Withholding

The screenshot shows the top portion of the Form 1042-S entry interface. Annotations with arrows point to specific fields:


- Box 3**: Points to the "Select chapter *" dropdown menu.
- Box 3b**: Points to the "Tax Rate" input field.
- Boxes along top of form**: A bracket groups the "Unique Form Identifier *" field, the "Is this an amended form?" section (with "No" selected), the "Pro-rata basis reporting" section (with "No" selected), and the "Have you deposited tax with the IRS pursuant to escrow procedure?" section (with "No" selected).
- Box 1**: Points to the "Select an income code *" dropdown menu.
- Box 2**: Points to the "Gross income" input field.
- Box 5**: Points to the "Withholding Allowance" input field.
- Box 6**: Points to the "Net income" input field.
- Box 7a**: Points to the "Federal Tax Withheld" input field.
- Box 8**: Points to the "Tax Withheld by Other Agencies" input field.


A red arrow points from a note box to the "Gross income" field.


Note: This statement is not true for scholarships, ignore it in this situation

READ THIS BEFORE TYPING:


- If any text is more than 35 characters, abbreviate it!
- Enter the 1042-S information as you see it from your paper form.
Not all boxes may be filled out – just enter whatever is on the form.
- Scroll down to finish form entry
- If you miss any required entries you'll get an error message and the top, and the problem boxes will be outlined in red with the error message.


Tax Paid by Withholding Agent
\$  **Box 11**


Total Withholding Credit
\$  **Box 10**


Amount Repaid to Recipient
\$  **Box 9**


Withholding Agent Information


Agent's Name
  **Box 12d**


Agent's EIN
 -  **Box 12a**

Chapter 3 Status Code
- Please Select -  **Box 12b**

Chapter 4 Status Code
- Please Select -  **Box 12c**

Agent's GIIN
  **Box 12e**


Agent's Foreign Tax ID Number
  **Box 12g**

Agent's Address
Country
United States of America 

Address (street number & name)


ZIP code
 -


City, town, or post office


State
Please Select - 


Box 12h-12i


Recipient Information


Chapter 3 Status Code
- Please Select -  **Box 13f**

Chapter 4 Status Code
- Please Select -  **Box 13g**


Recipient's GIIN
  **Box 13h**


Recipient's Foreign Tax ID Number
  **Box 13i**

LOB Code
- Please Select -  **Box 13j**

Account Number
  **Box 13k**

Primary Withholding Agent Information

Agent's Name
  **Box 14a**

Agent's EIN
 -  **Box 14b**

This Section Usually Blank

Intermediary or Flow-through Entity Information

Intermediary Entity's Name

Intermediary Entity's EIN

Chapter 3 Status Code

- Please Select -

Chapter 3 Status Code

- Please Select -

Intermediary Entity's GIN

Intermediary Entity's Foreign Tax ID Number

Intermediary Entity's Address

Country

United States of America

Address (street number & name)

ZIP code

City, town, or post office

State

- Please Select -

Payer Information

Payer's Name

Box 16a

Payer's TIN

Box 16b

Chapter 3 Status Code

- Please Select -

Box 16d

Chapter 4 Status Code

- Please Select -

Box 16e

Payer's GIN

Box 16c

Payer's State Tax Number

Box 17c

Name of State

- Please Select -

Select state if 17a is not blank

State Income Tax Withheld

Box 17a

CANCEL

When all info entered,
click continue

CONTINUE

Usually blank

Click here to edit or delete this info.



Foreign Person's U.S. Source Income Subject to Withholding

 Add a Form 1042-S - U.S. Tax Withheld

<div>3</div> <div>16</div>	Gross Income	\$1,600.00	Tax Withheld	\$140.00	
----------------------------	--------------	------------	--------------	----------	---



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Foreign Person's U.S. Source Income Subject to Withholding

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2022 | AMERICAN PLEDGE

Help & Support

Payments and Estimates

Federal Estimated Tax Payments

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments

State tax payments already made for 2022

BEGIN

Other Federal Withholdings

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2023 Estimated Tax Payments

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

IRC 1341 Repayment Amount

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

Foreign Partner's Information Statement of Sec. 1446 Withholding Tax

Form 9805

BEGIN

Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests

Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

END

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$623

Entering your taxable scholarship income into your tax return

Yes, you have to do this step!

Mac students check GLACIER to see if you have 1042-S (income Code 16 for scholarship in Box 1, top left-hand corner.

You enter the 1042-S document, and then enter the information again

A note about how scholarships are taxed

- Scholarships that are used for tuition or required books and fees are not taxable income for everyone (called qualified scholarships)
 - Usually **Macalester** will not provide a 1042-S for this type of scholarship
 - Shown in your student account statement
 - Sometimes called a tuition waiver or fee waiver.
- Scholarships that are used for all other things, such as room and board, or any other personal expenses
 - If you have a treaty benefit, the scholarship is not taxable
 - If you have no treaty benefit the scholarship IS taxable
- If you had a taxable scholarship, but spent some of the money on required tuition, books, or fees, you can not pay tax on that portion of the scholarship.
Does not apply to most Macalester students since money goes directly to pay tuition, room and board, etc.
 - If this applies to you, go figure out that amount now.
 - You must be able to document this with receipts if the IRS asks.

Click on Income

TaxSlayer 2022 | AMERICAN FLEDGE

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Payments and Estimates

Federal Estimated Tax Payments ⓘ

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ⓘ

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ⓘ

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ⓘ

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ⓘ

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes ⓘ

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2023 Estimated Tax Payments ⓘ

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ⓘ

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

IRC 1341 Repayment Amount ⓘ

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments ⓘ

Other nonresident payments

BEGIN

Foreign Partner's Information Statement of Sec. 1446 Withholding Tax Form 990-S

BEGIN

Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding Form 1042-S

END

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$623

Scroll down to
Scholarships and
Fellowship Grants

W-2 (Most Common Form) ⓘ
Wages and tax statement

EDIT

1099-G Box 1 ⓘ
Unemployment compensation

BEGIN

1099-G Box 2 ⓘ
State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ⓘ
Interest income, dividends, and distributions

BEGIN

1099-K ⓘ
Payment card and third party network transactions

BEGIN

1099-MISC ⓘ
Miscellaneous income

BEGIN

1099-NEC
Nonemployee compensation

BEGIN

1099-R, RRB, SSA ⓘ
Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F
Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ⓘ
May receive Form 1099-B, reported on Schedule D

BEGIN

Profit or Loss from Business ⓘ
Reported on Schedule C

BEGIN

Profit or Loss from Farming ⓘ
Reported on Schedule F

BEGIN

Profit or Loss from Rentals and Royalties ⓘ
Reported on Schedule E

BEGIN

Scholarships And Fellowship Grants
Taxable portion of a scholarship/grant must be included in gross income

BEGIN

SSA-1042S and RRB-1042S
Retirement benefits for nonresident aliens

BEGIN

Less Common Income ⓘ
K-1 earnings, gambling winnings, cancellation of debt, etc.

BEGIN

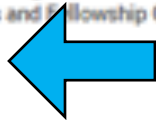


BACK

CONTINUE

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received



Enter total amount of scholarship from form 1042-S box 2

CANCEL



CONTINUE

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Help & Support ?

Income

W-2 (Most Common Form) ?

Wages and tax statement

EDIT

1099-G Box 1 ?

Unemployment compensation

BEGIN

1099-G Box 2 ?

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ?

Interest income, dividends, and distributions

BEGIN

1099-K ?

Payment card and third party network transactions

BEGIN

1099-MISC ?

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA ?

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ?

May receive Form 1099-B, reported on Schedule D

BEGIN

Profit or Loss from Business ?

Reported on Schedule C

BEGIN

Profit or Loss from Farming ?

Reported on Schedule F

BEGIN

Profit or Loss from Rentals and Royalties ?

Reported on Schedule E

BEGIN

Not common situation with Macalester students since scholarship generally go to direct payments for tuition, room, or board. If did happen need to show receipt paid for books, etc.

Entering the part of your taxable scholarship that you spent on tuition, required books or fees

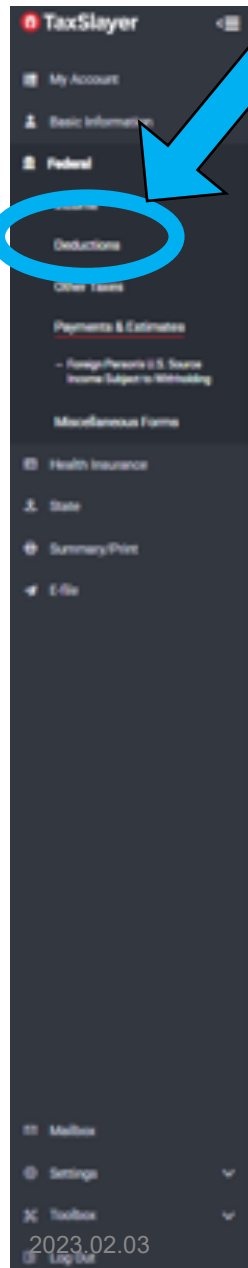
You've already entered your taxable scholarship income when you entered your 1042-S form.

This step reduces your taxable scholarship by the amount spent on qualified education expenses.

Note: You can only enter expenses up to the total amount of your taxable scholarship. Although the software won't stop you, claiming more expenses than your scholarship is not permitted under IRS regulations.

If this does not apply to you, skip to State Income Tax Refund or Payment section [go to pg 102.](#)

Click on Deductions



Payments and Estimates

Federal Estimated Tax Payments ⓘ

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ⓘ

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ⓘ

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ⓘ

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ⓘ

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes ⓘ

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2023 Estimated Tax Payments ⓘ

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ⓘ

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

IRC 1341 Repayment Amount ⓘ

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments ⓘ

Other nonresident payments

BEGIN

Foreign Partner's Information Statement of Sec. 1446 Withholding Tax Form 990-S

BEGIN

Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding Form 1042-S

END

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CONTINUE

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RETURN SUMMARY

Federal

\$623

Deductions

Adjustments to Income ⓘ

Educator expenses, medical savings accounts, student loan interest, etc.

Credits ⓘ

Child and dependent care credit, education credits, mortgage interest credit, etc.

Itemized Deductions ⓘ

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BEGIN

BEGIN

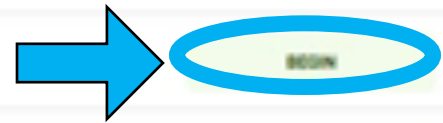
BACK

CONTINUE



Adjustments

Medical Savings Account Form 8853 ⓘ	BEGIN
Educator Expenses ⓘ	BEGIN
Health Savings Account Form 8889 ⓘ	BEGIN
Moving Expenses - Form 3903 ⓘ	BEGIN
Contributions to SEP, Simple and Qualified plans ⓘ	BEGIN
Self Employed Health Insurance ⓘ	BEGIN
Penalty on Early Withdrawal of savings or CD ⓘ	BEGIN
Scholarships And Fellowship Grants Excluded ⓘ	BEGIN
IRA Deduction ⓘ	BEGIN
Nondeductible IRAs - Form 8606	BEGIN
Student Loan Interest Deduction ⓘ	BEGIN



Scholarships and Fellowship Grants Excluded

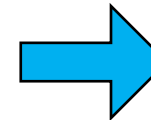
Amount of Scholarships and Fellowship Grants Excluded



Enter amount of scholarship spent on required tuition, books, and fees.

CANCEL

Not common situation with Macalester students since scholarship generally go to direct payments for tuition, room, or board. If did happen need to show receipt paid for books, etc.



CONTINUE

Adjustments

Medical Savings Account Form 8853 ⓘ

BEGIN

Educator Expenses ⓘ

BEGIN

Health Savings Account Form 8889 ⓘ

BEGIN

Moving Expenses - Form 3903 ⓘ

BEGIN

Contributions to SEP, Simple and Qualified plans ⓘ

BEGIN

Self Employed Health Insurance ⓘ

BEGIN

Penalty on Early Withdrawal of savings or CD ⓘ

BEGIN

Scholarships And Fellowship Grants Excluded ⓘ

BEGIN

IRA Deduction ⓘ

BEGIN

Nondeductible IRAs - Form 8606

BEGIN

Student Loan Interest Deduction ⓘ

BEGIN



Deductions

Adjustments to Income ⓘ

Educator expenses, medical savings accounts, student loan interest, etc.

BEGIN

Credits ⓘ

Child and dependent care credit, education credits, mortgage interest credit, etc.

BEGIN

Itemized Deductions ⓘ

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BACK

CONTINUE



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Help & Support

Other Taxes

Additional Taxes on Qualified Plans and Other Accounts

Reported on Form 5329

BEGIN

Alternative Minimum Tax (AMT)

Reported on Form 6251

BEGIN

Household Employment Taxes

Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT)

Reported on Form 9960

BEGIN

Parents' Election to Report Child's Interest and Dividends

Reported on Form 8814

BEGIN

Repayment of First-Time Homebuyer Credit

Reported on Form 5405

BEGIN

Self-Employment Tax

Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income

Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income

Reported on Form 9815

BEGIN

Tax on Income Not Effectively Connected to US Trade/Business

Reported on Schedule NEC

BEGIN

Transportation Tax

Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)

BEGIN

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$483

This completes entering
scholarship income

Entering state income tax payment made during 2022.

The best document for this information is a copy of your state tax return from last year, along with your bank / card statements for proof of payment. Only amounts you actually paid can be entered.

If you didn't pay additional state tax with your state tax return last year, you can skip to state refund section. [Go to pg 112.](#)

If you didn't get a refund, you can skip to the end section. Go to pg XXX.

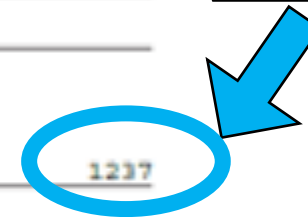
Example MN Return

2021 M1, page 2

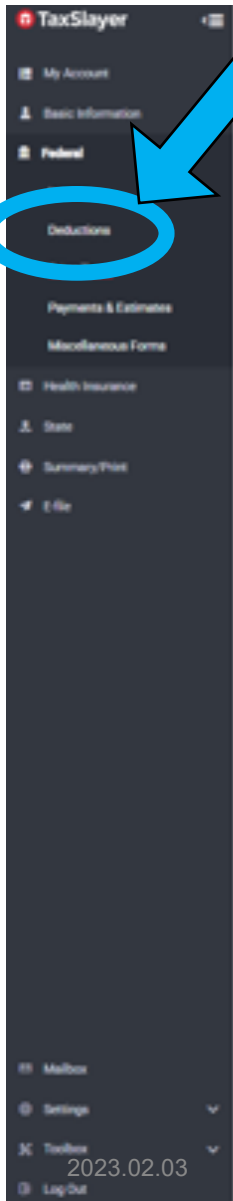


11	Alternative minimum tax (enclose Schedule M1MT)	11	■	
12	Add lines 10 and 11	12	■	1751
13	Full-year residents: Enter the amount from line 12 on line 13. Skip lines 13a and 13b. Part-year residents and nonresidents: From Schedule M1NR, enter the amount from line 12 on line 13, from line 28 on line 13a, and from line 29 on line 13b (enclose Schedule M1NR)	13	■	1751
	13a ■ 13b ■			
14	Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes) <input type="checkbox"/> (a) Schedule M1WOMT <input type="checkbox"/> (b) Schedule M1529 <input type="checkbox"/> (c) Schedule M115	14	■	
15	Tax before credits. Add lines 13 and 14	15	■	1751
16	Amount from line 18 of Schedule M1C, Nonrefundable Credits (enclose Schedule M1C)	16	■	
17	Subtract line 16 from line 15 (if result is zero or less, leave blank)	17	■	1751
18	Nongame Wildlife Fund contribution (see instructions) This will reduce your refund or increase the amount you owe	18	■	
19	Add lines 17 and 18	19	■	1751
20	Minnesota income tax withheld. Complete and enclose Schedule MIW to report Minnesota withholding from Forms W-2, 1099, and W-2G (do not send)	20	■	514
21	Minnesota estimated tax and extension payments made for 2021	21	■	
22	Amount from line 11 of Schedule M1REF, Refundable Credits (see instructions; enclose Schedule M1REF)	22	■	
23	Total payments. Add lines 20 through 22	23	■	514
24	REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions). For direct deposit, complete line 25	24	■	
25	Direct deposit of your refund (you must use an account not associated with a foreign bank): <input type="checkbox"/> Checking <input type="checkbox"/> Savings Routing Number _____ Account Number _____	25	■	
26	AMOUNT YOU OWE. If line 19 is more than line 23, subtract line 23 from line 19 (see instructions)	26	■	1237
27	Penalty amount from Schedule M15 (see instructions). Also subtract this amount from line 24 or add it to line 26 (enclose Schedule M15)	27	■	
28	IF YOU PAY ESTIMATED TAX and want part of your refund credited to estimated tax, complete lines 28 and 29. Amount from line 24 you want sent to you	28	■	
29	Amount from line 24 you want applied to your 2022 estimated tax	29	■	

Additional tax
you should
have paid



Click on Deductions



Other Taxes

Additional Taxes on Qualified Plans and Other Accounts ⓘ

Reported on Form 5329

BEGIN

Alternative Minimum Tax (AMT) ⓘ

Reported on Form 6251

BEGIN

Household Employment Taxes ⓘ

Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT) ⓘ

Reported on Form 990

BEGIN

Parents' Election to Report Child's Interest and Dividends ⓘ

Reported on Form 8814

BEGIN

Repayment of First-Time Homebuyer Credit ⓘ

Reported on Form 5405

BEGIN

Self-Employment Tax ⓘ

Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income ⓘ

Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income ⓘ

Reported on Form 9815

BEGIN

Tax on Income Not Effectively Connected to US Trade/Business ⓘ

Reported on Schedule NEC

BEGIN

Transportation Tax ⓘ

Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens) ⓘ

BEGIN

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$443

Deductions

Adjustments to Income ⓘ

Educator expenses, medical savings accounts, student loan interest, etc.

BEGIN

Credits ⓘ

Child and dependent care credit, education credits, mortgage interest credit, etc.

BEGIN

Itemized Deductions ⓘ

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BACK

CONTINUE



Itemized Deductions

Use Standard or Itemized Deduction

BEGIN

Taxes You Paid ⓘ

EDIT

Gifts to Charity ⓘ

BEGIN

Unreimbursed Employee Business Expense ⓘ

BEGIN

Job-Related Travel Expenses Form 2106 ⓘ

BEGIN

Other Itemized Deductions

BEGIN

Less Common Deductions

BEGIN

CONTINUE

Schedule A - Taxes You Paid



State and Local Tax amounts are automatically pulled from W-2, 1099, W-2G, and Estimates.
PLEASE DO NOT include any of these amounts in any of the boxes below or your calculations will NOT be correct.

Taxes Paid

Additional State and Local Income Tax
(DO NOT INCLUDE AMOUNTS FROM W-2, 1099, W-2G or Estimates.)

\$



Enter amount of tax paid with your state return

Prior Year 4th-Quarter State Estimates paid after 12/31/2021

\$

☐ I want to deduct my state sales taxes instead of my state income taxes.

You may want to do this if your state sales tax amount is more than your state income taxes withheld/paid in 2022 or if your state does not have income taxes.

CANCEL



CONTINUE

Schedule A - Taxes You Paid

\$0.00
\$0.00

TaxSlayer shows \$0 here but the data is properly entered and will be used in the calculations if you are itemizing.



Itemized Deductions

Use Standard or Itemized Deduction

BEGIN

Taxes You Paid ⓘ

EDIT

Gifts to Charity ⓘ

BEGIN

Unreimbursed Employee Business Expense ⓘ

BEGIN

Job-Related Travel Expenses Form 2106 ⓘ

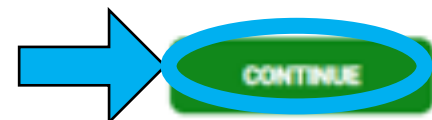
BEGIN

Other Itemized Deductions

BEGIN

Less Common Deductions

BEGIN



Deductions

Adjustments to Income ⓘ

Educator expenses, medical savings accounts, student loan interest, etc.

BEGIN

Credits ⓘ

Child and dependent care credit, education credits, mortgage interest credit, etc.

BEGIN

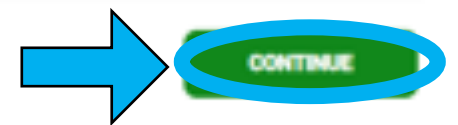
Itemized Deductions ⓘ

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

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Other Taxes

Additional Taxes on Qualified Plans and Other Accounts

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Alternative Minimum Tax (AMT)

Reported on Form 6251

BEGIN

Household Employment Taxes

Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT)

Reported on Form 990

BEGIN

Parents' Election to Report Child's Interest and Dividends

Reported on Form 8814

BEGIN

Repayment of First-Time Homebuyer Credit

Reported on Form 5405

BEGIN

Self-Employment Tax

Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income

Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income

Reported on Form 9815

BEGIN

Tax on Income Not Effectively Connected to US Trade/Business

Reported on Schedule NEC

BEGIN

Transportation Tax

Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)

BEGIN

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CONTINUE

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RETURN SUMMARY

Federal

\$443

Entering state income tax refund received during 2022.

The best document for this information is a copy of your state tax return from last year. If you can't find that you can try checking your bank statements, or use the state Dept. of Revenue website.

You will also need to use information from your 2021 federal return

If you didn't file a state tax return last year, you can skip to the end section.

[Go to pg 120.](#)

Example MN Return

2021 M1, page 2



11	Alternative minimum tax (enclose Schedule M1MT)	11	■	_____
12	Add lines 10 and 11	12	■	1540
13	Full-year residents: Enter the amount from line 12 on line 13. Skip lines 13a and 13b. Part-year residents and nonresidents: From Schedule M1NR, enter the amount from line 32 on line 13, from line 28 on line 13a, and from line 29 on line 13b (enclose Schedule M1NR)			
13		13	■	1540
13a ■ _____ 13b ■ _____				
14	Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes)			
	<input type="checkbox"/> (a) Schedule M1HOME <input type="checkbox"/> (b) Schedule M1529 <input type="checkbox"/> (c) Schedule M1LS	14	■	_____
15	Tax before credits. Add lines 13 and 14	15	■	1540
16	Amount from line 18 of Schedule M1C, <i>Nonrefundable Credits</i> (enclose Schedule M1C)	16	■	_____
17	Subtract line 16 from line 15 (if result is zero or less, leave blank)	17	■	1540
18	Nongame Wildlife Fund contribution (see instructions) This will reduce your refund or increase the amount you owe	18	■	_____
19	Add lines 17 and 18	19	■	1540
20	Minnesota income tax withheld. Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G (do not send)	20	■	2193
21	Minnesota estimated tax and extension payments made for 2021	21	■	_____
22	Amount from line 11 of Schedule M1REF, <i>Refundable Credits</i> (see instructions; enclose Schedule M1REF) . . .	22	■	_____
23	Total payments. Add lines 20 through 22	23	■	2193
24	REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions). For direct deposit, complete line 25	24	■	653
25	Direct deposit of your refund (you must use an account not associated with a foreign bank):			

Refund



☐ Checking

☐ Savings

Routing Number

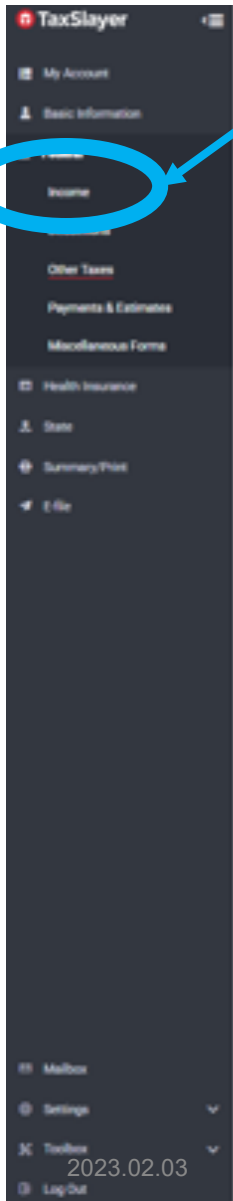
Account Number

Where to find itemized deduction information on your 2021 federal return

- If you had a 2021 form 1040-NR federal tax return go to Schedule A on page 3:

SCHEDULE A (Form 1040-NR)		Itemized Deductions		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service (99)		<p>► Go to www.irs.gov/Form1040NR for instructions and the latest information.</p> <p>► Attach to Form 1040-NR.</p> <p>Caution: If you are claiming a net qualified disaster loss on Form 4684, see instructions for line 7.</p>		<p>2021</p> <p>Attachment Sequence No. 7A</p>	
Name shown on Form 1040-NR THERESA DAVIES				Your identifying number XXX-XX-6666	
Taxes You Paid	1a	State and local income taxes	1a	1514	
	b	Enter the smaller of line 1a or \$10,000 (\$5,000 if you checked Married filing separately under Filing Status on page 1 of Form 1040-NR)	1b	1514	
Gifts to U.S. Charities	2	Gifts by cash or check. If you made any gift of \$250 or more, see instructions	2	60	
Caution: If you made a gift and received a benefit in return, see instructions.	3	Other than by cash or check. If you made any gift of \$250 or more, see instructions. Individuals must attach Form 8283 if line 3 is over \$500	3		
	4	Carryover from prior year	4		
	5	Add lines 2 through 4	5	60	
Casualty and Theft Losses	6	Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions	6		
Other Itemized Deductions	7	Other—from list in instructions. List type and amount ► _____ _____ _____ _____ _____	7		
Total Itemized Deductions	8	Add the amounts in the far right column for lines 1b through 7. Also, enter this amount on Form 1040-NR, line 12a	8	1574	

Click on Income



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Other Taxes

Additional Taxes on Qualified Plans and Other Accounts ⓘ Reported on Form 5329	BEGIN
Alternative Minimum Tax (AMT) ⓘ Reported on Form 6251	BEGIN
Household Employment Taxes ⓘ Reported on Schedule H	BEGIN
Net Investment Income Tax (NIIT) Reported on Form 990	BEGIN
Parents' Election to Report Child's Interest and Dividends ⓘ Reported on Form 8814	BEGIN
Repayment of First-Time Homebuyer Credit ⓘ Reported on Form 5405	BEGIN
Self-Employment Tax Reported on Schedule SE	BEGIN
Social Security and Medicare Tax on Unreported Tip Income ⓘ Reported on Form 4137	BEGIN
Tax For Certain Children Who Have Unearned Income ⓘ Reported on Form 9815	BEGIN
Tax on Income Not Effectively Connected to US Trade/Business Reported on Schedule NEC	BEGIN
Transportation Tax Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)?	BEGIN

BACK CONTINUE

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RETURN SUMMARY

Federal **\$443**

Not all states
send out forms
1099-G for
refunds, but this
is where you
enter that info.

Income

W-2 *(Most Common Form)* ⓘ
Wages and tax statement

EDIT

1099-G Box 1 ⓘ
Unemployment compensation

BEGIN

1099-G Box 2 ⓘ
State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ⓘ
Interest income, dividends, and distributions

BEGIN

1099-K ⓘ
Payment card and third party network transactions

BEGIN

1099-MISC ⓘ
Miscellaneous income

BEGIN

1099-NEC
Nonemployee compensation

BEGIN

1099-R, RRB, SSA ⓘ
Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

8915-F
Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ⓘ
May receive Form 1099-B, reported on Schedule D

BEGIN

Profit or Loss from Business ⓘ
Reported on Schedule C

BEGIN

Profit or Loss from Farming ⓘ
Reported on Schedule F

BEGIN

Profit or Loss from Rentals and Royalties ⓘ
Reported on Schedule E

BEGIN

Scholarships And Fellowship Grants
Taxable portion of a scholarship/grant must be included in gross income

BEGIN

SSA-1042S and RRB-1042S
Retirement benefits for nonresident aliens

BEGIN

Less Common Income ⓘ
K-1 earnings, gambling winnings, cancellation of debt, etc.

BEGIN

BACK

CONTINUE

State & Local Refund Worksheet

Only complete this worksheet if you itemized your 2021 tax return.

Bypass State Refund Worksheet

Enter amount here to bypass worksheet and enter the full amount as taxable on Form 1040

Enter total state income tax refund(s) received during calendar year 2022

State & Local Refunds

2021 state tax refund(s) (refunds from 1099-G or similar statements)

Prior Year Taxes

Last year's (2021 tax return) total state and local tax paid (Schedule A line 5d)

Last year's (2021 Tax Return) total itemized or standard deduction (Form 1040 line 12)

Total amount of prior year state tax withheld (including state estimated payments, Schedule A line 5a)

Prior year sales tax deduction (Schedule A line 5a)

Enter any calculated sales tax which you could have deducted on your prior year Schedule A

Blank

Last Year's (Tax Return) Filing Status *

Enter filing status: **married filing separately** and **check that spouse itemized**

☒ Check here if your spouse itemized in 2021

Last Year's (2021 Tax Return) Deductions for Age 65 and over or Blind

☐ Check here if NRVITAP claimed the Age 65 and older deduction last year.

☐ Check here if NRVITAP claimed the Blind deduction last year.

Check box if any apply (usually no).

Note that TaxSlayer does not currently properly calculate a taxable refund for nonresident aliens. For now, enter as described, and select last year's filing status as Married Filing Separately, and check that spouse itemized. This will calculate your taxable refund properly on your return, even though you had to enter something wrong to get it.

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Help & Support

RETURN SUMMARY

Federal **-\$727**

Income

W-2 (Most Common Form) Wages and tax statement	EDIT
1099-G Box 1 Unemployment compensation	BEGIN
1099-G Box 2 State or local income tax refunds, credits, or offsets	EDIT
1099-INT, DIV, OID Interest income, dividends, and distributions	BEGIN
1099-K Payment card and third party network transactions	BEGIN
1099-MISC Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
1099-R, RRB, SSA Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
8915-F Deferred Retirement Income Due to Disaster Relief in a Prior Year	BEGIN
Capital Gains and Losses May receive Form 1099-B, reported on Schedule D	BEGIN
Profit or Loss from Business Reported on Schedule C	BEGIN
Profit or Loss from Farming Reported on Schedule F	BEGIN
Profit or Loss from Rentals and Royalties Reported on Schedule E	BEGIN
Scholarships And Fellowship Grants Taxable portion of a scholarship/grant must be included in gross income	BEGIN
SSA-1042S and RRB-1042S Retirement benefits for nonresident aliens	BEGIN
Less Common Income K-1 earnings, gambling winnings, cancellation of debt, etc.	BEGIN

BACK

CONTINUE

This completes entering
state income tax refunds and
payments

Congratulations!

This completes preparing your federal return using the
Basic Scenario 3 Guide

If you received gift card from Mac, 1042 (Income Code 23), or award from some other organization, like Hack the Gap, this taxable income has to be reported.

From TS menu>Federal>Income>Less Common Income>Other Income Not Reported Elsewhere

TaxSlayer 2022 | AMERICAN PLEDGE Help & Support

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Less Common Income


Other Income Not Reported Elsewhere	BEGIN
Gambling Winnings W-2G	BEGIN
Other Compensation	BEGIN
Payments from Qualified Education Programs 1099-Q	BEGIN
Cancellation of Debt 1099-C, 982	BEGIN
Net Operating Loss (NOL) Carryover from Prior Year(s)	BEGIN


1. Enter INCOME


Whether or not you get 1042S (Income Code 23) or a letter/document stating how much you received as prize or award, you report each income amount here. If you got more than one prize or award, add up the total income you received; so if gift card for \$71 (Income Code 23) and the Gap prize of \$600, then total is \$671 since TaxSlayer may not allow you to enter each amount separately. Enter description "Award" and (total) amount of other income.


2. Enter TAX withheld if any


If you had federal tax withheld, report that tax withheld under TS menu>Payments & Estimates>Other Federal Withholdings> and enter amount on next slide.

TaxSlayer



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- W-2 Wage Statement


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Other Income

Form belongs to

Text

Other Income Description *

Other Income

Description of other income *

Amount of other income *

\$



Income reported here will carry to Line 8 of Schedule 1. Examples can include income reported on Form 1099-MISC, Boxes 3 and 8 as well as qualifying hobby related income to name a few. If you have an amount in any other box, [click here](#) to find out how you are required to report it.


CANCEL


CONTINUE

2. Enter TAX withheld if any

If you had federal tax withheld, report that tax withheld under TS menu>Payments & Estimates>Other Federal Withholdings> and enter amount in this field.

If you got 1042S, Income Code 23, look at Box 7a and report federal tax withheld, e.g., \$21 or amount stated, or check any documents you got that reports tax withheld under “Other Federal withholding (not from Form 1099)”.





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- Foreign Person's U.S. Source
Income Subject to Withholding

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Help & Support ?

Other Federal Withholdings

Note: Do not enter amount from W-2, 1099-R, or 1099-G (unemployment)

Federal withholding from Form 1099 *

\$

Other Federal withholding (not from Form 1099) *

\$

CANCEL

CONTINUE

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Next Steps

- Prepare your state return.
 - Our state guides are on the NRV TAP member site, under Step 2 in the special circumstances guides section
 - We have guides for
 - Minnesota
 - Pennsylvania
 - North Carolina
 - California
 - Maryland
- Update your return with any other special circumstances guides that apply
- File your tax return
 - Filing instructions guide is on the NRV TAP member site
 - Go to Step 3 to access the link to this guide to complete your returns and file them with the tax authorities

Minnesota State Income Tax Return

Accessing TaxSlayer – Make sure the link takes you here.

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.

CONTINUE

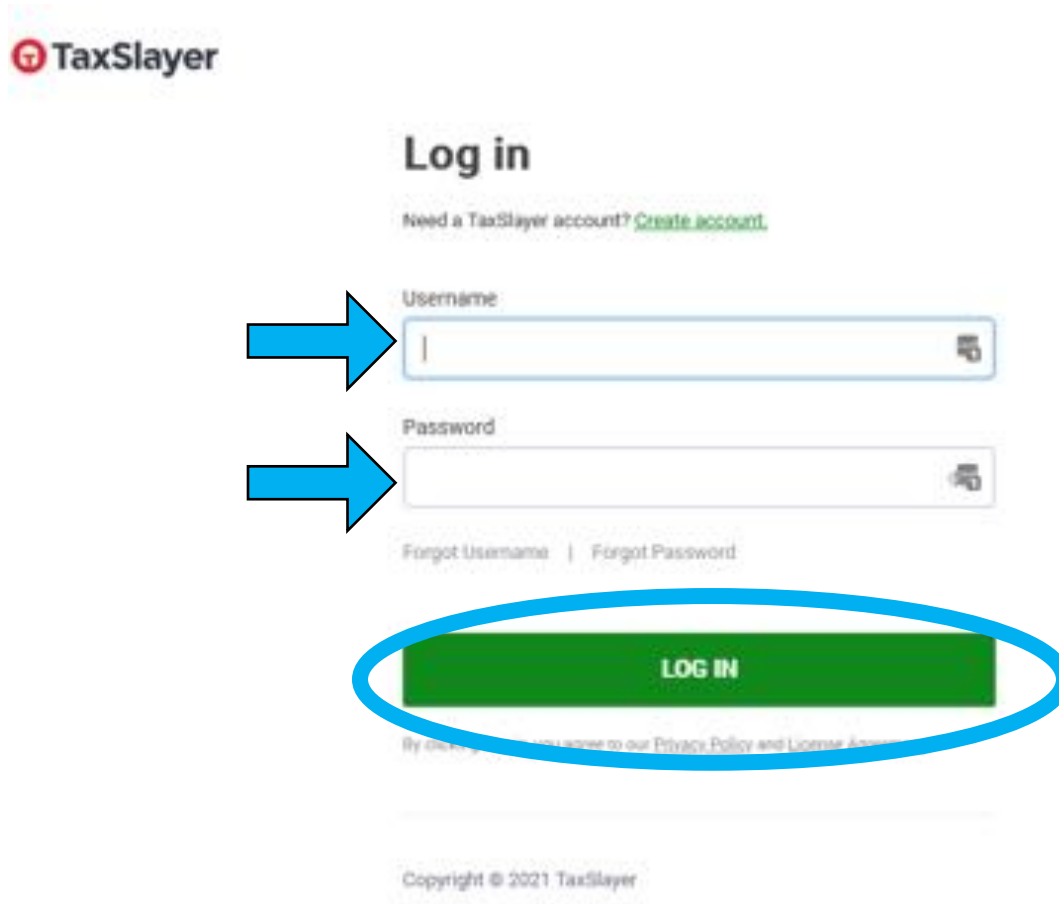
Do NOT go to the main TaxSlayer website.

Your only option on that site will be to pay for your return.

You MUST use the link in the member section of the NRV TAP website.

You will not be charged a fee if you are using the proper link.

Log into your TaxSlayer account



The image shows the TaxSlayer login page. At the top left is the TaxSlayer logo. Below it is the heading "Log in". Under the heading is a link: "Need a TaxSlayer account? [Create account.](#)". There are two input fields: "Username" and "Password". A blue arrow points to the Username field, and another blue arrow points to the Password field. Below the Password field are links for "Forgot Username" and "Forgot Password". A large green "LOG IN" button is circled in blue. At the bottom, there is a small link: "By clicking, you agree to our [Privacy Policy](#) and [License Agreement](#)". At the very bottom is the copyright notice: "Copyright © 2021 TaxSlayer".

TaxSlayer

Log in

Need a TaxSlayer account? [Create account.](#)

Username

Password

[Forgot Username](#) | [Forgot Password](#)

LOG IN

[By clicking, you agree to our \[Privacy Policy\]\(#\) and \[License Agreement\]\(#\)](#)


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Note that this return does not have a state return, only a federal return.


MY ACCOUNT

2022 Tax Return

Welcome back! Let's finish your 2022 tax return.





RETURN	STATUS	REFUND AMOUNT
Federal	Created 	\$386.00

If you do have a state, you need to delete it.

TaxSlayer My Account

MY ACCOUNT 2022 Tax Return

Welcome back! Let's finish your 2022 tax return.

CONTINUE

RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	-\$63.00
Minnesota	Created ⓘ	-\$73.00

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If you aren't already there, click on the state section

The screenshot displays the TaxSlayer website interface for the 2022 tax year. On the left, a dark sidebar contains navigation links: 'My Account', 'Basic Information', 'Federal', 'Health Insurance', 'State' (highlighted with a blue circle and a blue arrow), 'Summary/Print', and 'E-file'. The main content area is titled 'State Return' and includes a yellow warning box with an exclamation mark icon stating: 'If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.' Below this is a button labeled 'Add Another State Return'. A section for 'Minnesota Resident' is visible, featuring a 'Property Tax Refund' option and a green 'CONTINUE' button. The footer shows the copyright notice 'Copyright © 2024 TaxSlayer | [Privacy Policy](#)'.

State Return



If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

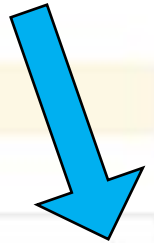
Add Another State Return

Minnesota
Nonresident

Property Tax Refund

CONTINUE

Click here to delete
this state.

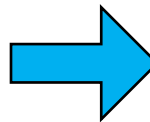


Are you sure that you want to delete this State Return?

Minnesota State Return

You will have to re-enter this information if you later decide to include this on your return.

CANCEL



DELETE



Let's get started on your state return

We'll transfer your information from your federal to your state return automatically, so this should be quick! You'll enter some state-specific information, and we'll help you find all possible tax breaks.

If you qualify for a free federal return, you can file a free state return for the following states:

Arkansas, Arizona, Dist of Columbia, Georgia, Iowa, Idaho, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, Mississippi, Montana, North Carolina, North Dakota, New York, Oregon, Rhode Island, South Carolina, Virginia, Vermont, West Virginia

Returns for all other states are \$0.00

BACK

[Skip state return](#)

GET STARTED

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Select your State Return

Please select the state that you would like to complete below.

Only states that accept tax returns for which you have not already created a state tax return are listed here. The following states **do not** have individual income tax returns:

Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming



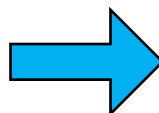
Choose State

Please Select



Select Minnesota
or click MN on the map

CANCEL



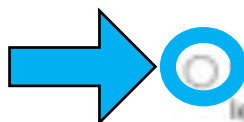
CONTINUE

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Select your Minnesota Return Residency

Please choose a return type

If you are a new student and came to MN in 2022, you should still select "Resident" in order for the software to work correctly.

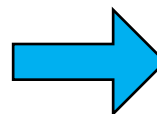


☒ **Resident:** You are a Resident if Minnesota was your domicile for the entire year OR you owned, rented or leased a home in Minnesota for the tax year AND spent more than 183 days in the state.

☐ **Part Year:** You are a Part Year Resident if you moved your permanent home into or out of Minnesota during the tax year.

☐ **Non-Resident:** You are a Non-Resident of Minnesota if you are a resident of another state and you have spent less than 183 days in Minnesota during the tax year.

CANCEL



CONTINUE

If you didn't work in another state, choose resident.

Ask ISP Tax Volunteer for these specific instructions if you worked in MN & another state.

If you did work in another state stop now! Go to the Working in MN and Another State special circumstances guide to complete your return.

Minnesota Return

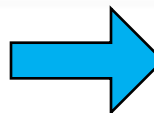
You can choose to designate \$5 per taxpayer to the State Elections Campaign below. This designation does NOT reduce your refund or increase your tax.

If you would like to designate \$5 to the State Election Campaign, select your party of choice. If you choose the General Campaign fund, the \$5 will be distributed among the candidates of all major parties listed.

--Select--



Recommend No Contribution



CONTINUE

From the federal election commission (www.fec.gov):

Federal law prohibits contributions, donations, expenditures and disbursements solicited, directed, received or made directly or indirectly by or from foreign nationals in connection with any election — federal, state or local. This prohibition includes contributions or donations made to political committees and building funds and to make electioneering communications. Furthermore, it is a violation of federal law to knowingly provide substantial assistance in the making, acceptance or receipt of contributions or donations in connection with federal and nonfederal elections to a political committee, or for the purchase or construction of an office building. This prohibition includes, but is not limited to, acting as a conduit

Congratulations! You have completed your standard Minnesota state return!

Would you like to add any of the following items or any additional items not listed below to your Minnesota state return?

- File Form M1PR, MN Property Tax Rebate
- Child and Dependent Care Credit
- Age 65 or over
- Lived or worked in another state(s)
- Paid for long term care
- Charitable donations greater than \$500
- More than one dependent child
- Received government assistance
- Contributed to a 401-k with income under \$34k
- Had home schooling expenses
- Served 20+ years in the military
- Military deduction or National Guard or reserves

NO

No

Is this your first time filing a MN return, or did you move since you filed your last one?

YES

Yes

Is this your first time filing a MN return, or did you move since you filed your last one? If No:

State Return



If you need to change your state residency status just delete the current return and start again.
State forms differ by the type of residency you select.



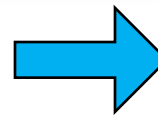
Add Another State Return

Minnesota

Resident



Property Tax Refund



CONTINUE

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Is this your first time filing a MN return, or did you move since you filed your last one? If Yes:

Minnesota Return

Basic Information

Minnesota Property Tax Rebate M1PR

Additions to Income

Subtractions from Income

Credits

Contributions

Payments

Miscellaneous Forms

Additional Nontaxable Income (Forms M1CD or M1ED)

START

START

START

START

START

START

START

START

START

EXIT MINNESOTA RETURN

Minnesota Return

Basic Information

Your federal information has been successfully transferred to your State. There are just a few more items required to complete the state return.

State Election Campaign

BEGIN

Is the address on your return a New Address?

☒ Yes

☐ No

Yes to indicate a new address

Do you want to force the MN Standard Deduction?

☒ Yes

☒ No

Do NOT say Yes to this!

Scroll down to continue

CONTINUE

Exit Minnesota Return

Minnesota Return

Basic Information

BECON

Minnesota Property Tax Rebate M1PR

BECON

Additions to Income

BECON

Subtractions from Income

BECON

Credits

BECON

Contributions

BECON

Payments

BECON

Miscellaneous Forms

BECON

Additional Nontaxable Income (Forms M1CD or M1ED)

BECON



State Return



If you need to change your state residency status just delete the current return and start again.
State forms differ by the type of residency you select.

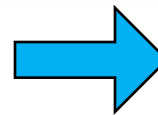


Add Another State Return

Minnesota
Resident



Property Tax Refund



CONTINUE

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If you didn't get MN Front Line Worker's Pay, skip to page 40.


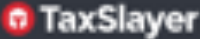
Minnesota Front Line Worker's Pay


If you got it, the following section will help you report it properly.


If you didn't get this payment, skip this section.


What is the Minnesota Front Line Worker's Pay?


- Payment of \$487.45 to individuals who worked on the frontlines during the COVID-19 peacetime emergency
 - Must have applied for it
 - Visit the [Minnesota Frontline Worker Pay website](#) and select **View your submissions**. Log in to your Frontline Worker Pay application to see if you were approved for a payment.
 - You will not get an income document to report this income
- This payment is TAXABLE on your federal income tax return
 - Report it on line 8 of federal Schedule 1 (Form 1040).
- This payment is NOT TAXABLE for Minnesota income taxes, and is not included in household income.
 - If you report the payment on line 8 of Schedule 1 on your federal return, subtract it on these lines:
 - Line 29 of Schedule M1M, Income Additions and Subtractions.
 - Line 10 of Form M1PR, Homestead Credit Refund (for Homeowners) and Renter's Property Tax Refund.
 - Line 5b of Schedule M1ED, K-12 Education Credit.





 My Account

 Basic Information

 Federal


 Health Insurance

 State

 Summary/Print

Summary

Print Results

 E-file

Tax Return Summary



Total Income	\$16,000.00	▼
Adjusted Gross Income	\$16,000.00	▼
Tax and Credits	\$300.00	▼
Total Tax	\$8.00	▼
Payments	\$1,700.00	▼
Refund	\$1,692.00	▼

 PRINT ▼

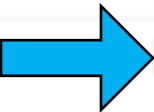
VIEW RETURN

BACK

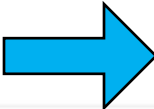
CONTINUE

Income

W-2 <small>(Most Common Form)</small> ⓘ Wages and tax statement	EDIT
1099-G Box 1 ⓘ Unemployment compensation	BEGIN
1099-G Box 2 ⓘ State or local income tax refunds, credits, or offsets	BEGIN
1099-INT, DIV, OID ⓘ Interest income, dividends, and distributions	BEGIN
1099-K ⓘ Payment card and third party network transactions	BEGIN
1099-MISC ⓘ Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
1099-R, RRB, SSA ⓘ Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
8915-F Deferred Retirement Income Due to Disaster Relief in a Prior Year	BEGIN
Alimony Received ⓘ Payments from a former spouse under a legal agreement	BEGIN
Capital Gains and Losses ⓘ May receive Form 1099-B, reported on Schedule D	BEGIN
Profit or Loss from Business ⓘ Reported on Schedule C	BEGIN
Profit or Loss from Farming ⓘ Reported on Schedule F	BEGIN
Profit or Loss from Rentals and Royalties ⓘ Reported on Schedule E	BEGIN
Less Common Income ⓘ K-1 earnings, gambling winnings, cancellation of debt, etc.	EDIT



Less Common Income

Other Income Not Reported Elsewhere	 BEGIN
Gambling Winnings W-2G ⓘ	BEGIN
Other Compensation	EDIT
Payments from Qualified Education Programs 1099-Q ⓘ	BEGIN
Cancellation of Debt 1099-C, 982	BEGIN
Net Operating Loss (NOL) Carryover from Prior Year(s)	BEGIN
Installment Sale Income 6252 ⓘ	BEGIN
Sale of Business Property 4797 ⓘ	BEGIN
K-1 Earnings	BEGIN
Gains and Losses From Section 1256 6781	BEGIN
Foreign Earned Income Exclusion 2555 ⓘ	BEGIN
Farm Rental Income and Expenses 4835 ⓘ	BEGIN

[CONTINUE](#)

Other Income

Form belongs to
NRVTAP TaxAssistance

Other Income Description *

Select Other Income

Description of other income *

Description

Amount of other income *

Amount same for everyone



Income reported here will carry to Line 8 of Schedule 1. Examples can include income reported on Form 1099-MISC, Boxes 3 and 8 as well as qualifying hobby related income to name a few. If you have an amount in any other box, [click here](#) to find out how you are required to report it.

CANCEL

CONTINUE

Other Income Item

 Add an Other Income Item

MN Frontline Worker Pay
\$487.00

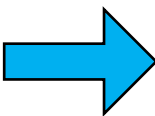


Less Common Income

Other Income Not Reported Elsewhere	BEGIN
Gambling Winnings W-2G ⓘ	BEGIN
Other Compensation	EDIT
Payments from Qualified Education Programs 1099-Q ⓘ	BEGIN
Cancellation of Debt 1099-C, 982	BEGIN
Net Operating Loss (NOL) Carryover from Prior Year(s)	BEGIN
Installment Sale Income 6252 ⓘ	BEGIN
Sale of Business Property 4797 ⓘ	BEGIN
K-1 Earnings	BEGIN
Gains and Losses From Section 1256 6781	BEGIN
Foreign Earned Income Exclusion 2555 ⓘ	BEGIN
Farm Rental Income and Expenses 4835 ⓘ	BEGIN



You've added the income on your federal return, but now we need to subtract it from your MN return



TaxSlayer

My Account

Basic Information

Federal

Income

W-2 Wage Statement

Scholarships and Grants

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

Income

W-2 (Most Common Form) Wages and tax statement	EDIT
1099-G Box 1 Unemployment compensation	BEGIN
1099-G Box 2 State or local income tax refunds, credits, or offsets	BEGIN
1099-INT, DIV, OID Interest income, dividends, and distributions	BEGIN
1099-K Payment card and third party network transactions	BEGIN
1099-MISC Miscellaneous income	BEGIN
1099-NEC Nonemployee compensation	BEGIN
1099-R, RRB, SSA Distributions from pensions, annuities, retirement, IRAs, social security, etc.	BEGIN
8915-F Deferred Retirement Income Due to Disaster Relief in a Prior Year	BEGIN
Alimony Received Payments from a former spouse under a legal agreement	BEGIN
Capital Gains and Losses May receive Form 1099-B, reported on Schedule D	BEGIN
Profit or Loss from Business Reported on Schedule C	BEGIN
Profit or Loss from Farming Reported on Schedule F	BEGIN
Profit or Loss from Rentals and Royalties Reported on Schedule E	BEGIN
Less Common Income K-1 earnings, gambling winnings, cancellation of debt, etc.	EDIT

State Return



If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.



Add Another State Return

Minnesota
Resident

Property Tax Refund



Edit

Delete

Minnesota Return

You can choose to designate \$5 per taxpayer to the State Elections Campaign below. This designation does NOT reduce your refund or increase your tax.

If you would like to designate \$5 to the State Election Campaign, select your party of choice. If you choose the General Campaign fund, the \$5 will be distributed among the candidates of all major parties listed.

No Contribution ▼



Congratulations! You have completed your standard Minnesota state return!

Would you like to add any of the following items or any additional items not listed below to your Minnesota state return?

- File Form M1PR, MN Property Tax Rebate
- Age 65 or over
- Paid for long term care
- More than one dependent child
- Contributed to a 401-k with income under \$34k
- Served 20+ years in the military
- Child and Dependent Care Credit
- Lived or worked in another state(s)
- Charitable donations greater than \$500
- Received government assistance
- Had home schooling expenses
- Military deduction or National Guard or reserves

NO



Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

BEGIN

Additions to Income

Adjustments for income taxed by MN but not the federal government

BEGIN

Subtractions from Income

Adjustments for income taxed by the federal government but not MN and other MN deductions

BEGIN

Credits

State-specific tax credits

BEGIN

Contributions

Option to contribute various MN funds

BEGIN

Payments

Apply refund to next years taxes & other MN withholding info

BEGIN

Miscellaneous Forms

Estimated payment vouchers, underpayment of estimated tax, etc.

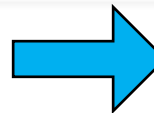
BEGIN

Additional Nontaxable Income (Forms M1ED or M1PR)

Adjustments specific to M1ED and M1PR

BEGIN

EXIT MINNESOTA RETURN



Minnesota Return

Subtractions From Income

We have automatically carried over certain subtractions from income to your Minnesota return; however, Minnesota does not tax certain items of income that are taxed by the Federal Government. Enter the amounts to be subtracted to the extent they were included as income on your Federal tax return.

K-12 Education Expense Subtraction

BEGIN

Deduction for Age 65 or Older/Disabled (Sch M1R)

BEGIN

Education Savings account Contribution Subtraction

BEGIN

First-Time Homebuyer Savings Account Subtraction

BEGIN

Active Duty Military Pay

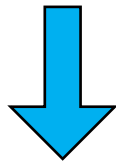
BEGIN

Depreciation Subtraction

BEGIN

Enter certain interest and/or Dividends on US Obligations

\$



Scroll Down to Bottom

Payment from the Minnesota Frontline Worker Pay Program.

\$ 487.45



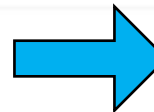
Itemized Deductions - Amount of mortgage interest reported on the Federal Schedule A that is from equity loan interest.

\$

Federal Adjustments not adopted by MN (Form M1NC)

BEGIN

BACK



CONTINUE

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

BEGIN

Additions to Income

Adjustments for income taxed by MN but not the federal government

BEGIN

Subtractions from Income

Adjustments for income taxed by the federal government but not MN and other MN deductions

BEGIN

Credits

State-specific tax credits

BEGIN

Contributions

Option to contribute various MN funds

BEGIN

Payments

Apply refund to next years taxes & other MN withholding info

BEGIN

Miscellaneous Forms

Estimated payment vouchers, underpayment of estimated tax, etc.

BEGIN

Additional Nontaxable Income (Forms M1ED or M1PR)

Adjustments specific to M1ED and M1PR

BEGIN



State Return



If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.



Add Another State Return

Minnesota
Resident

Property Tax Refund

...




Congratulations!!!

You have prepared your state tax return!

Tax Return Summary



Total Income	\$7,800.00	▼
Adjusted Gross Income	\$7,800.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$743.00	▼
Payments	\$780.00	▼
Refund	\$37.00	▼
Minnesota Amount due	\$30.00	

 PRINT ▼

VIEW RETURN

Download a pdf of your completed returns to review

BACK

Review printed PDF with ISP before filing.

CONTINUE

DO NOT e-file or mail your tax return(s) until you see an ISP tax tutor to review your NRA tax returns, which must include Forms 8843 or/and 1040NR. If your tax return doesn't include the 8843 or/and 1040NR, you selected the wrong TaxSlayer software - see ISP immediately to start over.


Filing instructions guide has been published on the NRVTAP member site

Go to Step 3 to access the link to this guide to complete your
returns and file them with the tax authorities

Tax Return Summary



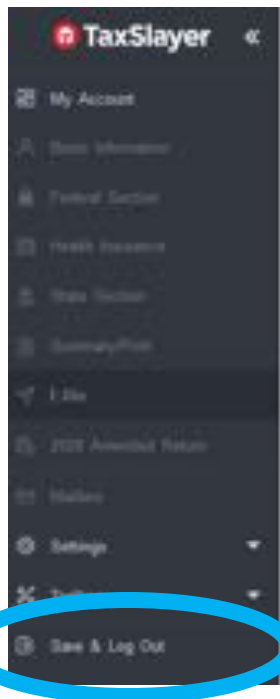
Total Income	\$7,800.00	▼
Adjusted Gross Income	\$7,800.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$743.00	▼
Payments	\$780.00	▼
Refund	\$37.00	▼
Minnesota Amount due	\$30.00	

 PRINT ▼

VIEW RETURN

BACK





2020 | American Flodge

1040NR e-Filing Not Yet Available

TaxSlayer is not currently accepting 1040NR e-files until a later date.
Please make sure you come back at a later date and e-file your tax return.

BACK

After you had your NRA tax return reviewed by ISP tax tutor, you can e-file if appropriate or mail your signed, paper return before April 15th.

If your federal/state return(s) accepted via e-file, you **MUST** still save PDF version for at least 5 years, but we suggest longer. If you can only file via mail and send in documents, makes sure you send in pen-signed copy of your return(s).

If your e-filed returned is rejected, contact ISP immediately and share any email or error code you get.

Save and log out, start a special circumstances guide, or go get the filing guide to file your return.