

NoRTH International Tax Clinic

DIY-Taxes using TaxSlayer

Basic Scenario 1

An IRS FSA (Facilitated Self-Assistance) Tax Clinic

This guide is intended to assist in preparing tax year 2023 federal income tax returns for nonresident alien STUDENTS from India.

IRS Required Disclosures

Your
Civil Rights
are
PROTECTED

Sus Derechos Civiles
están **PROTEGIDOS**

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 (incluso 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 edi.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 edi.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 wl.voltax@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, aquéllos 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 wl.voltax@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 or any other tax authorities.

Tax Process Overview

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!

Nonresidents

- Get Ready
 - Gather your income documents
 - Confirm your return is in scope
- Do Your Taxes
 - Option 1: Create and use a Personalized Guide
 - Create your personalized guide
 - Prepare your return
 - File your return
 - Option 2: Use tools, basic, and special circumstances guides
 - Confirm your federal tax residency status for 2023
 - Determine if you need to file a tax return
 - Determine your treaty benefits
 - Determine which scenarios apply to you
 - Prepare your return using a basic scenario
 - Update your return with any special circumstances scenarios
 - File your return

Residents

- Get Ready
 - Gather your income documents
 - Confirm your return is in scope
- Do Your Taxes
 - Option 1: Go straight to TaxSlayer, and use their built-in guide
 - Option 2: Create and use a Personalized Guide (coming soon).

This guide is created by another organization, therefore some of the information may not relate to Macalester NRA filers. Please read this along with with ISP instructions specific to Macalester. Complete GTP, then the ISP Tax Survey to get special link to TaxSlayer tax software if you qualify.

You should be here in the tax process

Have you confirmed your federal tax residency?

Macalester tax clients should use GLACIER' Tax Summary Report 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 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>.

Am I a Nonresident Alien?

It is your individual responsibility to determine your federal tax residency. This tool can describe most common situations, but it does not cover every possible scenario. Please see IRS Publication 519 for definitive guidance regarding determining your federal tax residency.

Select Tax Year

2023

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 U.S. on that same visit. The calculation will use today's date as the exit date. To project your status in the future, you can enter the future date you expect to depart.

If your visa changed without you leaving the U.S. enter two visits: one with an exit date the same as the end date of the first visa, and the second with an entry date the same as the first date of the second visa.

Visa ⓘ	Entry Date	Exit Date	
F-1 Student ×	08/08/2021 📅	05/31/2023 📅	Remove Visit
F-1 Student ×	08/23/2023 📅	MM/DD/YYYY 📅	Remove Visit

[Add another visit](#)

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2023.

Number of days **Present in 2023**: 282

Number of days **Present in 2022**: 365

Number of days **Present in 2021**: 146

Number of days **Exempt in 2023**: 282

Note: You are required to file Form 8843 to report your Exempt days for 2023.

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

Print Results

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

What are my treaty benefits?

This tool is intended to assist you in determining what treaty benefits you may be eligible to claim for wage or scholarship income, as well as income from dividend or stock sales. This tool will also help you evaluate if your treaty benefits match your income documents, and provide adjusting entries you can make in TaxSlayer to claim your full treaty benefits when they do not.

It is your individual responsibility to determine your eligibility to claim a tax treaty benefit on your federal tax return. This tool will describe what the benefits are, and summarize the eligibility requirements. Please see IRS Publications 519 and 901 for further details regarding tax treaties and eligibility. If your country of tax residency is not listed in this tool that means that there are no treaty benefits. The benefits for dividends and stock sales are not common, and you should review Publication 901 and the complete text of your tax treaty to confirm if you qualify. Also note that not all states honor federal income tax treaties, and so the benefits described here may or may not apply to your state tax return.

Select Visa

F-1 Student

Select Country of Tax Residency

India

Select Federal Tax Residency

Nonresident Alien

Did you receive dividends from U.S. Corporations

No

Did you have capital gains from sales of U.S. stocks

No

Check Treaty Benefits

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)

You are not eligible for any treaty benefits for wages or scholarships, however you are eligible to claim the standard deduction on your tax return. Use the guide for Basic Scenario 1 to prepare your tax return.

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

Print Results

Basic Scenario #1 Details

- This scenario provides step by step instructions for federal income tax return preparation for nonresident alien students from India who:
 - 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, Wisconsin, Ohio
- 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 \$79,000**

- Note: this is a software limit, and you won't be able to prepare a return if your income is over this amount.
- Some state income tax returns. We support MN, CA, PA, NC, MD, OH, and WI 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
- Self-employment Income (1099-NEC or 1099-MISC)
 - Per IRS rules, we can help with this for residents, but not for nonresident aliens. Here is a free resource that may help you no matter your federal tax residency status: [Self Employment Tax Guide from My Free Taxes](#)
- Income earned outside of the U.S.
- Amended Returns
- Prior Year (2022 or earlier) Returns
- Cryptocurrency or other digital assets
- 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 1 Steps

1. Create TaxSlayer account (must use link [shared by ISP after completing Tax Survey](#))
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

Not for Mac NRA tax filers.
Please skip this page.

Go to Your Member Site, Do Your Taxes tab, scroll down

Option 1: Prepare Your Return with a Personalized Guide - Nonresidents & Residents

Our Personalized Guide tool will help you create a customized guide that gives you a screenshot by screenshot, step by step set of instructions for how to prepare your return based on your individual situation. This guide includes only the pages and instructions that you need to prepare and file your return.

This tool combines our federal tax residency tool, treaty benefits tool, and has a series of questions to determine which basic and special circumstances scenarios you need (and which parts of those even apply).

When you finish the interview questions you will be able to download a pdf of your personalized guide.

Coming soon - 8843 Only Option: If you only need to file a form 8843 and don't have a SSN or ITIN, you can answer a few more questions in the interview, and our personalized guide tool will fill in your information on the form for you. All you'll need to do is print and review, sign and date, and then mail it in!

Step 1: Create your Personalized Guide

Personalized Guide Tool

Step 2: Prepare your Tax Return

Click Here to Access TaxSlayer
Software

Don't forget - use this link to CREATE your TaxSlayer account or your return won't be free!

Same TaxSlayer software link included in both
personalized guide and general guide sections.

Accessing TaxSlayer – Make sure the link takes you here.

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.

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.



Do NOT go to the main TaxSlayer website to create your account!

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

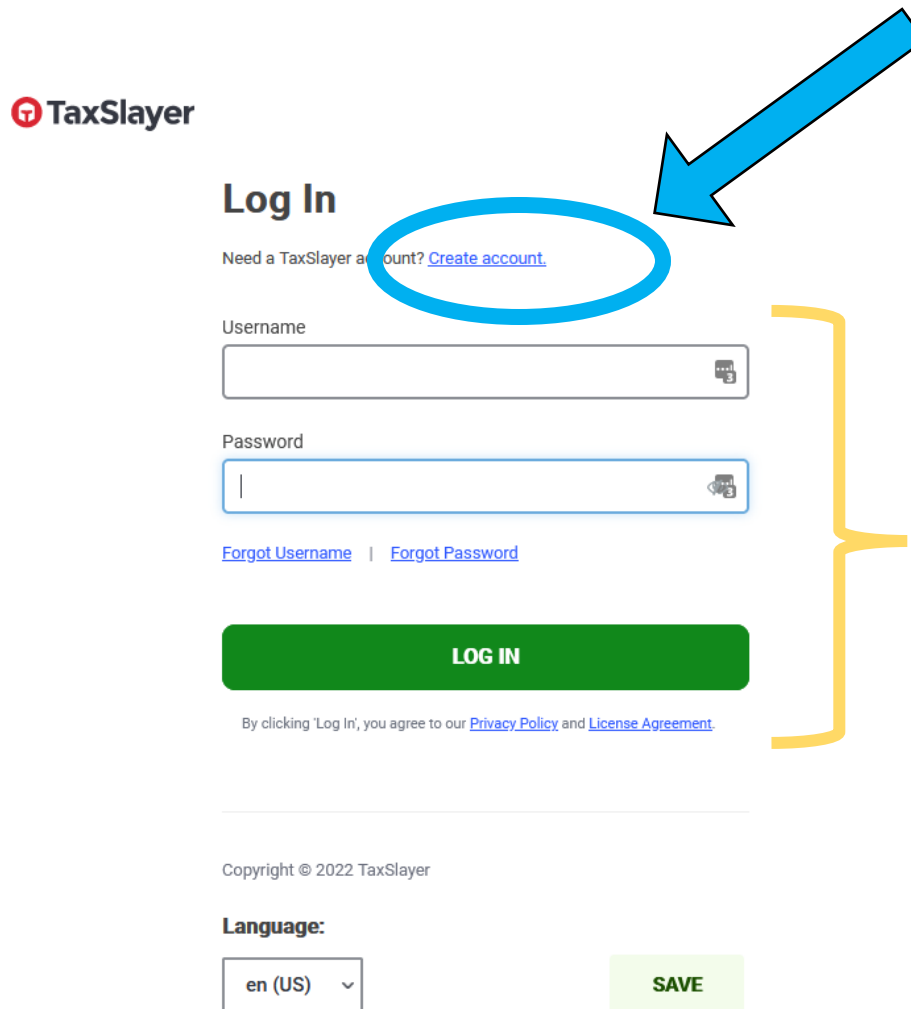
You MUST use the link in the Do Your Taxes page of the member website.

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

Macalester College <https://www.taxslayer.com/v.aspx?rdr=/vitafsa&source=TSUSATY2023&sidn=30011096>

You will not be charged a fee if you are using the proper link, or you will have to delete your account start your return again .

Creating your TaxSlayer account



The screenshot shows the TaxSlayer login interface. At the top left is the TaxSlayer logo. Below it is the heading "Log In". Under the heading, the text "Need a TaxSlayer account?" is followed by a blue link "Create account". This link is circled in blue, and a large blue arrow points to it from the top right. Below the link are two input fields: "Username" and "Password". A yellow bracket groups these fields with the "LOG IN" button below them. Below the password field are two links: "Forgot Username" and "Forgot Password". The "LOG IN" button is a green rectangle with white text. Below the button, a small line of text states: "By clicking 'Log In', you agree to our [Privacy Policy](#) and [License Agreement](#)." At the bottom of the page, there is a copyright notice "Copyright © 2022 TaxSlayer", a "Language:" section with a dropdown menu showing "en (US)", and a green "SAVE" button.

TaxSlayer

Log In

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

Username

Password

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

LOG IN

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

Copyright © 2022 TaxSlayer

Language:

en (US) ▾

SAVE

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

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:
(***)***_**36

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:

en (US) ▾

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

SAVE

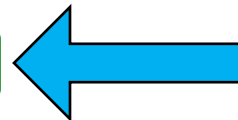
VERIFY



2023 Tax Return 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

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

Would you like us to import this data?

[BACK](#)



Get Started Now

Save time by automatically importing your information from last year's return.

- ✓ Import last years info
- ✓ W2 import
- ✓ IRS Inquiry Assistance

Enter the Primary Taxpayer's SSN and click Verify to proceed with import.

Taxpayer's SSN

 - -

[No, thanks](#)

VERIFY

[No, thanks](#)

YES

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

You might get this screen.

We haven't verified it for 2023, 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).



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.

Use LEGAL NAME and other information on passport.

Personal Information

Use legal passport name - not any preferred names.

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

Student

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, Sr, etc.)

SSN *

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

Date of Birth

MM	DD	YYYY
----	----	------

Occupation

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

BACK

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 -

Residency 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

Support Information

Check all that apply:

- ☐ Support can be claimed as a dependent on someone else's return. [?](#)
- ☐ Support was over age 18 and a full-time student at an eligible educational institution. [?](#)
- ☐ Support is blind.
- ☐ Support is deceased.

**Do NOT put a check mark
in this box!**

✗ ☒ Support wishes to contribute \$3 to the Presidential Election Campaign Fund. **✗**

- ☐ Support served in a combat zone during the current tax year. [?](#)
- ☐ Support was affected by a natural disaster during the current tax year.
- ☐ Support received, sold, exchanged, gifted, or disposed of a digital asset (or financial interest in a digital asset) in the current tax year.
- ☐ Support prefers to receive written communications from the IRS in a language other than English.
- ☐ Support prefers to receive written communications from the IRS in an accessible format.
- ☐ Support is at least age 18 and meets the requirements to claim the EIC. [?](#)

Crypto?

At any time during 2023, 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

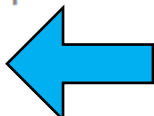
Skip

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

BACK

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 [hide](#)

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

PRINT

Seller has collected the simplified sellers use tax on taxable transactions delivered into Alabama and the tax will be remitted on the customer's behalf to the Alabama Department of Revenue. Seller's program account number is SSU-R010261419.

Banking Information [hide](#)

No information to display

IRS Payment Information [hide](#)

No information to display

Deactivate Tax Return [hide](#)

Tax Year 2021 (111-12-3333)

- 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

BACK

If you are single

If you are married

Must be from Canada, Mexico, India, or S. Korea, have child that is U.S. citizen, have spouse that died in 2021 or 2022, + 4 other criteria.
Email us to discuss if you think you qualify.

If you select "Single nonresident alien" then skip to slide 30.

WAIT! This isn't what I wanted!

SHOW RESIDENT OPTIONS

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.

There is NO option to enter any Spouse Information

This is **not a problem** for your federal return!

Nonresident aliens cannot file joint returns to their spouse.

As long as you select Married Nonresident Alien at the beginning, that's all you need to do for your federal return.

This is **bad news** for some state returns.

For TY2022 returns, if your spouse had a SSN/ITIN then you could efile your state return for some states. For TY2023 year all married nonresident aliens cannot efile their state through TaxSlayer. You'll need to either to paper file your state return, or use a direct e-file system if your state has that. We'll cover your options in the filing guide.

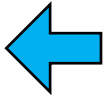
Dependents or Qualifying Person(s)

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. [?](#)

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

☐ Yes

☐ No



Select No

BACK



CONTINUE

Notes:

A spouse is never a dependent. This is for tax dependents, not visa (-2) dependents

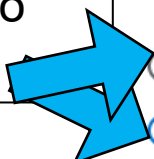
You must be from Canada, Mexico, India, or S. Korea to claim an exemption for your dependent. Your dependent must be a citizen or resident alien for 2023 and have a SSN or ITIN. This is quite unusual.

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

Basic Information Summary

Here's what we have so far:



Personal Information:

Primary Taxpayers:

Support NRVTAP [edit](#)

//2001

Student

Dependents:

Confirm that your information is correct, and then continue!



Contact Information:

Mailing Address:

200 University Ave 1 [edit](#)

Minneapolis, MN

Full-Year Resident of This State

Phone Number:

[edit](#)

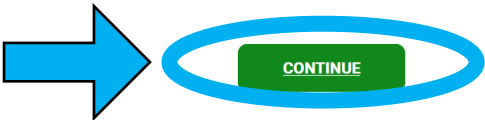
Use this number to verify account



Tax Information:

Filing Status:

Nonresident Alien [edit](#)



Let's do this! #slayit

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



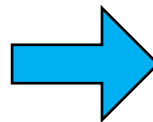
If you continue through this process here you will get warning messages when you are ready to file to confirm you have entered all documents.

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 <i>(Most Common Form)</i> 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.

TaxSlayer 2022 | AMERICAN PLEDGE Help & Support ?

Federal \$0

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

Income

W-2 <i>(Most Common Form)</i> ?	BEGIN
Wages and tax statement	
1099-G Box 1 ?	BEGIN
Unemployment compensation	
1099-G Box 2 ?	BEGIN
State or local income tax refunds, credits, or offsets	
1099-INT, DIV, OID ?	BEGIN
Interest income, dividends, and distributions	
1099-K ?	BEGIN
Payment card and third party network transactions	
1099-MISC ?	BEGIN
Miscellaneous income	
1099-NEC	BEGIN
Nonemployee compensation	
1099-R, RRB, SSA ?	BEGIN
Distributions from pensions, annuities, retirement, IRAs, social security, etc.	
8915-F	BEGIN
Deferred Retirement Income Due to Disaster Relief in a Prior Year	
Capital Gains and Losses ?	BEGIN
May receive Form 1099-B, reported on Schedule D	

Note: You should see 2023 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 us at your member support email and we'll walk you through fixing the issue.

When you log back in to 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?](#)

Select which method you prefer

SEND CODE

[Cancel](#)

Language:

en (US) ▾

SAVE

Enter your code



SEND

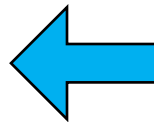
VERIFY



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

[Cancel](#)

Language:


en (US) ▾

SAVE

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

Welcome back! Let's finish your 2023 tax return.



RETURN	STATUS	REFUND AMOUNT
Federal	Created 	\$0.00

Entering Personal Information

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

Tax Year 2023 Basic Scenario 1

BEGIN

RETURN SUMMARY

Federal

\$0

Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

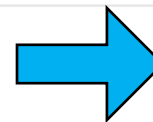
BEGIN



IRS Identity Protection PIN

BEGIN

1040NR Schedule OI



BEGIN

BACK

CONTINUE

Schedule OI



General Information

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

Income Exempt from Tax



BEGIN

BEGIN

BEGIN

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.**
For this basic scenario, it MUST be India.

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

2021-02-11

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 2023.

365

Mac people 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.

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

267

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

146

Tax Return Filing Information



Check if you have filed a U.S. Income tax return for a prior year.

Last Year Filed

2022

Form Title

1040NR

If you previously filed a tax return, check box and enter year and form.

☐ 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.

Check box if any apply.

Am I a Nonresident Alien?

It is your individual responsibility to determine your federal tax residency. This tool can describe most common situations, but it does not cover every possible scenario. Please see IRS Publication 519 for definitive guidance regarding determining your federal tax residency.

Select Tax Year

2023

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 U.S. on that same visit. The calculation will use today's date as the exit date. To project your status in the future, you can enter the future date you expect to depart.

If your visa changed without you leaving the U.S. enter two visits: one with an exit date the same as the end date of the first visa, and the second with an entry date the same as the first date of the second visa.

Visa

F-1 Student

Entry Date

08/08/2021

Exit Date

05/24/2022

Remove Visit

F-1 Student

08/31/2022

MM/DD/YYYY

Remove Visit

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2023.

Number of days Present in 2023: 365

Number of days Present in 2022: 267

Number of days Present in 2021: 146

Number of days Exempt in 2023: 365

Note: You are required to file Form 8843 to report your Exempt days for 2023.

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

Print Results

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 (reduces 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

2024.02.11

CONTINUE

Schedule OI



General Information

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

Mac people 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.

Income Exempt from Tax

EDIT

BEGIN

BEGIN

CONTINUE

Enter the information for your first visit to the U.S. during 2023.
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.

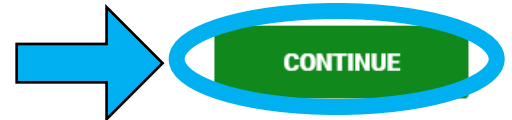
MM DD YYYY

Enter your *first date present in U.S. during 2023*.
Either date you entered during 2023, or
01/01/2023 if you were already here at start of
2023.

CANCEL

If you left the U.S. during 2023
enter the date departed, otherwise
leave blank.

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If you have more entry/exit dates during 2023 click here to enter them.

Schedule OI - Current Year Travel Dates

+ Schedule OI Travel Dates

1/1/2023

5/31/2023

...

8/23/2023

N/A

...

Click here to edit or delete this info.

When all 2023 visits entered, click continue

CONTINUE

Schedule OI



General Information

EDIT

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

EDIT

Income Exempt from Tax

EDIT



Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

BEGIN



IRS Identity Protection PIN

BEGIN



1040NR Schedule OI

BEGIN

BACK



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My Account

Basic Information

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Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

2024.02.11

Log Out

Income

W-2 <i>(Most Common Form)</i> ? 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. Tax Year 2023 Basic Scenario 1	BEGIN

RETURN SUMMARY

Federal \$0

Click on Federal Section

TaxSlayer <≡

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

2024.02.11

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

Tax Year 2023 Basic Scenario 1

RETURN SUMMARY

Federal

\$0

Click on Miscellaneous Forms

TaxSlayer <≡

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

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Summary/Print

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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



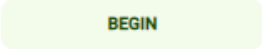
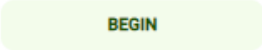
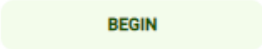
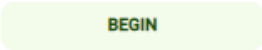
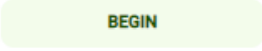
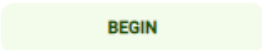
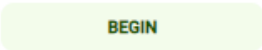
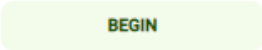
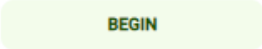
Tax Year 2023 Basic Scenario 1

RETURN SUMMARY

Federal

\$0

Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons Reported on Form 8843	Mac people use the GLACIER Tax Summary report for assistance or GTP produced Form 8843 for most of your information.	 
Allocation of Tax Amounts for Individuals in Certain States ⓘ Reported on Form 8958 (Only for married filing separately and some domestic partnerships)		
Application for Automatic Extension of Time to File ⓘ Applied for on Form 4868		
Closer Connection Exception Statement for Aliens Reported on Form 8840		
Initial and Annual Expatriation Statement Reported on Form 8854		
Injured Spouse Allocation ⓘ Reported on Form 8379		
Installment Agreement Request ⓘ Requested on Form 9465		
IRS Identification PIN ⓘ This is the PIN you need if you received a CP01A notice from the IRS		
Statement of Person Claiming Refund Due a Deceased Taxpayer ⓘ Claimed on Form 1310		
Statement of Specified Foreign Financial Assets Form 8938		

Form 8843 Part I - General Information

Type of U.S. Visa/Immigration Status

Mac people 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.

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 of your **MOST RECENT ENTRY** (from I-94) on this visa.

Note: This will be the visa on your I-94. This should be 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 India, 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

2024.02.11

Current Passport #

Tax Year 2023 Basic Scenario 1

Days in the U.S. in 2023

Days in the U.S. in 2022

Days in the U.S. in 2021

Days in 2023 you claim you can exclude (substantial presence test)

Your data does not copy over, so you need to re-enter it

Mac people 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.

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

Once all information entered

DELETE

CANCEL

CONTINUE

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

Select Tax Year

2023

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://f94.cbp.dhs.gov/f94/#/home>).

Your most recent visit can have no exit date, if you are still present in the U.S. on that same visit. The calculation will use today's date as the exit date. To project your status in the future, you can enter the future date you expect to depart.

If your visa changed without you leaving the U.S., enter two visits: one with an exit date the same as the end date of the first visa, and the second with an entry date the same as the first date of the second visa.

Visa

Entry Date

Exit Date

F-1 Student

08/08/2021

05/24/2022

Remove Visit

F-1 Student

08/31/2022

MM/DD/YYYY

Remove Visit

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2023.

Number of days **Present in 2023**: 365

Number of days **Present in 2022**: 267

Number of days **Present in 2021**: 146

Number of days **Exempt in 2023**: 365

Note: You are required to file Form 8843 to report your Exempt days for 2023.

Print Results

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 *

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

Enter your school information

Mac students:

Tel: 651 696 6992
Director: Luyen Phan
1600 Grand Ave
St Paul, MN 55105

Director of Academic Program

Director Name *

Director Phone Number *

Director Address *

Country *

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

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

2024.02.11

Answer Yes or 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

Visa held during 2022

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"

DELETE

CANCEL

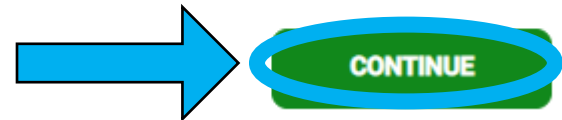
Tax Year 2023 Basic Scenario 1

CONTINUE

Once all
information
entered

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 to Main Page





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2022 | AMERICAN PLEDGE


Help & Support 

RETURN SUMMARY

Federal \$0

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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Basic Scenario #1 Details - Reminder

- This scenario provides step by step instructions for federal income tax return preparation for nonresident alien students from India who:
 - 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 refund
 - May have paid additional state tax
- We're now going to enter the income information for each of these types of income / documents.

Using the U.S./India tax treaty to take the standard deduction

Most students don't have enough individual (itemized) deductions so better to take the standard deduction, which is \$13,850 for 2023, which reduces your taxable income.

It is not required that you take the standard deduction, but it is usually to your benefit to do so.

If your itemized deductions are greater than \$13,850 (max \$10k of state income tax paid (\$5k if married), plus charitable contributions) then you should determine if it would make sense for you to itemize. This would be a good thing to ask about at a clinic if you think it applies to you.

If you do not want to take the standard deduction, you should use Basic Scenario 3 to prepare your return.

Click on Federal Section

TaxSlayer <≡

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Help & Support ?

Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

BEGIN



IRS Identity Protection PIN

BEGIN

1040NR Schedule OI

EDIT

BACK

CONTINUE

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RETURN SUMMARY

Federal \$0

Click on Deductions

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

Deductions

Adjustments to Income ?

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

EDIT

Credits ?

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

BEGIN

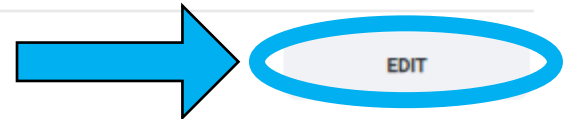
Itemized Deductions ?

Charitable contributions, mortgage interest, property taxes, etc.

EDIT

BACK

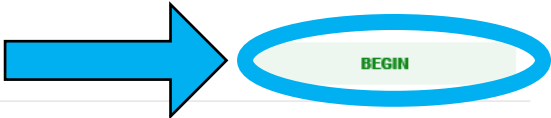
CONTINUE



Itemized Deductions



Use Standard or Itemized Deduction



Taxes You Paid [Learn more](#)

BEGIN

Gifts to Charity [Learn more](#)

BEGIN

Unreimbursed Employee Business Expense [Learn more](#)

BEGIN

Job-Related Travel Expenses Form 2106 [Learn more](#)

BEGIN

Miscellaneous Deductions

BEGIN

Less Common Deductions

BEGIN

CONTINUE

Use Standard or Itemized Deduction



Nonresident aliens cannot claim the Standard Deduction. However, a special rule applies to students and business apprentices from India who have a Tax Treaty, and can claim the Standard Deduction under Article 21(2). If this special rule applies, choose Standard Deduction below and Continue to save the selection.

Please choose one:

Force Itemized Deductions or Standard Deduction *

☐ Force Itemized

☒ Standard Deduction

Most students don't have enough individual (itemized) deductions so better to take the standard deduction, which is \$13,850 for 2023, which reduces you taxable income.

CANCEL

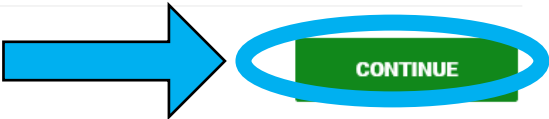
CONTINUE

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Itemized Deductions



Use Standard or Itemized Deduction	BEGIN
Taxes You Paid ? Learn more	BEGIN
Gifts to Charity ? Learn more	BEGIN
Unreimbursed Employee Business Expense ? Learn more	BEGIN
Job-Related Travel Expenses Form 2106 ? Learn more	BEGIN
Miscellaneous 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.

EDIT

Itemized Deductions ?

Charitable contributions, mortgage interest, property taxes, etc.



BEGIN

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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 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

Entering wage income reported on a W-2

If you have this document, not everyone does.

If you have no wage income, you can skip directly to the section on
scholarships

go to page 82, if you have taxable scholarships
reported on 1042-S, Code 16.

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

You do not create this document yourself.

Click on Federal Section to enter income

TaxSlayer <≡

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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 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

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Reported on Form 8615

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Tax on Income Not Effectively Connected to US Trade/Business

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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

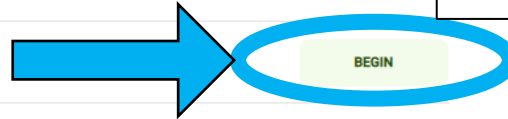
2024.02.11

Tax Year 2023 Basic Scenario 1

Income

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

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 ⓘ
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
2024.02.11

BEGIN

Enter W-2 information directly from form.

READ THIS BEFORE TYPING:

- If any text is more than 35 characters, abbreviate it - just type until you run out of available character spaces!
- 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 W-2 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.

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.

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

e Employee's name
NRVTAP TaxSupport

Country *
United States

Address (number and street) *
200 University Ave

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

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

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 \$

Boxes 12 & 13

This section reports certain retirement contributions, deferrals, nontaxable pay, and more. Enter any box 12 codes and respective amounts.

12a

Select

13

Mirror your form and check any that apply

- ☐ Statutory employee
- ☐ Retirement plan
- ☐ Third-party sick pay

Box 14

Enter any box 14 codes and amounts. If your code is not listed, select Other. If no code is listed, you can leave this section blank.

14 - Other

Select

Medicaid Waiver Payment

\$

- ☐ Select if you want to include Medicaid Waiver payments in the calculation of earned income.

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"/>	
+ 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

Taxpayer
University of Minnesota 41-6007513

Income \$18,740.00

Tax Withheld \$2,311.00

BACK

When all W-2 forms entered, click continue

CONTINUE

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– W-2 Wage Statement

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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

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

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 page 105 (state tax refund) or
pg 116 (state tax payment)

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

Text

Remember this won't show up until March 15

Click on Payments & Estimates

TaxSlayer <≡

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Help & Support ?

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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

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

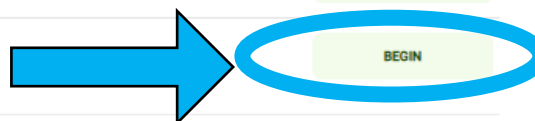
Form 8288-A

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 image shows a screenshot of the Form 1042-S with various fields and their corresponding annotations:

- Select chapter ***: A dropdown menu with "Chapter 3" selected. An arrow points to a red box labeled "Box 3 – Usually is Chapter 3".
- Tax Rate**: A text input field. An arrow points to a red box labeled "Box 3b".
- Unique Form Identifier ***: A text input field. An arrow points to a red box labeled "At top of form".
- Chapter 3 Code ***: A dropdown menu with "- Please Select -" selected. An arrow points to a red box labeled "Box 3a. If it is blank / empty, enter 00".
- Is this an amended form?**: Radio buttons for "Yes" and "No". "No" is selected.
- Pro-rata basis reporting?**: Radio buttons for "Yes" and "No". "No" is selected. A bracket groups this section with the "Is this an amended form?" section, with an arrow pointing to a red box labeled "Boxes along top of form".
- Have you deposited tax with the IRS pursuant to escrow procedure?**: Radio buttons for "Yes" and "No". "No" is selected.
- Select an income code ***: A dropdown menu with "- Please Select -" selected. An arrow points to a red box labeled "Box 1".
- Gross Income**: A text input field with a dollar sign. An arrow points to a red box labeled "Box 2".
- Withholding Allowance**: A text input field with a dollar sign. An arrow points to a red box labeled "Box 5".
- Net Income**: A text input field with a dollar sign. An arrow points to a red box labeled "Box 6".
- Federal Tax Withheld**: A text input field with a dollar sign. An arrow points to a red box labeled "Box 7a".
- Tax Withheld by Other Agents**: A text input field with a dollar sign. An arrow points to a red box labeled "Box 8".

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 (also outlined here in red)

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 GILN

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 GILN

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

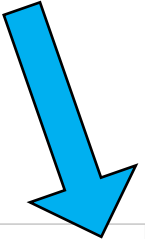
Usually blank

CANCEL

When all info entered,
click continue

CONTINUE

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

3 16	Gross Income	\$1,000.00	Tax Withheld	\$140.00	
----------------	--------------	------------	--------------	----------	---



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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!

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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 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

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!

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 (like India), 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

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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!

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Vouchers for 2023 Estimated Tax Payments ?

Print vouchers for estimated tax payments

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

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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 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

BACK

CONTINUE

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RETURN SUMMARY

Federal

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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.

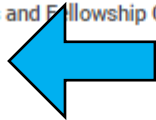


BACK

CONTINUE

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received



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



CANCEL



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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

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

If this does not apply to you, skip to State Income Tax Refund or Payment section

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

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.

Click on Income

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- Payments & Estimates
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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 8805

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

EDIT

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Federal

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W-2 *(Most Common Form)* ⓘ
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

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

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

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

Scroll down to Less
Common Income

EDIT

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN

BEGIN








BEGIN



BACK

CONTINUE

Less Common Income

Other Income Not Reported Elsewhere	
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
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

Other Income

Form belongs to
NRVTAP TaxAssistance

Other Income Description *

Other Income

Select Other Income

Description of other income *

QualifiedEducationExpense

Write "QualifiedEducationExpense"

Amount of other income *

-\$250.00

Enter amount of scholarship spent on required tuition, books, and fees as a **NEGATIVE** number



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

There is a 25 character limit for the description box. If you enter the above with no spaces it will fit.

Other Income Item

 Add an Other Income Item

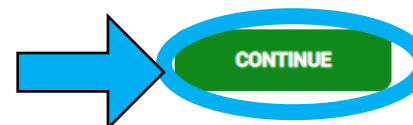
QualifiedEducationExpense

\$-250.00





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
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



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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

This completes entering
scholarship income

Entering state income tax payment made during 2023.

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.

Go to pg 127 if you are new student in US in 2023, then likely didn't pay any additional state taxes or receive state refund.

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 116 for state refund section.

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

A note about additional state payments

- If you are taking the standard deduction on your federal return, then you do not need to enter any additional state tax payments you may have made during calendar year 2023.
 - The point of using the standard deduction is that it is larger than all of your itemized deductions, which includes state tax paid.
- See the section on using the U.S./India tax treaty to take the standard deduction to determine if you want to enter additional tax paid.
 - If you do want to enter tax paid, continue to next slide.
 - If you do not, skip to end section.



11	Alternative minimum tax (enclose Schedule M1MT)	11	■	
12	Add lines 10 and 11	12		1507
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		1507
	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		1507
16	Amount from line 19 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		1507
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		1507
20	Minnesota income tax withheld. Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G and Schedules KPI, KS, and KF	20	■	695
21	Minnesota estimated tax and extension payments made for 2022	21	■	
22	Amount from line 12 of Schedule M1REF, Refundable Credits (see instructions; enclose Schedule M1REF)	22	■	
23	Total payments. Add lines 20 through 22	23		695
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			
26	AMOUNT YOU OWE. If line 19 is more than line 23, subtract line 23 from line 19 (see instructions)	26	■	812
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	■	
	IF YOU PAY ESTIMATED TAX and want part of your refund credited to estimated tax, complete lines 28 and 29.			
28	Amount from line 24 you want sent to you	28	■	
29	Amount from line 24 you want applied to your 2023 estimated tax	29	■	

Taxpayer(s): I declare that this return is correct and complete to the best of my knowledge and belief.


Your Signature 6515551212 Daytime Phone	Spouse's Signature (If Filing Jointly) Date (MM/DD/YYYY) 02/05/2024
Paid Preparer's Signature	Email Address 02/05/2024 Date (MM/DD/YYYY) S50018506 PTIN or VITA/TCE # (required)
Preparer's Daytime Phone	Preparer's Email Address
<input checked="" type="checkbox"/> I do not want my paid preparer to file my return electronically.	<input type="checkbox"/> I authorize the Minnesota Department of Revenue to discuss this tax return with the preparer or the third-party designee indicated on my federal return.











Include a copy of your 2022 federal return and schedules.


Mail to: Minnesota Individual Income Tax, Mail Station 0010, 600 N. Robert St., St. Paul, MN 55145-0010



Additional tax
you should
have paid



Click on Deductions

TaxSlayer 


-  My Account
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-  **Deductions**
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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 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

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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



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.



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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 ?

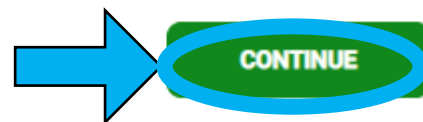
BEGIN

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.

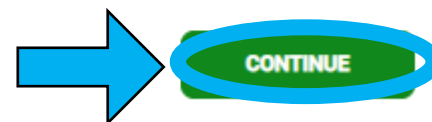
BEGIN

Itemized Deductions [?](#)

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

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Other Taxes

Additional Taxes on Qualified Plans and Other Accounts

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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Entering state income tax refund received during 2023.

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 2022 federal return

If you didn't file a state tax return last year, you can skip to the end section. [Go to pg 127](#)

A note about how state refunds are taxed

- If you took the standard deduction on your federal return last year, and you received a state income tax refund during calendar year 2023, that refund is not taxable.
 - This should apply in almost all situations for students from India.
 - If this does apply, you do not need to enter your state tax refund, and can proceed straight to the end section.
- If you did itemize last year, you will need to enter your refund if it is taxable
 - Complete the following section to determine if your refund is taxable, and how to enter it in the software will determine if it is taxable and carry it to the appropriate form.

Steps for State Tax Refund

1. Confirm amount of state tax refund
2. Confirm that you itemized your deductions
3. Confirm amount of state & local tax paid you included in your itemized deductions
4. Determine if your state tax refund is taxable
5. Enter taxable refund into TaxSlayer

Example MN Return

2022 M1, page 2



11	Alternative minimum tax (enclose Schedule M1MT)	11	1507
12	Add lines 10 and 11	12	
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	1507
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	1507
16	Amount from line 19 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	1507
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	1507
20	Minnesota income tax withheld. Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G and Schedules KPI, KS, and KF	20	2193
21	Minnesota estimated tax and extension payments made for 2022	21	
22	Amount from line 12 of Schedule M1REF, Refundable Credits (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	686
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 _____		
26	AMOUNT YOU OWE. If line 19 is more than line 23, subtract line 23 from line 19 (see instructions)	26	
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 2023 estimated tax	29	

Taxpayer(s): I declare that this return is correct and complete to the best of my knowledge and belief.

Your Signature 6515551212 Daytime Phone	Spouse's Signature (If Filing Jointly) Date (MM/DD/YYYY) 02/05/2024
Paid Preparer's Signature	Email Address Date (MM/DD/YYYY) 02/05/2024 PTIN or VITA/TCE # (required) S50018506
Preparer's Daytime Phone	Preparer's Email Address

☒ I do not want my paid preparer to file my return electronically. ☐ I authorize the Minnesota Department of Revenue to discuss this tax return with the preparer or the third-party designee indicated on my federal return.

1. Confirm Refund Amount

You can also check your bank statements to confirm you received this amount!

2. Confirm you itemized for 2022.

Where to find itemized / standard deduction information on your 2022 federal return: Form 1040NR, on the first page, line 12

If you took the standard deduction:

11	Subtract line 10d from line 9. This is your adjusted gross income	11	41000
12	Itemized deductions (from Schedule A (Form 1040-NR)) or, for certain residents of India, standard deduction (see instructions)	12	12950
13a	Qualified business income deduction from Form 8995 or Form 8995-A		
b	Exemptions for estates and trusts only (see instructions)	13b	
c	Add lines 13a and 13b	13c	
14	Add lines 12 and 13c	14	12950
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	28050

If you itemized deductions:

11	Subtract line 10d from line 9. This is your adjusted gross income	11	8400
12a	Itemized deductions (from Schedule A (Form 1040-NR)) or, for certain residents of India, standard deduction. See instructions	12a	556
b	Charitable contributions for certain residents of India. See instructions	12b	
c	Add lines 12a and 12b	12c	556
13a	Qualified business income deduction from Form 8995 or Form 8995-A	13a	
b	Exemptions for estates and trusts only. See instructions	13b	
c	Add lines 13a and 13b	13c	
14	Add lines 12c and 13c	14	556
15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	7844

3. Confirm state & local tax in itemized deductions

SCHEDULE A (Form 1040-NR)		Itemized Deductions		OMB No. 1545-0074	
Department of the Treasury Internal Revenue Service		Go to www.irs.gov/Form1040NR for instructions and the latest information. Attach to Form 1040-NR.		2022 Attachment Sequence No. 7A	
Name shown on Form 1040-NR LISA HUI		Your identifying number XXX-XX-1111			
Taxes You Paid	1a	State and local income taxes	1a	556	
	b	Enter the smaller of line 1a or \$10,000 (\$5,000 if married filing separately)	1b		556
Gifts to U.S. Charities Caution: If you made a gift and got a benefit for it, see instructions.	2	Gifts by cash or check. If you made any gift of \$250 or more, see instructions	2		
	3	Other than by cash or check. If you made any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	3		
	4	Carryover from prior year	4		
	5	Add lines 2 through 4	5		
	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		
	8	Add the amounts in the far right column for lines 1b through 7. Also, enter this amount on Form 1040-NR, line 12	8		556

For Paperwork Reduction Act Notice, see the Instructions for Form 1040-NR.

QNA

Schedule A (Form 1040-NR) 2022

If you itemized, here is where to find your state and local tax deduction information on your 2022 federal return

4. Determine if your state tax refund is taxable

11	Subtract line 10d from line 9. This is your adjusted gross income		11	8400
12a	Itemized deductions (from Schedule A (Form 1040-NR)) or, for certain residents of India, standard deduction. See instructions	12a	556	
b	Charitable contributions for certain residents of India. See instructions	12b		
c	Add lines 12a and 12b		12c	556
13a	Qualified business income deduction from Form 8995 or Form 8995-A	13a		
b	Exemptions for estates and trusts only. See instructions	13b		
c	Add lines 13a and 13b		13c	
14	Add lines 12c and 13c		14	556
15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-		15	7844

- If **line 11** AND **line 15** are BOTH greater than 0 (zero or blank)
 - Your state tax refund is taxable
 - See how to enter it on the following pages
- If **line 11** EQUALS 0 (zero or blank)
 - Your state tax refund is NOT taxable
 - Skip to the next section
- If **line 11** is greater than 0 AND **line 15** equals 0 (zero or blank)
 - Your state tax refund is partially taxable
 - Email us and we will help you figure out how much is taxable. Go to your member homepage, click on “Get Help”, and send an email to the address listed on that page

Click on Income

TaxSlayer <≡

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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

\$683

Not all states send out forms 1099-G for state income tax refunds. Even if you didn't get that form this is where you enter that amount.

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 2022 tax return.

Bypass State Refund Worksheet

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

\$

Enter the amount of state income tax refund.

State & Local Refunds

2022 state tax refunds (all refunds from 1099-G or similar statements)

\$

Prior Year Taxes

Last year's (2022 tax return) total state and local tax paid (Schedule A line 5d)

\$

Last year's (2022 Tax Return) total itemized or standard deductions (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

\$

Last Year's (2022 Tax Return) Filing Status *

Select one... 

Enter filing status from last year: **single** or **married**
filing separately

Last Year's (2022 Tax Return) Deductions for Age 65 and over or Blind:

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



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

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

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

RETURN SUMMARY



Federal **-\$727**


This completes entering
state income tax refunds and
payments


Congratulations!


This completes preparing your federal return using the
Basic Scenario 1 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.



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Help & Support 

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

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 hack 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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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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Minnesota State Income Tax Return

Minnesota Income Tax Overview

- Minnesota honors federal tax treaties, so any federal tax exemptions will apply to your state return as well.
- If you worked in Minnesota
 - You are required to complete a Minnesota Income Tax Return
 - Your employer *should* have reported your Minnesota income on your W-2 with MN information in boxes 15, 16, 17
- You will also owe Minnesota tax on taxable scholarships you receive from Minnesota sources
- If you worked in another state
 - Your employer *should* have reported your income earned in another state on your W-2 with that state's information in boxes 15, 16, 17.
- If the above is all true, then you can follow these instructions for preparing your Minnesota return.
 - If it is not, contact us at (see the support email address on your “Get Help” page). Ideally your employer should correctly report your wages on your W-2. We can walk you through your situation and options if you think there are errors on your W-2 form(s).

Before we get back into TaxSlayer, there is one important step you need to complete.

- You must determine your MN residency for 2023.
 - We have provided a Minnesota Residency worksheet to help you determine your MN residency. See the next 3 slides for a review.
 - Once completed, print / save a copy for your records!
- There are 3 MN residency status options:
 - Full year MN resident
 - Part year MN resident
 - MN nonresident

Minnesota Residency Test

- Which MN residency status you have will depend on the amount of time you spent in Minnesota, and your living situation during the year.
 - Did you spend at least 183 days in Minnesota?
 - Any part of a day counts as a whole day
 - Did you (or your spouse, if married) rent, own, occupy, or maintain an abode?
 - An abode is residence in Minnesota suitable for year-round use that is equipped with its own cooking and bathing facilities

MN Residency Status Options

- **To be considered a nonresident of MN:**
 - You were present in the state of MN for less than 183 days during 2023
 - **OR**
 - You were present in the state of MN for at least 183 days during 2023
 - **AND**
 - You (and your spouse, if married) did not rent, own, maintain, or occupy an abode at any point during the entire year
- **To be a considered a part-year resident of MN:**
 - You were present in the state of MN for at least 183 days during 2023
 - **AND**
 - You or your spouse rented, owned, maintained, or occupied an abode for some part of the year
- **To be a considered a full-year resident of MN:**
 - You were present in MN for at least 183 days during 2023
 - **AND**
 - You or your spouse rented, owned, maintained, or occupied an abode for the entire year

You can use this table to help you determine your MN residency during 2023:

Start Date	End Date	U.S. State or Country where you lived	Was where you lived an abode – cooking, bathing, sleeping, & facilities (Y/N)?	If not MN, did you still maintain a MN residence that was an abode (Y/N)?	# Days	Nonresident or Resident (N/R)
1/1/2023						
	12/31/2023					
					365	

How to fill out this table:

- For the calendar year 2023, you need to document where you were physically present, and what your living situation was.
 - Enter the start and end date for each period of time where you were in a different living situation. Do not double count days – the next start date will be the day after the prior end date.
 - Enter where you were living in that period – which state if you were in the U.S., or the country if you were outside of the U.S.
 - Indicate if where you lived was an abode (cooking, bathing, sleeping facilities). Note that dorms are not usually an abode because they do not contain cooking or bathing facilities within the room.
 - If you were not living in Minnesota for that period, did you still maintain (rent, own, occupy) a MN residence that was an abode?
 - Count the number of days you were living in that particular situation. Your days should total to 365.
- For each period you were either a MN resident or a MN nonresident. Fill out the final column with R / N to indicate your status during that period.
 - If you were physically present in MN for less than 183 days during 2023, you were a nonresident for all periods you were present, no matter if you lived in an abode or not.
 - If you were physically present in MN for more than 183 days during 2023, then you were a resident for any periods where you lived in an abode in MN, or you maintained an abode in MN (even if you were not present in MN during that period).
- Determine your Minnesota residency by looking at the N/R column entries
 - If you were a MN nonresident for all periods, you are a MN nonresident for the year.
 - If you were a MN nonresident for some periods, and a MN resident for some periods, you are a MN part-year resident.
 - If you were a MN resident for all periods – the entire calendar year – you are a MN full year resident.

What effect does MN Residency Status have?

- **To be considered a nonresident of MN:**

- You were present in the state of MN for less than 183 days during 2023
- **OR**
- You were present in the state of MN for at least 183 days during 2023
- **AND**
- You (and your spouse, if married) did not rent, own, maintain, or occupy an abode at any point during the entire year

Pay MN tax on income from MN sources while a nonresident

- **To be a considered a part-year resident of MN:**

- You were present in the state of MN for at least 183 days during 2023
- **AND**
- You or your spouse rented, owned, maintained, or occupied an abode for some part of the year

- **To be a considered a full-year resident of MN:**

- You were present in MN for at least 183 days during 2023
- **AND**
- You or your spouse rented, owned, maintained, or occupied an abode in MN for some part of the year

Pay MN tax on all US income* earned while a MN resident

Did you receive the Minnesota One-time tax rebate payment?

This was a \$260 you might have received if you were a MN resident and filed a MN income tax return for 2021.

The instructions for entering this information and the Minnesota adjustments are after the Minnesota tax return instructions for residents/PY residents /nonresidents.

Minnesota Return Preparation

- You know what your MN residency status is:
 - Full Year Resident
 - Part Year Resident
 - Nonresident
- You know the impact of your residency status – what income Minnesota will tax
 - Minnesota source income while you are a nonresident
 - All federally taxable income while you are a resident
- You know if you received the MN One-time tax rebate payment
- You are ready to go back into TaxSlayer, and then go to your residency section in this guide for instructions on how to prepare your MN tax return.

Accessing TaxSlayer – Make sure the link takes you here.

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.

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.



Do NOT go to the main TaxSlayer website to create your account!
Your only option on that site will be to pay for your return.
You **MUST** use the link in the Do Your Taxes page of the member website.

You will not be charged a fee if you are using the proper link, or you will have to delete your account start your return again .

Log into your TaxSlayer account



Log in

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

Username

Password

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

LOG IN

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

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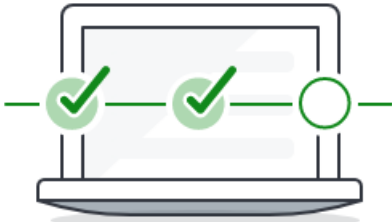
You should have a federal return. You might not have any state returns.

MY ACCOUNT

2023 Tax Return

Welcome back! Let's finish your 2023 tax return.

CONTINUE



RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	\$42.00

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You should have a federal return. You might have a Minnesota return, and / or another state.

MY ACCOUNT

2023 Tax Return

Welcome back! Let's finish your 2023 tax return.



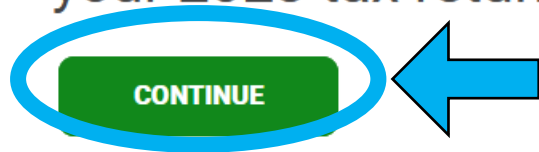
RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	-\$11.00
Minnesota	Created ⓘ	\$0.00

If you do have a Minnesota return, you need to delete it and re-start your MN return.

MY ACCOUNT

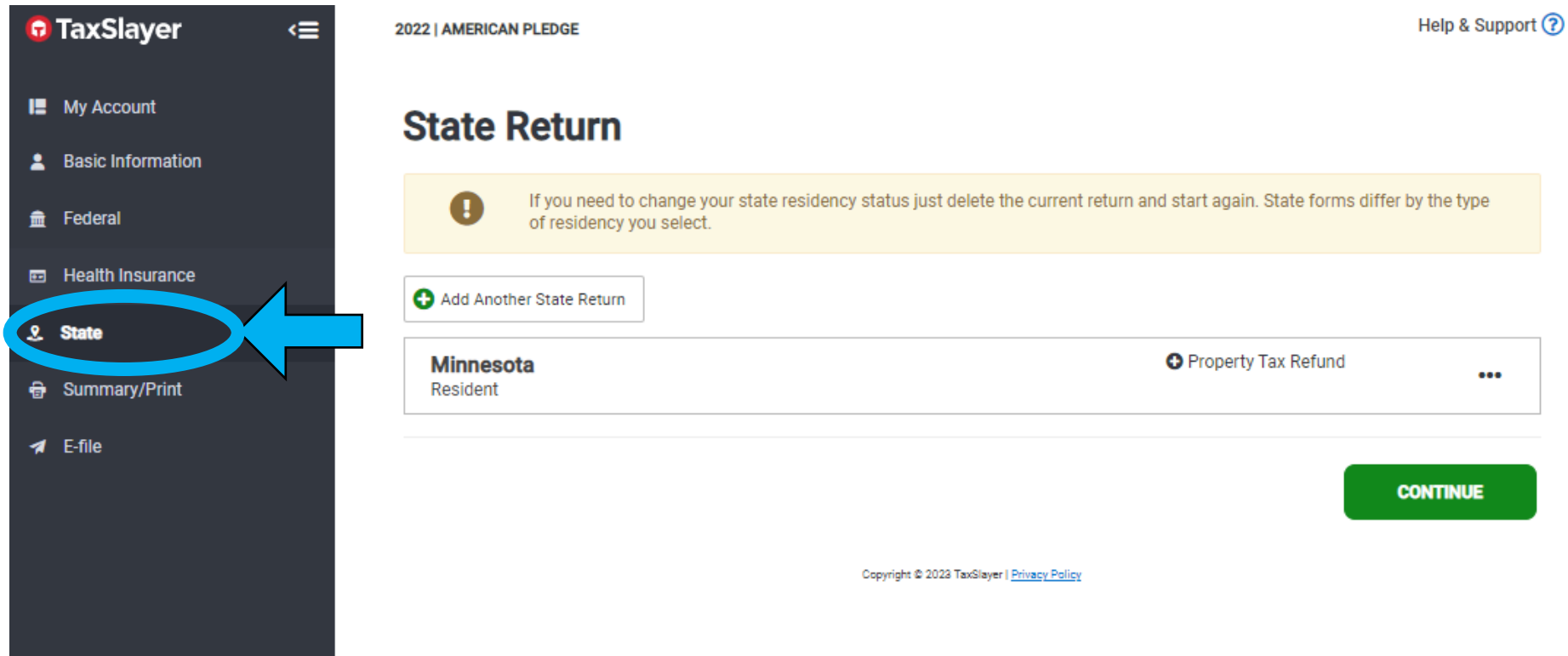
2023 Tax Return

Welcome back! Let's finish
your 2023 tax return.



RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	-\$11.00
Minnesota	Created ⓘ	\$0.00

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



The screenshot displays the TaxSlayer website interface. On the left, a dark sidebar contains a menu with the following items: 'My Account', 'Basic Information', 'Federal', 'Health Insurance', 'State', 'Summary/Print', and 'E-file'. The 'State' item is highlighted with a blue circle, and a large blue arrow points to it from the right. The main content area is titled '2022 | AMERICAN PLEDGE' and 'State Return'. It features a yellow warning box with an exclamation mark icon and the text: '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 shown, with a '+ Property Tax Refund' option and a three-dot menu icon. A green 'CONTINUE' button is located at the bottom right. The footer includes the copyright notice 'Copyright © 2023 TaxSlayer | Privacy Policy'.

Only do this if you have accidentally started a MN or other return. If you have already prepared your other state return because you received income there, do NOT delete it!

Click here to delete this state.

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

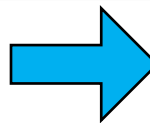
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Are you sure that you want to delete this State Return?

Minnesota State Return

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

CANCEL



DELETE

TaxSlayer might skip this slide and the next one, and jump straight into asking about your Minnesota Residency



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

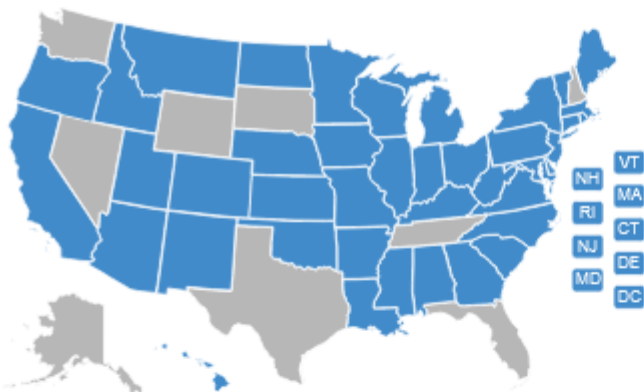
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Select your State Return

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



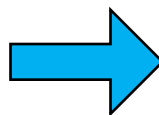
Choose State

- Please Select -



Select Minnesota
or click MN on the map

CANCEL



CONTINUE

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TaxSlayer might skip this slide, and jump straight into asking about your Minnesota Residency

These definitions aren't completely right for nonresident alien returns. Use the residency you determined earlier

Select your Minnesota Return Residency

Please choose a return type

- ☐ **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 entire 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

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Select your MN
residency

Minnesota State Income Tax Return for MN Full Year Resident

As a MN full year resident you will pay MN tax on all federally taxable income received during 2023.

This includes all wages earned in the U.S. no matter what state you were in when you earned them, and all scholarships / fellowships from organizations in the U.S.

If you are a MN Part Year or MN Nonresident, skip to that section

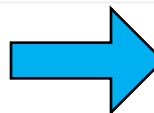
Minnesota Return

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.



Recommend No Contribution



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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

Congrats! We've created your standard Minnesota return based on your federal information.

Some taxpayers have additional items to include. Do you need to add anything else to your Minnesota return?

Common Credits:

- ✓ 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, CONTINUE

No

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

YES, ADD MORE ITEMS

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.



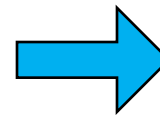
Add Another State Return

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

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 M1PR)

Additional Nontaxable Income specific to M1PR

BEGIN

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



Is the address on your return a New Address?

☒ Yes



Yes to indicate a new address

☐ No

Do you want to force the MN Standard Deduction?

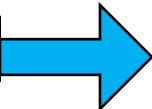
☒ Yes



Do NOT say Yes to this!

☒ No

Scroll down to continue

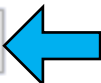


Minnesota Return

If you click the red **X** on the begin from previous slide, it takes you to the state election campaign donation.

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.



Recommend No Contribution



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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

Exit Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

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Additions to Income

Adjustments for income taxed by MN but not the federal government

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

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State-specific tax credits

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Contributions

Option to contribute various MN funds

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Payments

Apply refund to next years taxes & other MN withholding info

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Miscellaneous Forms

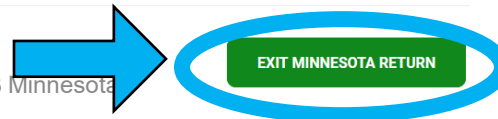
Estimated payment vouchers, underpayment of estimated tax, etc.

BEGIN

Additional Nontaxable Income (Forms M1PR)

Additional Nontaxable Income specific to 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

Part Year



Property Tax Refund ...



Minnesota State Income Tax Return for MN Part - Year Resident

For the periods you are a MN resident you will pay MN tax on all federally taxable income received during that period.

This includes all wages earned in the U.S. no matter what state you were in when you earned them, and all scholarships / fellowships from organizations in the U.S.

For the periods you are a nonresident you will pay MN tax on income from MN sources.

This includes wages earned working in Minnesota as well as scholarships/fellowships from organizations in Minnesota

If you are a MN Nonresident, skip to that section

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return



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

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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 M1PR)

Additional Nontaxable Income specific to M1PR

BEGIN

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.

Select your state of residency

Leave blank

Select Foreign Country of Residence if outside of United States

Select your country of tax residence

Enter Beginning Residency Date for Minnesota

Enter Ending Residency Date for Minnesota

Enter the start and end dates of the longest MN resident period from your residency table.

State Election Campaign

BEGIN

Is the address on your return a New Address?

☐ Yes

☒ No

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

Do you want to force the MN Standard Deduction?

☒ Yes

☒ No

Do NOT say Yes to this!

BACK

Then scroll down to continue

CONTINUE

Minnesota Return

If you click the red **X** on the begin from previous slide, it takes you to the state election campaign donation.

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.



Recommend No Contribution



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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

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

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Adjustments for income taxed by MN but not the federal government

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State-specific tax credits

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Option to contribute various MN funds

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Payments

Apply refund to next years taxes & other MN withholding info

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Miscellaneous Forms

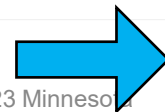
Estimated payment vouchers, underpayment of estimated tax, etc.

BEGIN

Additional Nontaxable Income (Forms M1PR)

Additional Nontaxable Income specific to M1PR

BEGIN



EXIT MINNESOTA RETURN

TaxSlayer may give you a warning if you had income from another state, and if that state has an income tax return.

Warnings Concerning Your Federal Return



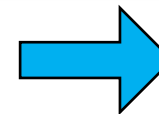
There may be an error on your federal return

Please take a moment to review the following before you continue

You indicated that you paid taxes to CA on your W-2, but you are not filing a CA state return. To add a state return, select the button below and follow the instructions to add your state return.

ADD STATE RETURN(S)

BACK



CONTINUE

Please review our list of special circumstances guides for other states we support, and if your state is listed, see that guide for more details.

If you worked in a state that is not listed, you can use the software to prepare your return, but we cannot provide any guidance.

Adjustment for a scholarship / fellowship grant from a Minnesota source

A scholarship/fellowship grant from a Minnesota source is one that comes from an organization in Minnesota, such as the University of Minnesota.

If you have this, please use the following slides to report that scholarship/fellowship grant as Minnesota source income

If you do not have a scholarship / fellowship grant, or you have one but it is not from a Minnesota source, skip to the end of this section

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

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Apply refund to next years taxes & other MN withholding info

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Estimated payment vouchers, underpayment of estimated tax, etc.

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Additional Nontaxable Income (Forms M1PR)

Additional Nontaxable Income specific to M1PR

BEGIN



Minnesota Return

Income Subject To Tax

Minnesota wages from Form W-2, lines 15-20, have been automatically carried to the Minnesota tax return. Indicate the amount of additional income listed below taxable to Minnesota.

Amount of Wages received as a nonresident military spouse, if certain requirements are met (See M1 Instructions)

\$

You'd only make an adjustment here if your W-2 is wrong. Please email or come to a tax clinic before you put a number here.

i Federal return has wages in the amount of \$7,087.00.

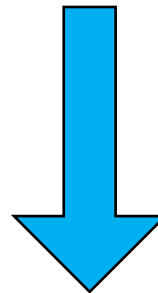
Interest and Dividend Income

\$

Business Income/(Loss)

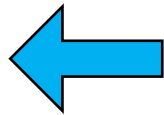
\$

Scroll Down



Other income/(Loss)

\$



Enter the amount of scholarships /
fellowships that are from a Minnesota source

i Federal return has other income in the amount of \$11,300.00.

Bonus depreciation addition

\$

Pass-through Credit claimed on M1REF

\$

Section 179 Addition

\$

Suspended loss addition

\$

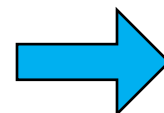
Other required additions from Schedule M1M & M1AR

\$

Federal Adjustments

\$

BACK



CONTINUE

End of
Adjustment for a scholarship /
fellowship grant from a
Minnesota source

Minnesota Return

Minnesota Return

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Personal info needed for MN return

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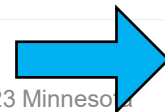
Estimated payment vouchers, underpayment of estimated tax, etc.

BEGIN

Additional Nontaxable Income (Forms M1PR)

Additional Nontaxable Income specific to M1PR

BEGIN



EXIT MINNESOTA RETURN

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

Part Year

+ Property Tax Refund ...



Minnesota State Income Tax Return for MN Nonresident

As a nonresident you will pay MN tax on income from MN sources.

This includes wages earned working in Minnesota as well as
scholarships/fellowships from organizations in Minnesota

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return



Minnesota Property Tax Rebate M1PR

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Additional Nontaxable Income (Forms M1PR)

Additional Nontaxable Income specific to M1PR

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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.

Select your state of residency





Leave blank

Select Foreign Country of Residence if outside of United States



Select your country of tax residence

State Election Campaign



Is the address on your return a New Address?

☐ Yes

☐ No

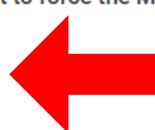


Is this your first time filing a MN return, or did you move since you filed your last one? Yes, if so.

Do you want to force the MN Standard Deduction?

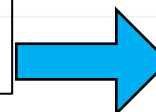
 ☐ Yes

☐ No



Do NOT say
Yes to this!

Then scroll down
to continue



Minnesota Return

Minnesota Return

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Personal info needed for MN return

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Only accessible after exiting MN main menu

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Minnesota Return

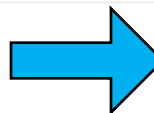
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TaxSlayer will give you a warning about the other state you worked in, if that state has an income tax return.

Warnings Concerning Your Federal Return



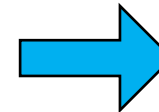
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Adjustment for a scholarship / fellowship grant from a Minnesota source

A scholarship/fellowship grant from a Minnesota source is one that comes from an organization in Minnesota, such as the University of Minnesota.

If you have this, please use the following slides to report that scholarship/fellowship grant as Minnesota source income

If you do not have a scholarship / fellowship grant, or you have one but it is not from a Minnesota source, skip to the end of this section

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return

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Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

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Additional Nontaxable Income specific to M1PR

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Minnesota Return

Income Subject To Tax

Minnesota wages from Form W-2, lines 15-20, have been automatically carried to the Minnesota tax return. Indicate the amount of additional income listed below taxable to Minnesota.

Amount of Wages received as a nonresident military spouse, if certain requirements are met (See M1 Instructions)

\$

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i Federal return has wages in the amount of \$7,087.00.

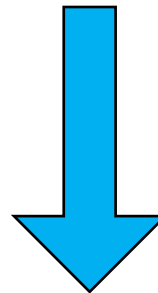
Interest and Dividend Income

\$

Business Income/(Loss)

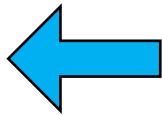
\$

Scroll Down



Other income/(Loss)

\$



Enter the amount of scholarships /
fellowships that are from a Minnesota source

i Federal return has other income in the amount of \$11,300.00.

Bonus depreciation addition

\$

Pass-through Credit claimed on M1REF

\$

Section 179 Addition

\$

Suspended loss addition

\$

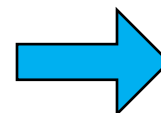
Other required additions from Schedule M1M & M1AR

\$

Federal Adjustments

\$

BACK



CONTINUE

End of
Adjustment for a scholarship /
fellowship grant from a
Minnesota source

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

Part Year

+ Property Tax Refund ...



For all MN residency options:



Did you receive the
Minnesota One-time tax rebate
payment?


This was a \$260 payment you might have received if you were a MN resident and filed a MN income tax return for 2021.


The instructions for entering this information and the Minnesota adjustments are after the Minnesota tax return instructions for residents/PY residents /nonresidents.


What is the Minnesota One-time tax rebate payment?


- Payment of \$260.00 to individuals who were Minnesota residents and filed a 2021 Minnesota income tax return
 - There are income limits, so if your income was too high you might not receive this payment.
 - If you had a bank account on your 2021 return, then the payment should have been direct deposited. Otherwise it would have been mailed as a check in the fall of 2023.
 - If you have questions about eligibility or if the MN Dept. of Revenue tried to send one of these forms to you, contact them directly at 651-296-3781 or 1-800-652-9094, or [email their income tax division](#)
 - You will get a 1099-MISC income document to report this income.
- This payment is TAXABLE on your federal income tax return
 - Enter the 1099-Misc form in the income section
- 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

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Help & Support 

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 (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

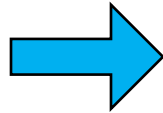
BACK

CONTINUE

Tax Year 2023 Minnesota

How do you want to enter your 1099-MISC?

Select your preference below.



Enter your info

Fill out your 1099-MISC manually.

BACK

CONTINUE

How do you want to enter your 1099-MISC?

Select your preference below.



Enter your info

Fill out your 1099-MISC
manually.

BACK

CONTINUE



1099-MISC

Miscellaneous Income

You receive Form 1099-MISC for miscellaneous income, such as rents, prizes, awards, medical and health care payments, etc. Enter the following information using your form.

Payer Information

Payer's name *

Country *

Address (street number & name) *

ZIP code *

 -

City, town or post office *

State *

☐ Use payer's SSN as ID

Payer's TIN *

Also may be found in the box labeled Payer's Federal Identification Number

Recipient Information

Also may be found in the box labeled Recipient's Identification Number

Recipient's name *

Country *

Address (street number & name) *

ZIP code *

 -

City, town or post office *

State *

Account number

READ THIS BEFORE TYPING:

- If any text is more than 35 characters, abbreviate it - just type until you run out of available character spaces!
- Enter the 1099-Misc information EXACTLY as you see it from your paper form. Key in what you see.
- Every box on this screen has a letter or number that matches a corresponding box on your paper 1099-Misc.
- Scroll down to finish 1099-Misc 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.

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

Income

1. Rents

2. Royalties

3. Other income

5. Fishing boat proceeds

☐ 7. Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale

8. Substitute payments in lieu of dividends or interest

10. Gross proceeds paid to an attorney

12. Section 409A deferrals

15. Nonqualified deferred compensation

4. Federal income tax withheld

6. Medical and health care payments

9. Crop insurance proceeds

11. Fish Purchased for Resale

14. Excess golden parachute payments

This is where the \$260 payment should be on your form

State Information 1


☐ I have an amount in Box 16 and/or 18.

CANCEL

When all info entered, click continue

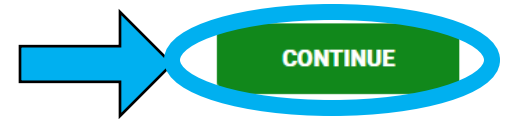
CONTINUE

1099-MISC

 Add another Form 1099-MISC

State of Minnesota

Carried To Schedule 1, Line 8 ...



Back to Main Page



☰

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

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

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Log Out

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 8805

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

EDIT

BACK



CONTINUE


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RETURN SUMMARY


Federal


\$623





 My Account

 Basic Information

 Federal


 Health Insurance

 State


 **Summary/Print**

Summary

Print Results

 E-file


2022 | AMERICAN PLEDGE

Help & Support 

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

State Return

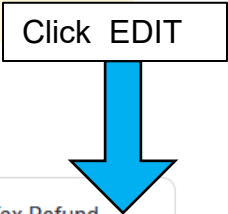
⚠ If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

+ Add Another State Return

Minnesota
Part Year

+ Property Tax Refund

...



CONTINUE

Minnesota Return

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 M1PR)

Additional Nontaxable Income specific to 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

Education Savings account Contribution Subtraction

BEGIN

First-Time Homebuyer Savings Account Subtraction

BEGIN

Depreciation Subtraction

BEGIN

Enter certain Interest and/or Dividends on US Obligations

\$

Scroll Down

260

Subtraction for One-time rebates for tax year 2021 included in Federal AGI

\$

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

\$

Did you receive Payment from the MN Frontline Worker Pay Program? Note: the subtraction will automatically be calculated.

☐ Yes

☐ No

BACK

CONTINUE

Minnesota Return

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

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Adjustments for income taxed by MN but not the federal government

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Miscellaneous Forms

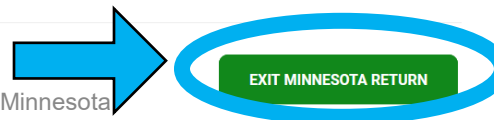
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Additional Nontaxable Income (Forms M1PR)


Additional Nontaxable Income specific to M1PR


BEGIN





Back at the main page in the state section!


TaxSlayer





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Help & Support 

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 this is your only or final
special circumstances
information to enter, go to next
slide

If not, save your file, and go to your next special circumstances guide.

Filing instructions guide has been published on the member site

Go to Do Your Taxes, scroll down to E-File Your Return to access
the link to this guide to complete your returns and file them
with the tax authorities

Congratulations!!!

You have prepared your tax return!