

NoRTH International Tax Clinic

DIY-Taxes using TaxSlayer

Basic Scenario 2

NRA with Tax Treaty

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 aliens.

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

Macalester tax clients should use GLACIER' Tax Summary Report and GTP to confirm any tax treaty benefits. You can only use TaxSlayer software if your NRA for tax.

If you want to get same information that is shown here, you can also access <https://tools.nrtaxhelp.org/treatybenefits> by using NRVAP's site, <https://www.nrvtap.com/>, and using there What Are My Treaty Benefits? tool.

Have you checked your treaty benefits?

Select Visa

F-1 Student

Select Country of Tax Residency

China

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

My treaty benefit for scholarship or fellowship income (Code 16)

| Maximum Dollar Amount | Maximum Years in the U.S. | Treaty Article |
|-----------------------|---------------------------|----------------|
| No Limit | No Limit | 20(b) |

My treaty benefit for wage income for Studying and Training (Code 20)

| Maximum Dollar Amount | Maximum Years in the U.S. | Treaty Article |
|-----------------------|---------------------------|----------------|
| 5000 | No Limit | 20(c) |

Did you enter your income documents? Are you in the right basic scenario?

| | | | |
|---------------|-------------------------|--------|-----------------|
| Document Type | Income Code (if 1042-S) | Income | |
| W-2 × ▾ | Select Income Code ▾ | 8400 ▾ | Remove Document |
| 1042-S × ▾ | 20 × ▾ | 5000 ▾ | Remove Document |

[Add another document](#)

Check if treaty benefits match

Clear All Documents

Match Status for Wages

| Treaty Information | | | My Information | |
|-----------------------|---------------------------|----------------|----------------------|---------------|
| Maximum Dollar Amount | Maximum Years in the U.S. | Treaty Article | Income Document Type | Income Amount |
| | | | W-2 | 8400 |
| | | | 1042-S | 5000 |
| 5000 | No Limit | 20(c) | Total | 13400 |

Your treaty benefits match

Follow the **Basic Scenario 2** guide for **and treaty benefits** into TaxSlayer.

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

Print Results

Basic Scenario #2 Details

- This scenario is intended to assist in federal tax return preparation for nonresident aliens who **have** treaty benefits for wages and/or scholarships:
 - May have wage income
 - This may be reported on a W-2
 - This may be reported on a 1042-S form with income code 19 or 20
 - Your treaty benefit either matches the amount of the 1042-S form, or you have no treaty benefit
 - May have scholarship or fellowship income
 - This would be reported on a form 1042-S form with income code 16
 - Your treaty benefit either matches the amount, or you have no treaty benefit
 - 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 2 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!

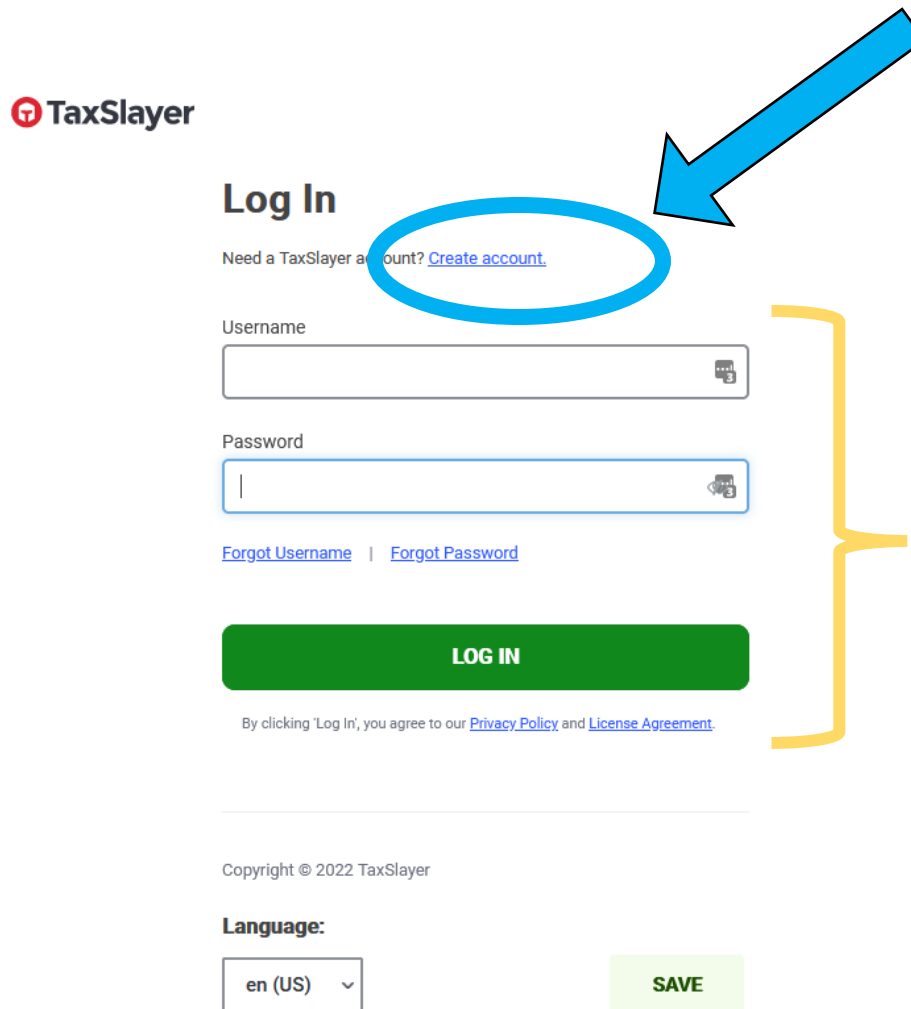
Your only option on that site will be to pay for your return.

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". A blue circle highlights the text "Need a TaxSlayer account? [Create account.](#)", with a large blue arrow pointing to it from the right. Below this are two input fields: "Username" and "Password", each with a small icon on the right. Below the password field are two links: "[Forgot Username](#)" and "[Forgot Password](#)". A large green button labeled "LOG IN" is centered below these links. A yellow bracket on the right side of the form groups the login fields and the "LOG IN" button. At the bottom of the form, there is a line of text: "By clicking 'Log In', you agree to our [Privacy Policy](#) and [License Agreement](#)". Below this is a horizontal line, followed by the text "Copyright © 2022 TaxSlayer". At the bottom, there is a "Language:" section with a dropdown menu showing "en (US)" and a green "SAVE" button.

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

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

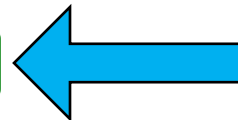
VERIFY



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

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

Occupation

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

Put your visa type: Student, Researcher, etc.

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

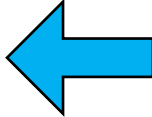
Skip

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

7. Make sure you re-click the TaxSlayer link before starting over on your return.

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

If you are single

If you are married

If SINGLE, skip to slide 31.

WAIT! This isn't what I wanted!

SHOW RESIDENT OPTIONS

BACK

Must be from Canada, Mexico, India, or S. Korea, have child that is U.S. citizen, have spouse that died in 2021 or 2022, + 4 other criteria.

Email us to discuss if you think you qualify.

CONTINUE

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

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.

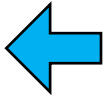
Dependents or Qualifying Person(s)

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

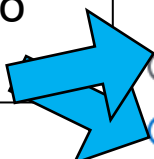
You must be from Canada, Mexico, India, or S. Korea to claim an exemption for your dependent. Your dependent must be a citizen or resident alien for 2023 and have a SSN or ITIN. This is quite unusual.


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](#)

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:

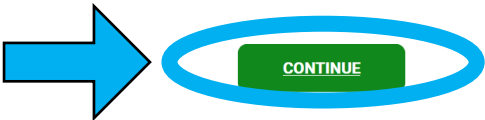
Use this number to verify account [edit](#)



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.



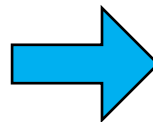
If you continue through this process here you will get warning messages when you are ready to file to confirm you have entered all documents.

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

×

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State

Summary/Print

E-file

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2022 | AMERICAN PLEDGE

Help & Support

Federal
\$0

Income

W-2 (Most Common Form) ?

Wages and tax statement

BEGIN

1099-G Box 1 ?

Unemployment compensation

BEGIN

1099-G Box 2 ?

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ?

Interest income, dividends, and distributions

BEGIN

1099-K ?

Payment card and third party network transactions

BEGIN

1099-MISC ?

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA ?

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

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ?

May receive Form 1099-B, reported on Schedule D

BEGIN

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

2024.02.11

Tax Year 2023 Basic Scenario 2

35

TaxSlayer 2022 | AMERICAN PLEDGE Help & Support ?

Federal \$0

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

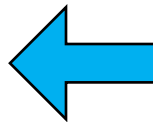
VERIFY



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 2

BEGIN

RETURN SUMMARY

Federal

\$0

Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

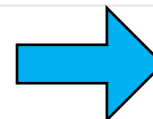
BEGIN



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 *

Country of Residence *

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

U.S. Travel Information

Other not listed

Other Not Listed

Studying in another country may not establish tax residency.

Select type of U.S. Visa *

Nonimmigrant Visa

Nonimmigrant Visa

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

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

F1

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

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

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

Nature of Change

F1 to J1 student

Example of what to put IF you changed your visa

Date Changed

8 2021 10 21

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

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



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.

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.

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

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

Check box if any apply.

Refund Mailing Information

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

Country

- Please Select -

Address (street number & name)

City, town, or post office

Foreign State or Province

Foreign Postal Code

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

Income Exempt from U.S. Tax

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

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

Check box if any apply (usually no).

Wages Exempt by a Treaty (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

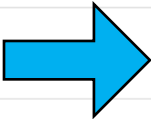


General Information

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

Income Exempt from Tax

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.



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 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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2024.02.11

Log Out

2022 | AMERICAN PLEDGE

Help & Support ?

RETURN SUMMARY

Federal \$0

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 | |
| Tax Year 2023 Basic Scenario 2 | |

Click on Federal Section

TaxSlayer <≡

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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 2

RETURN SUMMARY

Federal

\$0

Click on Miscellaneous Forms

TaxSlayer <≡

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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 ?
Tax Year 2023 Basic Scenario 2

BEGIN

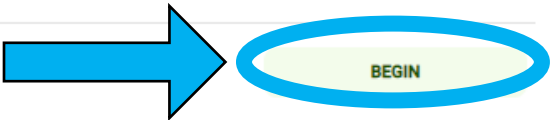
RETURN SUMMARY

Federal

\$0

Miscellaneous Forms

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.



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

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 I94) 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?

▾



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

What country issued you a passport?

- Please Select - ▾



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

Passport number

2024.02.11



Current Passport #

Tax Year 2023 Basic Scenario 2

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

J-1 Non-student visas
skip the next 2 slides

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information

EDIT

Part II - Teachers and Trainers

BEGIN

Part III - Students

F-1 or J-1 Student visas



EDIT

Part IV - Professional Athletes

BEGIN

Part V - Individuals with a Medical Condition

BEGIN

CONTINUE

Form 8843 Part III - Students

Academic institution where you attended

Institution Name *

Institution Phone Number *

Institution Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

 -

City, town, or post office *

State *

- Please Select -

Enter your school information

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 *

United States of America

Address (street number & name) *

ZIP code *

 -

City, town, or post office *

State *

- Please Select -

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

Answer Yes or No

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"

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

DELETE

CANCEL

2024.02.11

Tax Year 2023 Basic Scenario 2

CONTINUE

Once all
information
entered

Form 8843 - Exempt and Individuals With a Medical Condition

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

CONTINUE

Form 8843 Part II - Teachers and Trainers

Academic institution where you taught

Institution Name *

Institution Phone Number *

() -

Institution Address

Country

United States of America

Address (street number & name)

ZIP code

-

City, town, or post office

State

- Please Select -

Enter your school information

Director of Academic Program

Director Name *

Director Phone Number *

() -

Director Address

Country

United States of America

Address (street number & name)

ZIP code

-

City, town, or post office

State

- Please Select -

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

U.S. presence

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

- ☐ Yes
- ☒ No

Answer Yes or No

Visa held during 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

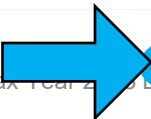
Visa held during 2022

Did you have a visa in this year?

- ☐ Yes
- ☒ No

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

Once all information entered



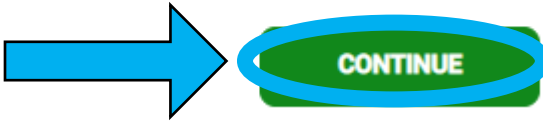
CONTINUE

DELETE

CANCEL

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 |

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Help & Support 

RETURN SUMMARY

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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 #2 Details - Reminder

- This scenario is intended to assist in federal tax return preparation for nonresident aliens who **have** treaty benefits for wages and/or scholarships:
 - May have wage income
 - This may be reported on a W-2
 - This may be reported on a 1042-S form with income code 19 or 20
 - May have scholarship or fellowship income
 - This would be reported on a form 1042-S form with income code 16
 - May have filed a federal and state income tax return last year
 - May have received a state income tax refund
 - May have paid additional state income tax
- We're now going to enter the income information for each of these types of income / documents.
 - First, we'll enter the income document(s)
 - Second, we'll enter the treaty benefit (if you have it)

Entering wage income reported on a W-2

If you have this document, not everyone does.

If you don't have this document, then skip to section on entering wage
income reported on a 1042-S

go to pg 76, if you have income
reported on 1042-S.

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

go to pg 96, if you have scholarship income
reported on 1042-S.

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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- Log Out

2022 | AMERICAN ELEGANCE

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

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Tax Year 2023 Basic Scenario 2

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

BEGIN

2024.02.11

Enter W-2 information directly from form.

READ THIS BEFORE TYPING:

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.

- 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.

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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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**

Entering wage income reported on a 1042-S

If you have this document, not everyone does.

If you don't have this document, then skip to section on scholarships [go to pg 96.](#)

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

Remember this won't show up xxxxxxx

Click on Payments & Estimates

TaxSlayer <≡

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2023 AMERICAN PLEDGE

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

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

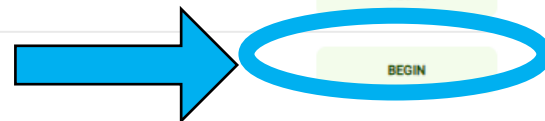
Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

BEGIN



Enter 1042-S information directly from form.

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

The image shows a digital form for Form 1042-S with several fields and annotations. Blue arrows point from text boxes to specific form fields. Red boxes highlight certain fields. A blue bracket groups the 'Is this an amended form?' and 'Pro-rata basis reporting?' sections.

Annotations:

- Box 3 – Usually is Chapter 3** (points to 'Select chapter *' dropdown)
- Box 3b** (points to 'Tax Rate' field)
- At top of form** (points to 'Unique Form Identifier *' field)
- Box 3a. If it is blank / empty, enter 00** (points to 'Chapter 3 Code *' dropdown)
- Boxes along top of form** (bracketed group for 'Is this an amended form?' and 'Pro-rata basis reporting?')
- Box 1** (points to 'Select an income code *' dropdown)
- Box 2** (points to 'Gross Income' field)
- Box 5** (points to 'Withholding Allowance' field)
- Box 6** (points to 'Net Income' field)
- Box 7a** (points to 'Federal Tax Withheld' field)
- Box 8** (points to 'Tax Withheld by Other Agents' field)

Form Fields:

- Select chapter *
Chapter 3
- Tax Rate
- Unique Form Identifier *
- Chapter 3 Code *
- Please Select -
- Is this an amended form?
☐ Yes
☒ No
- Pro-rata basis reporting?
☐ Yes
☒ No
- Have you deposited tax with the IRS pursuant to escrow procedure?
☐ Yes
☒ No
- Select an income code *
- Please Select -
- Gross Income
Gross Income will not be carried to your return. Please enter it on the applicable form.
\$
- Withholding Allowance
\$
- Net Income
\$
- Federal Tax Withheld
\$
- Tax Withheld by Other Agents
\$

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 20 | Gross Income \$5,000.00 | Tax Withheld \$0.00 | ... |
|----------------|----------------------------|------------------------|-----|

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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

Entering treaty exemption for wage income (benefit matches 1042-S)

If you have this treaty benefit, not everyone does.

go to pg 96 scholarship.

If you do not, skip to the scholarship section if you have a scholarship, or go on to the State Income Tax Refund or Payment section if you do not have a scholarship.

go to pg 130 State Income Tax Refund or Payment section.

You should have already determined your treaty benefit information.

If you haven't done that yet, go do it now!

| Document Type | Income Code (if 1042-S) | Income | |
|---------------|-------------------------|--------|-----------------|
| W-2 | Select Income Code | 8400 | Remove Document |
| 1042-S | 20 | 5000 | Remove Document |

[Add another document](#)

Check if treaty benefits match

Clear All Documents

Example for a student whose treaty benefit matches their income documents

| Match Status for Wages | | | | |
|------------------------|---------------------------|----------------|----------------------|---------------|
| Treaty Information | | | My Information | |
| Maximum Dollar Amount | Maximum Years in the U.S. | Treaty Article | Income Document Type | Income Amount |
| | | | W-2 | 8400 |
| | | | 1042-S | 5000 |
| 5000 | No Limit | 20(c) | Total | 13400 |

Your treaty benefits match

Follow the Basic Scenario 2 guide for entering your income and treaty benefits into TaxSlayer.

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

Print Results

2024.02.11

Document Type

Income Code (if 1042-S)

Income

1042-S

19

28000

Remove Document

Add another document

Check if treaty benefits match

Clear All Documents

Example for a J-1 teacher whose treaty benefit matches their income documents

| Match Status for Wages | | | | |
|------------------------|---------------------------|----------------|----------------------|---------------|
| Treaty Information | | | My Information | |
| Maximum Dollar Amount | Maximum Years in the U.S. | Treaty Article | Income Document Type | Income Amount |
| | | | 1042-S | 28000 |
| No Limit | 3 | 19 | Total | 28000 |

Your treaty benefits match

Follow the Basic Scenario 2 guide for entering your income and treaty benefits into TaxSlayer.

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

Print Results

Because there is no limit on their treaty benefit amount, and all of their income of this type is reported on a 1042-S, this is a match

2024.02.11 [Log Out](#)

[Help & Support ?](#)

Click on Basic Information at Main Page

Payments and Estimates

| | |
|---|-------|
| Federal Estimated Tax Payments ⓘ | BEGIN |
| Federal tax payments already made for 2022 | |
| State Estimated Tax Payments ⓘ | BEGIN |
| State tax payments already made for 2022 | |
| Other Federal Withholdings ⓘ | BEGIN |
| Federal withholdings you haven't already entered | |
| Other State Withholdings ⓘ | BEGIN |
| State withholdings you haven't already entered | |
| Underpayment of Estimated Tax ⓘ | BEGIN |
| Determine if you owe a penalty for underpayment of estimated tax and next steps | |
| Apply Overpayment to Next Year's Taxes ⓘ | BEGIN |
| You can take the cash now or roll it over to next year's taxes. Up to you! | |
| Vouchers for 2023 Estimated Tax Payments ⓘ | BEGIN |
| Print vouchers for estimated tax payments | |
| Amount Paid with Extension ⓘ | BEGIN |
| This is the amount you paid when you applied for a 6-month extension using Form 4868 | |
| IRC 1341 Repayment Amount ⓘ | BEGIN |
| Claim of Right related tax credit | |
| Other Form 1040-NR Payments | BEGIN |
| Other nonresident payments | |
| Foreign Partner's Information Statement of Sec. 1446 Withholding Tax | BEGIN |
| Form 8805 | |
| Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests | BEGIN |
| Form 8288-A | |
| Foreign Persons U.S. Source Income Subject to Withholding | EDIT |
| Form 1042-S | |

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CONTINUE

Tax Year 2023 Basic Scenario 2

Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

BEGIN



IRS Identity Protection PIN

BEGIN

1040NR Schedule OI

EDIT



BACK

CONTINUE

Schedule OI

| | |
|---|-------|
| General Information | EDIT |
| Dates Entered and Departed the U.S. in Current Year | EDIT |
| Income Exempt from Tax | BEGIN |
| CONTINUE | |



Schedule OI - Income Exempt from Tax

Name of the Country *



Select country of tax residence

Tax Treaty Article *



Select treaty article from My Treaty Benefits results

Number of months claimed on prior tax returns



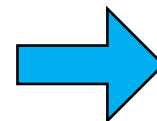
Number of months you previously claimed this treaty on a tax return

Amount of exempt income



Number from 1042-S box 2


CANCEL



CONTINUE

For the Number of months you previously claimed this treaty:
If you filed last year, use last year's number from your schedule OI + 12
If you didn't file last year, leave blank

Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00

Click here to edit or delete this info.

Example only, your country / benefit may be different.

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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| | |
|--------------------------------|----------|
| 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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This completes entering
wage income and treaty
benefits for wages

Entering scholarship income reported on a 1042-S

Mac students check GLACIER if you have Form 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 pg 130.](#)

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

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

Click on Payments & Estimates

TaxSlayer <≡

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2023 AMERICAN PLEDGE

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**

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

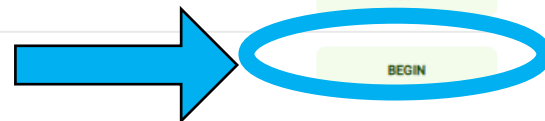
Form 8288-A

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 digital form for Form 1042-S with several fields and annotations. Blue arrows point from text boxes to specific form fields. Red boxes highlight certain areas. A blue bracket groups the 'Is this an amended form?' and 'Pro-rata basis reporting?' sections.

Annotations:

- Box 3 – Usually is Chapter 3**: Points to the 'Select chapter' dropdown menu.
- Box 3b**: Points to the 'Tax Rate' input field.
- At top of form**: Points to the 'Unique Form Identifier' input field.
- Box 3a. If it is blank / empty, enter 00**: Points to the 'Chapter 3 Code' dropdown menu.
- Boxes along top of form**: A bracket points to the 'Is this an amended form?' and 'Pro-rata basis reporting?' sections.
- Box 1**: Points to the 'Select an income code' dropdown menu.
- Box 2**: Points to the 'Gross Income' input field.
- Box 5**: Points to the 'Withholding Allowance' input field.
- Box 6**: Points to the 'Net Income' input field.
- Box 7a**: Points to the 'Federal Tax Withheld' input field.
- Box 8**: Points to the 'Tax Withheld by Other Agents' input field.

Form Fields:

- Select chapter *
Chapter 3
- Tax Rate
- Unique Form Identifier *
- Chapter 3 Code *
- Please Select -
- Is this an amended form?
☐ Yes
☒ No
- Pro-rata basis reporting?
☐ Yes
☒ No
- Have you deposited tax with the IRS pursuant to escrow procedure?
☐ Yes
☒ No
- Select an income code *
- Please Select -
- Gross Income
Gross Income will not be carried to your return. Please enter it on the applicable form.
\$
- Withholding Allowance
\$
- Net Income
\$
- Federal Tax Withheld
\$
- Tax Withheld by Other Agents
\$

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 GIN

Intermediary Entity's Foreign Tax ID Number

Intermediary Entity's Address

Country

United States of America

Address (street number & name)

ZIP code

 -

City, town, or post office

State

- Please Select -

Payer Information

Payer's Name

Box 16a

Payer's TIN

 - -

Box 16b

Chapter 3 Status Code

- Please Select -

Box 16d

Chapter 4 Status Code

- Please Select -

Box 16e

Payer's GIN

Box 16c

Payer's State Tax Number

Box 17c

Name of State

- Please Select -

Select state if 17a is not blank

State Income Tax Withheld

\$

Box 17a

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


| | | | | | |
|----------------|--------------|------------|--------------|----------|--------------|
| <div>316</div> | Gross Income | \$1,000.00 | Tax Withheld | \$140.00 | <div>⋮</div> |
|----------------|--------------|------------|--------------|----------|--------------|





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 TaxSlayer



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Income


Deductions


Other Taxes


Payments & Estimates


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


Miscellaneous Forms


 Health Insurance


 State


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2022 | AMERICAN PLEDGE

Help & Support ?

Payments and Estimates

Federal Estimated Tax Payments ?

Federal tax payments already made for 2022

BEGIN

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Other Federal Withholdings ?

Federal withholdings you haven't already entered

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

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Claim of Right related tax credit

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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

RETURN SUMMARY

Federal

\$623

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Entering treaty exemption for scholarship income (benefit matches 1042-S)

If you have this treaty benefit, not everyone does.

You should have already determined your treaty benefit information.

If you haven't done that yet, go do it now!

Document Type

Income Code (if 1042-S)

Income

1042-S



16



12000



Remove Document

[Add another document](#)

Check if treaty benefits match

Clear All Documents

Example for a student whose
treaty benefit matches their
income documents

Match Status for scholarships

Treaty Information

Maximum Dollar Amount

Maximum Years in the U.S.

Treaty Article

My Information

Income Document Type

Income Amount

No Limit

5

21(1)

Total

12000

Your treaty benefits match

Follow the [Basic Scenario 2](#) guide for entering your income and treaty benefits into TaxSlayer.

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

Print Results

2024.02.11

Because there is no limit on their treaty benefit amount, and all of their income of this type is reported on a 1042-S, this is a match

Click on Basic Information at Main Page

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

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Federal withholdings you haven't already entered

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[Print vouchers for estimated tax payments](#)

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Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

BACK

Tax Year 2023 Basic Scenario 2

CONTINUE

Basic Information



Personal Information

EDIT



Filing Status

EDIT



Dependents / Qualifying Person

BEGIN



IRS Identity Protection PIN

BEGIN

1040NR Schedule OI


EDIT



BACK

CONTINUE


Schedule OI

| | |
|---|---|
| General Information | EDIT |
| Dates Entered and Departed the U.S. in Current Year | EDIT |
| Income Exempt from Tax |  BEGIN |
| CONTINUE | |

If you have already entered treaty benefits for wages, click the + to enter benefits for your scholarship

If this is your first treaty benefit, you won't get this page, so skip to the next guide page

Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00

...

CONTINUE

Example only, your country /
benefit may be different.

Schedule OI - Income Exempt from Tax

Name of the Country *



Select country of tax residence

Tax Treaty Article *



Select treaty article from My Treaty Benefits results

Number of months claimed on prior tax returns



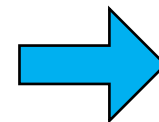
Number of months you previously claimed this treaty on a tax return

Amount of exempt income



Number from 1042-S box 2


CANCEL



CONTINUE

For the Number of months you previously claimed this treaty:
If you filed last year, use last year's number from your schedule OI + 12
If you didn't file last year, leave blank

Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00

Click here to edit or delete this info.

Example only, your country / benefit may be different.

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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
Back to Main Page








 My Account


 **Basic Information**


 Personal Information


 Filing Status


 Dependents/Qualifying Person


 IRS Identity Protection PIN


 Federal



 Health Insurance



 State


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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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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. **Doesn't apply to most Mac students since money goes directly to pay tuition, room and board, etc.**
 - **If this applies to you, go figure out that amount NOW.**
 - You must be able to document this with receipts if the IRS asks.

Click on Income

TaxSlayer 2022 | AMERICAN PLEDGE Help & Support ?

- My Account
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- Income**
- Deductions
- Other Taxes
- Payments & Estimates
 - Foreign Person's U.S. Source Income Subject to Withholding
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Payments and Estimates

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Federal tax payments already made for 2022

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State Estimated Tax Payments ?

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

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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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RETURN SUMMARY

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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

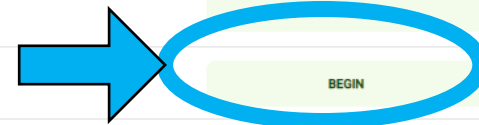
Scholarships And Fellowship Grants
Taxable portion of a scholarship/grant must be included in gross income

BEGIN

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

BEGIN

Less Common Income [?](#)
K-1 earnings, gambling winnings, cancellation of debt, etc.

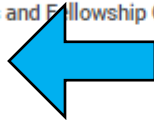


BACK

CONTINUE

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received



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

CANCEL



CONTINUE

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Help & Support ?

Income

W-2 *(Most Common Form)* ?

Wages and tax statement

EDIT

1099-G Box 1 ?

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1099-G Box 2 ?

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Profit or Loss from Rentals and Royalties ?

Reported on Schedule E

BEGIN

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.

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

go to pg 130.

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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BACK

CONTINUE

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W-2 *(Most Common Form)* ⓘ
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1099-G Box 1 ⓘ
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1099-G Box 2 ⓘ
State or local income tax refunds, credits, or offsets

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Nonemployee compensation

1099-R, RRB, SSA ⓘ
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8915-F
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Reported on Schedule C

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Reported on Schedule F

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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

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



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

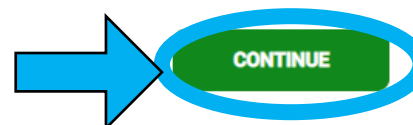
QualifiedEducationExpense
\$-250.00

...





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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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

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.

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 140.](#)

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

Example MN Return

2022 M1, page 2



| | | | |
|--|--|----|------|
| 11 | Alternative minimum tax (enclose Schedule M1MT) | 11 | 1507 |
| 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 <input type="checkbox"/> 13b <input type="checkbox"/> | | | |
| 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 | 25 | |
| 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. | | | |

Additional tax
you should
have paid



| | | |
|--|--|--|
| Your Signature 6515551212 Daytime Phone | Spouse's Signature (If Filing Jointly) 02/05/2024 Date (MM/DD/YYYY) | 02/05/2024 Date (MM/DD/YYYY) |
| 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

Click on 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

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CONTINUE

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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

from last year.

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

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

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

CANCEL



CONTINUE

Schedule A - Taxes You Paid

\$0.00
\$0.00



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



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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 ?

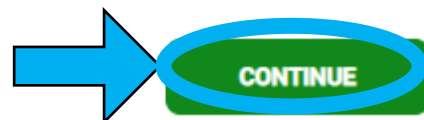
BEGIN

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.

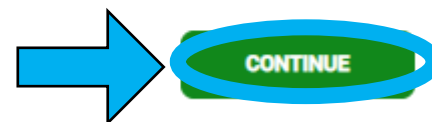
BEGIN

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.

Steps for State Tax Refund

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

Example MN Return

2022 M1, page 2



| | | | |
|---|--|----|------|
| 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 <input type="checkbox"/> 13b <input type="checkbox"/> | | | |
| 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, <i>Nonrefundable Credits</i> (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, <i>Refundable Credits</i> (see instructions; enclose Schedule M1REF) | 22 | |
| 23 | Total payments. Add lines 20 through 22 | 23 | 2193 |
| 24 | REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions). For direct deposit, complete line 25 | 24 | 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 | |
| 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 _____ | | 02/05/2024 | |
| 6515551212 | | Date (MM/DD/YYYY) | |
| Daytime Phone | | | |
| Preparer's Signature _____ | | 02/05/2024 | |
| | | Date (MM/DD/YYYY) | |
| Preparer's Daytime Phone _____ | | S50018506 | |
| | | PTIN or VITA/TCE # (required) | |
| 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 with the preparer or the third-party designee indicated on my federal return.
Mail to: Minnesota Individual Income Tax, Mail Station 0010, 600 N. Robert St., St. Paul, MN 55145-0010

1171

1. Confirm
Refund Amount

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

2024.02.11

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2. Confirm state & local tax in itemized deductions

Here is where to find your state and local tax deduction information on your 2022 federal return

| SCHEDULE A (Form 1040-NR) <small>Department of the Treasury Internal Revenue Service</small> | | Itemized Deductions <small>Go to www.irs.gov/Form1040NR for instructions and the latest information. Attach to Form 1040-NR.</small> | | <small>OMB No. 1545-0074</small> 2022 <small>Attachment Sequence No. 7A</small> | |
|--|-----------|--|-----------|--|-----------|
| <small>Name shown on Form 1040-NR</small> LISA HUI | | | | <small>Your identifying number</small> XXX-XX-1111 | |
| Taxes You Paid | 1a | State and local income taxes | 1a | 556 | 1b |
| | b | Enter the smaller of line 1a or \$10,000 (\$5,000 if married filing separately) | | | |
| Gifts to U.S. Charities | 2 | Gifts by cash or check. If you made any gift of \$250 or more, see instructions | 2 | | 5 |
| | 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 | | | |
| | | | | | |
| Casualty and Theft Losses | 6 | Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions | 6 | | 6 |
| Other Itemized Deductions | 7 | Other—from list in instructions. List type and amount: _____ _____ _____ _____ _____ _____ | | | 7 |
| Total Itemized Deductions | 8 | Add the amounts in the far right column for lines 1b through 7. Also, enter this amount on Form 1040-NR, line 12 | 8 | 556 | 8 |

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

QNA

Schedule A (Form 1040-NR) 2022

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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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

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CONTINUE

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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

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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

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

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

BEGIN

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RETURN SUMMARY

Federal **-\$727**

This completes entering
state income tax refunds and
payments

If you received gift card from Mac, reported on 1042-S Income Code 23, or award from other organization, i.e., Hack the Gap, this taxable income has to be reported.

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 OTHER INCOME


Whether or not you get 1042S, Income Code 23, or a letter/document stating how you received as prize or award, you report income amount here. If you got more than one prize or award, add up the total income you received. If you got giftcard for \$71 Income Code 23, and Hack the Gap prize of \$600, then you enter total of \$671 since TaxSlayer may not allow you to enter each amount separately.


2. Enter DESCRIPTION "Award" and total amount of other income.

3. Enter TAX WITHHELD if any on next slide.



 My Account

 Basic Information

 **Federal**

Income


- W-2 Wage Statement


Deductions


Other Taxes

Payments & Estimates

Miscellaneous Forms

 Health Insurance

 State

 Summary/Print

Other Income

Form belongs to

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

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 the amount of federal tax withheld, e.g, \$21, or check any documents you got that reports tax withheld under this section “Other Federal Withholdings (not from Form 1099)”.





My Account

Basic Information

Federal

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Deductions

Other Taxes

Payments & Estimates

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

Miscellaneous Forms

Health Insurance

State

Summary/Print

2022 | AMERICAN PLEDGE

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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Congratulations!

This completes preparing your federal return using the
Basic Scenario 2 Guide

Next Steps

- Prepare your state return.
 - Our state guides are on the member site, under Do Your Taxes, scroll down to the special circumstances guides section
 - We have guides for
 - Minnesota
 - Pennsylvania
 - North Carolina
 - California
 - Maryland
 - Wisconsin
 - Ohio
- Update your return with any other special circumstances guides that apply
- File your tax return
 - Filing instructions guide is on the member site
 - Go to Do Your Taxes to access the link to this guide to complete your returns and file them with the tax authorities