

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 **2025** 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 wj.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, aquellos con dominio limitado del inglés y la milicia.

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

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

Para denunciar un comportamiento no ético al IRS, envíenos un correo electrónico a wj.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 NRV TAP'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)

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 NRV TAP's site, <https://www.nrvtap.com/>, and using there What Are My Treaty Benefits? tool.

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			
<input type="checkbox"/> 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 **adding** treaty benefits into TaxSlayer.

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

Print Results

2024.02.11

Tax Year 2023 Basic Scenario 2

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

This guide is based upon instructions provided by The NonResident Tax Help Group (NoRTH), <https://www.nrtaxhelp.org/>. Free membership through site for assistance with other state returns.

- 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 \$89,000**
 - 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 (**2025** 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

SKIP this page if Macalester NRA; use TaxSlayer link provided by ISP.

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.

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.



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

Do NOT go to the main TaxSlayer website 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

TaxSlayer

Log In

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

Username

Password

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

LOG IN

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

Copyright © 2022 TaxSlayer

Language:

en (US)

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



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:

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



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



2025 Tax Return Created!

Now, let's keep going.



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

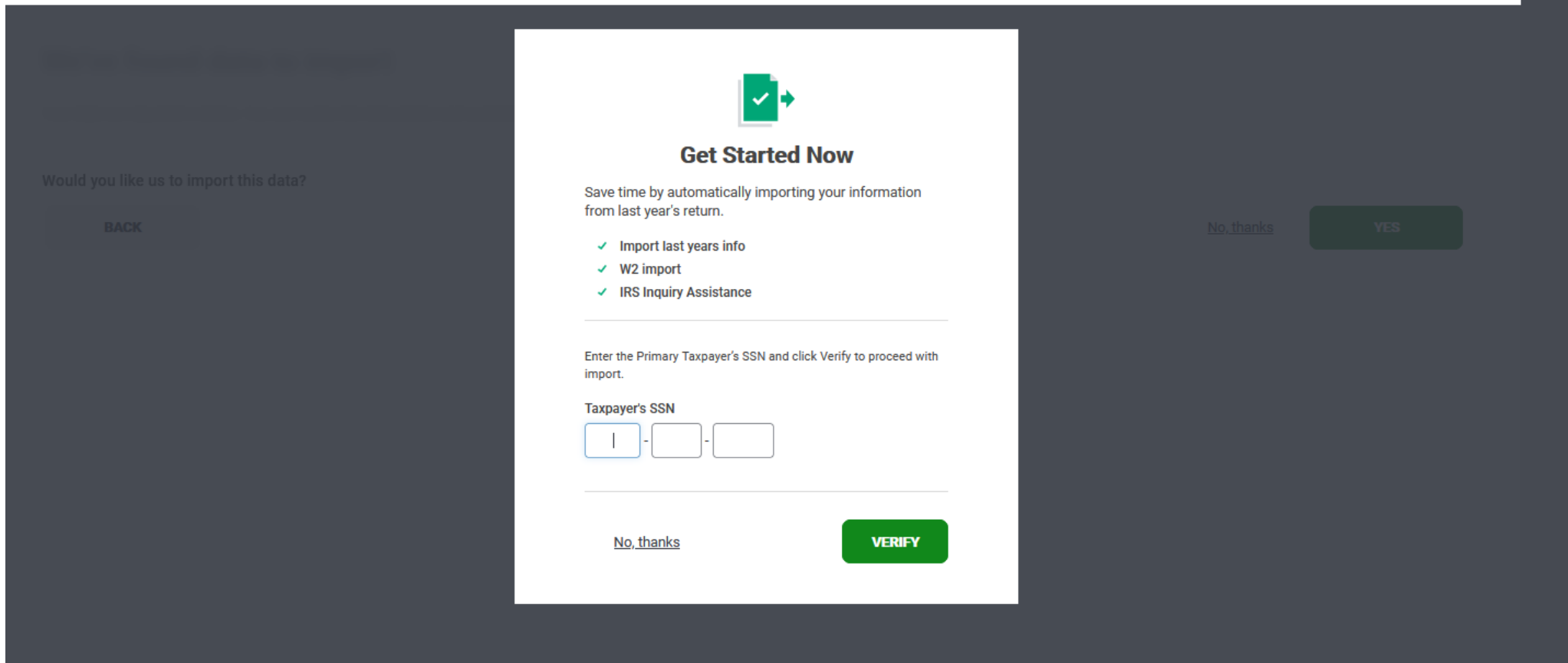
I am filing a joint return with my spouse.

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.



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

MM DD YYYY

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

MI

Last name

Suffix (Jr, Sr, etc.)

SSN *

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

Date of Birth

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

Mailing Address

Country *

United States

Address *

Street number and name

Apartment, suite, unit number, etc.

Numbers only (example: "121", not "APT 121")

ZIP code *

City *

State *

Select

I have a stateside military address

What is your state residency status? *

I am a full-year resident of this state

I am a full-year resident of another state

I am a part-year resident of this state

BACK

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 Part-Year Resident for now – you will enter your actual state residency status in the state section

Fill out all boxes, then continue

Additional Information

Support Information

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

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!

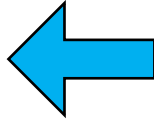
BACK

[Skip](#)

CONTINUE

What's your filing status? ^{*}

- Single
- Married filing jointly
- Married filing separately
- Head of household
- Qualifying surviving spouse
- Nonresident Alien



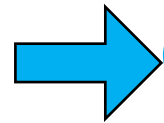
Need help determining your filing status?

FILING STATUS WIZARD

Do NOT click

BACK

Do NOT click 'BACK'



CONTINUE

Don't see "Non-resident Alien" under Filing Status? You have accidentally clicked on a wrong button and are in the wrong software package.

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!**

What's your filing status? ^{*}

Single nonresident alien

Married nonresident alien

Qualifying widow(er) with dependent child

You are single

WAIT! This isn't what I wanted!

[SHOW RESIDENT OPTIONS](#)

[BACK](#)

[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?

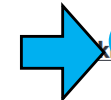
Yes

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](#)
[Redacted]
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:

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

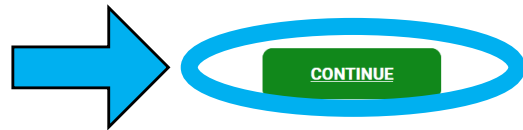


Tax Information:

Filing Status:

Nonresident Alien [edit](#)

Double check this is Nonresident Alien!



Let's do this! #slayit

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



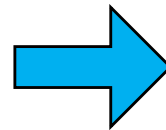
If you continue through this process here you will get warning messages when you are ready to file to confirm you have entered all documents.

Add your forms quickly with Quick File

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



BACK



I don't know which forms I need

~~CONTINUE~~

TaxSlayer ×

- My Account
- Basic Information
- Federal**
 - Income
 - Deductions
 - Other Taxes
 - Payments & Estimates
 - Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings ▾
- Toolbox ▾
- Log Out**

2022 | AMERICAN PLEDGE

Help & Support ?

Federal
\$0

Income

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

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

TaxSlayer 2022 | AMERICAN PLEDGE Help & Support ?

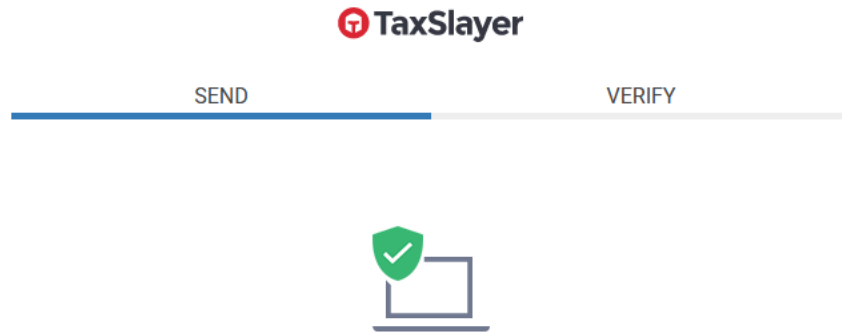
Federal \$0

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 **2025** American Pledge on the top or 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:



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

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

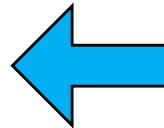
VERIFY



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




MY ACCOUNT

2023 Tax Return

Welcome back! Let's finish your 2025 tax return.



RETURN	STATUS	REFUND AMOUNT
Federal	Created 	\$0.00

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[Privacy Policy](#)

Entering Personal Information

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

2024.02.11
Log Out

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



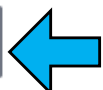
Individual

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 02 2021

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

Days Present in the U.S.

Number of days in the U.S. for 2025

365

Number of days in the U.S. for 2024

267

Number of days in the U.S. for 2023

146

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.

Tax Return Filing Information

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

Last Year Filed

2022

Form Title

1040NR

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

- Check if you are filing a return for a trust.
- Check if you received total compensation over \$250,000.
- Check if you used an alternate method to determine the source of the income.

Check box if any apply.

Am I a Nonresident Alien?

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

Select Tax Year

2023

Enter Your Visits

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

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

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

Visa	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.

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

Print Results

Refund Mailing Information

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

Country

- Please Select -

Address (street number & name)

City, town, or post office

Foreign State or Province

Foreign Postal Code

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

Income Exempt from U.S. Tax

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

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

Check box if any apply (usually no).

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

\$ ~~X~~

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

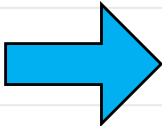


General Information

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 2025. You can enter additional visits after this step.

Schedule OI - Current Year Travel Dates

Date Entered U.S. *

MM DD YYYY

Enter first date present in U.S. during 2025. Either date you entered during 2025, or 01/01/2025 if you were already here at start of 2025.

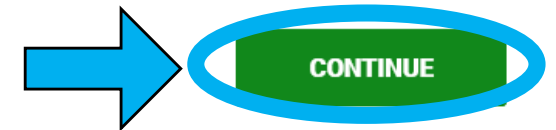
Date Departed U.S.

MM DD YYYY

CANCEL

If you left the U.S. during 2025 enter the date departed, otherwise leave blank.

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If you have more entry/exit dates during **2025** click here to enter them.

Schedule OI - Current Year Travel Dates

+ Schedule OI Travel Dates

1/1/**2025**
5/31/2023

8/23/**2025**
N/A

Click here to edit or delete this info.

When all **2025** 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

 **CONTINUE**

Back to Main Page

TaxSlayer

- My Account
- Basic Information
- Federal**
 - Income
 - Deductions
 - Other Taxes
 - Payments & Estimates
 - Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- 2024.02.11
- Log Out

2022 | AMERICAN PLEDGE

Help & Support

Income

- W-2** *(Most Common Form)* **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

RETURN SUMMARY

Federal \$0

Click on Federal Section

TaxSlayer

- My Account
- Basic Information
- Federal**
- Deductions
- Other Taxes
- Payments & Estimates
- Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- 2024.02.11
- Log Out

2022 | AMERICAN PLEDGE

Help & Support

Income

- W-2** *(Most Common Form)* **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
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- 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

RETURN SUMMARY

Federal \$0

Click on Miscellaneous Forms

TaxSlayer <≡

- My Account
- Basic Information
- Federal**
 - Income
 - Deductions
 - Other Taxes
 - Payments & Estimates
 - Miscellaneous Form**
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- Log Out

2024.02.11

2022 | AMERICAN PLEDGE

Help & Support ?

Income

- W-2** (Most Common Form) ? **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
- Profit or Loss from Business** ? **BEGIN**

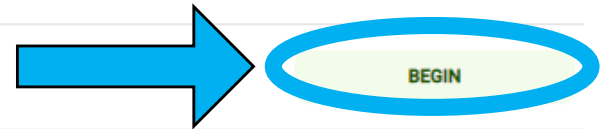
Tax Year 2023 Basic Scenario 2

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

BACK
2024.02.11

CONTINUE
55

Form 8843 Part I - General Information

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.

Type of U.S. Visa/Immigration Status

Select type of U.S. Visa *

Nonimmigrant Visa



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

Nonimmigrant visa type code

F1



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

Date entered U.S.

MM DD YYYY



Date of your **first entry** on this visa. Check **Glacier Tax Prep (GTP) Form 8843 line 1a**

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 #

Days in the U.S. in **2025**

Days in the U.S. in **2024**

Days in the U.S. in **2023**

Days in **2025** 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.

“Days in 2025 you claim you can exclude (SPT)” often same as days you were in US in 2025 above.

Once all information entered

DELETE

CANCEL



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://94.cbp.dhs.gov/94/#/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

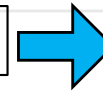
EDIT

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-20 OR of the director of your degree program. or DS-2019

Answer Yes or No

Visa held during 2017

Did you have a visa in this year?

- Yes
- No

Visa held during 2018

Did you have a visa in this year?

- Yes
- No

Visa held during 2019

Did you have a visa in this year?

- Yes
- No

Visa held during 2020

Did you have a visa in this year?

- Yes
- No

Visa held during 2021

Did you have a visa in this year?

- Yes
- No

Visa held during 2022

Did you have a visa in this year?

- Yes
- No

U.S. presence

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

- Yes
- No

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

- Yes
- No

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

DELETE

CANCEL

CONTINUE

Once all information entered

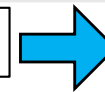
Form 8843 - Exempt and Individuals With a Medical Condition

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

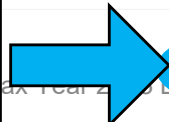
Did you have a visa in this year?

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

2024.02.11
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

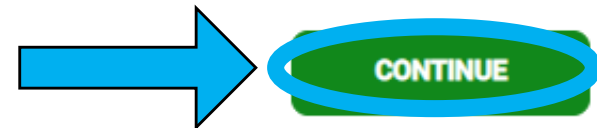
EDIT

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

BACK

2024.02.11

Tax Year 2023 Basic Scenario 2



CONTINUE

65

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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- Federal**
- Income
- Deductions
- Other Taxes
- Payments & Estimates
- Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- Log Out

2022 | AMERICAN EDGE Help & Support

Other Taxes

- Additional Taxes on Qualified Plans and Other Accounts** [?](#) BEGIN
Reported on Form 5329
- Alternative Minimum Tax (AMT)** [?](#) BEGIN
Reported on Form 6251
- Household Employment Taxes** [?](#) BEGIN
Reported on Schedule H
- Net Investment Income Tax (NIIT)** BEGIN
Reported on Form 8960
- Parents' Election to Report Child's Interest and Dividends** [?](#) BEGIN
Reported on Form 8814
- Repayment of First-Time Homebuyer Credit** [?](#) BEGIN
Reported on Form 5405
- Self-Employment Tax** BEGIN
Reported on Schedule SE
- Social Security and Medicare Tax on Unreported Tip Income** [?](#) BEGIN
Reported on Form 4137
- Tax For Certain Children Who Have Unearned Income** [?](#) BEGIN
Reported on Form 8615
- Tax on Income Not Effectively Connected to US Trade/Business** BEGIN
Reported on Schedule NEC
- Transportation Tax** BEGIN
Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)?

BACK CONTINUE

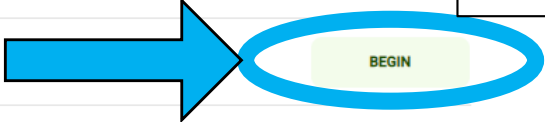
RETURN SUMMARY

Federal	\$0
---------	-----

Income

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

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



Enter W-2 information directly from form.

W-2

Check any of these that apply to you:

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

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

b Employer identification number (EIN) *

c Employer's name *

Country *

Address (number and street) *

ZIP Code *

City *

State *


d Control number - Not required for filing taxes online.

READ THIS BEFORE TYPING:

- If any text is more than 35 characters, abbreviate it - 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.

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



e Employee's name
NRVTAP TaxSupport

Country *
United States

Address (number and street) *
200 University Ave

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

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

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

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

[+ 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

Back to Main Page



TaxSlayer ☰

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 - W-2 Wage Statement
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 - Other Taxes
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- Summary/Print
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- Mailbox
- Settings ▾
- Toolbox ▾
- Log Out

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Help & Support ?

Income

W-2 <i>(Most Common Form)</i> ? 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**

If Mac student and received 1042-S, Income Code 23 for gift card, monetary prize or award, etc, DO NOT report here, follow instructions elsewhere to report properly 1042-S, Income Code 23 income and tax paid.

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 **XXXXXX**

Click on Payments & Estimates

TaxSlayer 2023 AMERICAN PLEDGE Help & Support ?

- My Account
- Basic Information
- Federal**
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 - W-2 Wage State
 - Deducti
 - OW
 - Payments & Estimates**
 - Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- Log Out

2024.02.11

Income

W-2 <i>(Most Common Form)</i> ? 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
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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

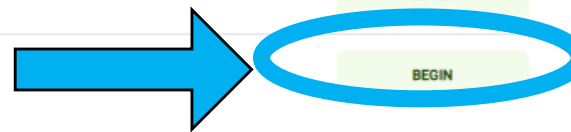
Form 8288-A

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 highlighted by red boxes and blue arrows pointing to them. The callouts are:

- Box 3 – Usually is Chapter 3**: Points to the 'Select chapter *' dropdown menu.
- Box 3b**: Points to the 'Tax Rate' text input field.
- At top of form**: Points to the 'Unique Form Identifier *' text 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 on the left side of the form groups the 'Is this an amended form?' (radio buttons), 'Pro-rata basis reporting?' (radio buttons), and 'Have you deposited tax with the IRS pursuant to escrow procedure?' (radio buttons) sections.
- Box 1**: Points to the 'Select an income code *' dropdown menu.
- Box 2**: Points to the 'Gross Income' text input field.
- Box 5**: Points to the 'Withholding Allowance' text input field.
- Box 6**: Points to the 'Net Income' text input field.
- Box 7a**: Points to the 'Federal Tax Withheld' text input field.
- Box 8**: Points to the 'Tax Withheld by Other Agents' text input field.

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
2024-02-11 - 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 -

Usually blank

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

When all info entered, click 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	...
----------------	----------------------------	------------------------	-----



Back to Main Page



TaxSlayer <≡

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2022 | AMERICAN PLEDGE

Help & Support ?

Payments and Estimates

Federal Estimated Tax Payments ?

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ?

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ?

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ?

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ?

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

BEGIN

Apply Overpayment to Next Year's Taxes ?

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

BEGIN

Vouchers for 2023 Estimated Tax Payments ?

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ?

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

BEGIN

IRC 1341 Repayment Amount ?

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

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

Form 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

If Mac student and received 1042-S, Income Code 23 for gift card, monetary prize or award, etc, DO NOT report here, follow instructions elsewhere to report properly 1042-S, Income Code 23 income and tax paid.

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!

This Tax Treaty Benefits tool is accessible from another website, <https://tools.nrtaxhelp.org/treatybenefits>

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			My Information	
Treaty 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

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

TaxSlayer

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- Toolbox

2024.02.11
Log Out

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

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

Basic Information

 Personal Information 

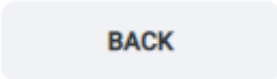
 Filing Status 

 Dependents / Qualifying Person 

 IRS Identity Protection PIN 

1040NR Schedule OI 







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



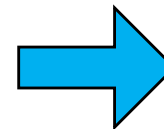
Number of months you previously claimed this treaty on a tax return

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

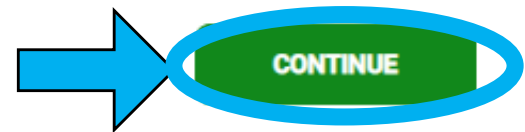
EDIT

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

 **CONTINUE**

Back to Main Page



TaxSlayer <≡

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 - IRS Identity Protection PIN
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- Mailbox
- Settings ▾
- Toolbox ▾
- Log Out

2022 | AMERICAN PLEDGE

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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This completes entering
wage income and treaty
benefits for wages

If Mac student and received 1042-S, Income Code 23 for gift card, monetary prize or award, etc, DO NOT report here, follow instructions elsewhere to report properly 1042-S, Income Code 23 income and tax paid.

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 2023 AMERICAN PLEDGE Help & Support ?

- My Account
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 - Deducti
 - OW
 - Payments & Estimates**
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- E-file
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- Settings
- Toolbox
- Log Out

2024.02.11

Income

W-2 <i>(Most Common Form)</i> ? 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

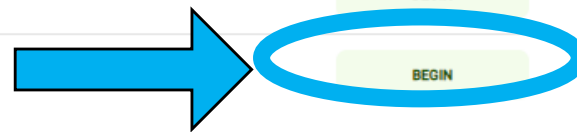
Form 8288-A

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 highlighted by blue arrows pointing to callout boxes:

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

READ THIS BEFORE TYPING:

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

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

Total Withholding Credit
\$ ← **Box 10**

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

Withholding Agent Information

Agent's Name
 ← **Box 12d**

Agent's EIN
 - ← **Box 12a**

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

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

Agent's GIIN
 ← **Box 12e**

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

Agent's Address
Country
United States of America

Address (street number & name)

ZIP code
 -

City, town, or post office

State
2024-02-11 - 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 -

Usually blank

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

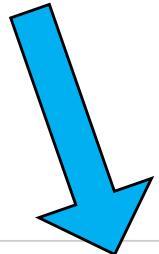
When all info entered, click continue

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

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

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

Click here to edit or delete this info.



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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

RETURN SUMMARY

Federal

\$623

If Mac student and received 1042-S, Income Code 23 for gift card, monetary prize or award, etc, DO NOT report here, follow instructions elsewhere to report properly 1042-S, Income Code 23 income and tax paid.

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

My Information

Maximum Dollar Amount	Maximum Years in the U.S.	Treaty Article	Income Document Type	Income Amount
No Limit	5	21(1)	1042-S	12000
			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

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

TaxSlayer

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2024.02.11
Log Out

Click on Basic Information at Main Page

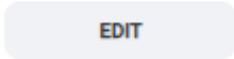
Payments and Estimates

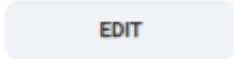
- Federal Estimated Tax Payments** ?
Federal tax payments already made for 2022 BEGIN
- State Estimated Tax Payments** ?
State tax payments already made for 2022 BEGIN
- Other Federal Withholdings** ?
Federal withholdings you haven't already entered BEGIN
- Other State Withholdings** ?
State withholdings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

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Basic Information

 Personal Information 

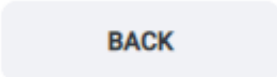
 Filing Status 

 Dependents / Qualifying Person 

 IRS Identity Protection PIN 

1040NR Schedule OI 







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



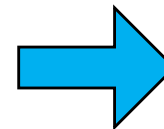
Number of months you previously claimed this treaty on a tax return

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

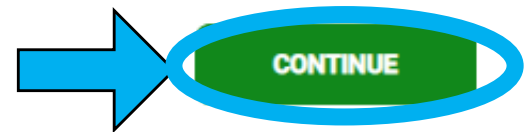
EDIT

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

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 **CONTINUE**

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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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If Mac student and received 1042-S, Income Code 23 for gift card, monetary prize or award, etc, DO NOT report here, follow instructions elsewhere to report properly 1042-S, Income Code 23 income and tax paid.

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 ?

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2024.02.11 Log Out

Payments and Estimates

Federal Estimated Tax Payments ?

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ?

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ?

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ?

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ?

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

BEGIN

Apply Overpayment to Next Year's Taxes ?

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

BEGIN

Vouchers for 2023 Estimated Tax Payments ?

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ?

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

BEGIN

IRC 1341 Repayment Amount ?

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

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

Form 8805

BEGIN

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

Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

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CONTINUE

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RETURN SUMMARY

Federal

\$623

Scroll down to
Scholarships and
Fellowship Grants

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

EDIT

1099-G Box 1 ⓘ
Unemployment compensation

BEGIN

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

BEGIN

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

BEGIN

1099-K ⓘ
Payment card and third party network transactions

BEGIN

1099-MISC ⓘ
Miscellaneous income

BEGIN

1099-NEC
Nonemployee compensation

BEGIN

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

BEGIN

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

BEGIN

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

BEGIN

Profit or Loss from Business ⓘ
Reported on Schedule C

BEGIN

Profit or Loss from Farming ⓘ
Reported on Schedule F

BEGIN

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

BEGIN

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

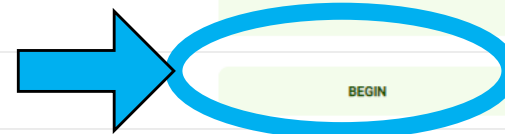
BEGIN

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

BEGIN

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

BEGIN

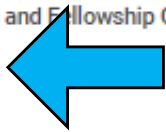


BACK

CONTINUE

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received



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

CANCEL



CONTINUE

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- Toolbox ∨
- Log Out

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Help & Support ?

Income

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

Not common situation with 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

TaxSlayer

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2024.02.11 Log Out

Payments and Estimates

Federal Estimated Tax Payments [?](#)

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments [?](#)

State tax payments already made for 2022

BEGIN

Other Federal Withholdings [?](#)

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings [?](#)

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax [?](#)

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

BEGIN

Apply Overpayment to Next Year's Taxes [?](#)

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

BEGIN

Vouchers for 2023 Estimated Tax Payments [?](#)

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension [?](#)

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

BEGIN

IRC 1341 Repayment Amount [?](#)

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

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

Form 8805

BEGIN

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

Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

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CONTINUE

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RETURN SUMMARY

Federal

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Scroll down to Less Common 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.

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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

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



Other Income

Form belongs to
NRVTAP TaxAssistance

Other Income Description *

Select Other Income

Description of other income *

Write "QualifiedEducationExpense"

Amount of other income *

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

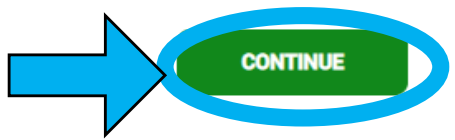
 Add an Other Income Item

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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Help & Support ?

Income

W-2 <i>(Most Common Form)</i> ? 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 2024 .

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	■	_____
12	Add lines 10 and 11	12	■	1507
13	Full-year residents: Enter the amount from line 12 on line 13. Skip lines 13a and 13b. Part-year residents and nonresidents: From Schedule M1NR, enter the amount from line 32 on line 13, from line 28 on line 13a, and from line 29 on line 13b (enclose Schedule M1NR)	13	■	1507
	13a ■ _____ 13b ■ _____			
14	Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes)	14	■	_____
	<input type="checkbox"/> (a) Schedule M1HOME <input type="checkbox"/> (b) Schedule M1529 <input type="checkbox"/> (c) Schedule M1LS			
15	Tax before credits. Add lines 13 and 14	15	■	1507
16	Amount from line 19 of Schedule M1C, Nonrefundable Credits (enclose Schedule M1C)	16	■	_____
17	Subtract line 16 from line 15 (if result is zero or less, leave blank)	17	■	1507
18	Nongame Wildlife Fund contribution (see instructions) This will reduce your refund or increase the amount you owe	18	■	_____
				
19	Add lines 17 and 18	19	■	1507
20	Minnesota income tax withheld. Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G and Schedules KPI, KS, and KF	20	■	695
21	Minnesota estimated tax and extension payments made for 2022	21	■	_____
22	Amount from line 12 of Schedule M1REF, Refundable Credits (see instructions; enclose Schedule M1REF)	22	■	_____
23	Total payments. Add lines 20 through 22	23	■	695
24	REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions). For direct deposit, complete line 25	24	■	_____
25	Direct deposit of your refund (you must use an account not associated with a foreign bank):			
	<input type="checkbox"/> Checking <input type="checkbox"/> Savings _____ Routing Number Account Number			
26	AMOUNT YOU OWE. If line 19 is more than line 23, subtract line 23 from line 19 (see instructions)	26	■	812
27	Penalty amount from Schedule M15 (see instructions). Also subtract this amount from line 24 or add it to line 26 (enclose Schedule M15)	27	■	_____
	IF YOU PAY ESTIMATED TAX and want part of your refund credited to estimated tax, complete lines 28 and 29.			
28	Amount from line 24 you want sent to you	28	■	_____
29	Amount from line 24 you want applied to your 2023 estimated tax	29	■	_____

Additional tax
you should
have paid



Your Signature	Spouse's Signature (If Filing Jointly)	02/05/2024
6515551212		Date (MM/DD/YYYY)
Daytime Phone	Email Address	
	02/05/2024	S50018506
Paid Preparer's Signature	Date (MM/DD/YYYY)	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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AMERICAN PLEDGE 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	\$683
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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

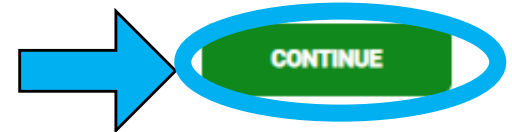
from last year.

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

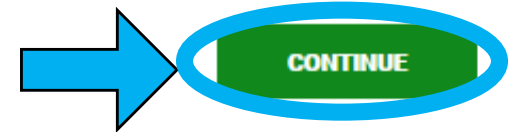


Schedule A - Taxes You Paid

\$0.00
\$0.00



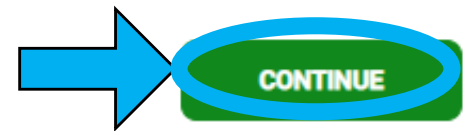
TaxSlayer shows \$0 here but the data is properly entered and will be used in the calculations if you are itemizing.



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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.

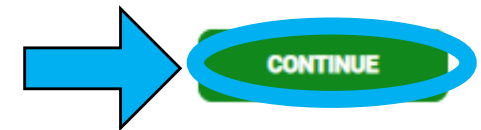
BEGIN

Itemized Deductions [?](#)

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

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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

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RETURN SUMMARY

Federal **\$683**

Entering state income tax refund received during 2024 .

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 ■ _____ 13b ■ _____

14 Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes)
 (a) Schedule M1HOME (b) Schedule M1529 (c) Schedule M1LS 14 ■ _____

15 Tax before credits. Add lines 13 and 14 15 _____ 1507

16 Amount from line 19 of Schedule M1C, Nonrefundable Credits (enclose Schedule M1C) 16 ■ _____

17 Subtract line 16 from line 15 (if result is zero or less, leave blank) 17 _____ 1507

18 Nongame Wildlife Fund contribution (see instructions)
This will reduce your refund or increase the amount you owe 18 ■ _____

19 Add lines 17 and 18 19 _____ 1507

20 Minnesota income tax withheld. Complete and enclose Schedule M1W to report
Minnesota withholding from Forms W-2, 1099, and W-2G and Schedules KPI, KS, and KF 20 ■ _____ 2193

21 Minnesota estimated tax and extension payments made for 2022 21 ■ _____

22 Amount from line 12 of Schedule M1REF, Refundable Credits (see instructions; enclose Schedule M1REF) 22 ■ _____

23 Total payments. Add lines 20 through 22 23 _____ 2193

24 REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions).
For direct deposit, complete line 25 24 ■ _____ 686

25 Direct deposit of your refund (you must use an account not associated with a foreign bank):
 Checking 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 ■ _____



1. Confirm Refund Amount

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

Your Signature _____ Date (MM/DD/YYYY) 02/05/2024

6515551212 _____ Spouse's Signature (If Filing Jointly) _____
Daytime Phone _____

Paid Preparer's Signature _____ Date (MM/DD/YYYY) 02/05/2024 _____
PTIN or VITA/TCE # (required) S50018506

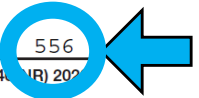
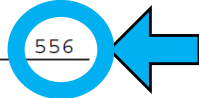
Preparer's Daytime Phone _____ Preparer's Email Address _____

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

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



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

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Help & Support ?

Other Taxes

Additional Taxes on Qualified Plans and Other Accounts ? Reported on Form 5329	BEGIN
Alternative Minimum Tax (AMT) ? Reported on Form 6251	BEGIN
Household Employment Taxes ? Reported on Schedule H	BEGIN
Net Investment Income Tax (NIIT) Reported on Form 8960	BEGIN
Parents' Election to Report Child's Interest and Dividends ? Reported on Form 8814	BEGIN
Repayment of First-Time Homebuyer Credit ? Reported on Form 5405	BEGIN
Self-Employment Tax Reported on Schedule SE	BEGIN
Social Security and Medicare Tax on Unreported Tip Income ? Reported on Form 4137	BEGIN
Tax For Certain Children Who Have Unearned Income ? Reported on Form 8615	BEGIN
Tax on Income Not Effectively Connected to US Trade/Business Reported on Schedule NEC	BEGIN
Transportation Tax Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)?	BEGIN

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RETURN SUMMARY

Federal **\$683**

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

Income

W-2 <i>(Most Common Form)</i> ⓘ 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

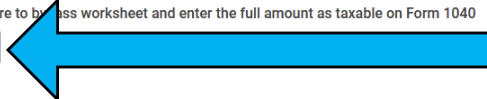


State & Local Refund Worksheet

① 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 *

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

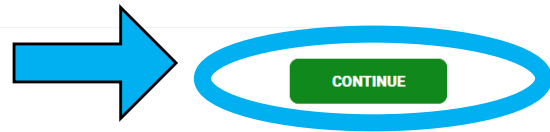


Last Year's (2022 Tax Return) Deductions for Age 65 and over or Blind:

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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Help & Support ?

Income

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

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RETURN SUMMARY

Federal -\$727

This completes entering
state income tax refunds and
payments



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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

Help & Support 

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.

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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)”.

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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