NoRTH & NRVTAP International Tax Clinic

DIY-Taxes using TaxSlayer

An IRS FSA (Facilitated Self-Assistance) Tax Clinic

This guide is intended to assist in preparing tax year 2021 federal and Minnesota 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.

Publication 4053 (EN/SP) (Rev. 4-2016) Catalog Number 64031P Department of the Treasury **Internal Revenue Service** www.irs.gov

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 wi.voltax@irs.gov

Programas de Impuestos Gratuitos Ofrecidos por VITA/TCE

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

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

Aunque el IRS es responsable de proporcionar los requisitos de supervisión para los programas de Asistencia Voluntaria al Contribuyente (VITA) y de Asesoramiento Tributario para las Personas de Edad Avazada (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 wi.voltax@irs.gov

Publication 4836 (EN-SP) (Rev. 9-2020) Catalog Number 54502V Department of the Treasury **Internal Revenue Service** www.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.

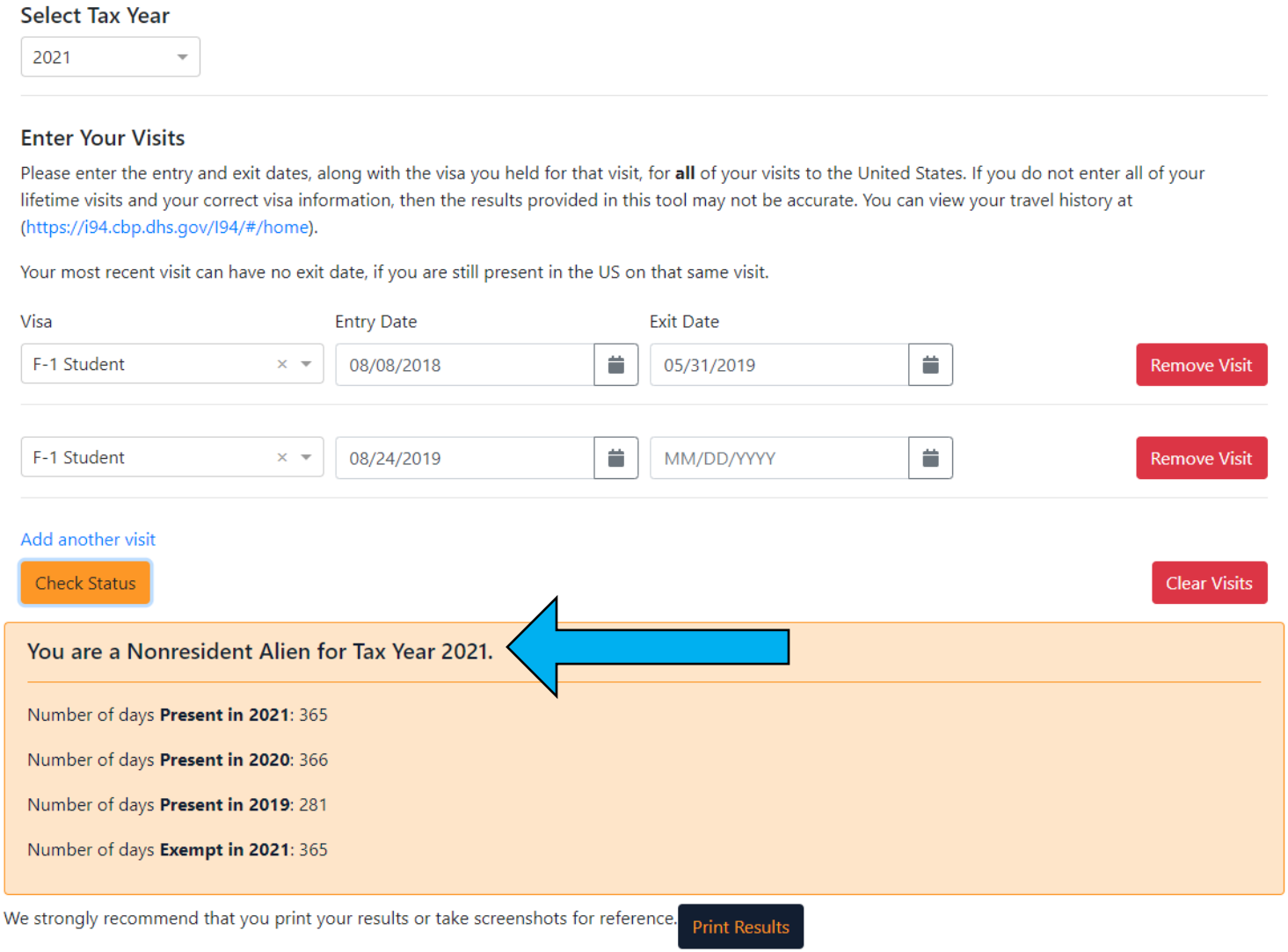
- It is <u>your responsibility</u> to correctly prepare your tax return.
  - When you sign to send it in, you are signing under penalties of perjury that the return is true, correct, and complete.
  - We have provided aides to assist you in this process, and opportunities to talk to trained volunteers about how to prepare your return, but ultimately it is up to you to ensure that your return is correct.
  - As an IRS VITA clinic, the volunteers and organizations who assist you are not liable for any incorrect information in your return.
  - If the return you prepare is incorrect, YOU will be responsible for any additional tax, interest, or penalties that you may owe the IRS / MN Department of Revenue.

Tax Process Overview

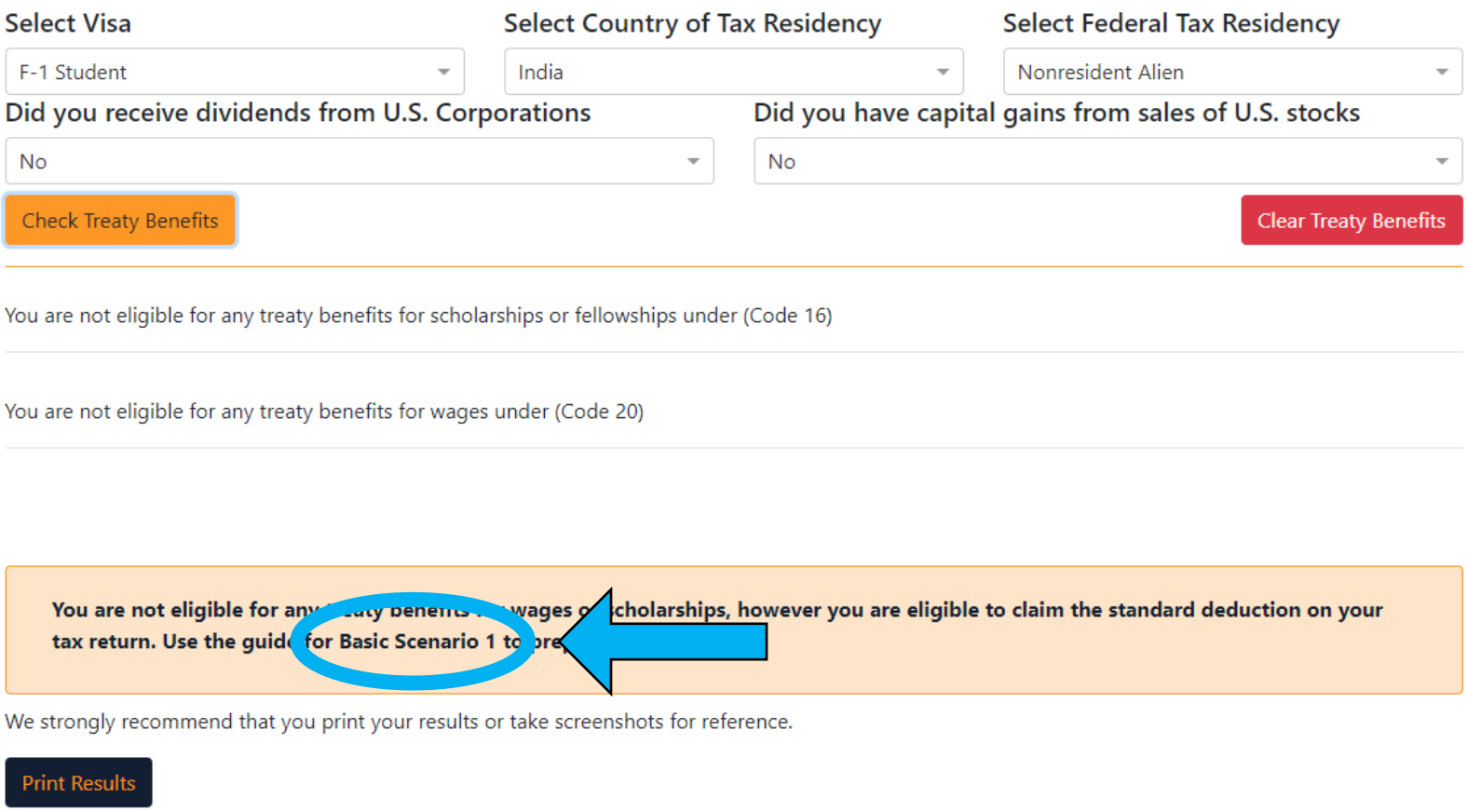
- **Step 1: Get Organized**
  - Confirm your federal tax residency status for 2021. You can use our free Am I A Nonresident Alien? tool.
  - Determine if you need to file a tax return
  - Gather your income documents
  - Confirm your return is in scope
- **Step 2: Prepare Your Return**
  - Determine your treaty benefits. You can use our free What Are My Treaty Benefits? tool.
  - Determine which scenario(s) apply to you
  - Prepare your return using the basic scenario
  - Update your return with any special circumstances scenarios
- **Step 3: File Your Return**
  - E-file your return
  - Paper file (if you can't e-file)

You should be here in the tax process

Have you confirmed your federal tax residency?



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



Basic Scenario #1 Details

- This scenario is intended to in federal and Minnesota tax return preparation for nonresident alien students from India who:
  - May have wage income
    - This would be reported on a W-2
  - May have scholarship income
    - This would be reported on a form 1042-S form with income code 16
  - May have filed a federal and state income tax return last year
    - May have received a state refund
    - May have paid additional state tax

- If this scenario doesn't represent your basic situation, please go back to the main website and choose a different scenario.

Special Circumstances Scenarios

- These scenarios are intended to expand the federal and Minnesota tax return preparation process for nonresident aliens who have the following special circumstances:
  - Minnesota Property Tax Refund
  - Working in Minnesota and another state(s)
    - Working in California
  - Investment transactions – Interest, Dividends, Capital Gains
  - Wage Income with No 1042-S, or Your Treaty Benefits DO NOT MATCH
  - Fellowship / Scholarship 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, complete this basic scenario, and then complete the guides for any special circumstances that apply.

Out of Scope Income & Situations

- Income over $73,000 Note: this is a software limit, and you won't be able to prepare a return if your income is over this amount.
- Resident aliens (Free software or tax clinics are available for those who qualify)
- Other state income tax returns (we support Minnesota returns, the software supports 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)
- Income earned outside of the US
- Amended returns
- Prior Year (2020 or earlier) Returns. The software only does 2021 returns.
- Cryptocurrency

- If something is out of scope, you can prepare your tax return using this software. However, we cannot assist you with preparing that return, or answer any questions about it. You can find reference materials here:
  - https://www.irs.gov/
  - https://www.revenue.state.mn.us/

Basic Scenario 1 Steps

1. Create TaxSlayer account

2. Prepare Federal Return
   - Enter Personal Information
   - Enter wage information
   - Enter scholarship information
   - Enter state tax refund / additional amounts paid

3. Prepare MN return
   - Information transfers directly, so almost no work needed

4. Review return

5. File return or adjust return using special circumstances guide(s)

Access TaxSlayer Software

Go to NRVTAP Member Site, Step 2

To access the special Macalester TaxSlayer program please use this link only
https://www.taxslayer.com/v.aspx?rdr=/vitafsa&source=TSUSATY2021&sidn=30011096

Prepare your return using a basic scenario

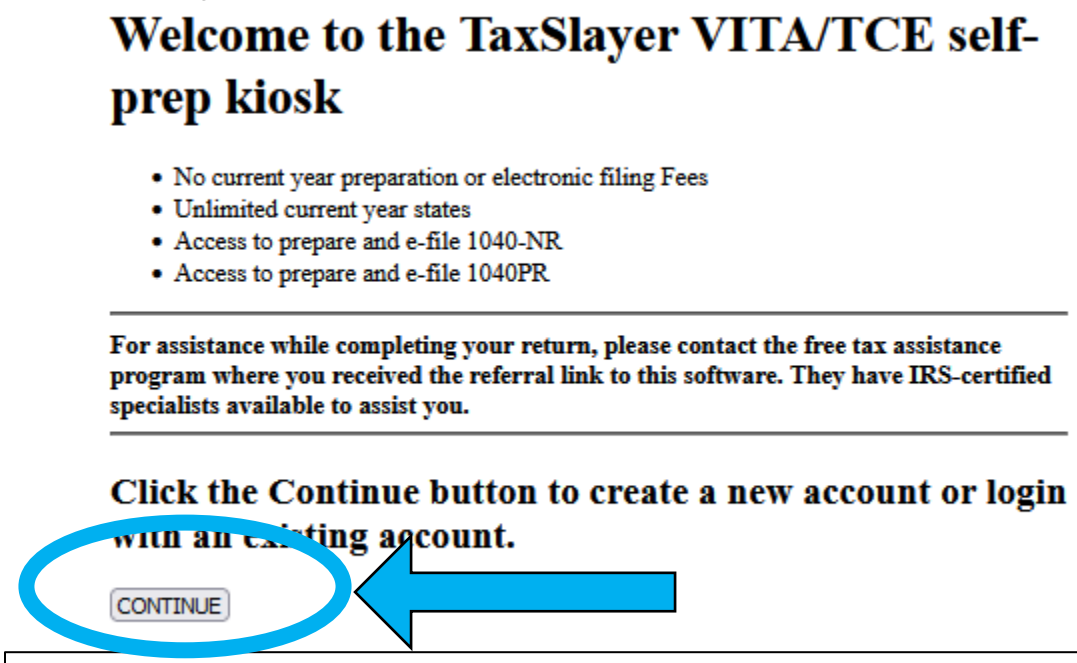
Click Here to Access the TaxSlayer Software

Basic Scenario 1: Students from India +

Basic Scenario 2 - Treaty Benefits +

Basic Scenario 3 - No Treaty Benefits +

Accessing TaxSlayer – Make sure the link takes you here.



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

Do NOT go to the main TaxSlayer website.

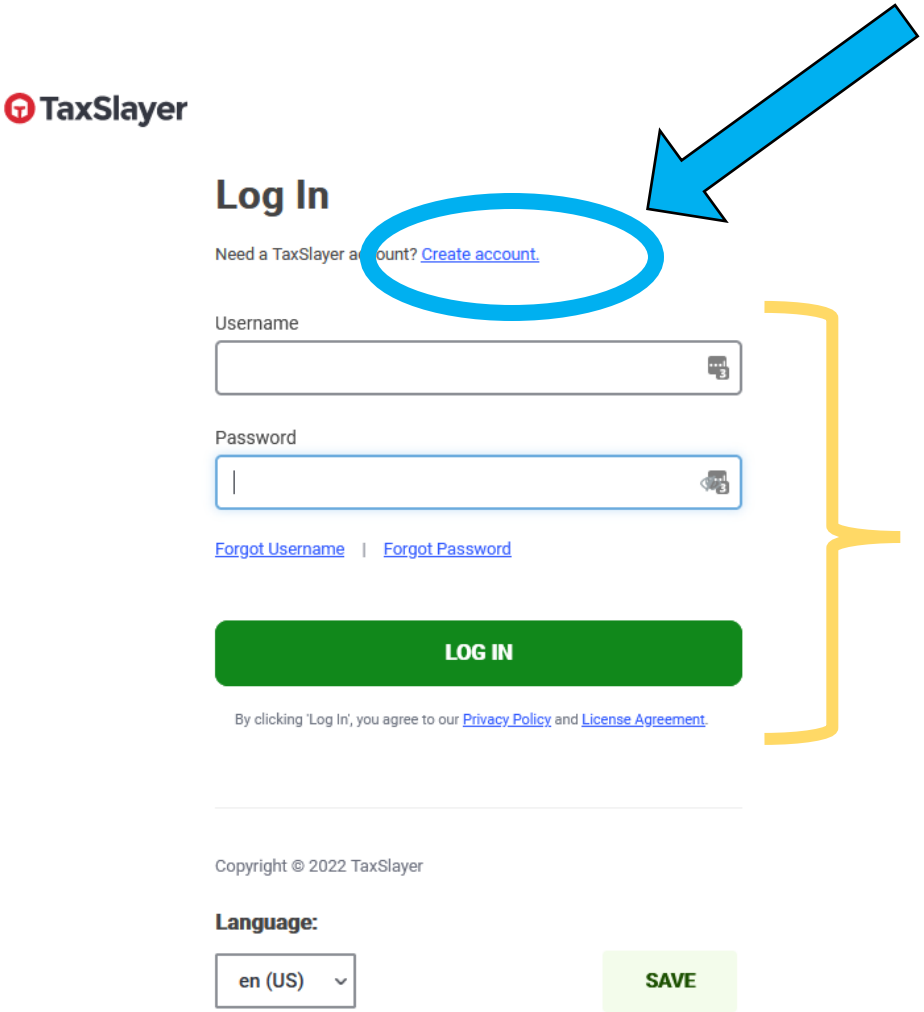
Your only option on that site will be to pay for your return.

You MUST you the link in the member section of the NRVTAP website.

To access the special Macalester TaxSlayer program please use this link only
https://www.taxslayer.com/v.aspx?rdr=/vitafsa&source=TSUSATY2021&sidn=30011096

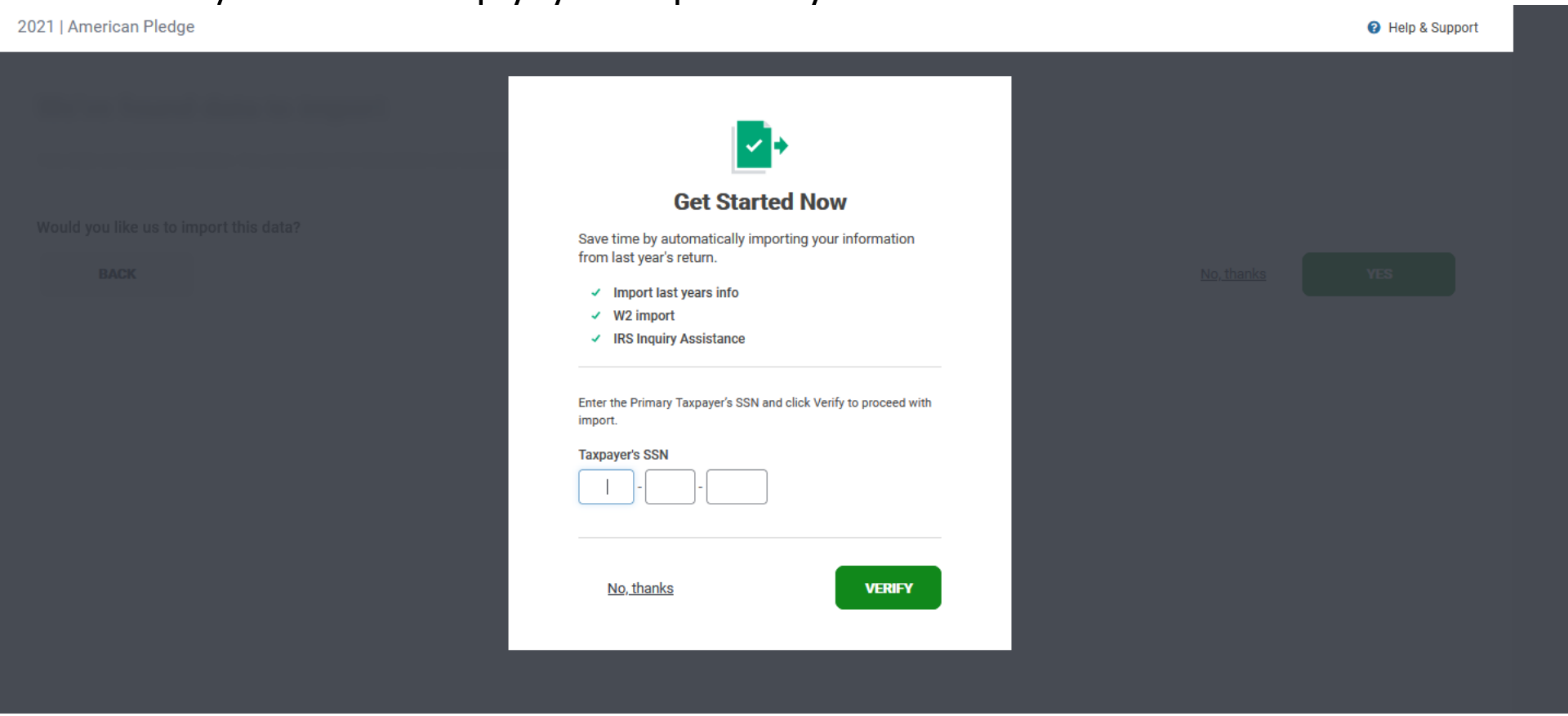
You will not be charged a fee if you are using the proper link.

Creating your TaxSlayer account



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

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

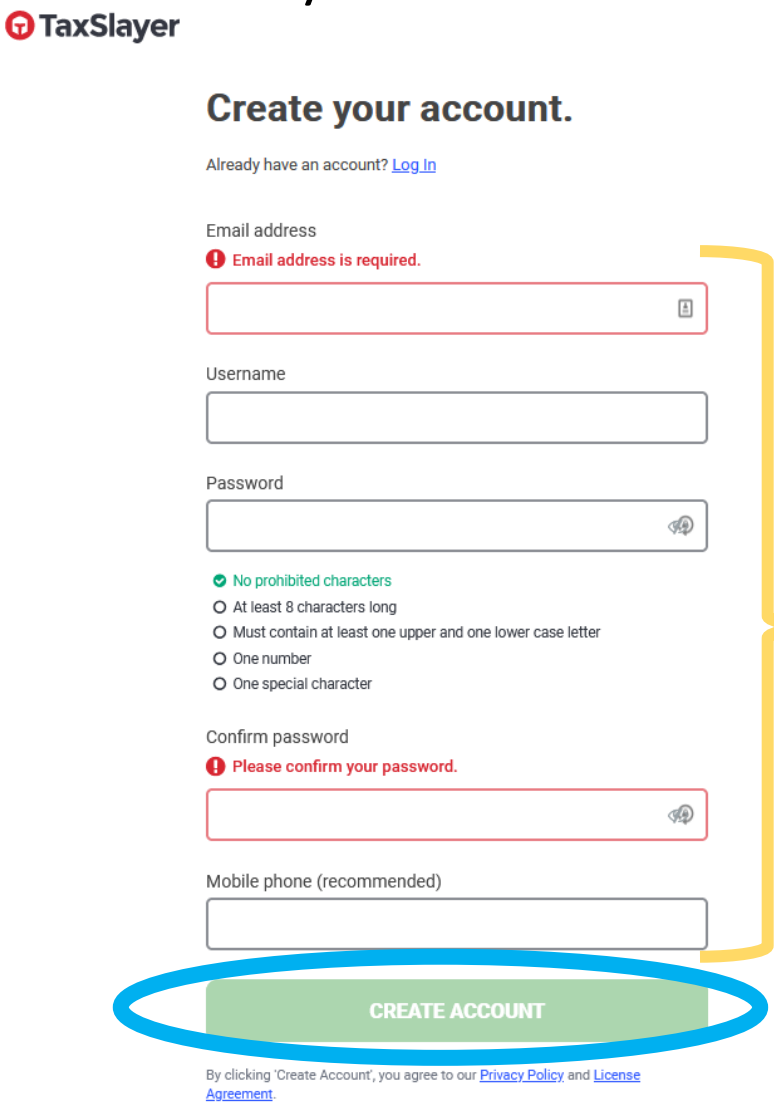


If this is your first time using TaxSlayer you won't get this screen

Creating your TaxSlayer account

Recommend entering your mobile phone number if you have one.

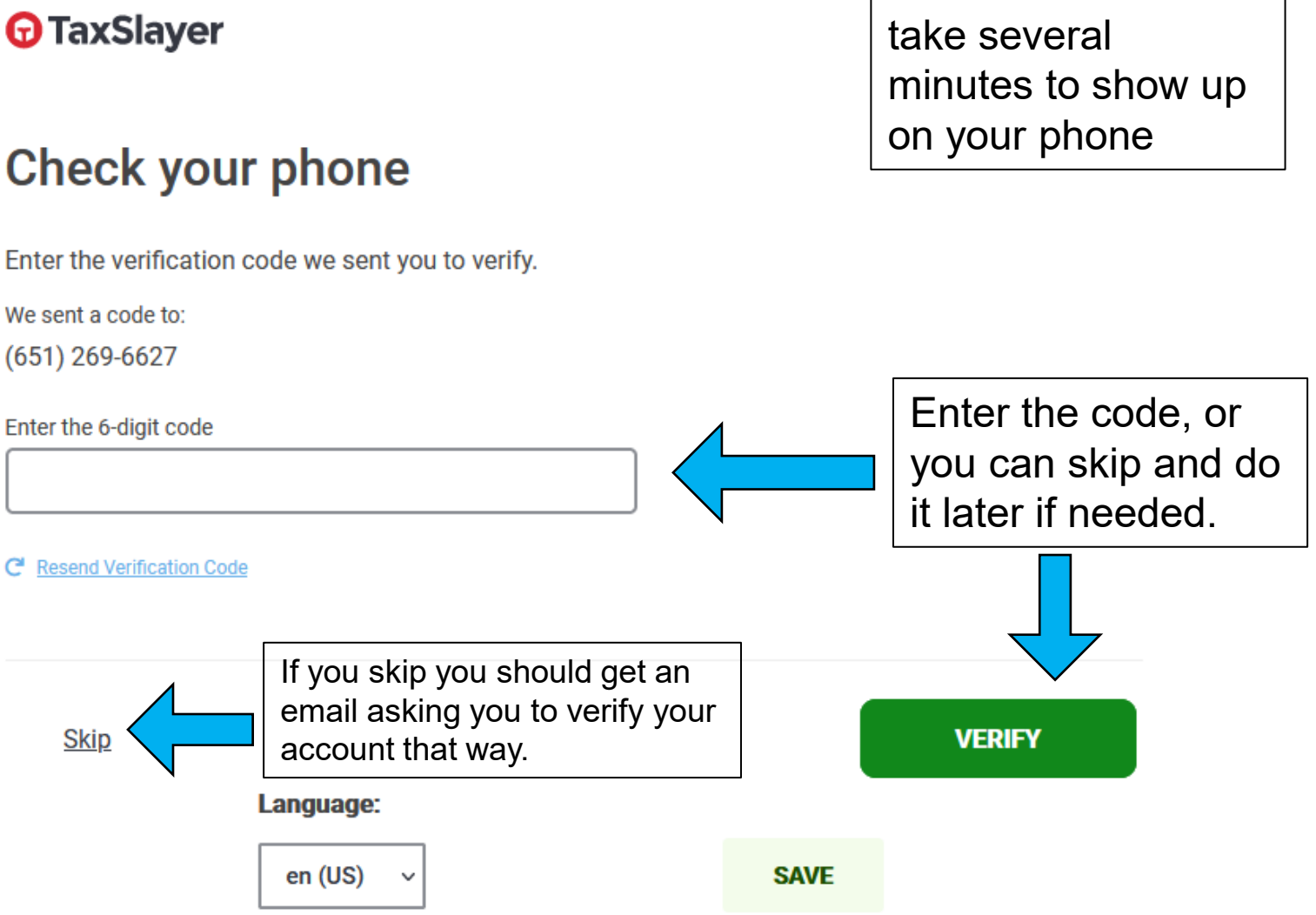
It will be required for e-filing.



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

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

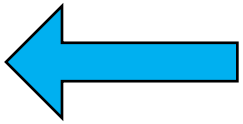
Note: Codes can take several minutes to show up on your phone

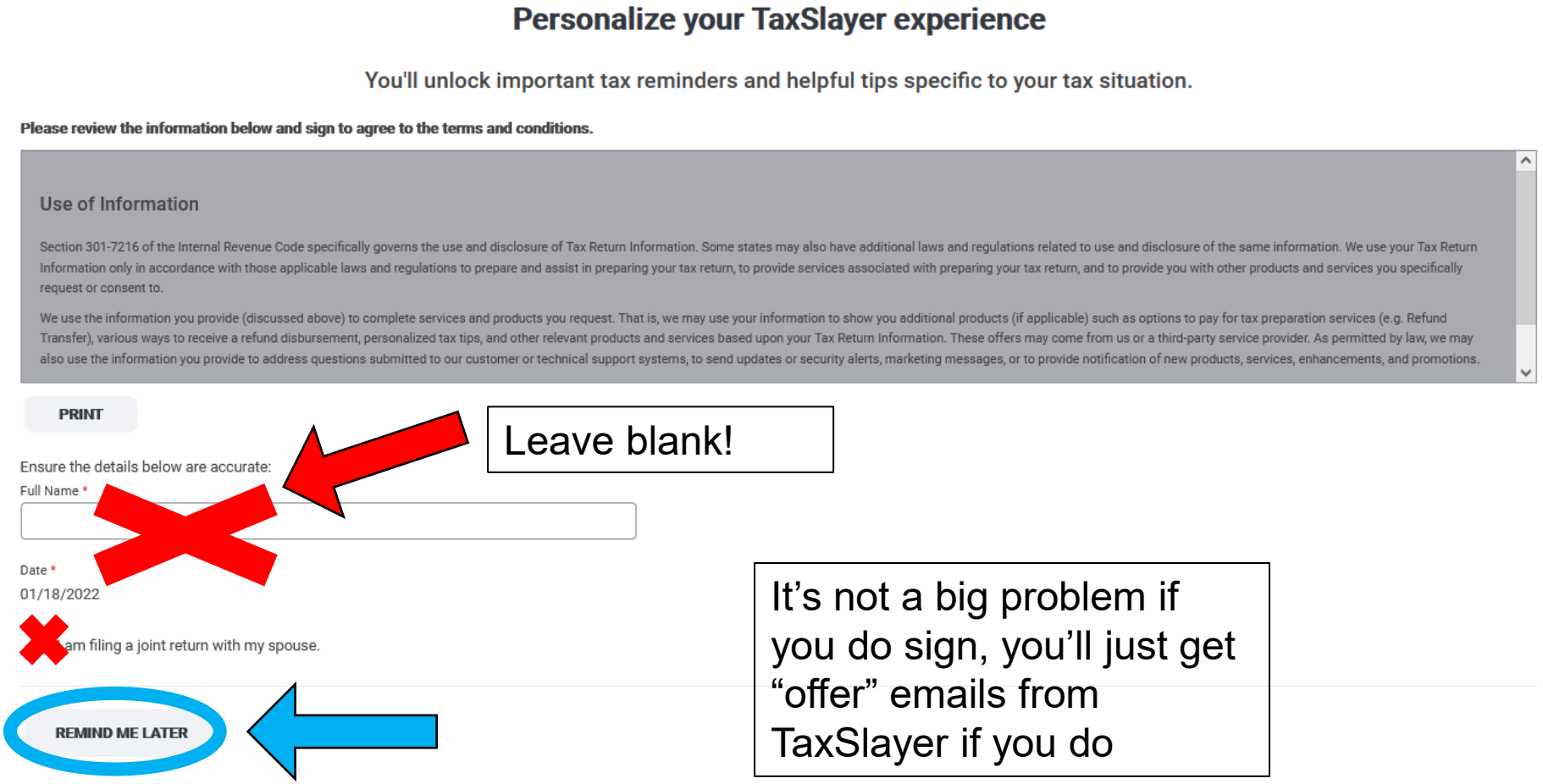


Success! Your TaxSlayer account has been created.

Now, let's keep going.

CONTINUE





Leave blank!

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

You might get this screen.
We haven't verified it works, 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.

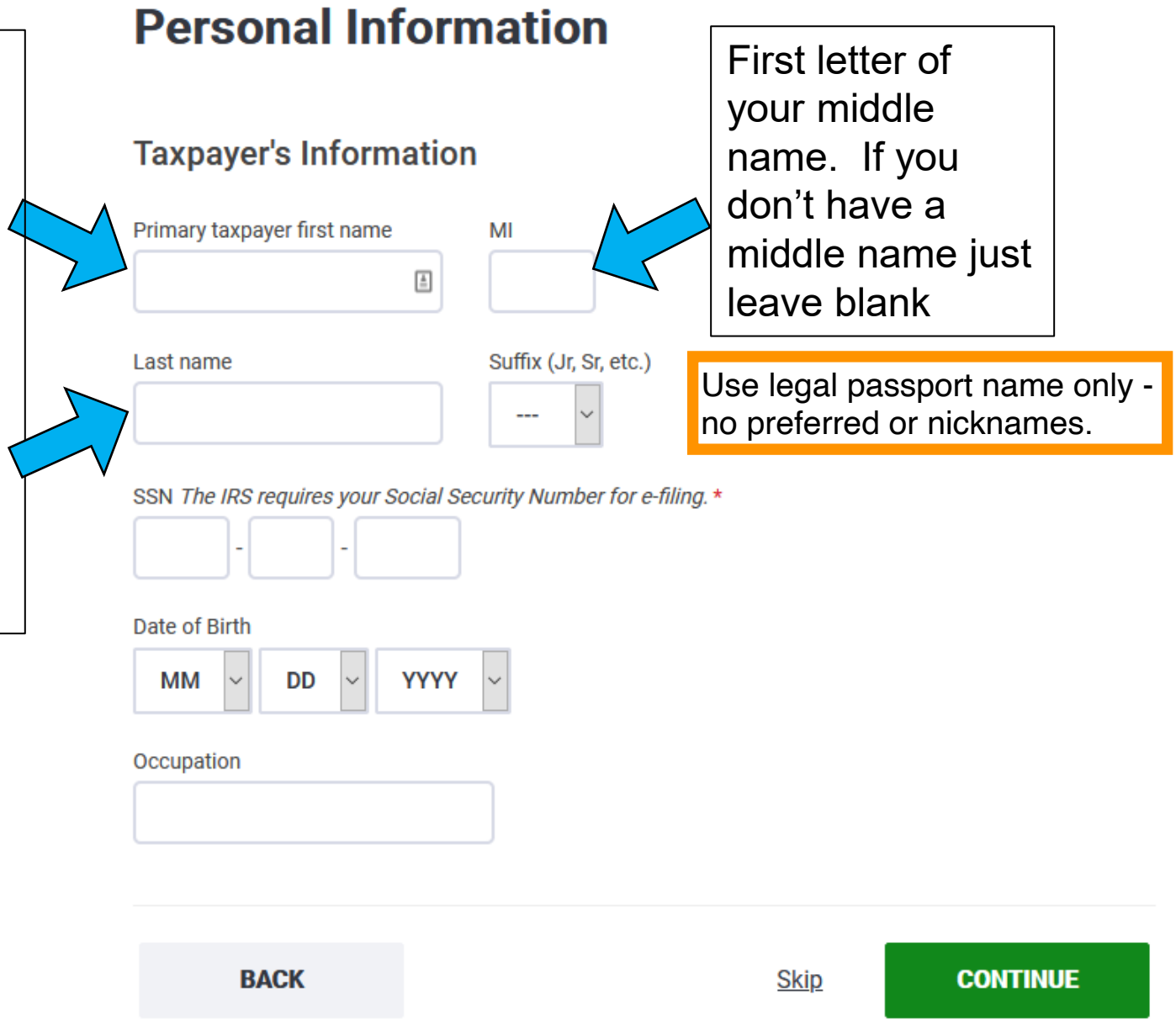
Want to get a head start on your Tax Return?

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.



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

Use legal passport name only - no preferred or nicknames.

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

MM DD YYYY

Occupation

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

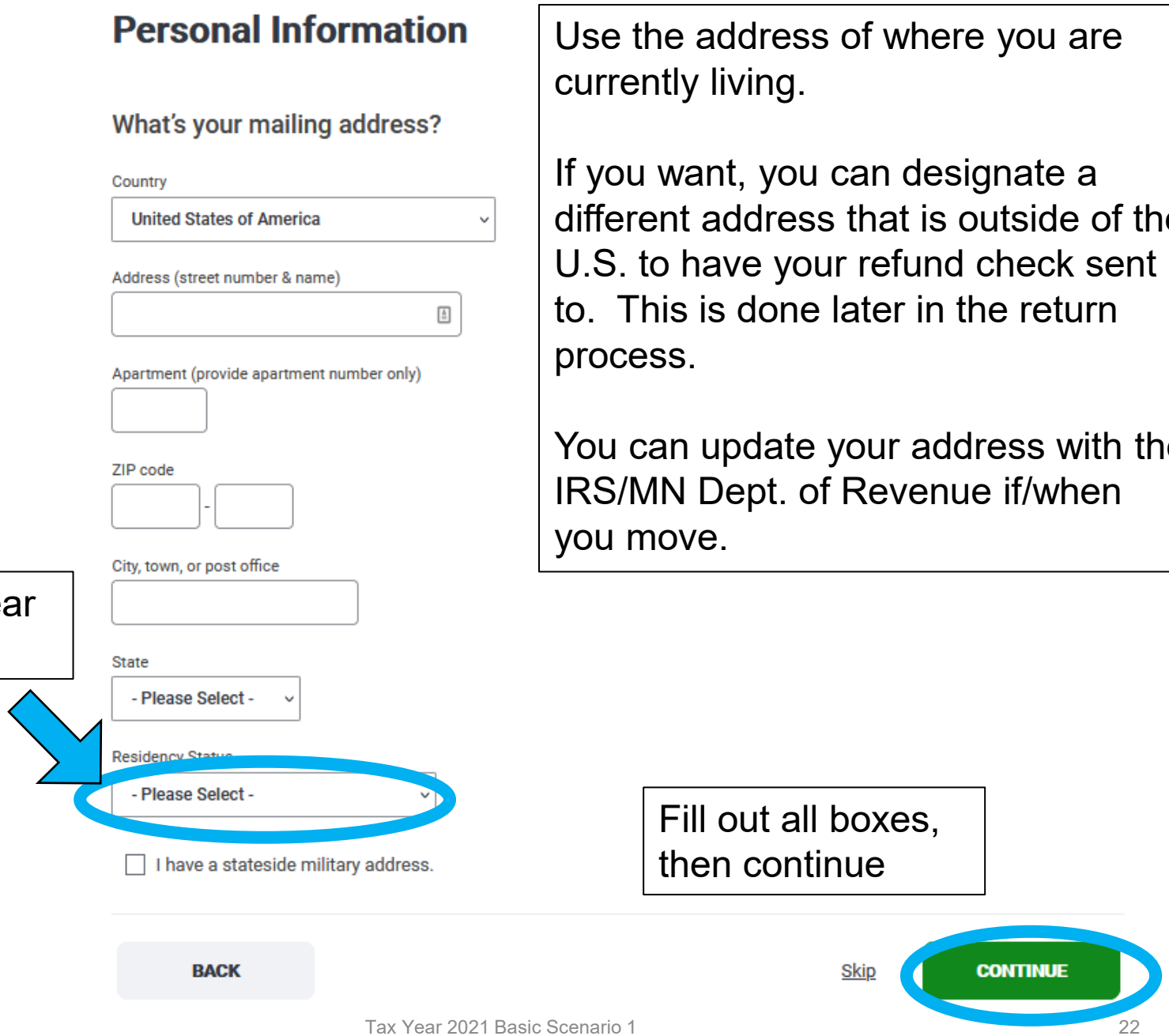
These are very common reasons for a return to be rejected during e-filing.

Confirm all boxes, then continue

BACK

Skip

CONTINUE



Use the address of where you are currently living.

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

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

Enter Full-Year Resident

Fill out all boxes, then continue

Additional Information

Do NOT put a check mark in any of these boxes!

Taxpayer's Information

Check any of these that apply to you:

- Support can be claimed as a dependent on someone else's return. Learn more
- Support was over age 18 and a full-time student at an eligible educational institution. Learn more
- Support is blind.
- Support is deceased.
- Support wishes to contribute $3 to the Presidential Election Campaign Fund.
- Support served in a combat zone during the current tax year. Learn more
- Support wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit.
- Support was affected by a natural disaster during the current tax year.
- Support received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during 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.

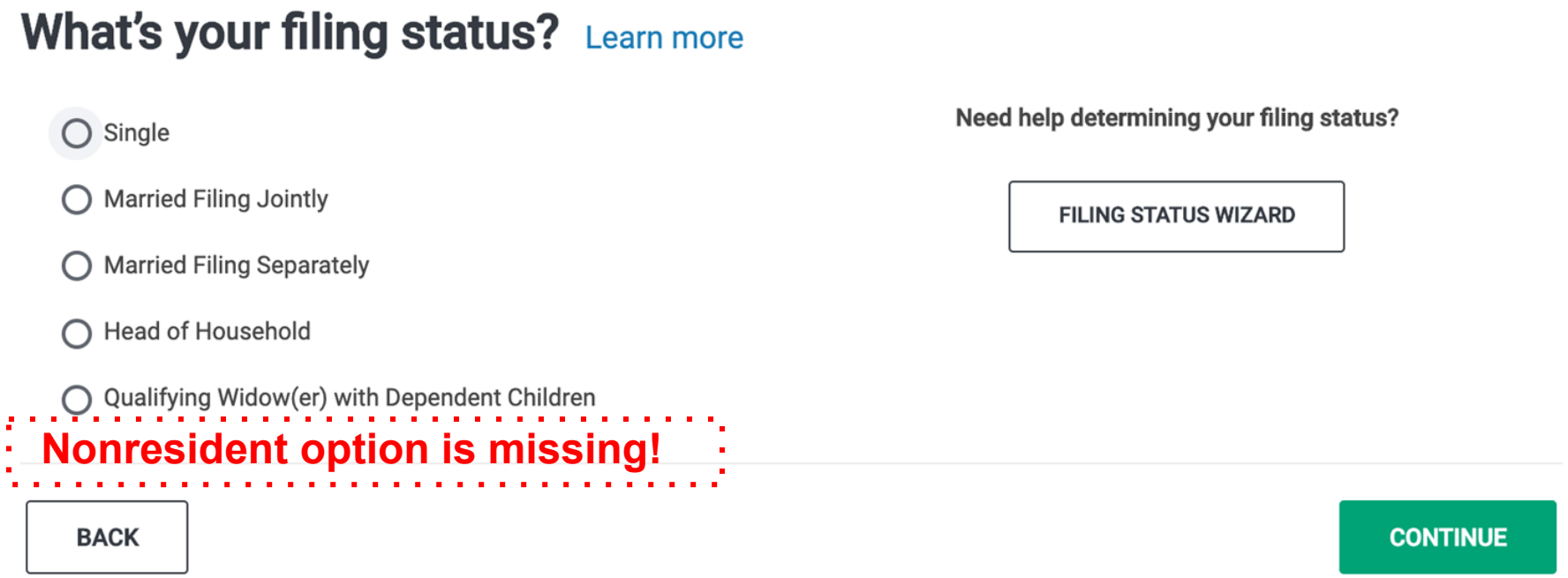
Continue Only

BACK

Skip CONTINUE

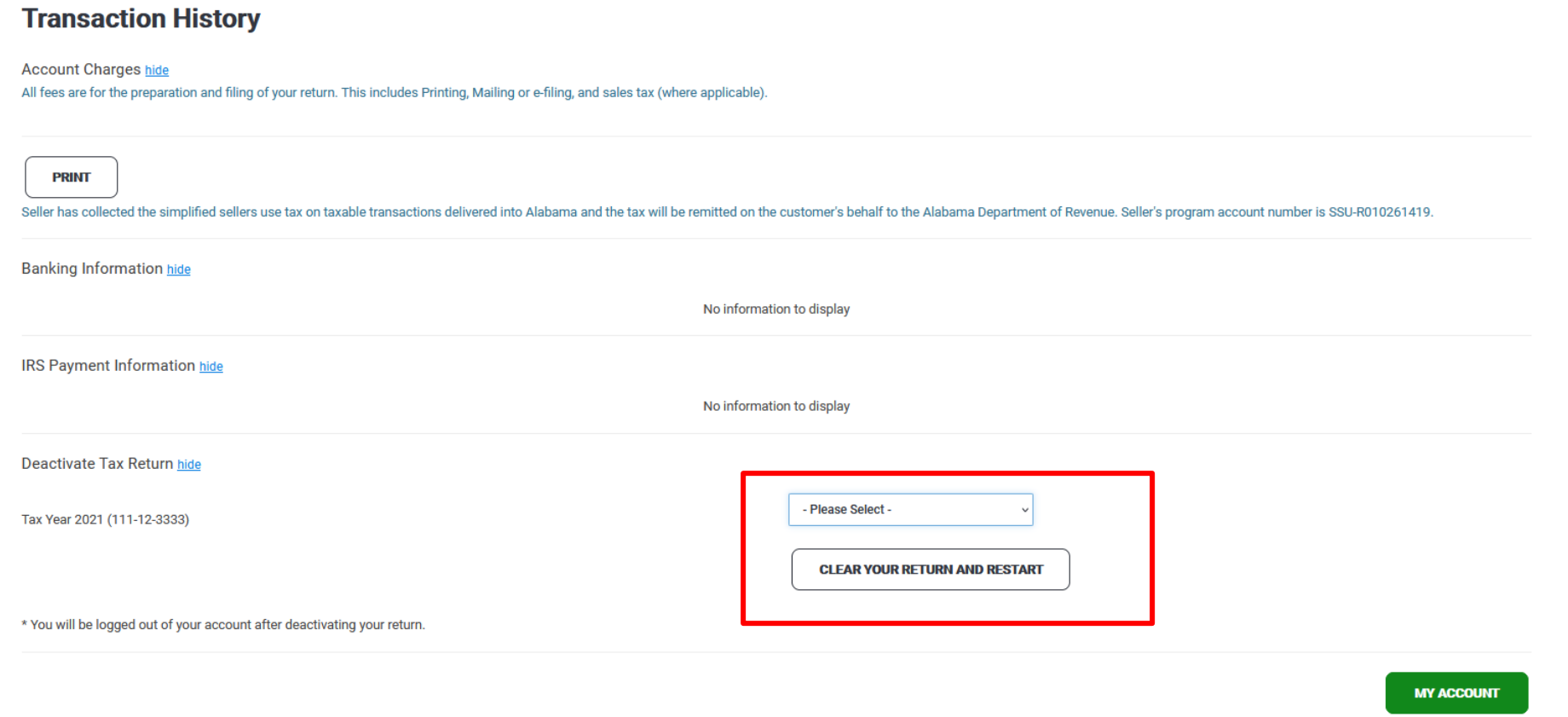
What's your filing status?
Learn more
Single
Married Filing Jointly
Married Filing Separately
Head of Household
Qualifying Widow(er) with Dependent Children
Nonresident Alien
Need help determining your filing status?
WIZARD
Do NOT click
IMPORTANT you SELECT this option, Nonresident Alien, only. Anything else you will be in the wrong tax program and not get correct documents as NRA for tax purpose.
CONTINUE
Do NOT click 'BACK"

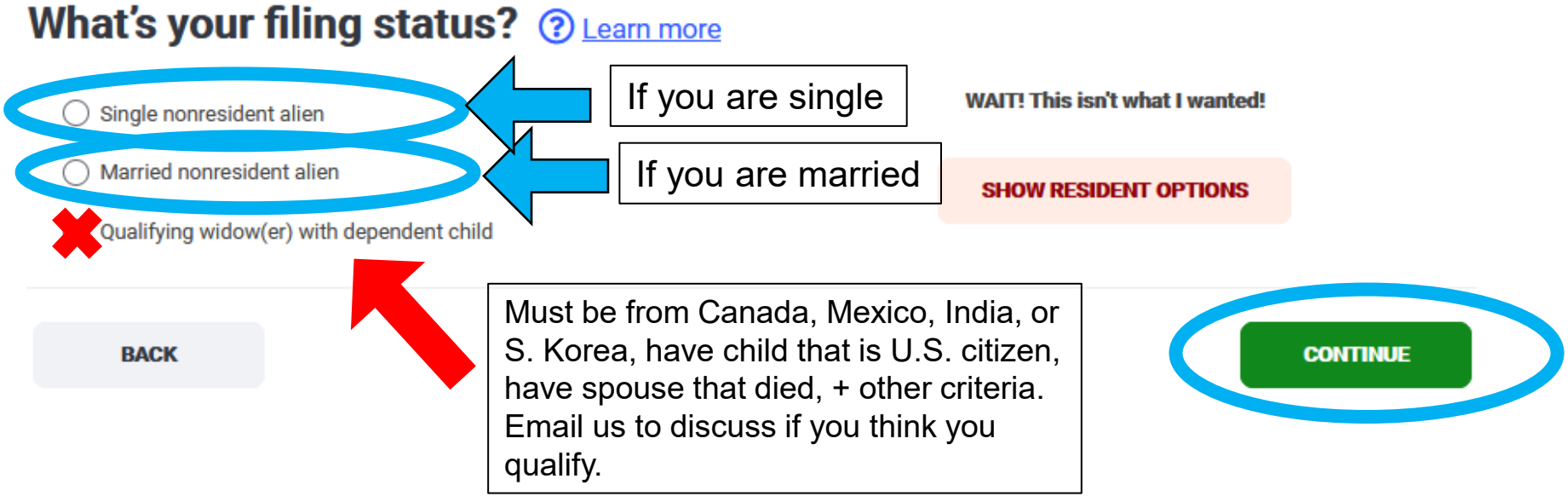
If you do not see "Nonresident Alien" in the Filing Status section, you have accidentally clicked on a wrong button and are in the wrong software package.



Don’t see “Non-resident Alien” under Filing Status? Do the following to fix it:

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





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

Dependents or Qualifying Person(s)

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

Learn more

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

Select which applies to you

YES NO

Notes:
A spouse is never a dependent.

You must be from Canada, Mexico, India, or S. Korea to claim an exemption for your dependent. Your dependent must be a citizen or resident alien for 2021 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

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

Select which applies to you

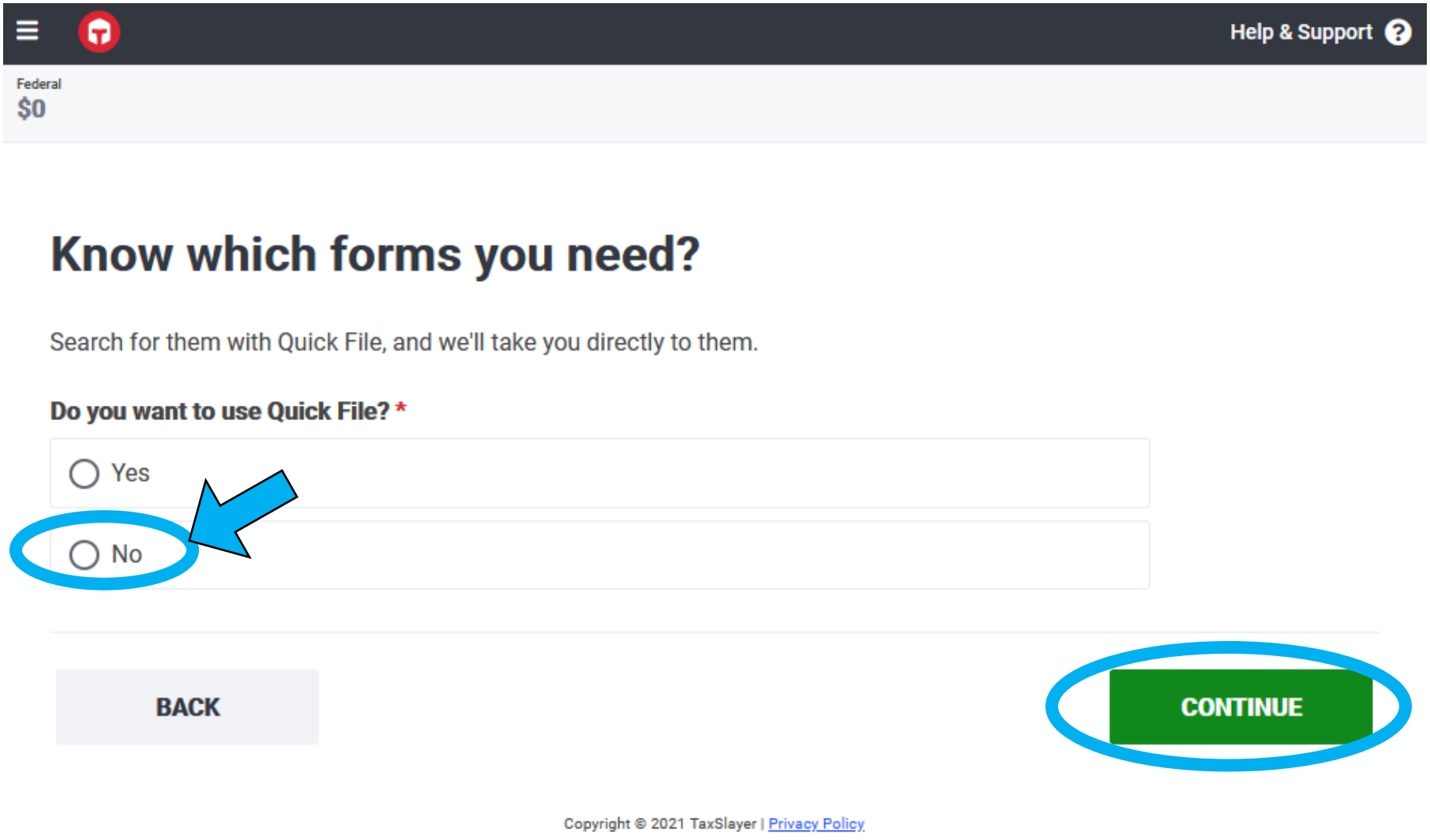
- ◯ Yes, someone on my return received an Identity Protection PIN.
- ◯ No, no one on my return received an Identity Protection PIN.

BACK Skip CONTINUE

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

Let's do this! #slayit

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


Help & Support
Federal
$0
Know which forms you need?
Search for them with Quick File, and we'll take you directly to them.
Do you want to use Quick File? *
Yes
No
BACK
CONTINUE
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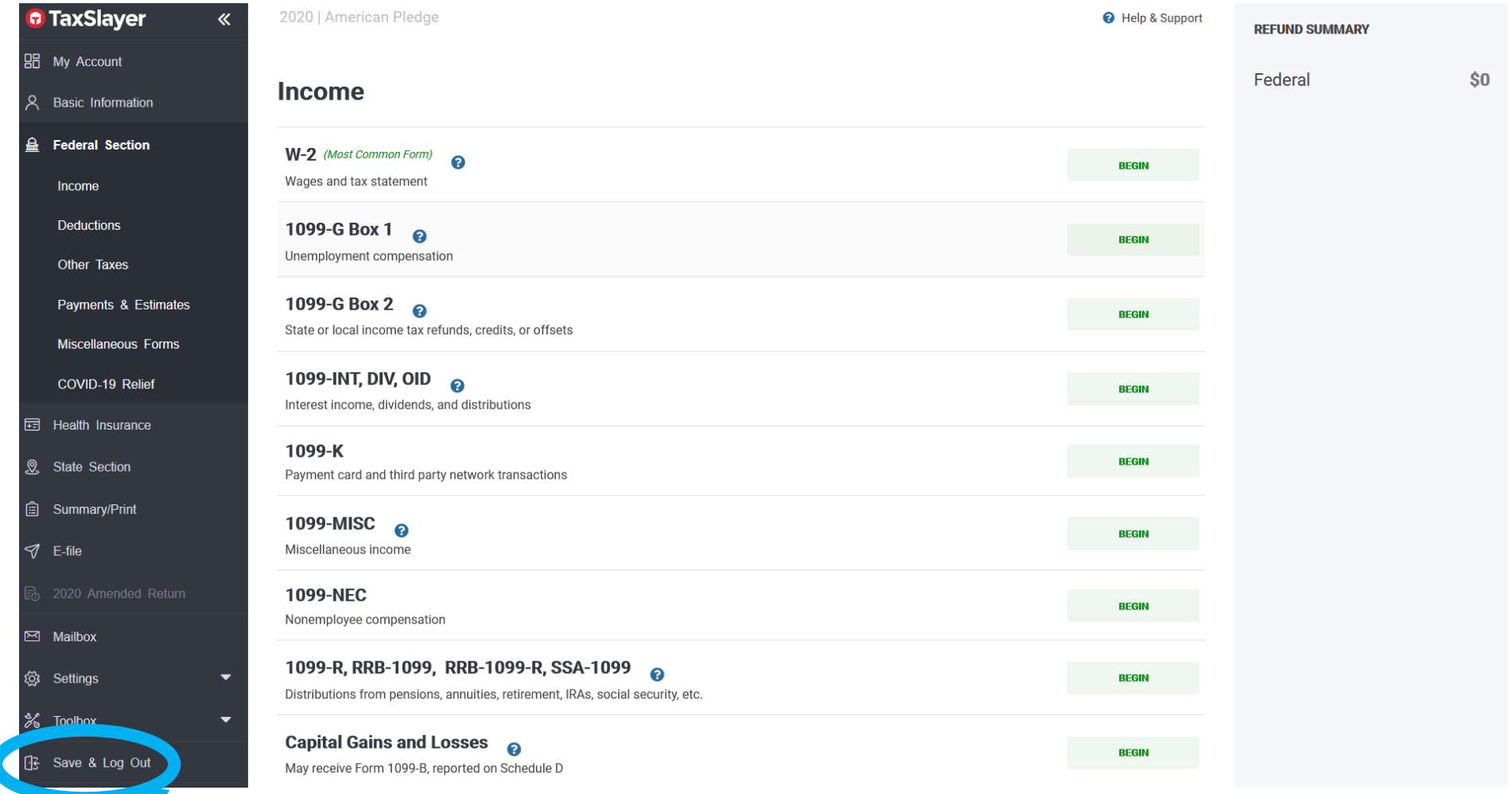
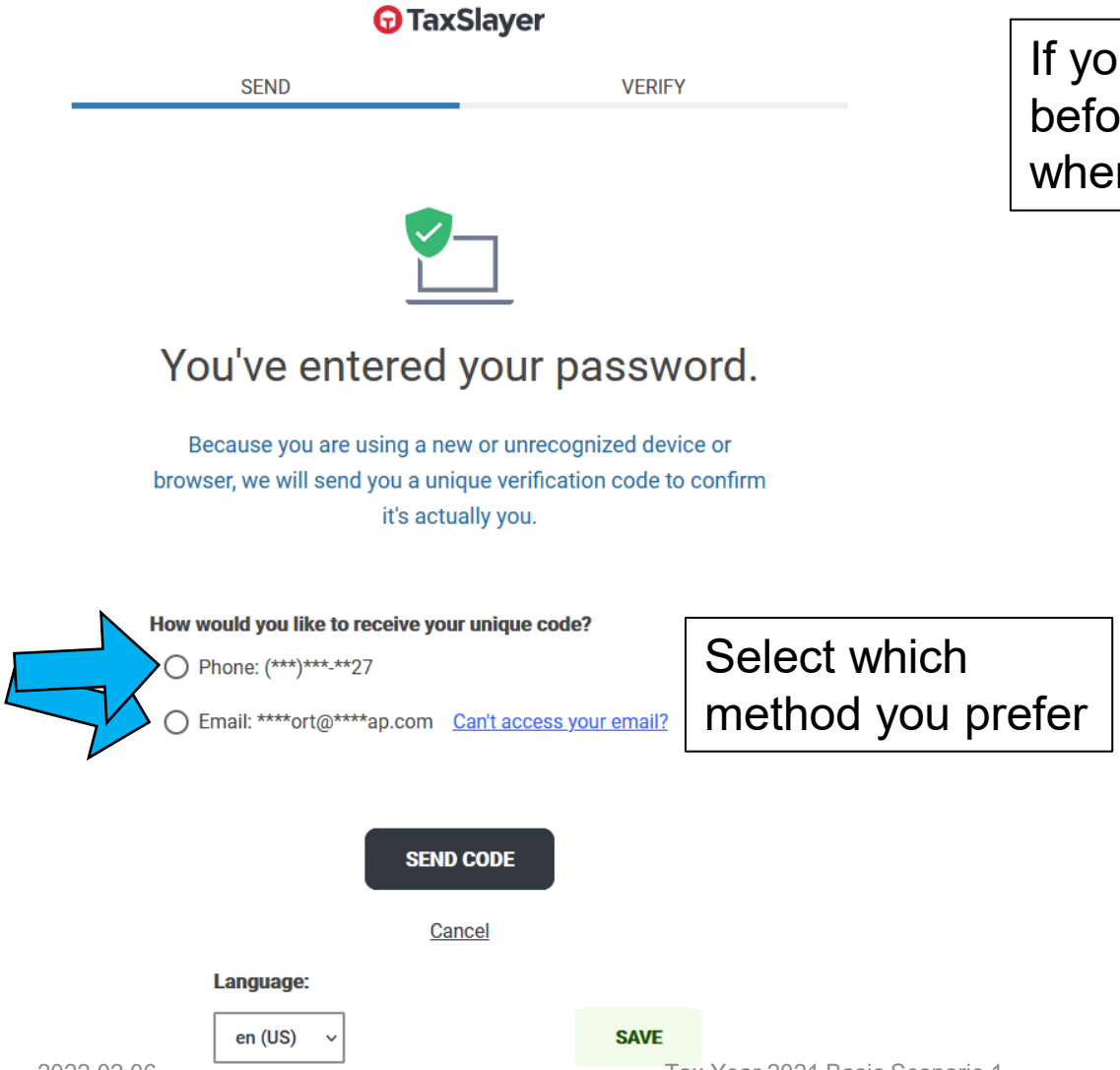


Note: You are now at the point where you can save and exit the return, and come back later if needed.

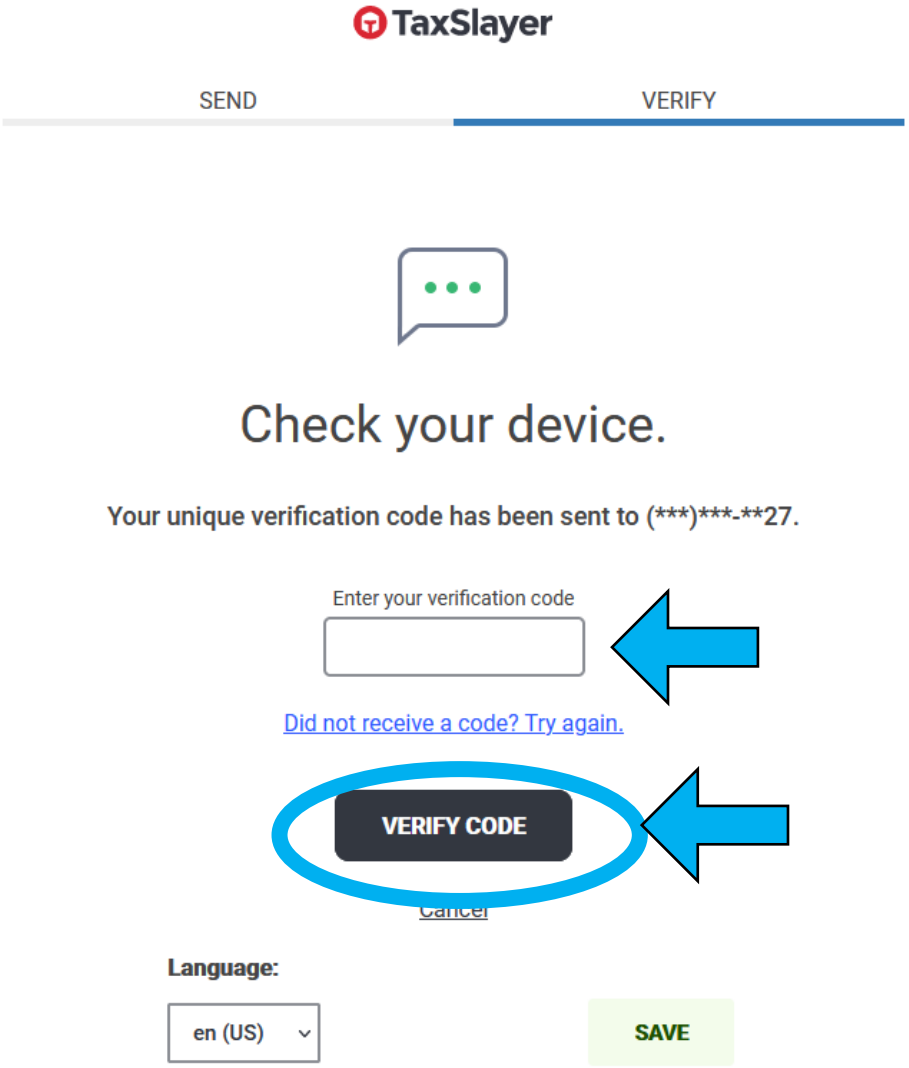
When you log back in to TaxSlayer:



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

Select which method you prefer

Enter your code



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

MY ACCOUNT **2021** Tax Return

Welcome back! Let's finish your 2021 tax return.

CONTINUE

RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	**$0.00**

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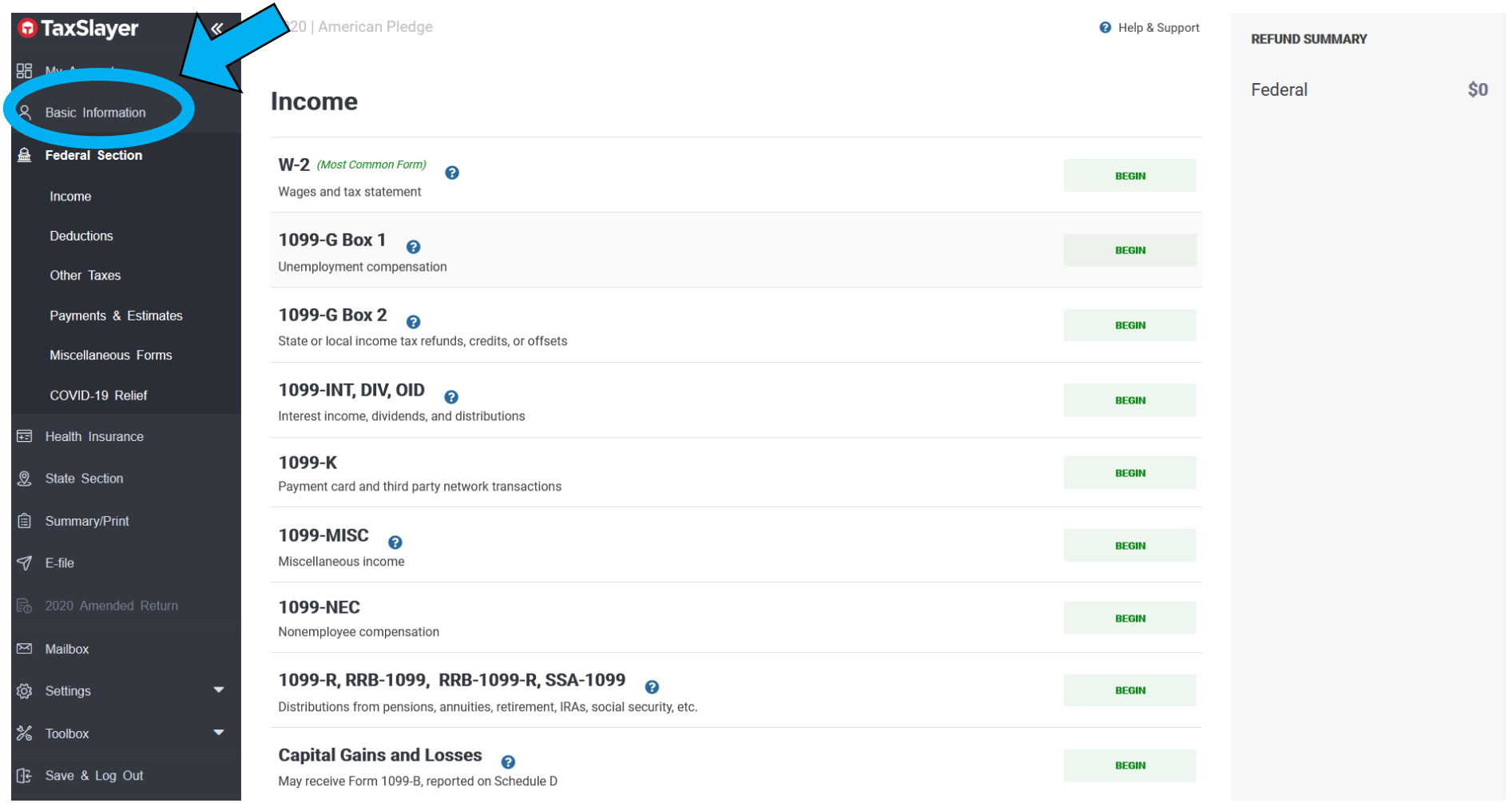
Privacy Policy

Entering Personal Information

Click on Basic Information



Basic Information

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

BACK

CONTINUE

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Schedule OI

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

CONTINUE

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Schedule OI - General Information

General Information

Type of 1040NR Entity *

Individual

Individual

Country of Citizenship *

- Please Select -

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 Residence *

- Please Select -

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

U.S. Travel Information

Other not listed

Other Not Listed

Select type of U.S. Visa *

Nonimmigrant Visa

Nonimmigrant Visa

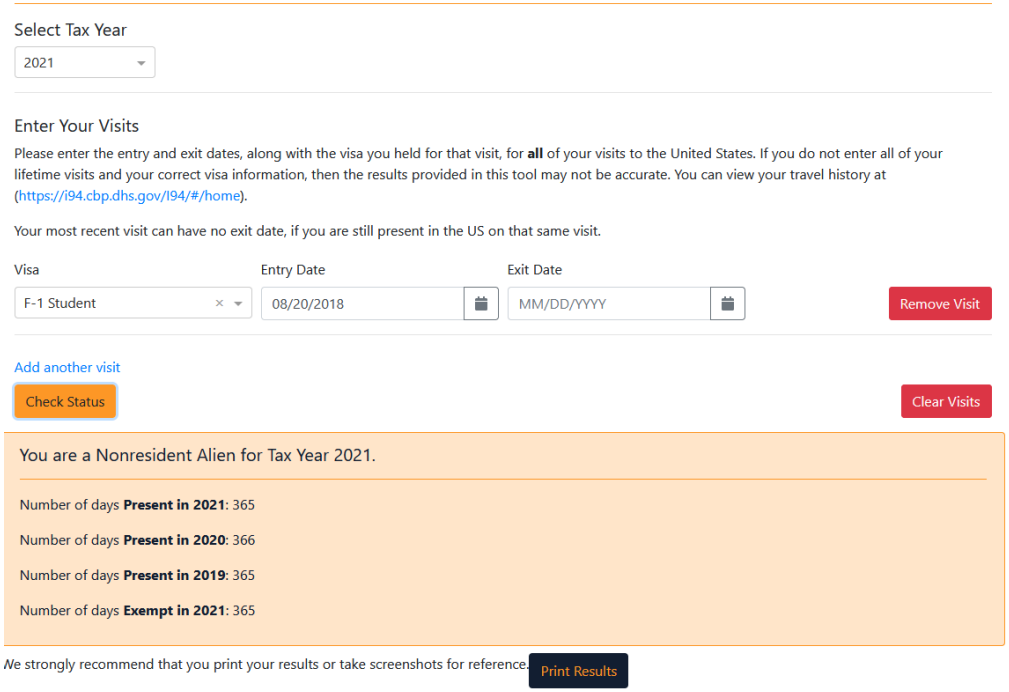
Select nonimmigrant visa type on the last day of the tax year

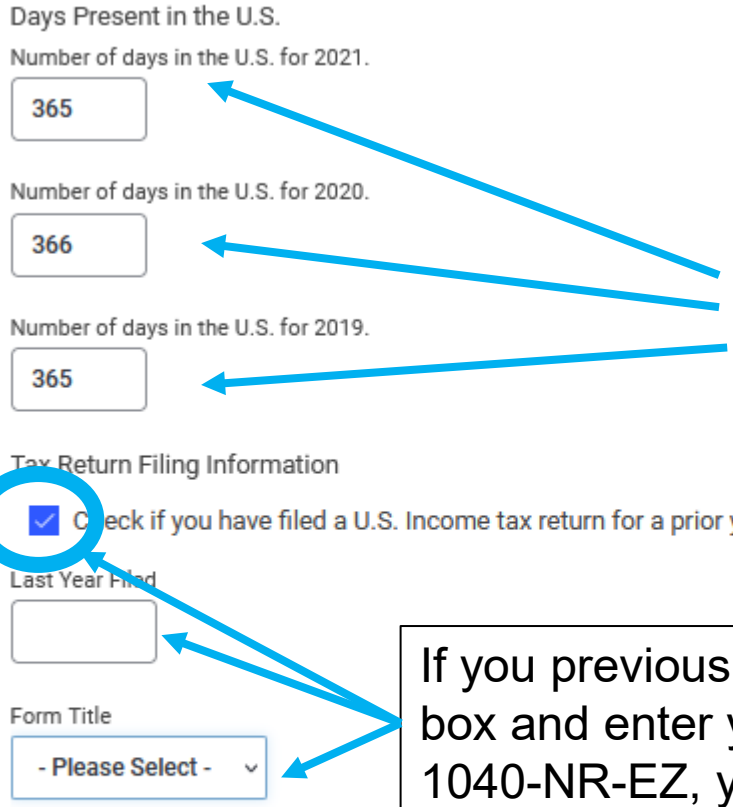
Visa type: F-1, J-1, etc.

- ☐ 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!

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





Use the GLACIER Tax Summary report for assistance or tax return/ documents produced with your federal return 1040NR in GTP for help.

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

Check box if any apply.

Refund Mailing Information

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

Country

- Please Select -

Address (street number & name)

City, town, or post office

Foreign State or Province

Foreign Postal Code

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

Income Exempt from U.S. Tax

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

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

Check box if any apply (usually no).

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

$

Leave blank!

Real Property Election

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

○ Yes

○ No

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

CANCEL

2022.02.06

CONTINUE

Schedule OI

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

CONTINUE

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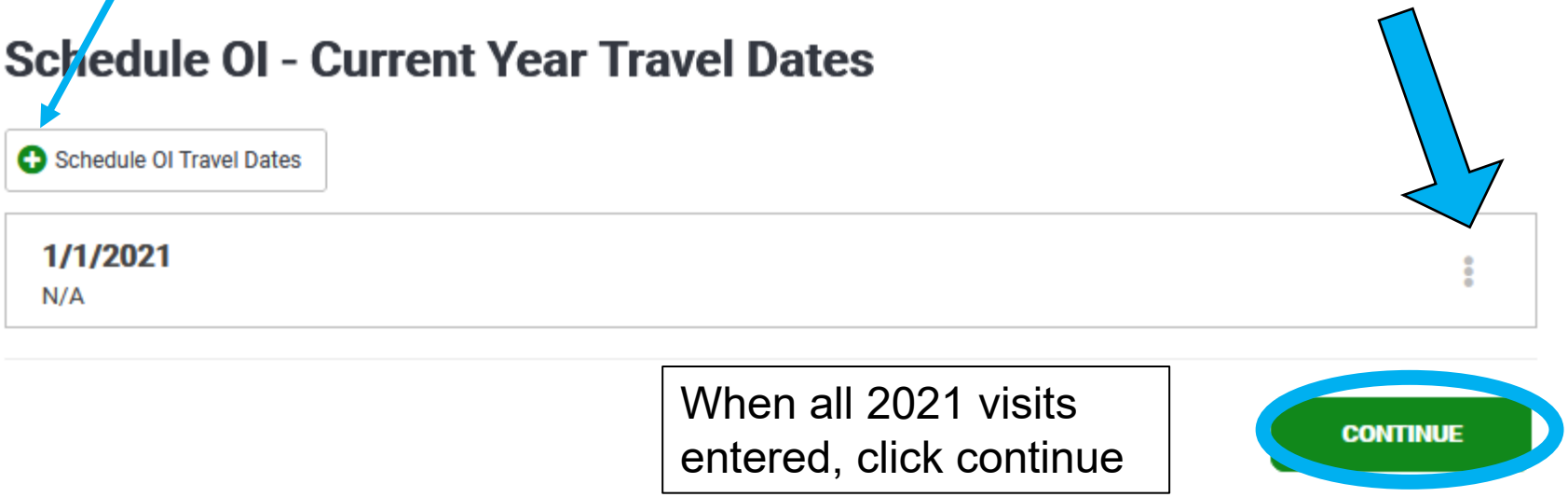
Enter the information for your first visit to the U.S. during 2021. You can enter additional visits after this step.

Enter first date present in U.S. during 2021. Either date you entered during 2021, or 01/01/2021 if you were already here at start of 2021.

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

If you have more entry/exit dates during 2021 click here to enter them.

Click here to edit or delete this info.



When all 2021 visits entered, click continue

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Schedule OI

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

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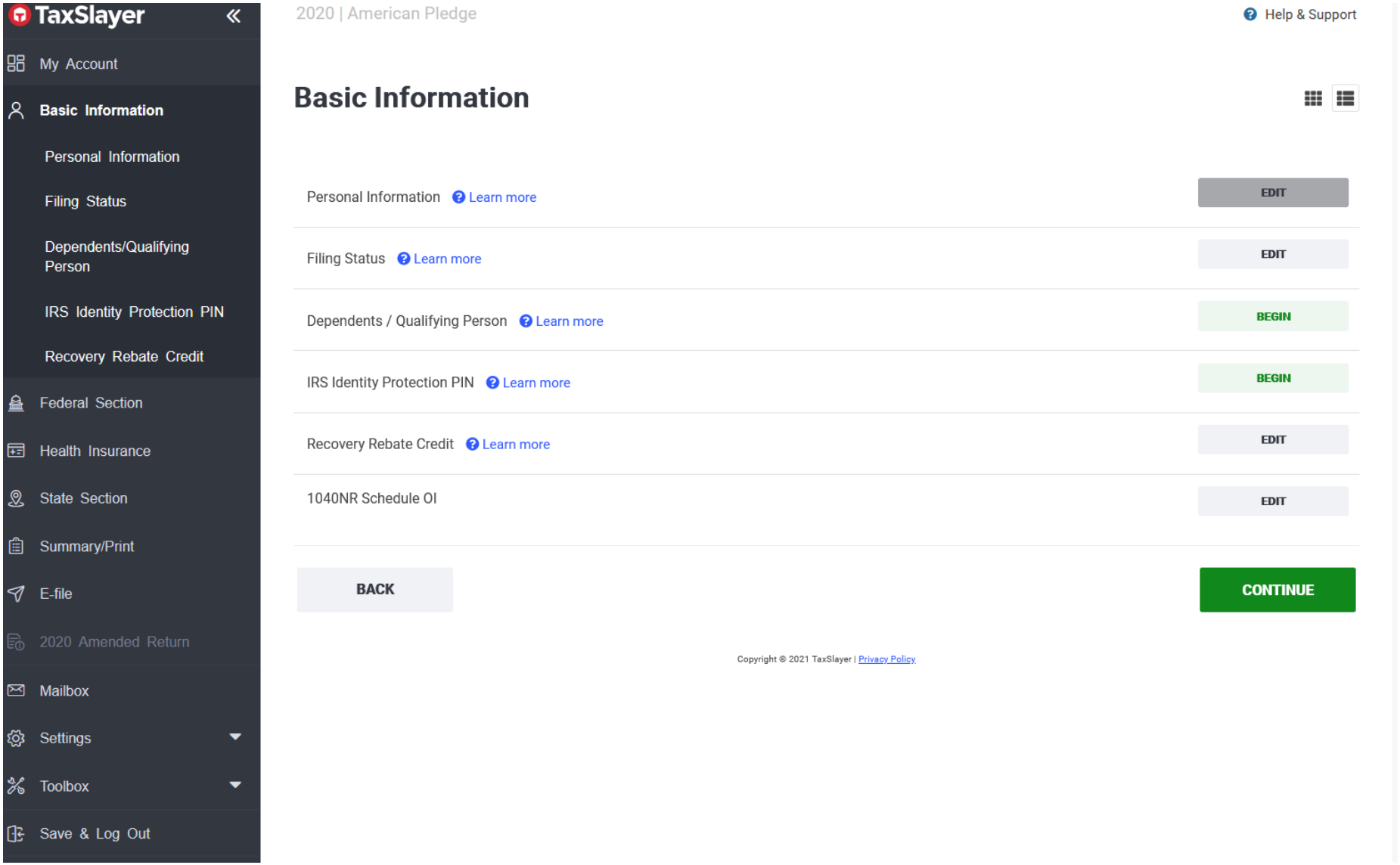
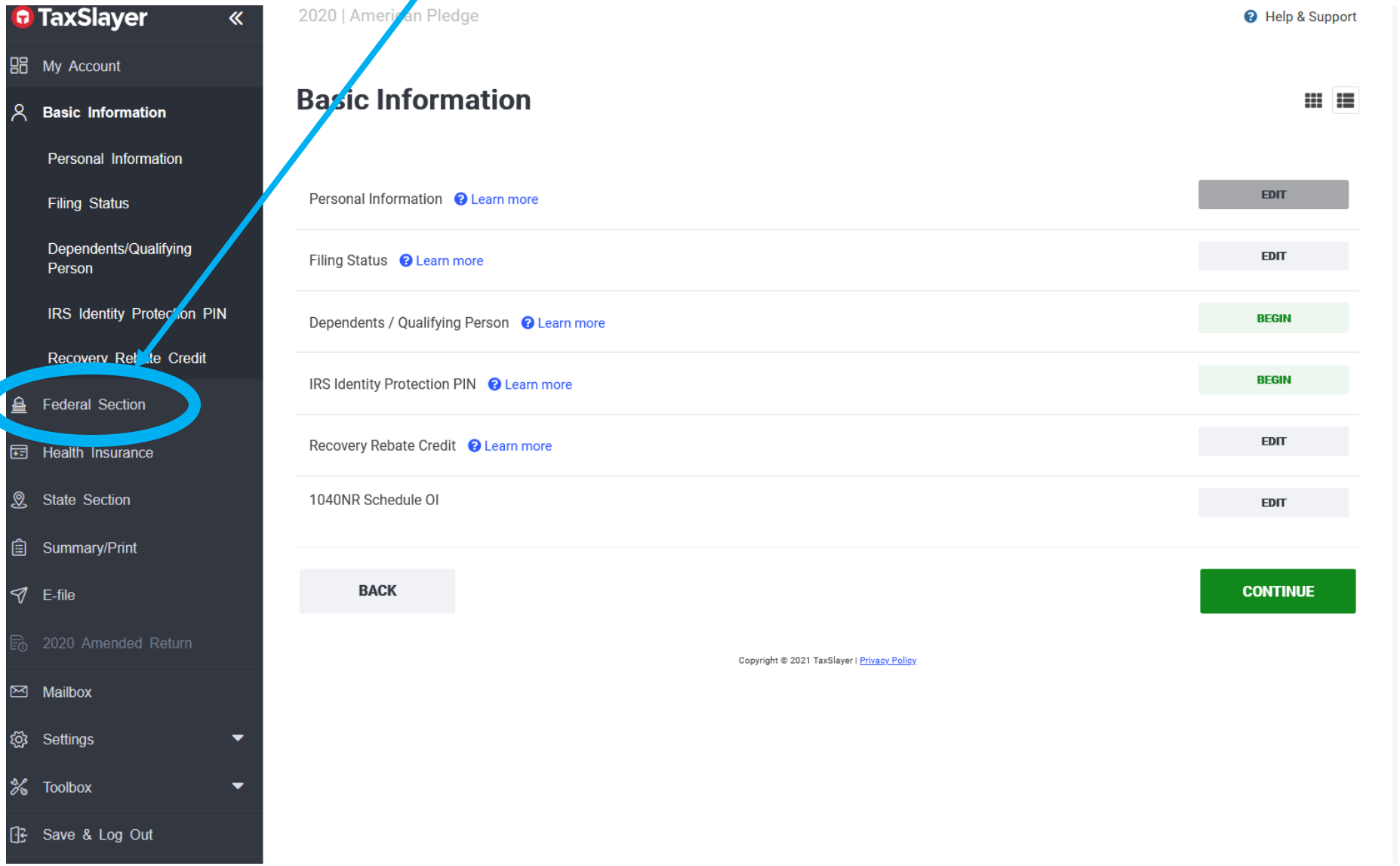
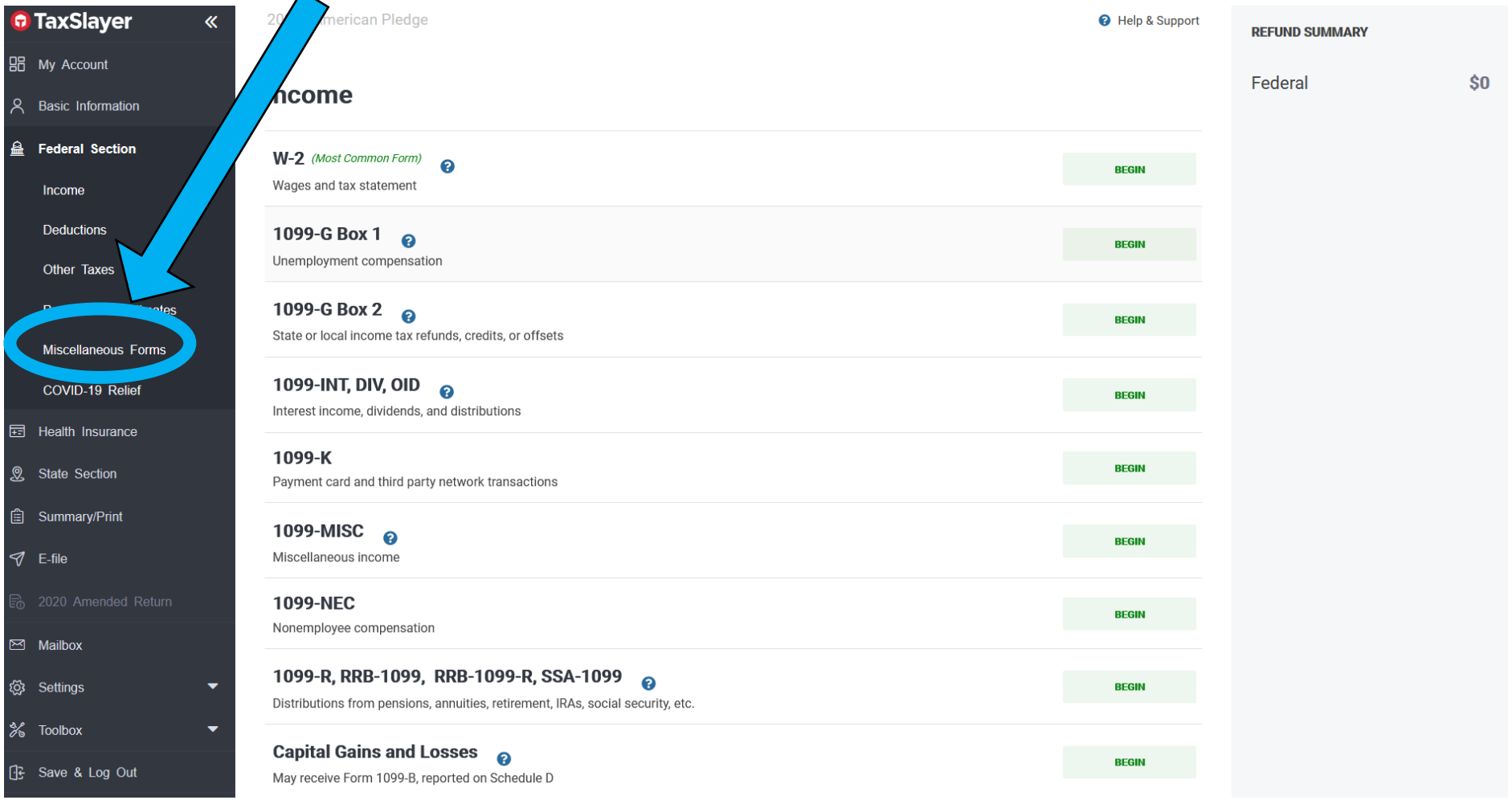
Back to Main Page



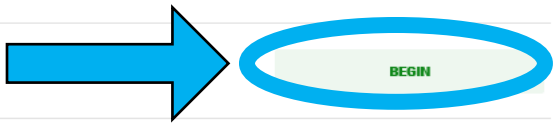
Click on Federal Section



Click on Miscellaneous Forms



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
PIN needed if you were issued a CP01A notice from the IRS — BEGIN

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

BACK CONTINUE

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Form 8843 Part I - General Information

Type of U.S. Visa/Immigration Status

Select type of U.S. Visa *

Nonimmigrant Visa

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

Nonimmigrant visa type code

F1

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

Date entered U.S.

MM DD YYYY

Date you first ever entered the U.S.

Visa Change Information

Have you changed your visa type (nonimmigrant status)?

Yes

No

Should already be filled out, go back and change under person info schedule OI if incorrect. 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 2020?

Korea South

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

What country issued you a passport?

- Please Select -

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

Passport number

Current Passport #

Days in the U.S. in 2021

365

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

Days in the U.S. in 2020

366

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

Days in the U.S. in 2019

365

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

Use the GLACIER Tax Summary report for assistance or tax return/documents produced with your federal return 1040NR in GTP for help.

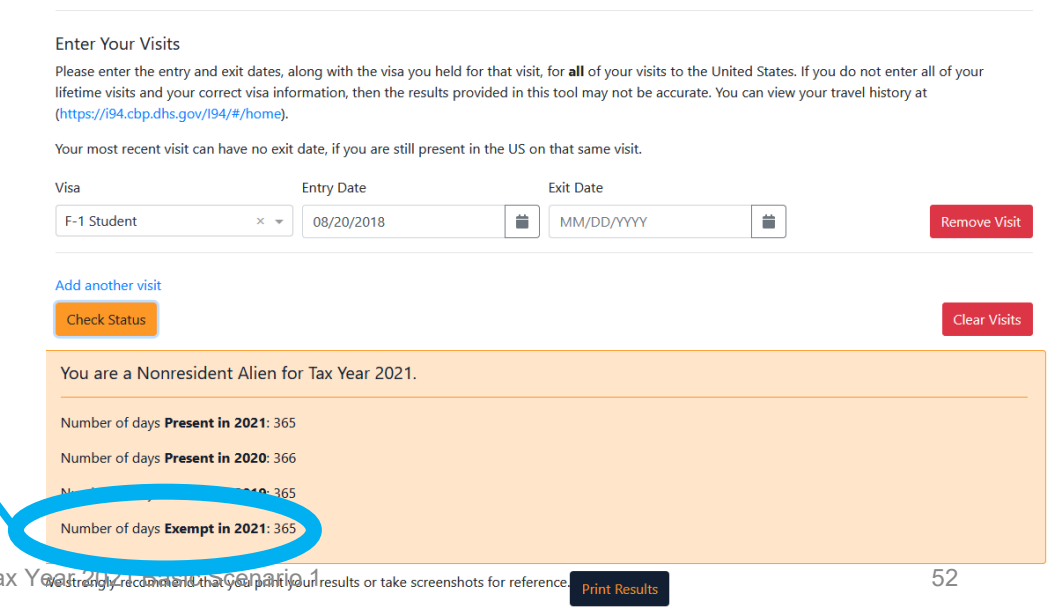
Days in 2021 you claim you can exclude (substantial presence test)

365

DELETE CANCEL

Once all information entered

CONTINUE



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

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information	EDIT
Part II - Teachers and Trainers	BEGIN
Part III - Students	BEGIN
Part IV - Professional Athletes	BEGIN
Part V - Individuals with a Medical Condition	BEGIN

F-1 or J-1 Student visas

CONTINUE

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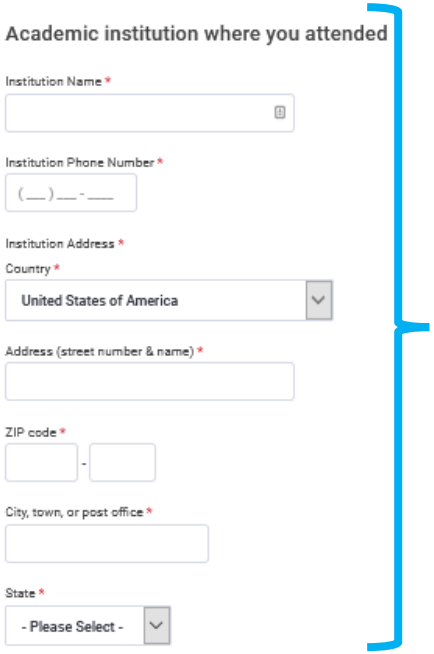
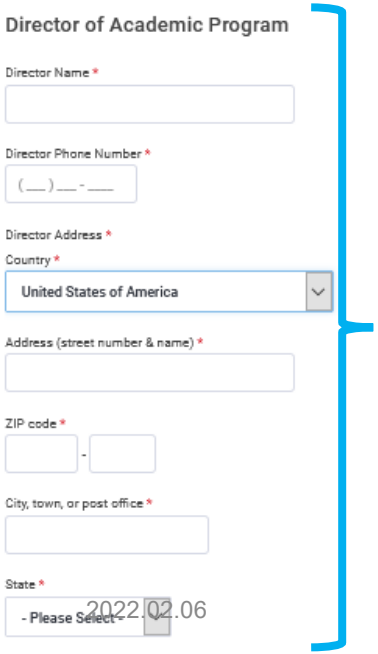
Form 8843 Part III - Students



Enter your school information

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



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

Form 8843 Part III - Students

Answer Yes or No

U.S. presence

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

- ◯ Yes

permanent resident status or have an application pending to change

Visa held during 2015

Did you have a visa in this year?

- ◯ Yes
- ◉ No

Visa held during 2016

Did you have a visa in this year?

- ◯ Yes
- ◉ No

Visa held during 2017

Did you have a visa in this year?

- ◯ Yes
- ◉ No

Visa held during 2018

Did you have a visa in this year?

- ◯ Yes
- ◉ No

Visa held during 2019

Did you have a visa in this year?

- ◯ Yes
- ◉ No

Visa held during 2020

Did you have a visa in this year?

- ◯ Yes
- ◉ No

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”

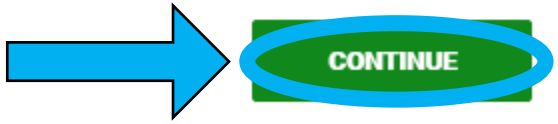
DELETE CANCEL

CONTINUE

Once all information entered

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information	EDIT
Part II - Teachers and Trainers	BEGIN
Part III - Students	BEGIN
Part IV - Professional Athletes	BEGIN
Part V - Individuals with a Medical Condition	BEGIN



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Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons
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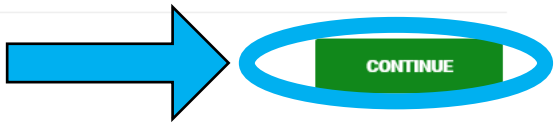
Requested on Form 9465 — BEGIN

IRS Identification Pin
PIN needed if you were issued a CP01A notice from the IRS — BEGIN

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

BACK



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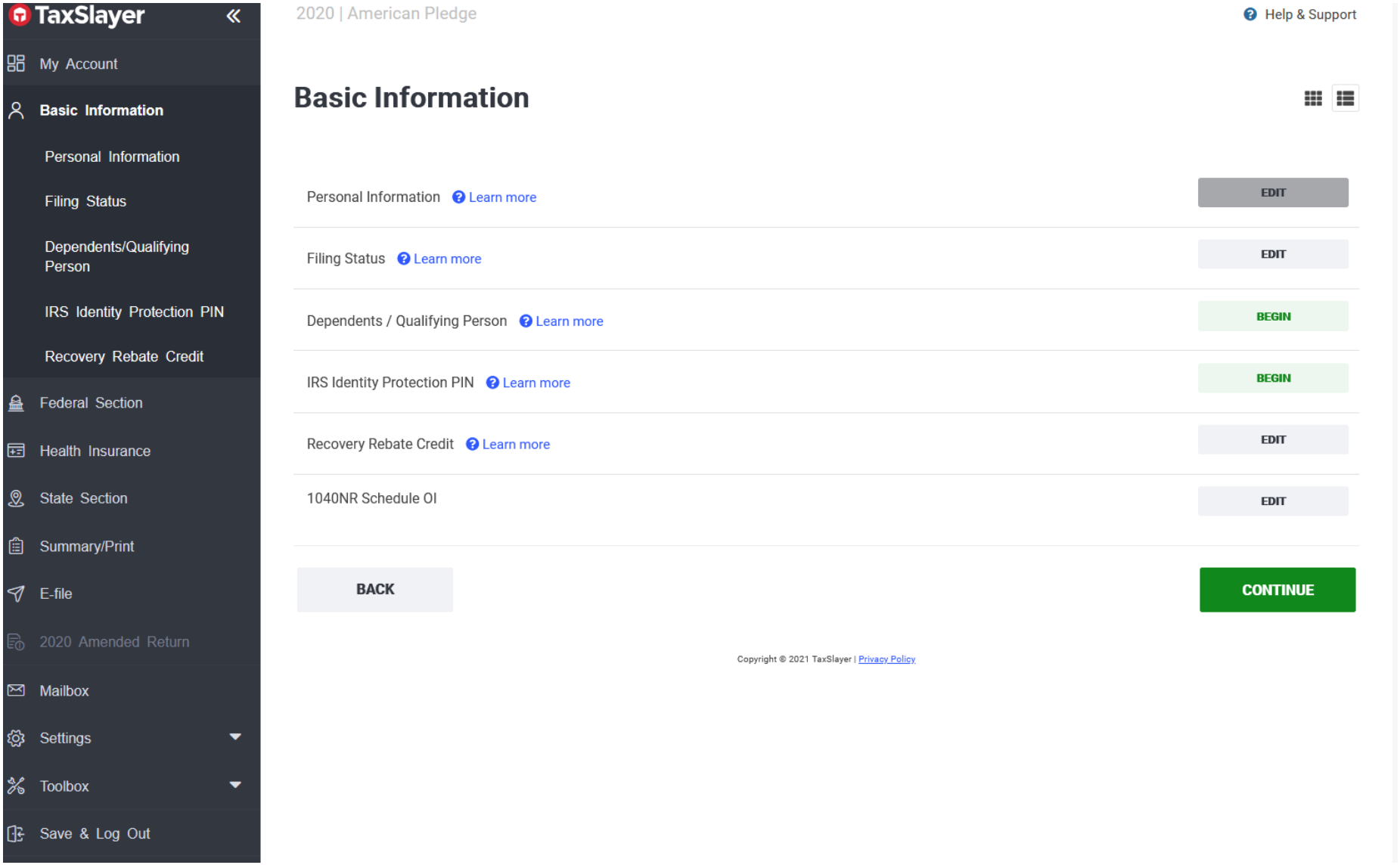
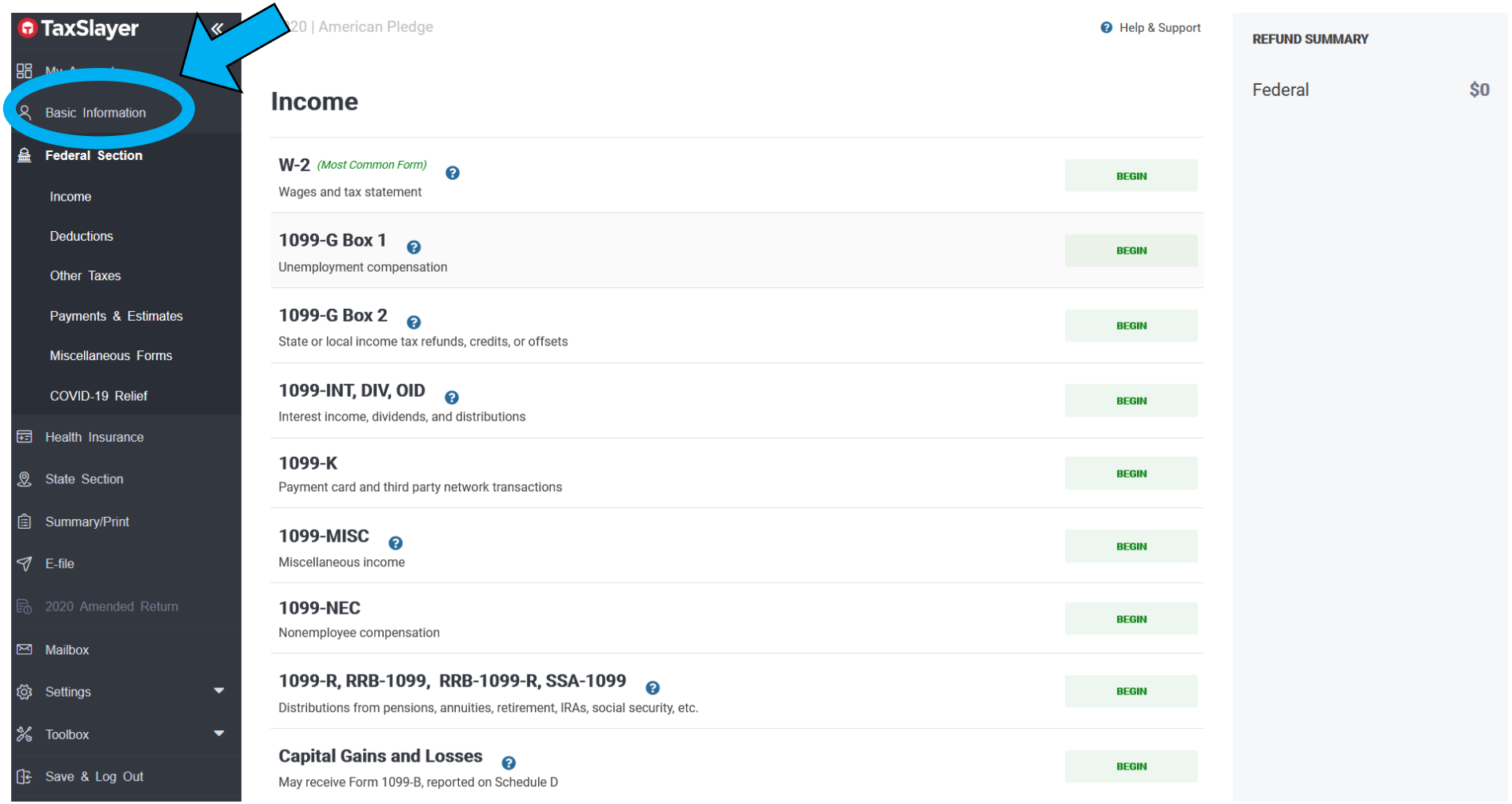
Back to Main Page



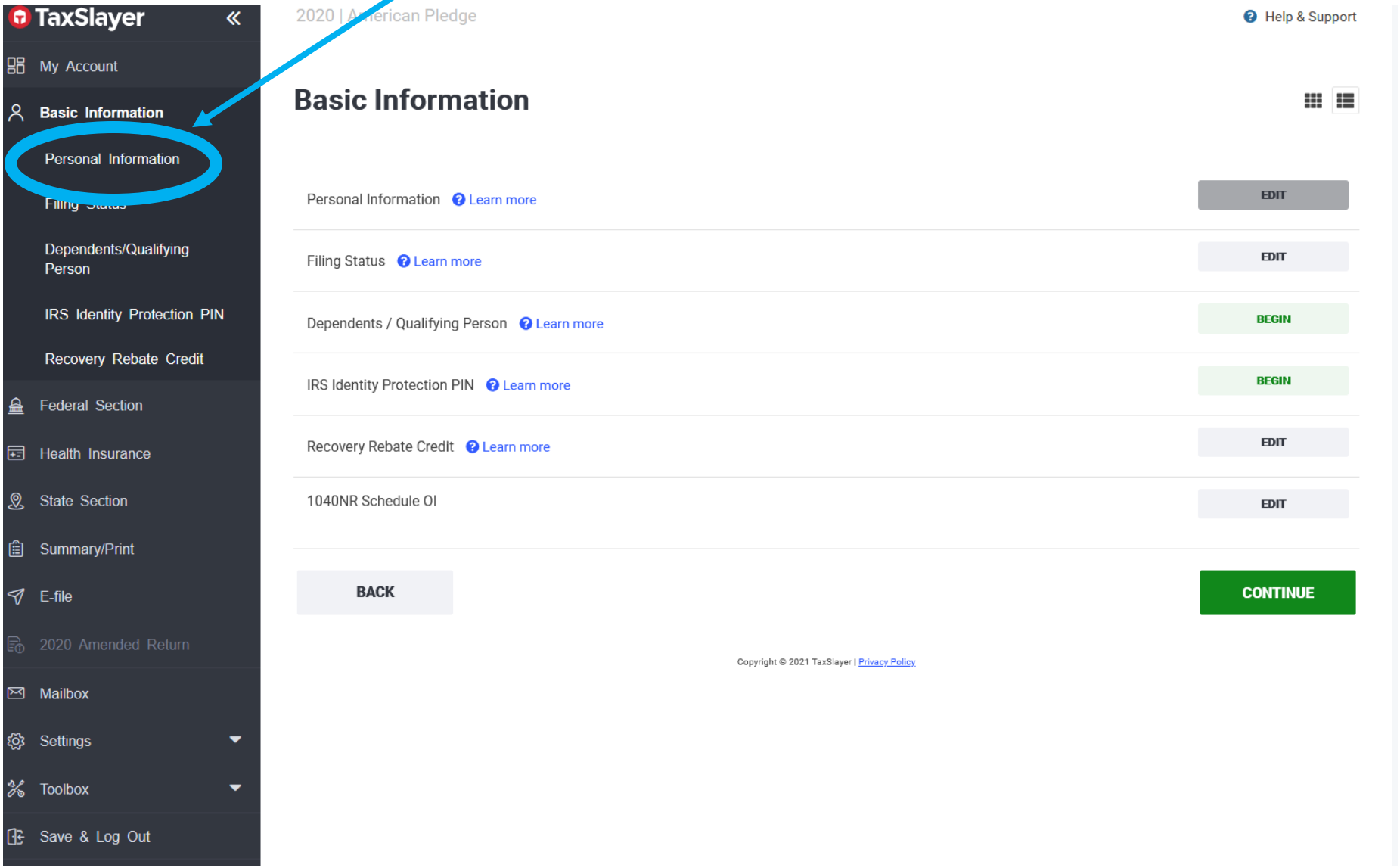
Entering Spouse Information

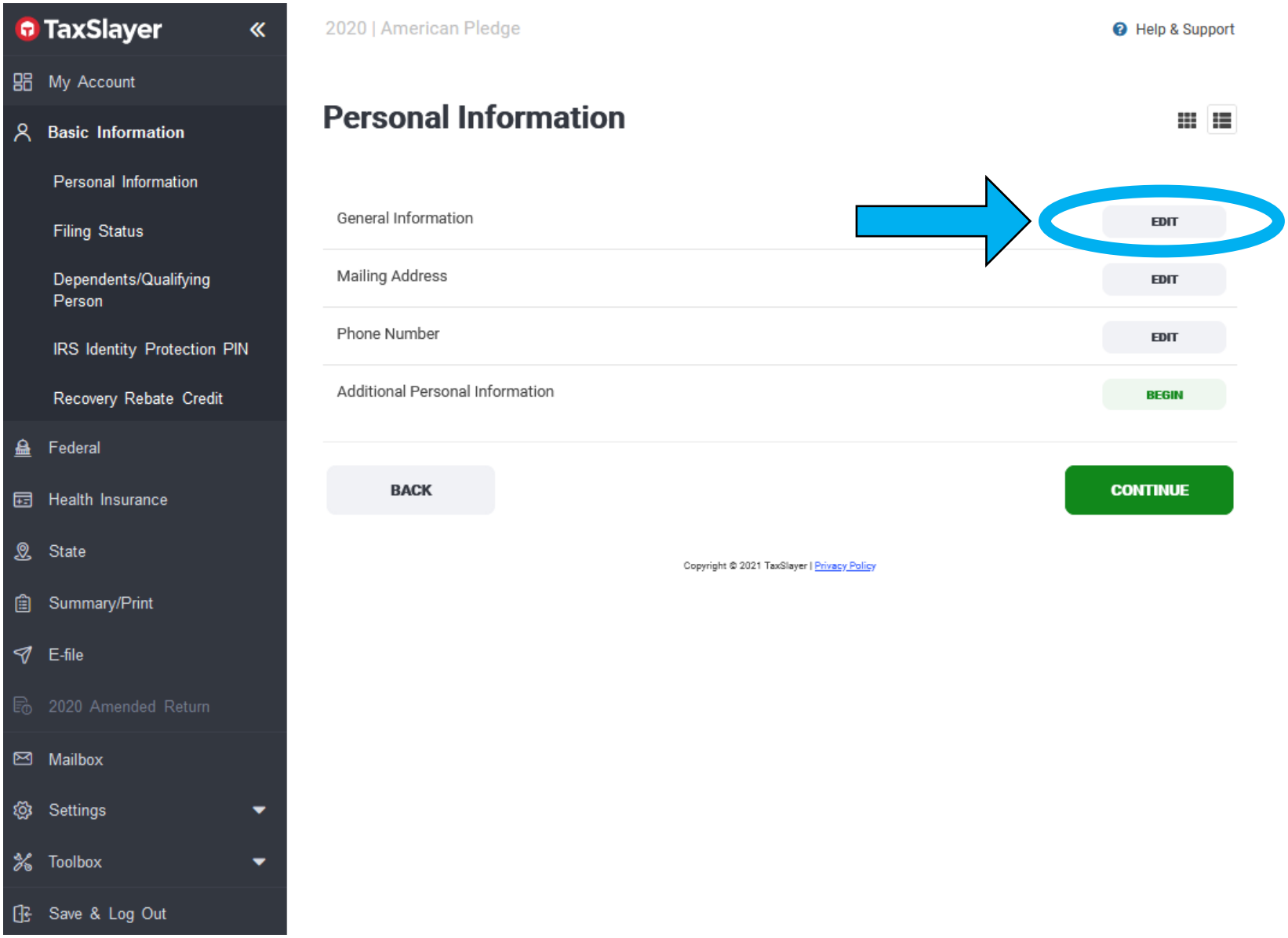
This is only if you are married, and your spouse has an ITIN/SSN. If you are single, or your spouse does not have an ITIN/SSN, skip this section.

Click on Basic Information



Click on Personal Information




TaxSlayer
My Account
Basic Information
Personal Information
Filing Status
Dependents/Qualifying Person
IRS Identity Protection PIN
Recovery Rebate Credit
Federal
Health Insurance
State
Summary/Print
E-file
2020 Amended Return
Mailbox
Settings
Toolbox
Save & Log Out
2020 | American Pledge
Help & Support
Personal Information
General Information
EDIT
Mailing Address
EDIT
Phone Number
EDIT
Additional Personal Information
BEGIN
BACK
CONTINUE
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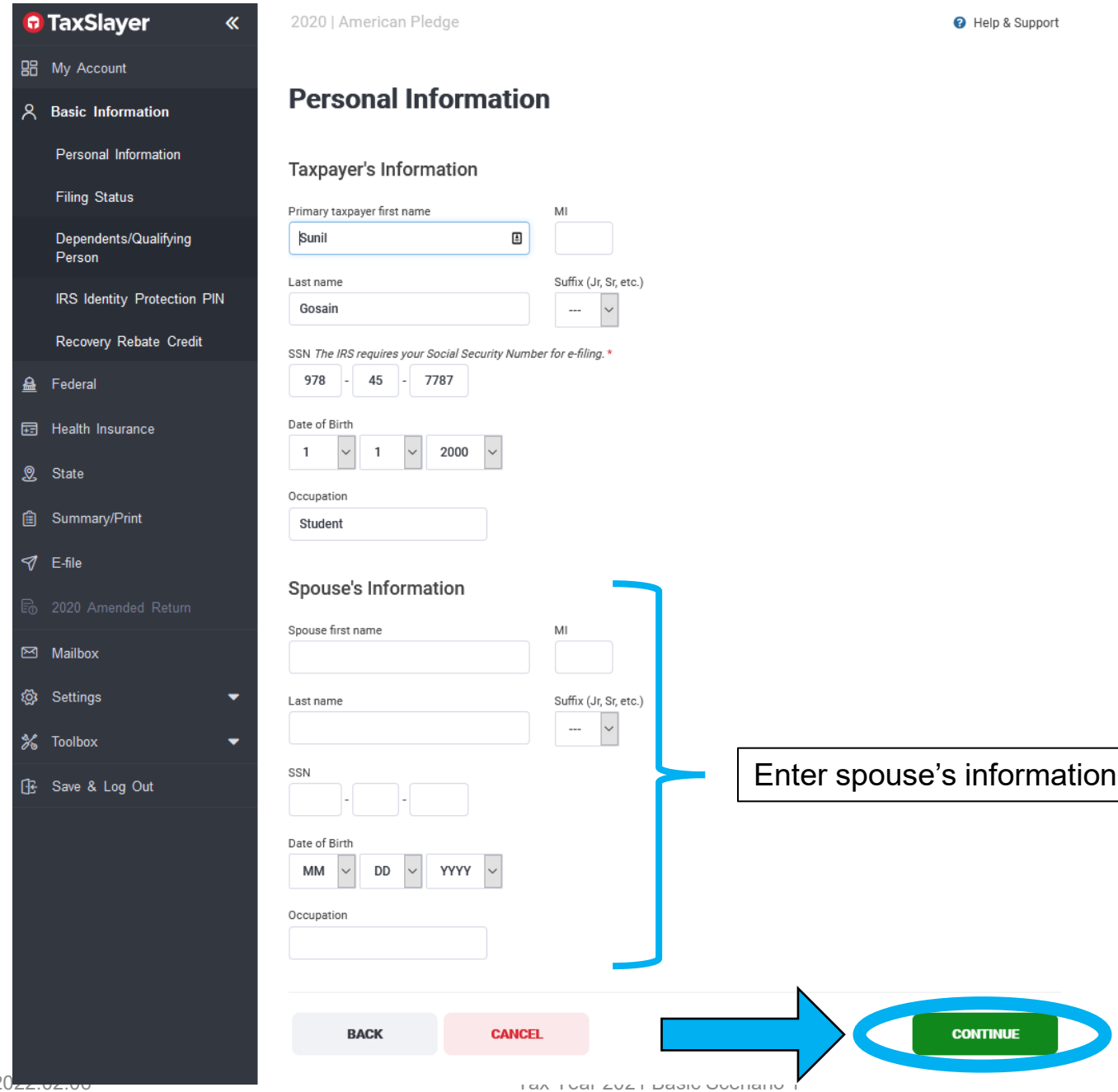
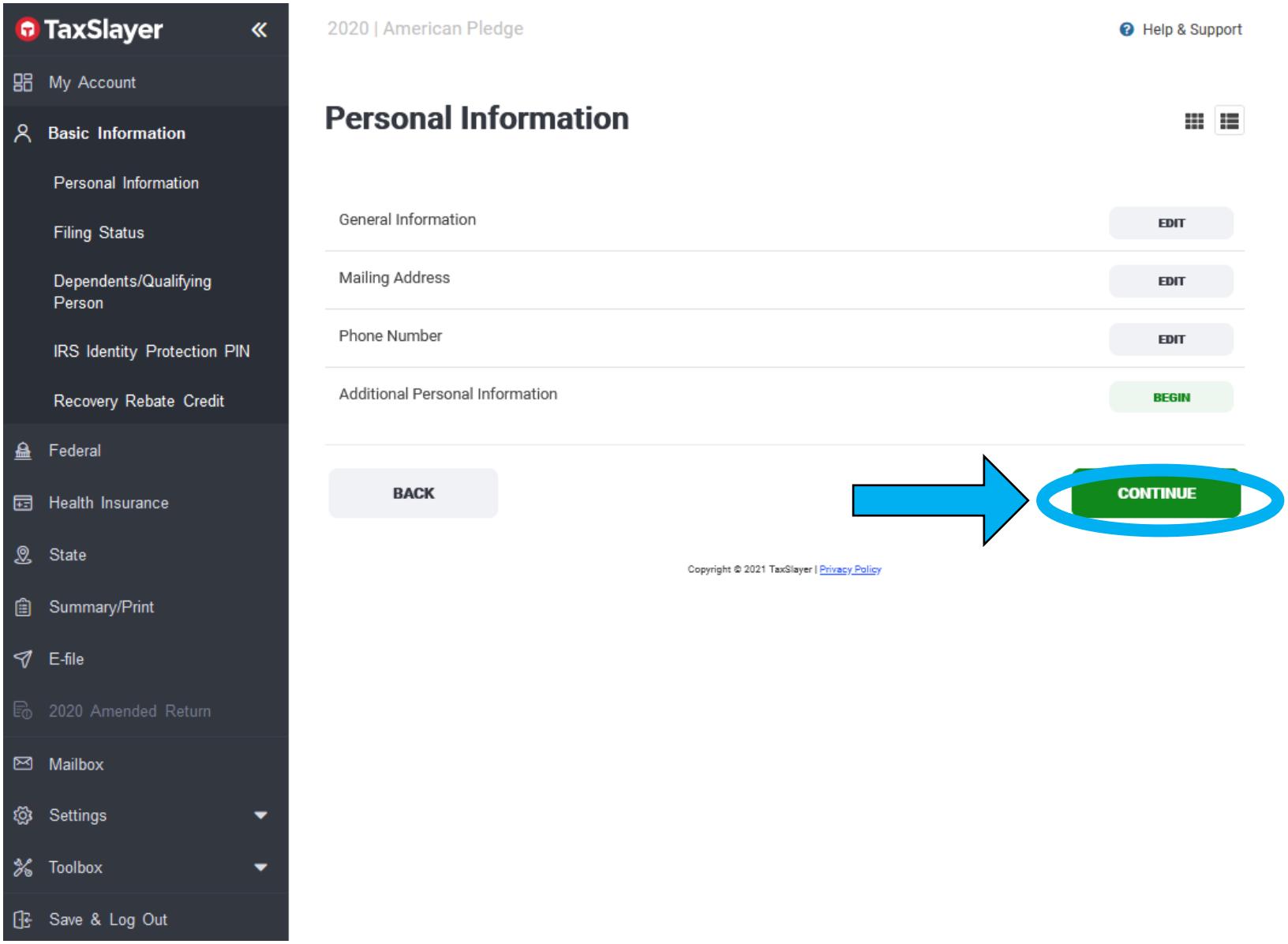

TaxSlayer
My Account
Basic Information
Personal Information
Filing Status
Dependents/Qualifying Person
IRS Identity Protection PIN
Recovery Rebate Credit
Federal
Health Insurance
State
Summary/Print
E-file
2020 Amended Return
Mailbox
Settings
Toolbox
Save & Log Out
2020 | American Pledge
Help & Support
Personal Information
Taxpayer's Information
Primary taxpayer first name
Sunil
MI
Last name
Gosain
Suffix (Jr, Sr, etc.)

SSN The IRS requires your Social Security Number for e-filing. *
978 - 45 - 7787
Date of Birth
1
1
2000
Occupation
Student
Spouse's Information
Spouse first name
MI
Last name
Suffix (Jr, Sr, etc.)

SSN
Date of Birth
MM
DD
YYYY
Occupation
Enter spouse's information
BACK
CANCEL
CONTINUE


TaxSlayer
My Account
Basic Information
Personal Information
Filing Status
Dependents/Qualifying Person
IRS Identity Protection PIN
Recovery Rebate Credit
Federal
Health Insurance
State
Summary/Print
E-file
2020 Amended Return
Mailbox
Settings
Toolbox
Save & Log Out
2020 | American Pledge
Help & Support
Personal Information
General Information
EDIT
Mailing Address
EDIT
Phone Number
EDIT
Additional Personal Information
BEGIN
BACK
CONTINUE
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Basic Scenario #1 Details - Reminder

- This scenario is intended to assist in federal and Minnesota tax return preparation for nonresident alien students from India who:
  - May have wage income
    - This would be reported on a W-2
  - May have scholarship 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 refund
    - May have paid additional tax

- We're now going to enter the income information for each of these types of income / documents.

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

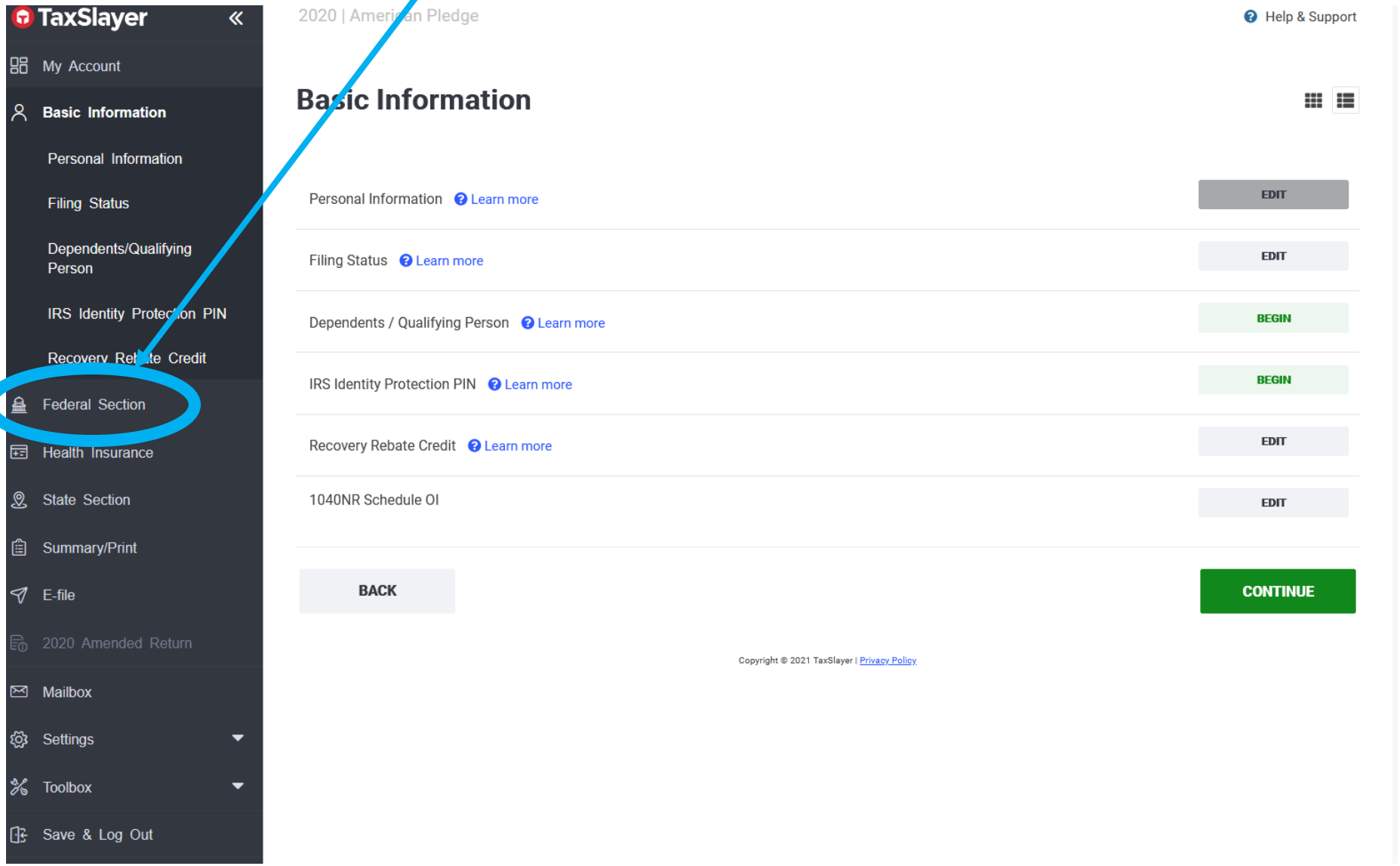
It is not required that you take the standard deduction, but it is usually to your benefit to do so.

If your itemized deductions are greater than $12,400 (max $10k of state income tax paid, plus charitable contributions) then you should determine if it would make sense for you to itemize. This would be a good thing to ask about at a clinic if you think it applies to you.

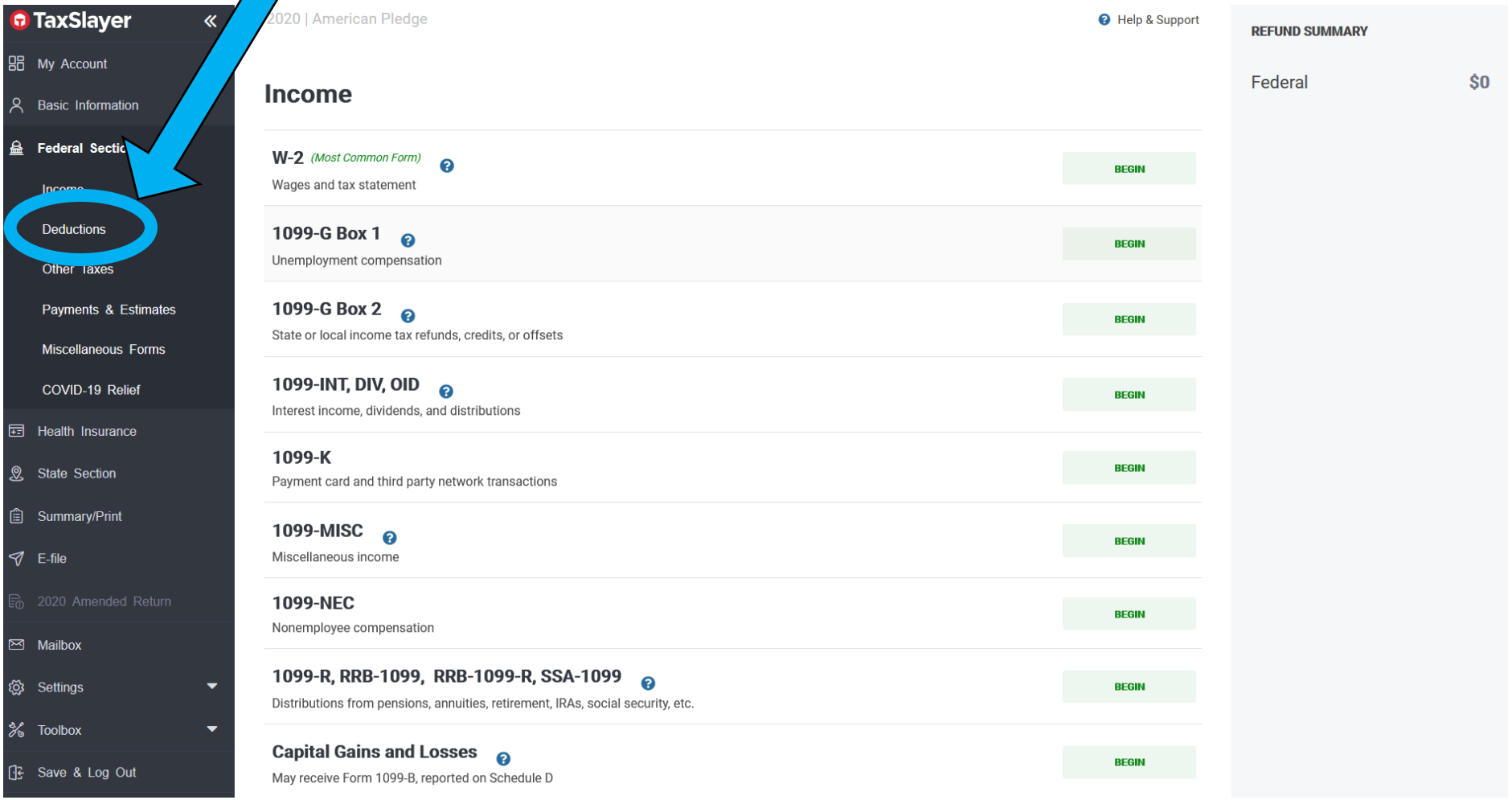
If you do not want to take the standard deduction, you should use Basic Scenario 3 to prepare your return.

Most students don't have enough individual (itemized) deductions so better to take the standard deduction, which is $12,550 for 2021, which reduces you taxable income.

Click on Federal Section



Click on Deductions



Deductions

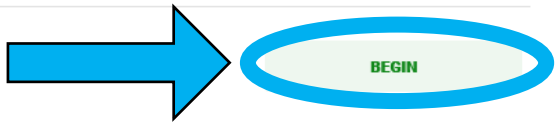
Adjustments to Income
Educator expenses, medical savings accounts, student loan interest, etc.

BEGIN

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

EDIT

Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc.



BACK

CONTINUE

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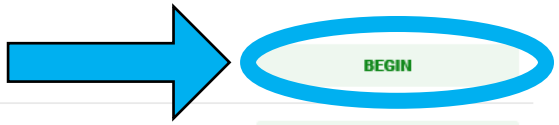
Itemized Deductions



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

CONTINUE

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Use Standard or Itemized Deduction

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

Please choose one:

Force Itemized Deductions or Standard Deduction *

- ○ Force Itemized
- ○ Standard Deduction

Most students don't have enough individual (itemized) deductions so better to take the standard deduction, which is $12,550 for 2021, which reduces you taxable income.

CANCEL

CONTINUE

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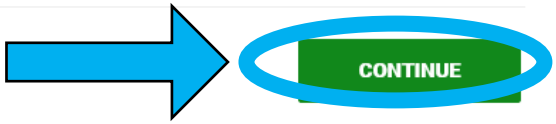
Itemized Deductions

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



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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.

EDIT

Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BACK

CONTINUE

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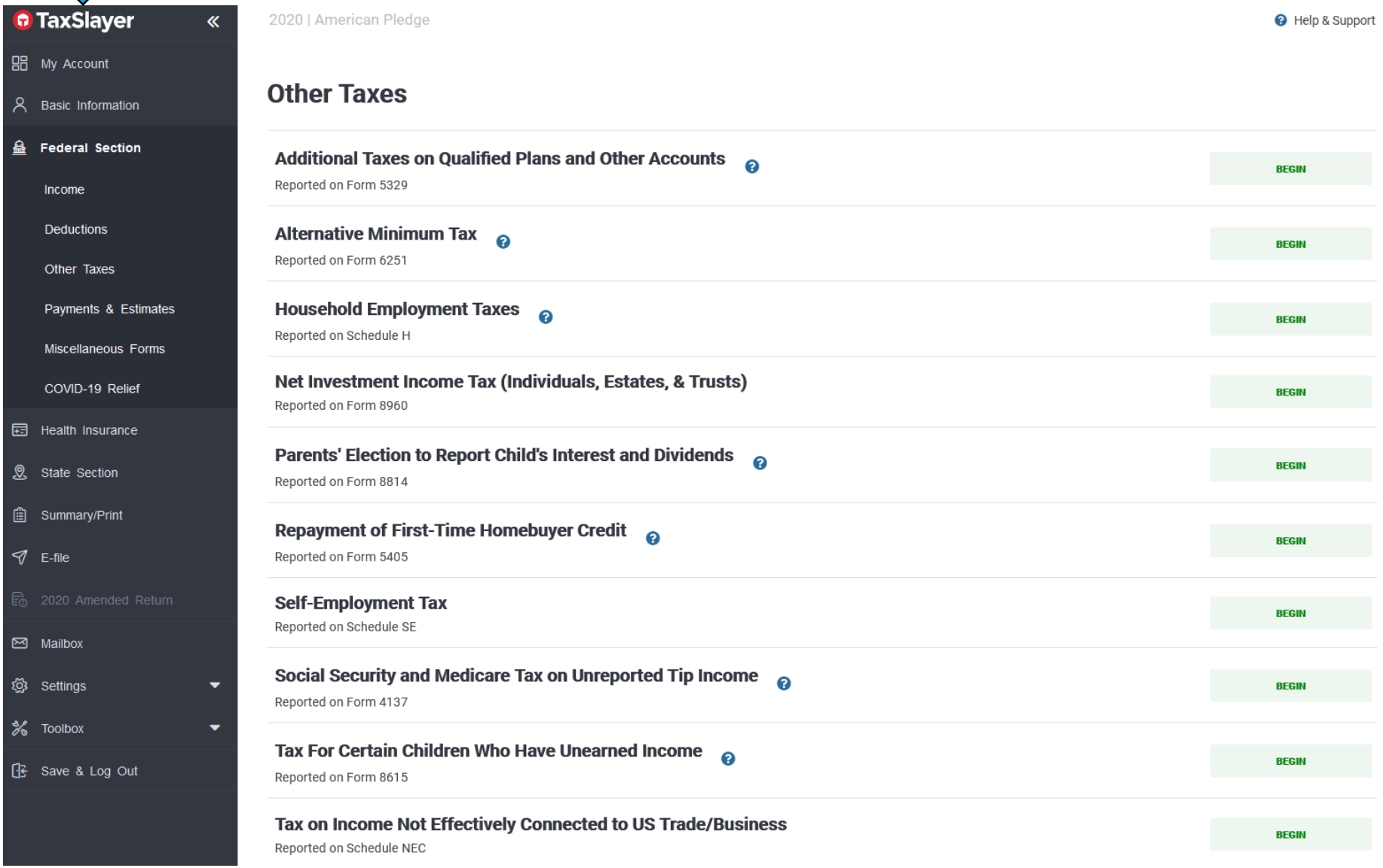


Entering wage income reported on a W-2

If you have this document, not everyone does.

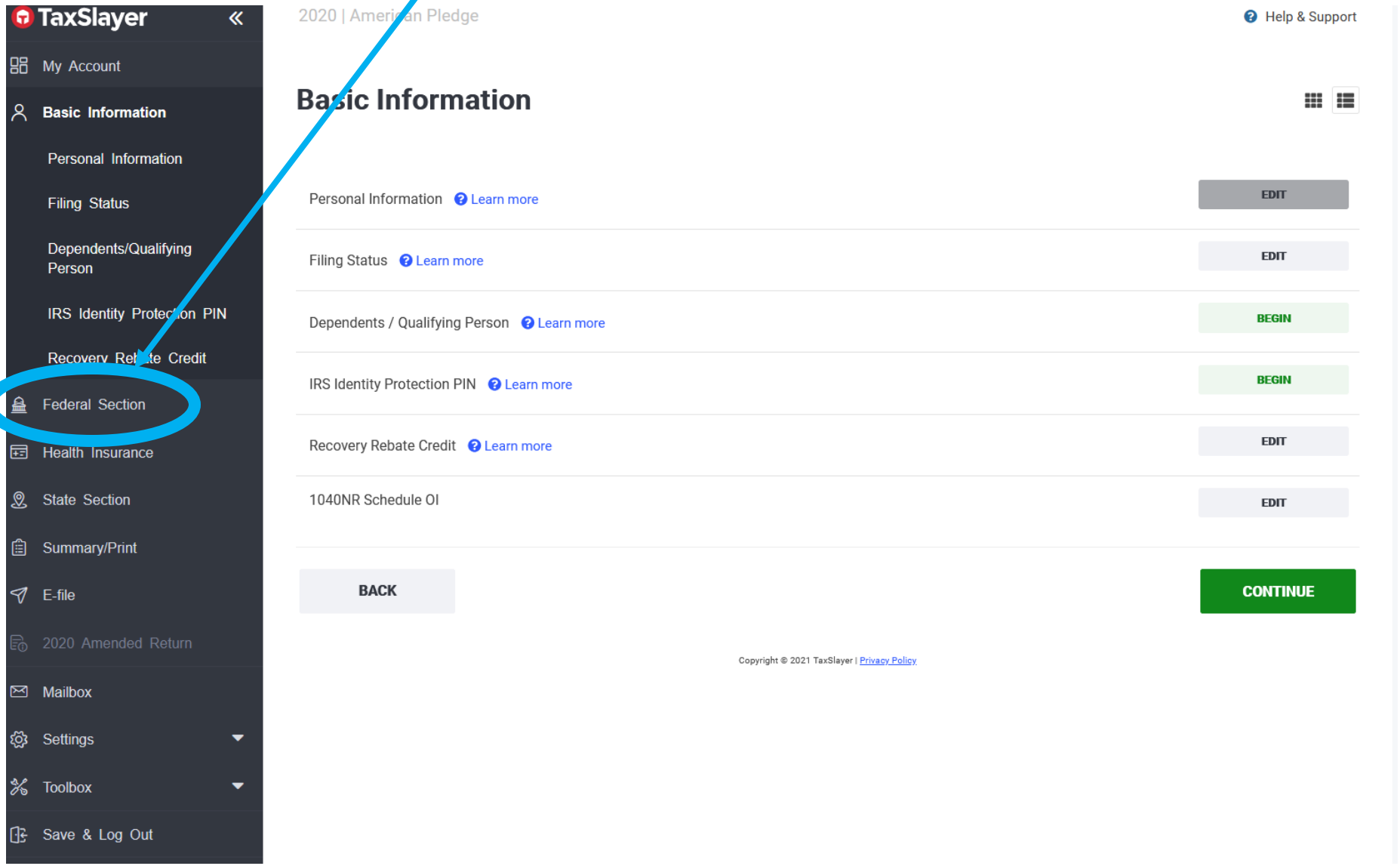
If you have no wage income, you can skip directly to the section on scholarships

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

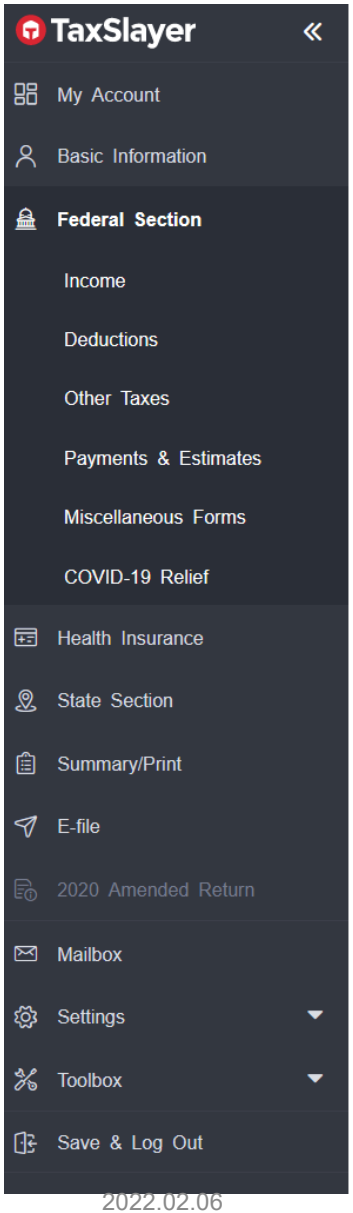
You do not create this document yourself.

If you worked for Macalester you can access your W-2 on 1600grand

Click on Federal Section to enter income



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



2020 | American Pledge

Help & Support

Income

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

1099-G Box 1
Unemployment compensation — BEGIN

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

1099-INT, DIV, OID
Interest income, dividends, and distributions — BEGIN

1099-K
Payment card and third party network transactions — BEGIN

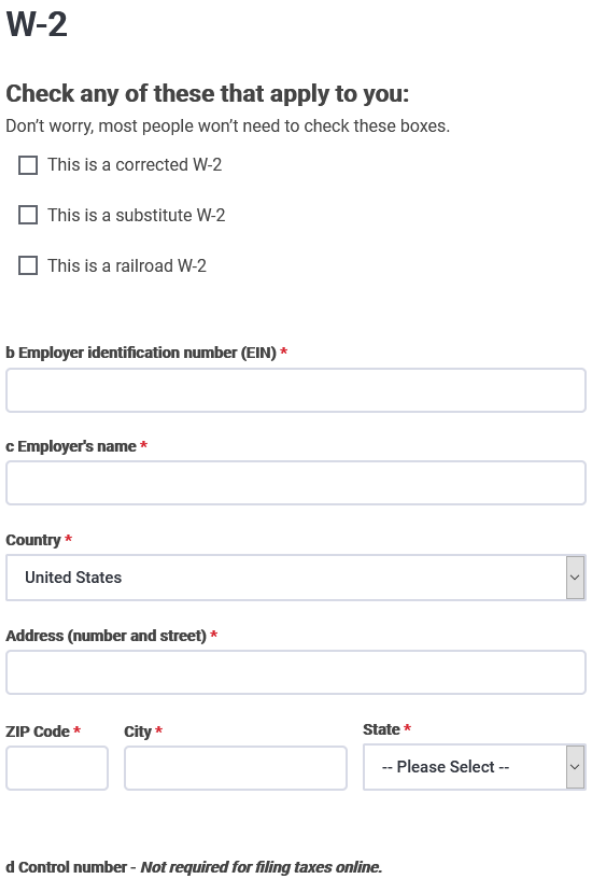
1099-MISC
Miscellaneous income — BEGIN

1099-NEC
Nonemployee compensation — BEGIN

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

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

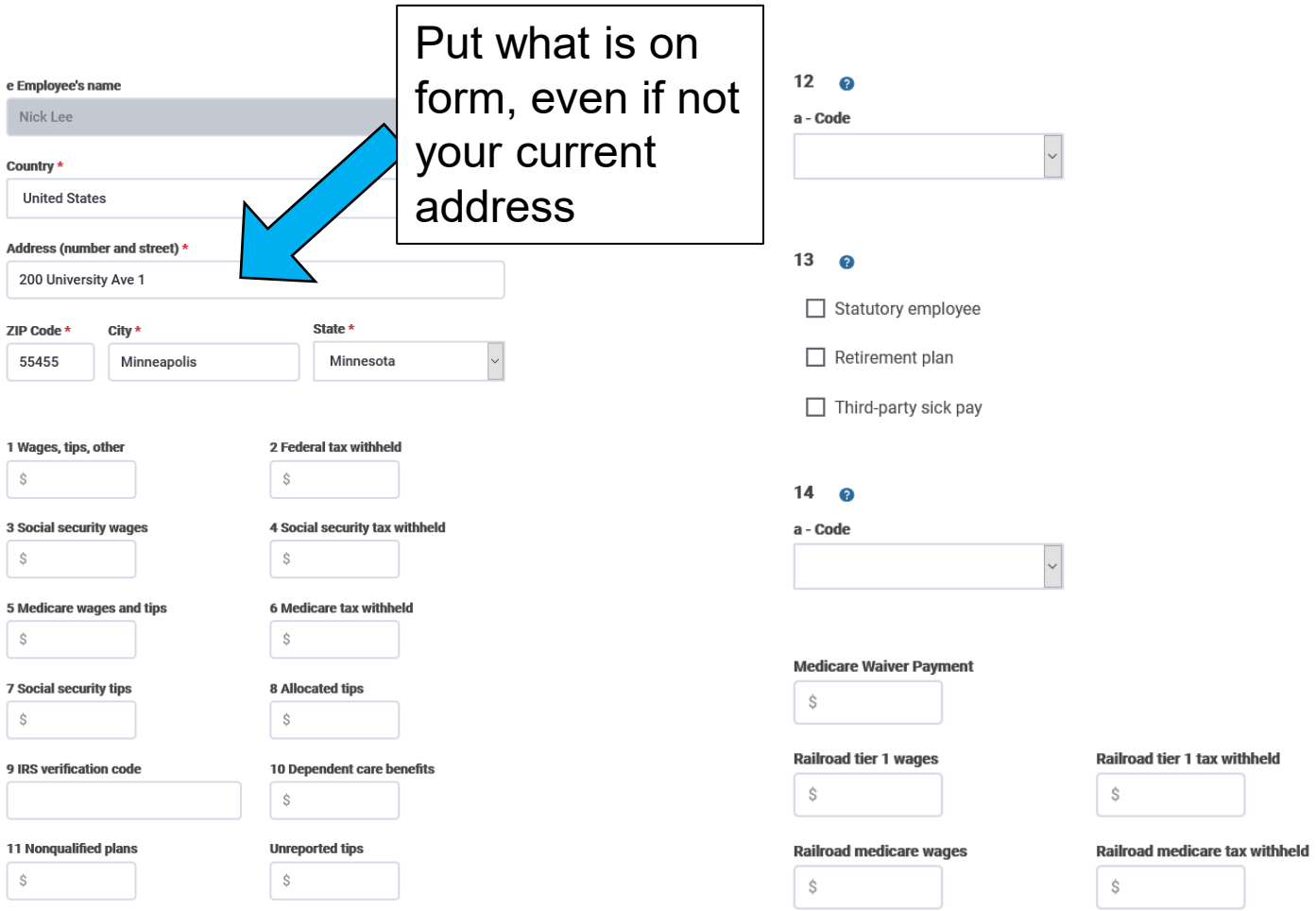
Enter W-2 information directly from form.



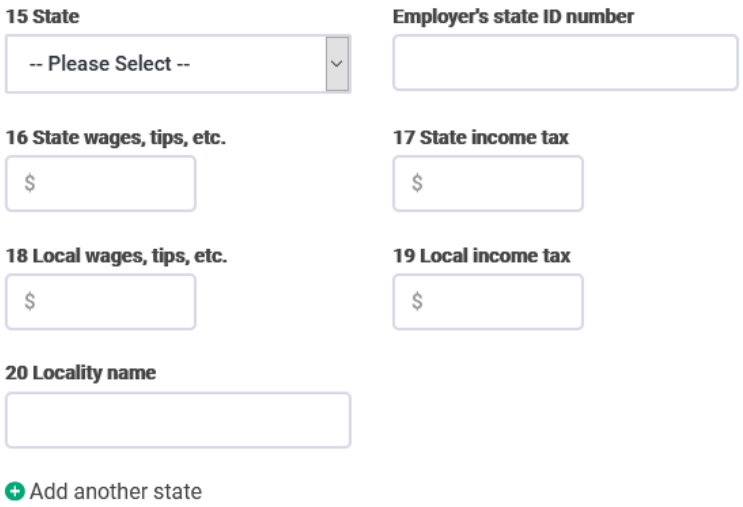
READ THIS BEFORE TYPING:

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

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



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



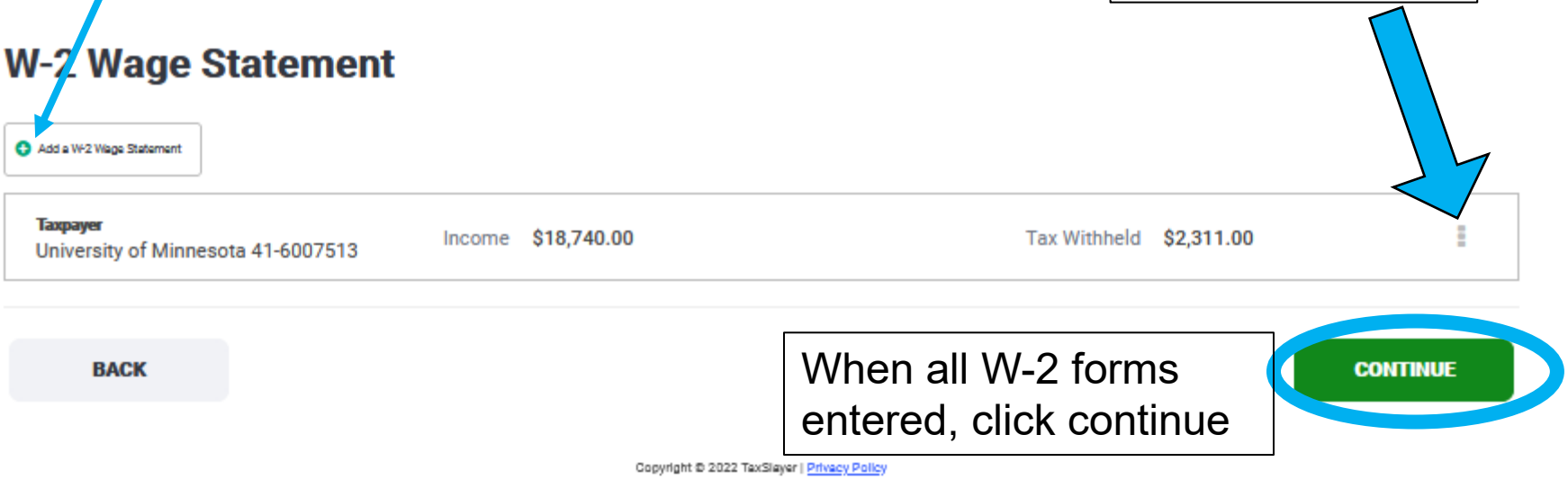
CANCEL

When all info entered, click continue

CONTINUE

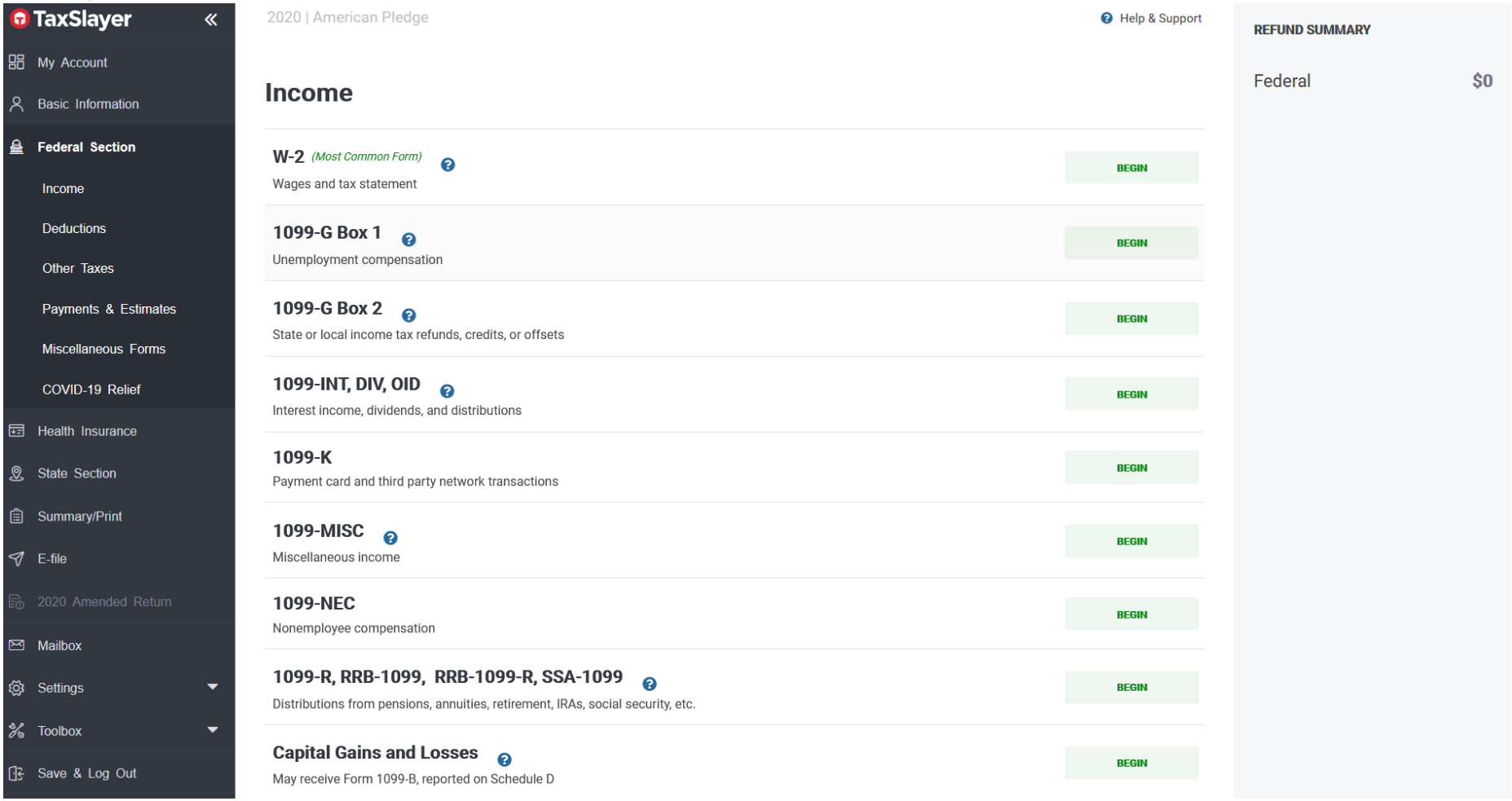
If you have more W-2 Forms to enter

Click here to edit or delete this info.



When all W-2 forms entered, click continue

Back to Main Page



This completes entering wage income

Entering scholarship income reported on a 1042-S

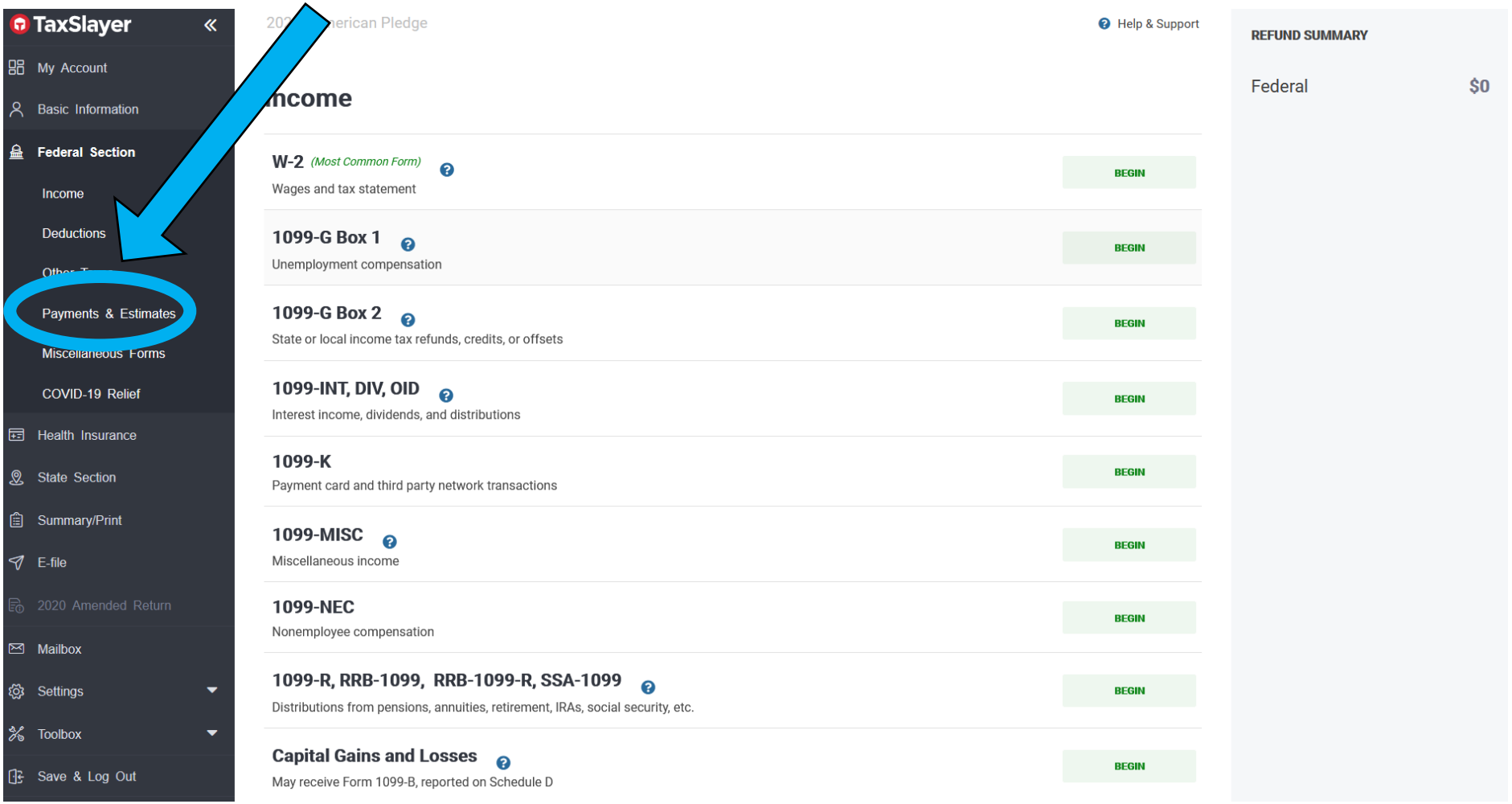
Mac students check GLACIER to see if you have 1042-S (income Code 16 for scholarship in Box 1, top left-hand coerne. If you have this document, not everyone does.

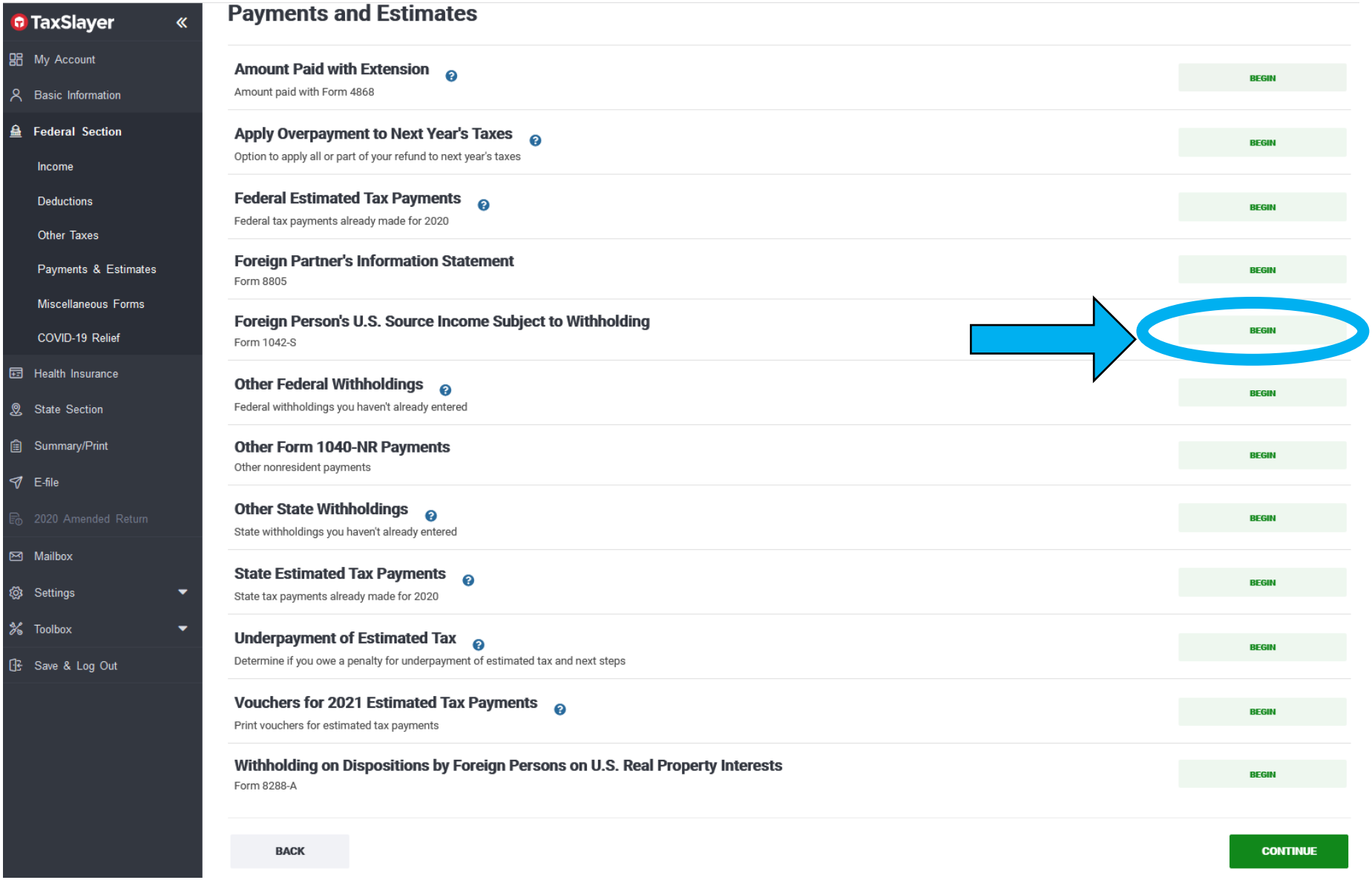
If you don't have this document, then skip to State Income Tax Refund or Payment section

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

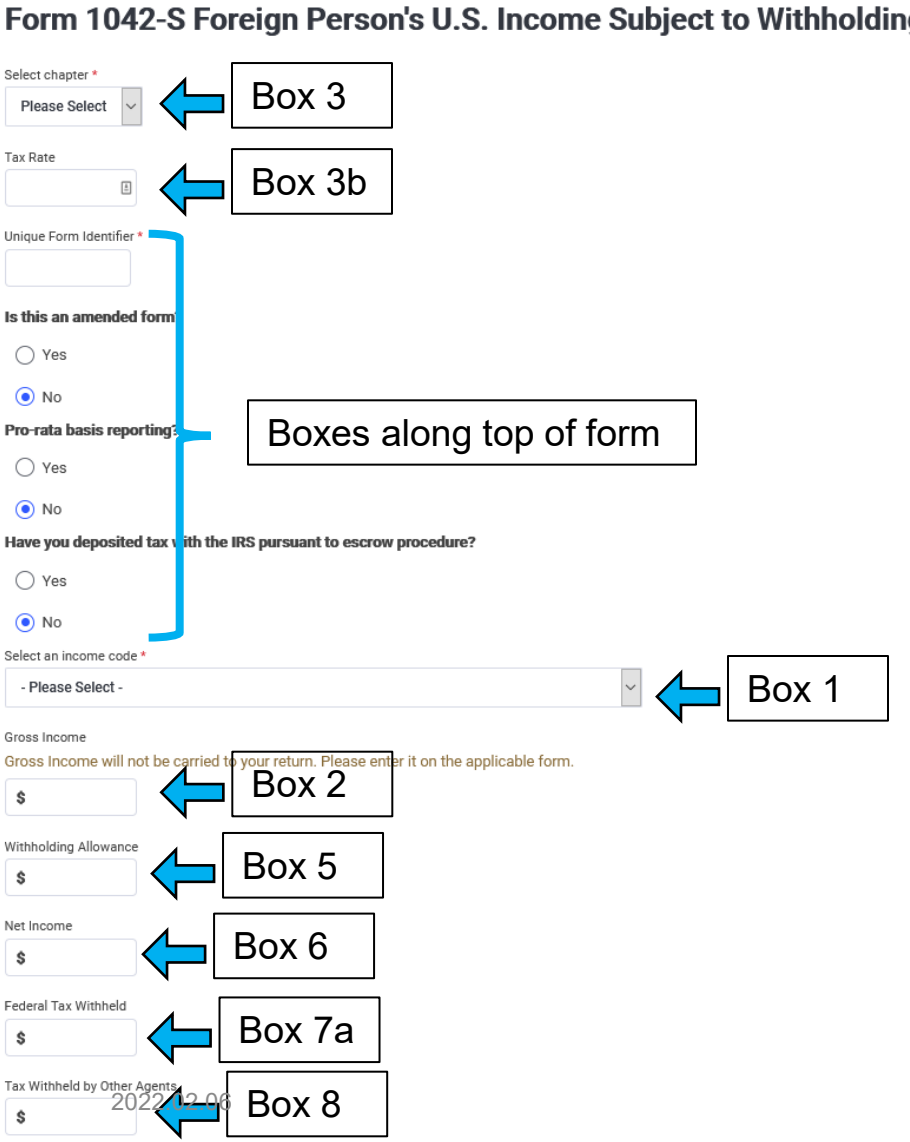
.

Click on Payments & Estimates



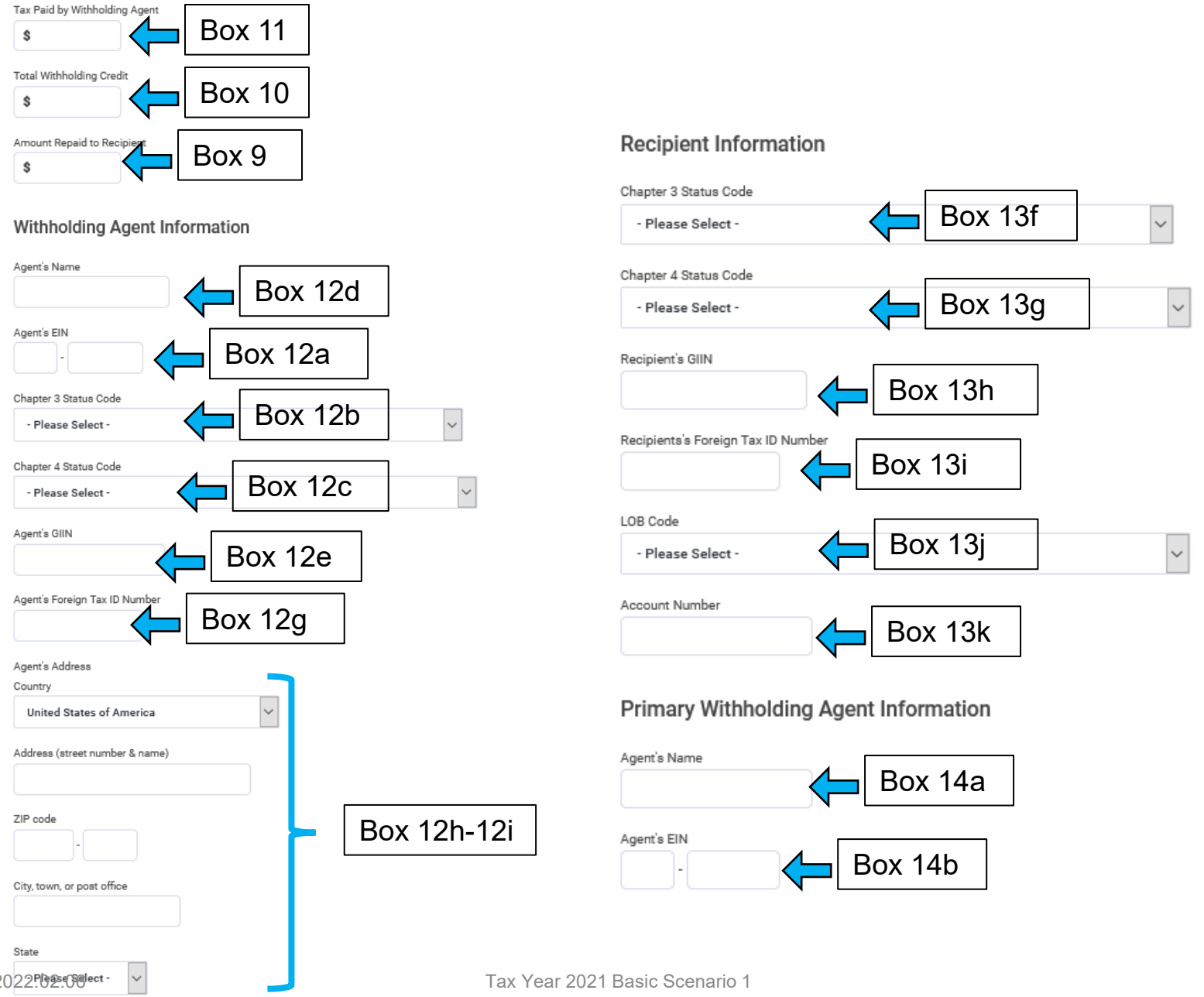

TaxSlayer
My Account
Basic Information
Federal Section
Income
Deductions
Other Taxes
Payments & Estimates
Miscellaneous Forms
COVID-19 Relief
Health Insurance
State Section
Summary/Print
E-file
2020 Amended Return
Mailbox
Settings
Toolbox
Save & Log Out
Payments and Estimates
Amount Paid with Extension
Amount paid with Form 4868
BEGIN
Apply Overpayment to Next Year's Taxes
Option to apply all or part of your refund to next year's taxes
BEGIN
Federal Estimated Tax Payments
Federal tax payments already made for 2020
BEGIN
Foreign Partner's Information Statement
Form 8805
BEGIN
Foreign Person's U.S. Source Income Subject to Withholding
Form 1042-S
BEGIN
Other Federal Withholdings
Federal withholdings you haven't already entered
BEGIN
Other Form 1040-NR Payments
Other nonresident payments
BEGIN
Other State Withholdings
State withholdings you haven't already entered
BEGIN
State Estimated Tax Payments
State tax payments already made for 2020
BEGIN
Underpayment of Estimated Tax
Determine if you owe a penalty for underpayment of estimated tax and next steps
BEGIN
Vouchers for 2021 Estimated Tax Payments
Print vouchers for estimated tax payments
BEGIN
Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests
Form 8288-A
BEGIN
BACK
CONTINUE

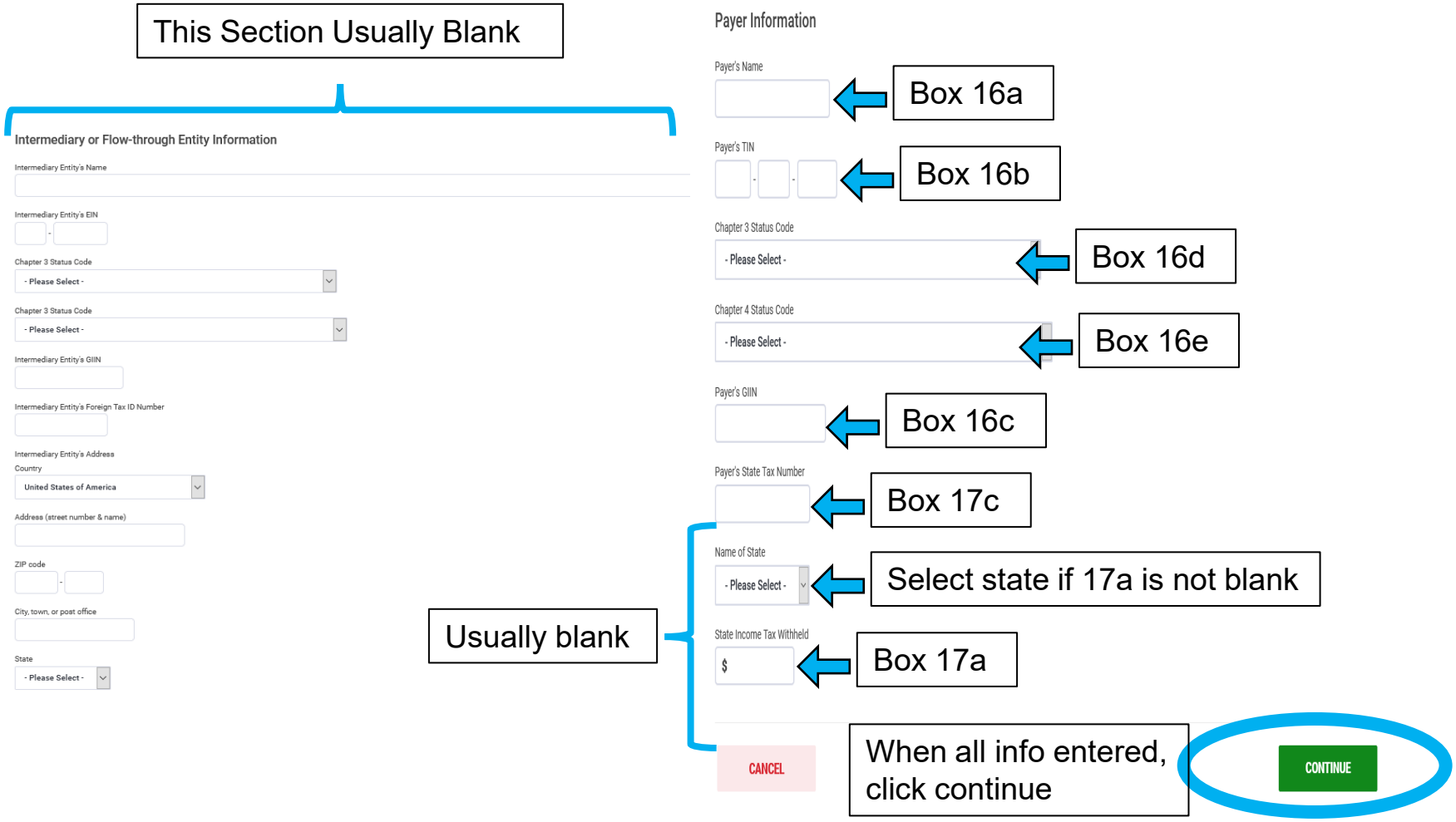
Enter 1042-S information directly from form.



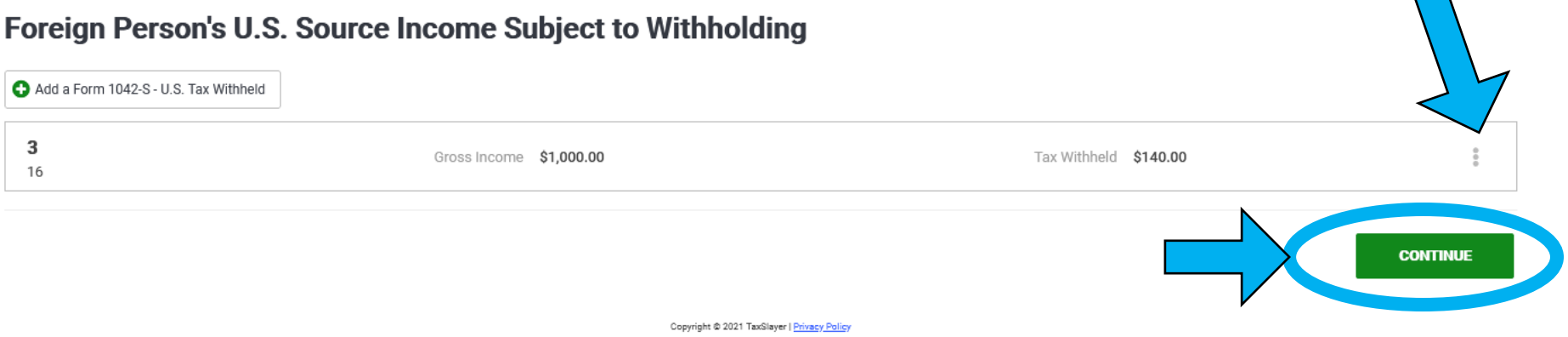
READ THIS BEFORE TYPING:

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

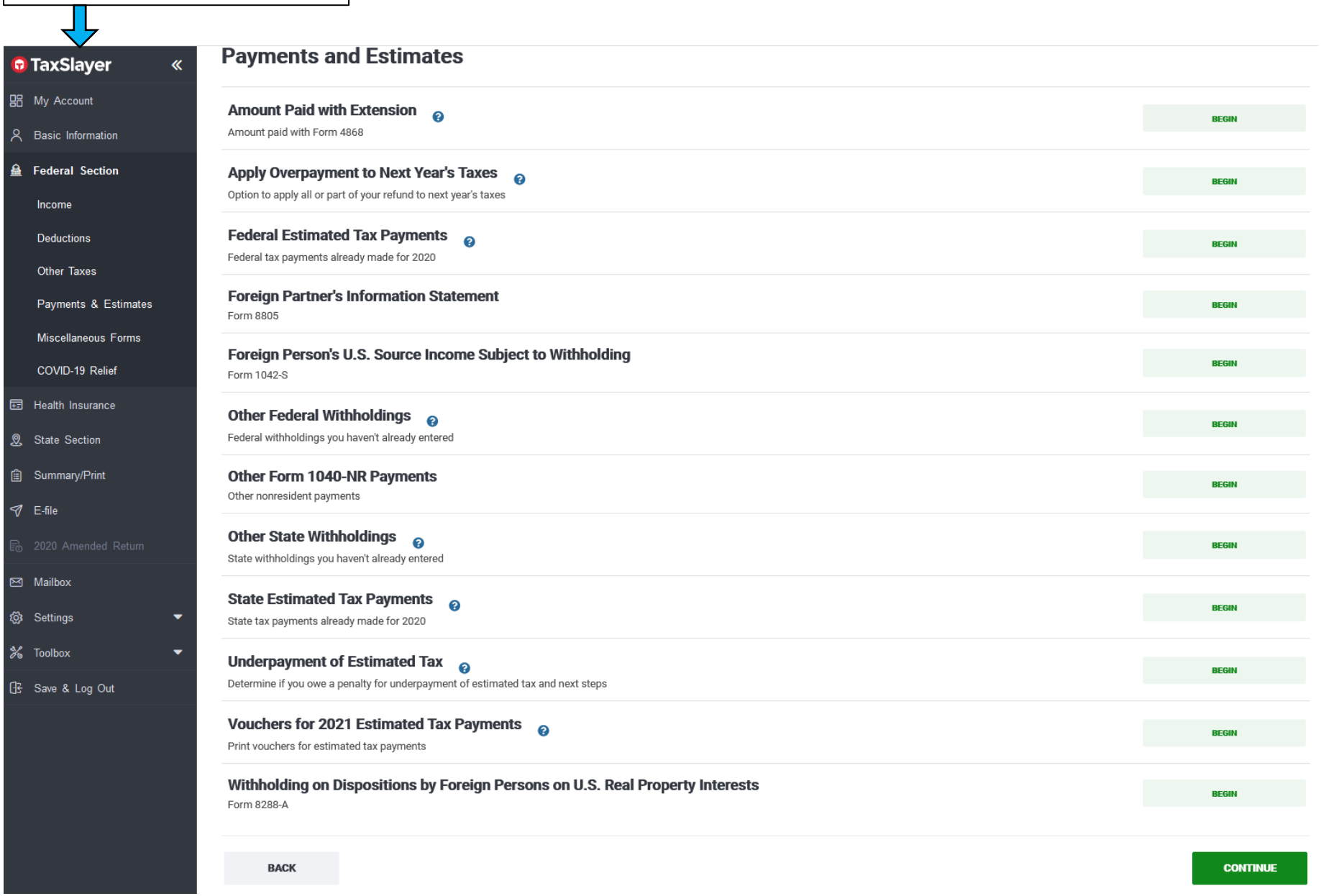

Tax Paid by Withholding Agent
$
Box 11
Total Withholding Credit
$
Box 10
Amount Repaid to Recipient
$
Box 9
Withholding Agent Information
Agent's Name
Box 12d
Agent's EIN
Box 12a
Chapter 3 Status Code
- Please Select -
Box 12b
Chapter 4 Status Code
- Please Select -
Box 12c
Agent's GIIN
Box 12e
Agent's Foreign Tax ID Number
Box 12g
Agent's Address
Country
United States of America
Address (street number & name)
ZIP code
City, town, or post office
State
- Please Select -
Box 12h-12i
Recipient Information
Chapter 3 Status Code
- Please Select -
Box 13f
Chapter 4 Status Code
- Please Select -
Box 13g
Recipient's GIIN
Box 13h
Recipients'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 GIIN
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 GIIN
Box 16c
Payer's State Tax Number
Box 17c
Name of State
- Please Select -
Select state if 17a is not blank
State Income Tax Withheld
$
Box 17a
CANCEL
When all info entered, click continue
CONTINUE

Click here to edit or delete this info.



Back to Main Page



Entering scholarship income into your tax return

Yes, you have to do this step!

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

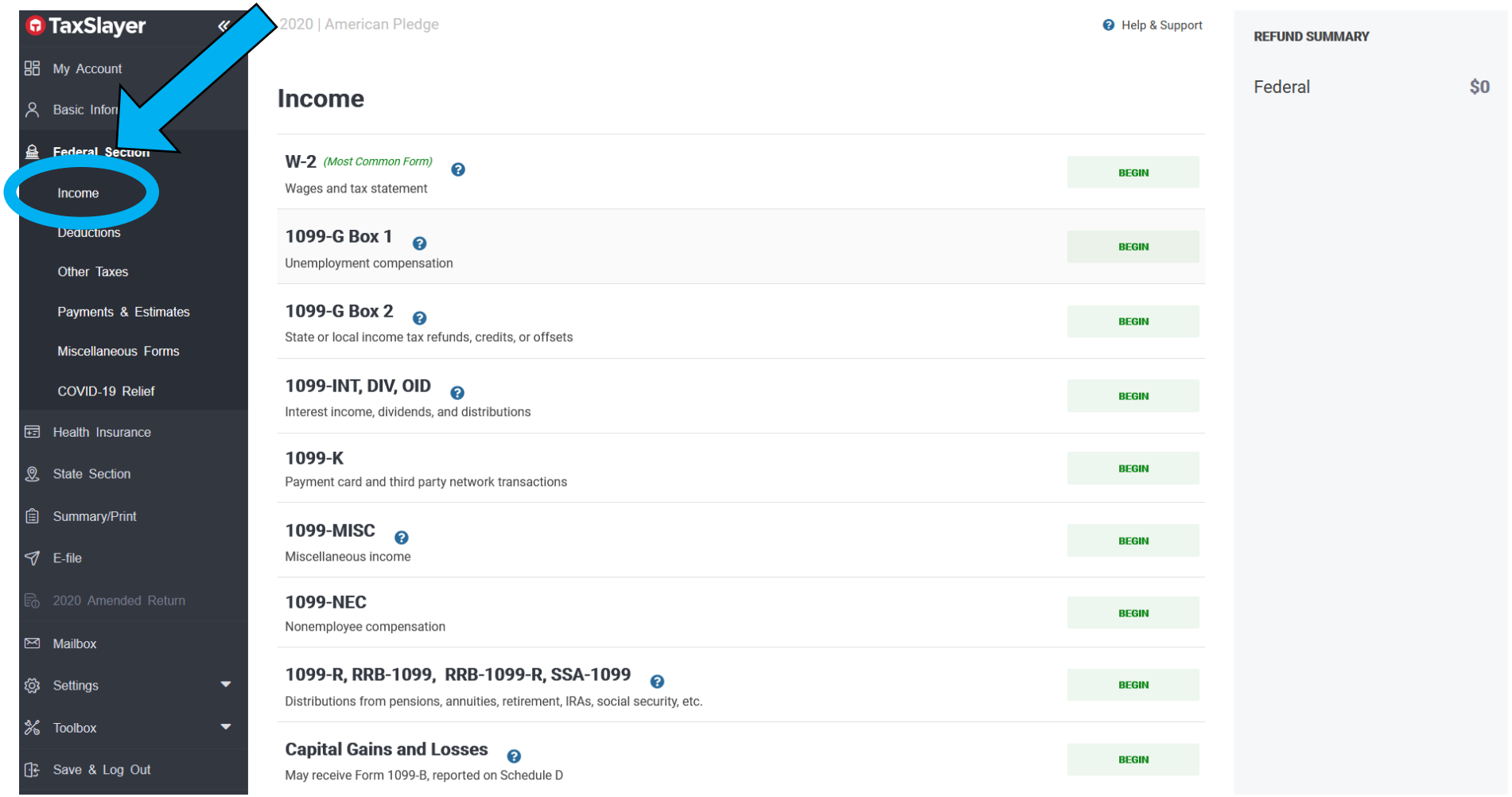
A note about how scholarships are taxed

- 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
    - Text
    - Sometimes called a tuition waiver or fee waiver.

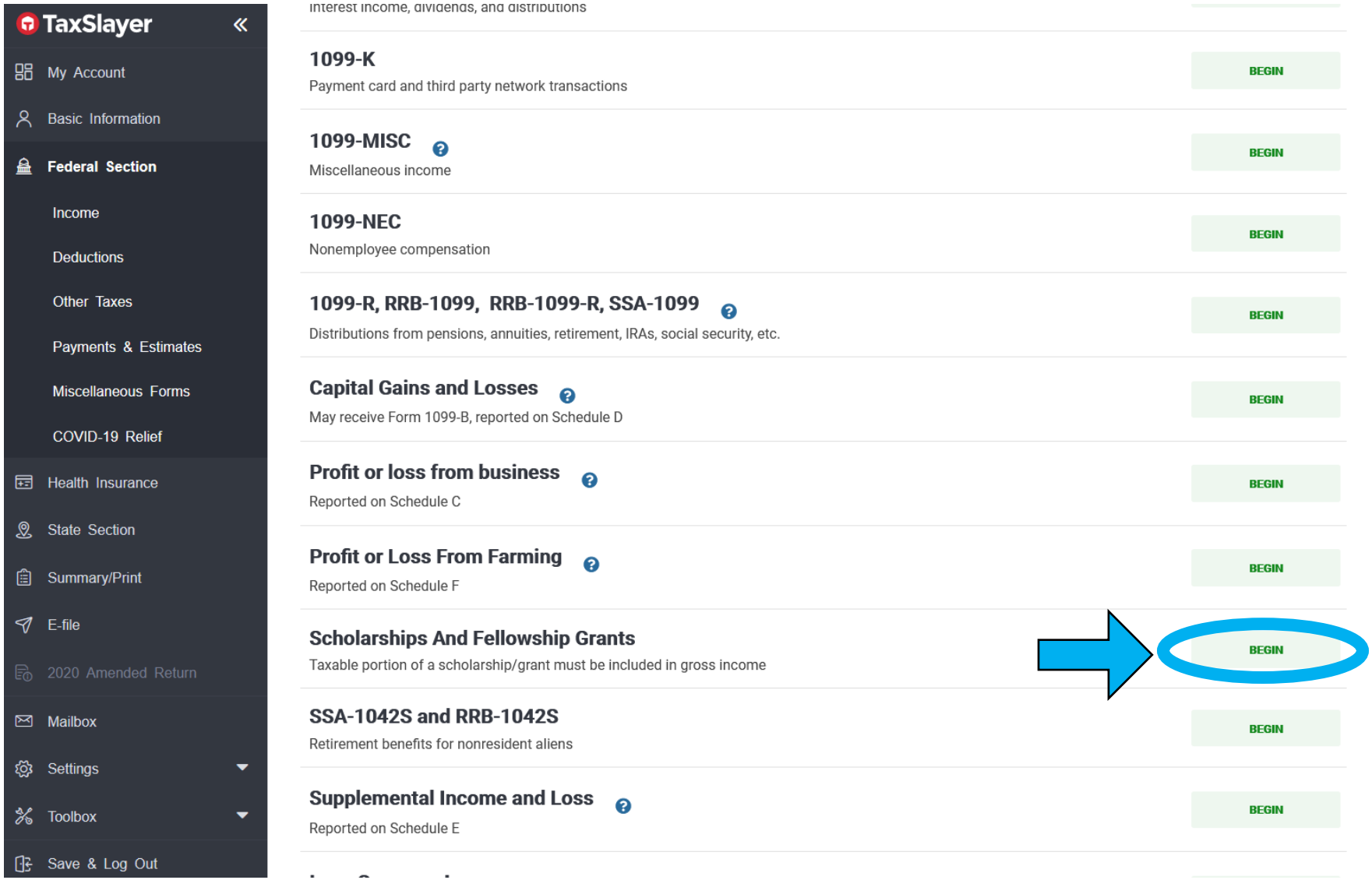
- Scholarships that are used for all other things, such as room and board, or any other personal expenses
  - If you have a treaty benefit, the scholarship is not taxable
  - If you have no treaty benefit (like India), the scholarship IS taxable

- 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.
  - 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



Scroll down to find Scholarships



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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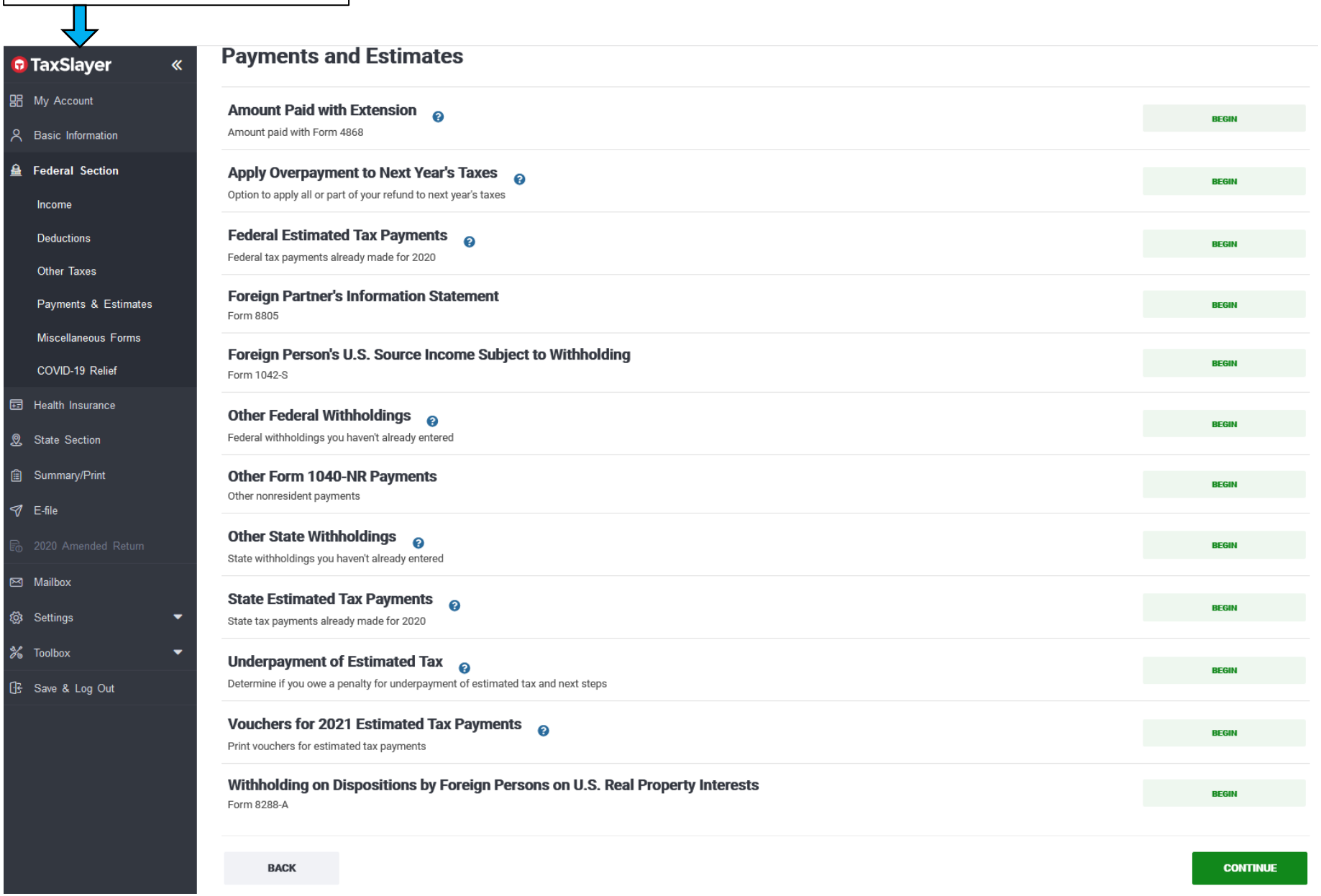
Back to Main Page

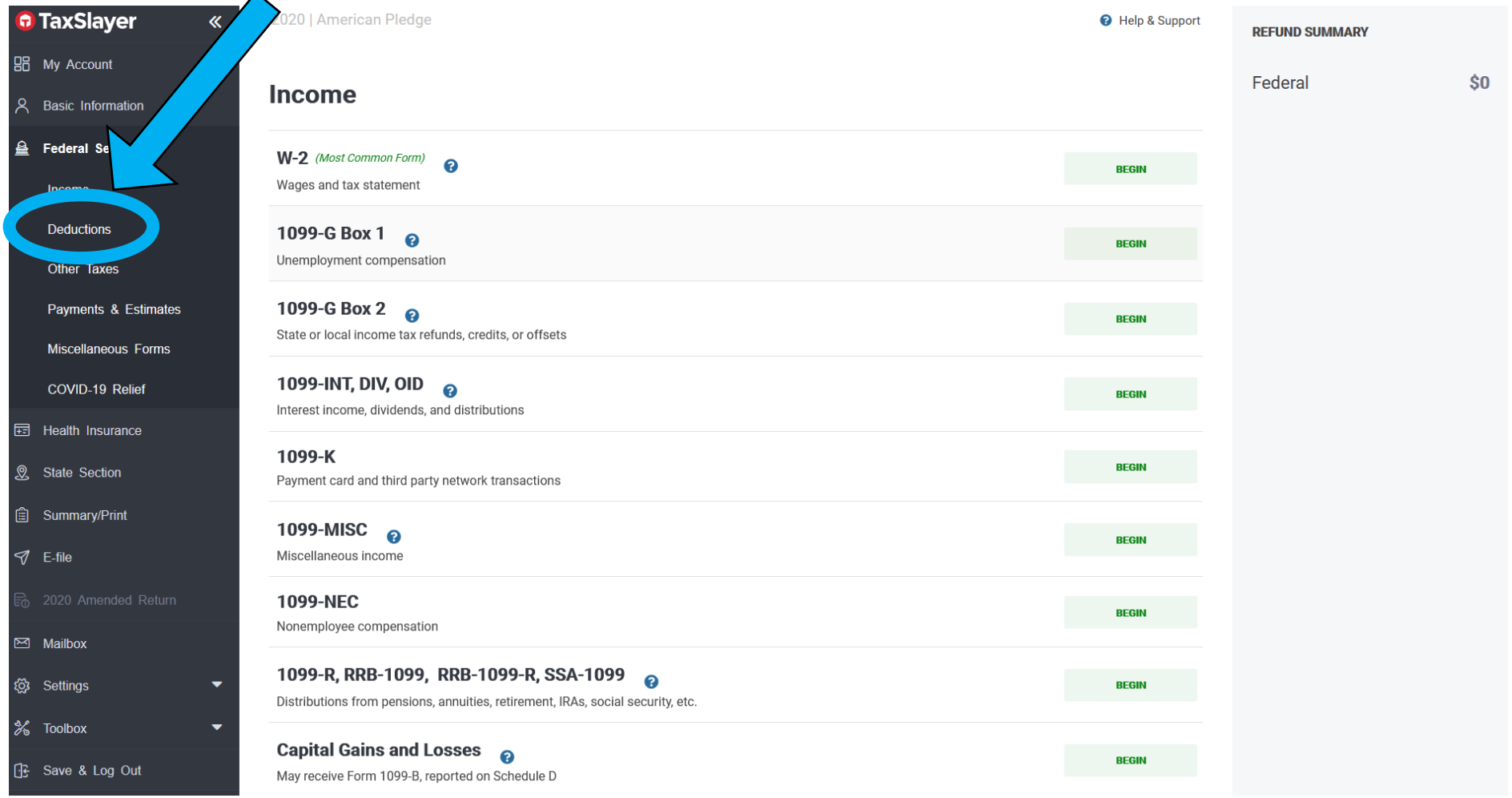


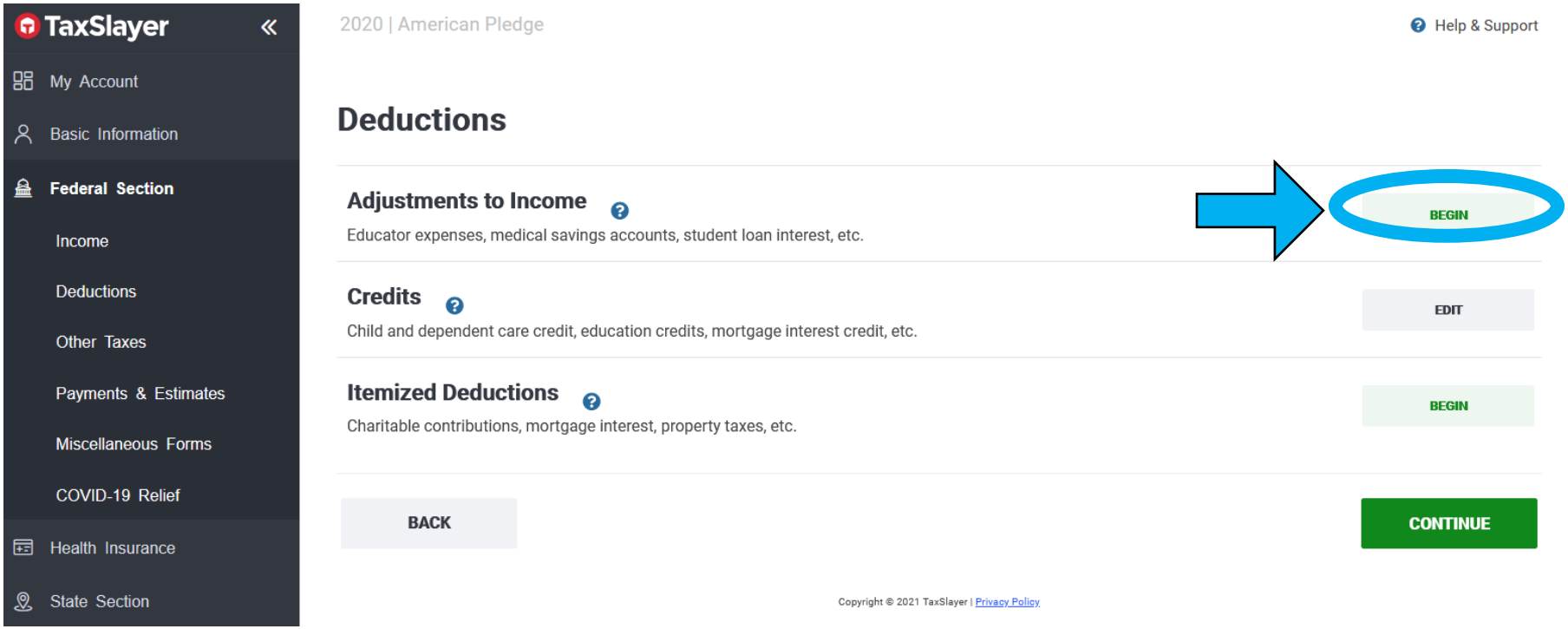
Entering the part of your taxable scholarship that you spent on tuition, required books or fees

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

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

Click on Deductions




TaxSlayer
My Account
Basic Information
Federal Section
Income
Deductions
Other Taxes
Payments & Estimates
Miscellaneous Forms
COVID-19 Relief
Health Insurance
State Section
2020 | American Pledge
Help & Support
Deductions
Adjustments to Income
Educator expenses, medical savings accounts, student loan interest, etc.
BEGIN
Credits
Child and dependent care credit, education credits, mortgage interest credit, etc.
EDIT
Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc.
BEGIN
BACK
CONTINUE
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Adjustments

Medical Savings Account Form 8853 Learn more	BEGIN
Educator Expenses Learn more	BEGIN
Health Savings Account Form 8889 Learn more	BEGIN
Moving Expenses Form 3903 Learn more	BEGIN
Contributions to SEP, Simple, and Qualified Plans Learn more	BEGIN
Self-Employed Health Insurance Learn more	BEGIN
Penalty on Early Withdrawal of Savings or CD Learn more	BEGIN
Scholarships And Fellowship Grants Excluded	BEGIN
IRA Deduction Learn more	BEGIN
Nondeductible IRAs Form 8606	BEGIN
Student Loan Interest Deduction Learn more	BEGIN
Domestic Production Form 8903 Learn more	BEGIN

CONTINUE

Scholarships and Fellowship Grants Excluded

Amount of Scholarships and Fellowship Grants Excluded

$|

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

CANCEL

CONTINUE

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

Adjustments

Medical Savings Account Form 8853 Learn more	BEGIN
Educator Expenses Learn more	BEGIN
Health Savings Account Form 8889 Learn more	BEGIN
Moving Expenses Form 3903 Learn more	BEGIN
Contributions to SEP, Simple, and Qualified Plans Learn more	BEGIN
Self-Employed Health Insurance Learn more	BEGIN
Penalty on Early Withdrawal of Savings or CD Learn more	BEGIN
Scholarships And Fellowship Grants Excluded	EDIT
IRA Deduction Learn more	BEGIN
Nondeductible IRAs Form 8606	BEGIN
Student Loan Interest Deduction Learn more	BEGIN
Domestic Production Form 8903 Learn more	BEGIN

Deductions

Adjustments to Income

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

EDIT

Credits

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

EDIT

Itemized Deductions

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BACK

CONTINUE

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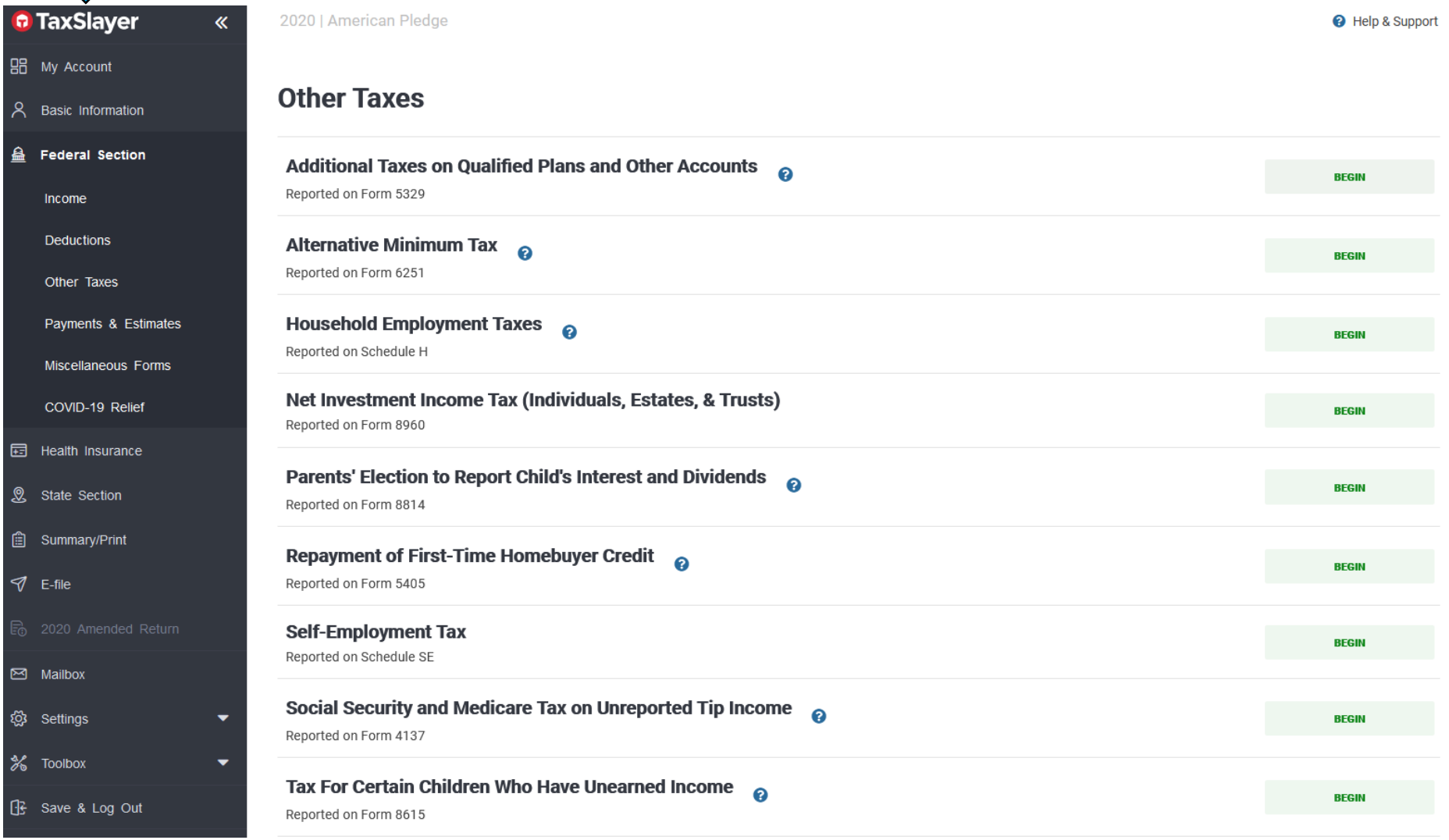
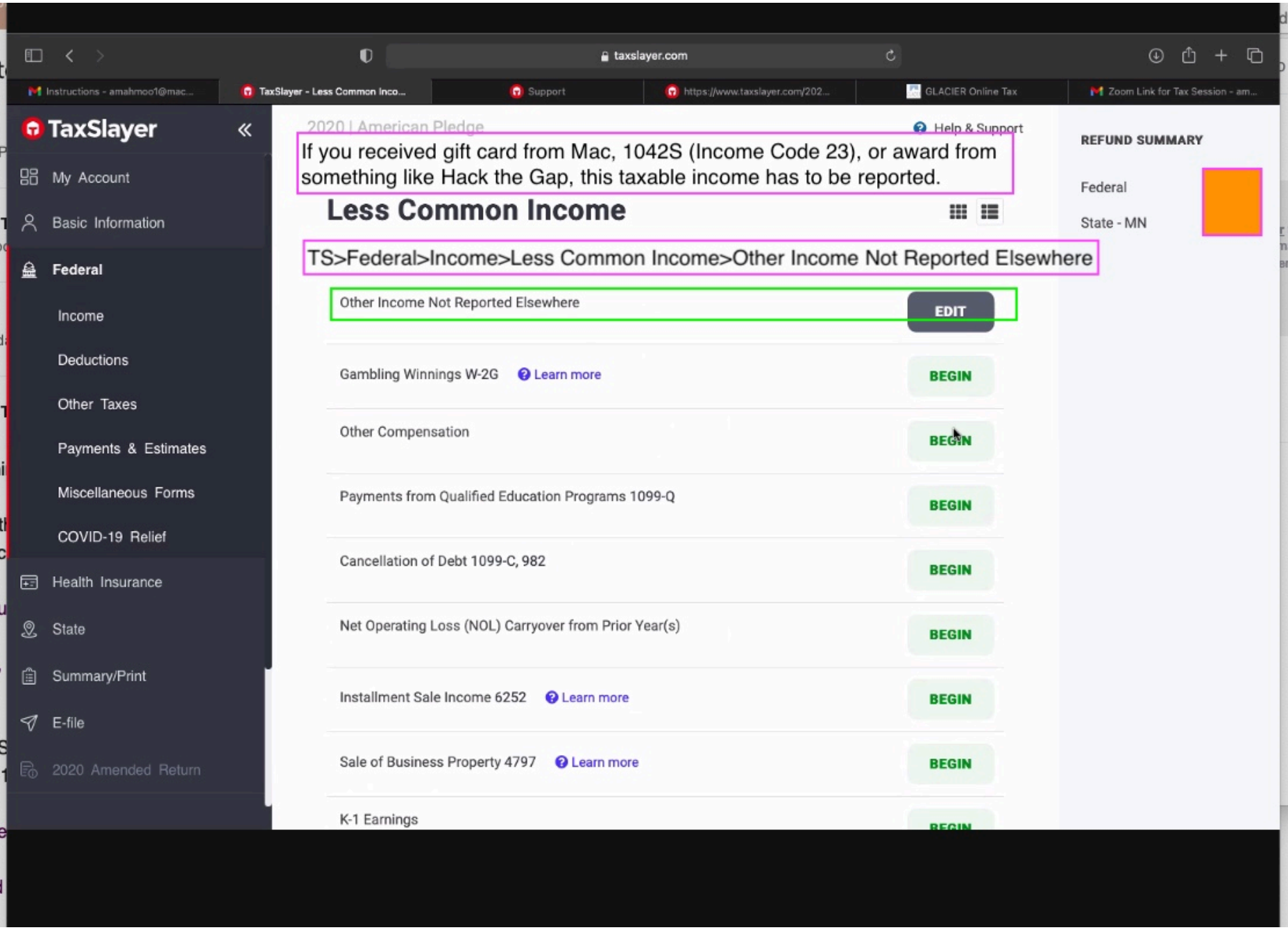
Back to Main Page



This completes entering scholarship income


taxslayer.com
Instructions - amahmoo1@mac...
TaxSlayer - Less Common Inco...
Support
https://www.taxslayer.com/202...
GLACIER Online Tax
Zoom Link for Tax Session - am...
TaxSlayer
My Account
Basic Information
Federal
Income
Deductions
Other Taxes
Payments & Estimates
Miscellaneous Forms
COVID-19 Relief
Health Insurance
State
Summary/Print
E-file
2020 Amended Return
2020 | American Pledge
Help & Support
If you received gift card from Mac, 1042S (Income Code 23), or award from something like Hack the Gap, this taxable income has to be reported.
Less Common Income
TS>Federal>Income>Less Common Income>Other Income Not Reported Elsewhere
Other Income Not Reported Elsewhere
EDIT
Gambling Winnings W-2G
Learn more
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
Learn more
BEGIN
Sale of Business Property 4797
Learn more
BEGIN
K-1 Earnings
REFUND SUMMARY
Federal
State - MN

Other Income

Form belongs to

[redacted]

Description of other income *

Award

Amount of other income *

$ 71

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

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

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 hereto find out how you are required to report it.

CANCEL

CONTINUE

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Federal [redacted]

State - MN

Other Federal Withholdings

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

Federal withholding from Form 1099

$

If you got 1042, Income Code 23, look at Box 7a and report federal tax withheld, e.g. $21 or amount stated, or check any documents you got to report any tax withheld.

Other Federal withholding (not from Form 1099)

$21

CANCEL

CONTINUE

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Entering state income tax payment made during 2021.

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.

If you didn’t get a refund, you can skip to the Minnesota section.

A note about additional state payments

- If you are taking the standard deduction on your federal return, then you do not need to enter any additional state tax payments you may have made during calendar year 2021.
  - The point of using the standard deduction is that it is larger than all of your itemized deductions, which includes state tax paid.
- See the section on using the U.S./India tax treaty to take the standard deduction to determine if you want to enter additional tax paid.
  - If you do want to enter tax paid, continue to next slide.
  - If you do not, skip to Minnesota section.

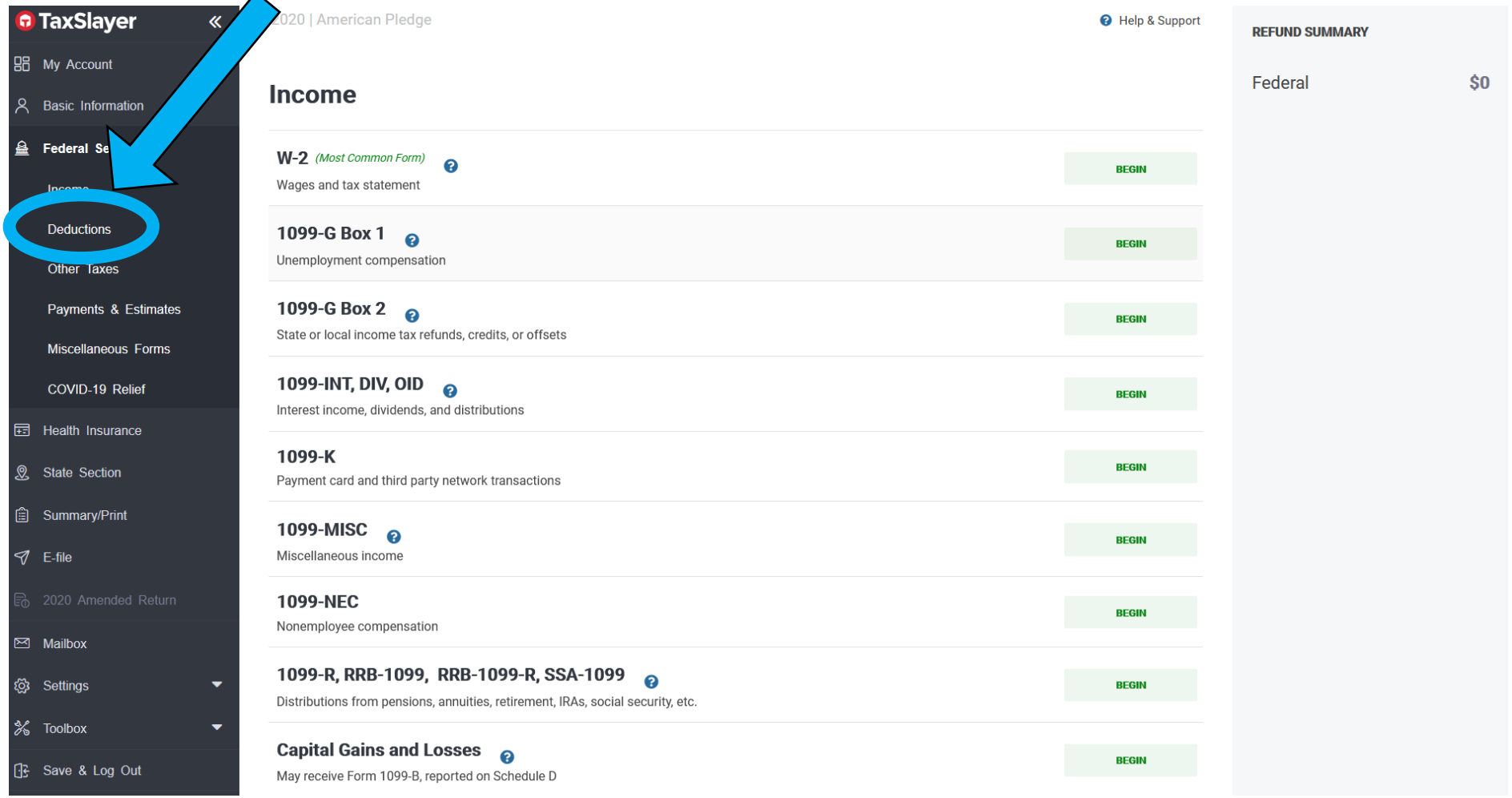
Example MN Return

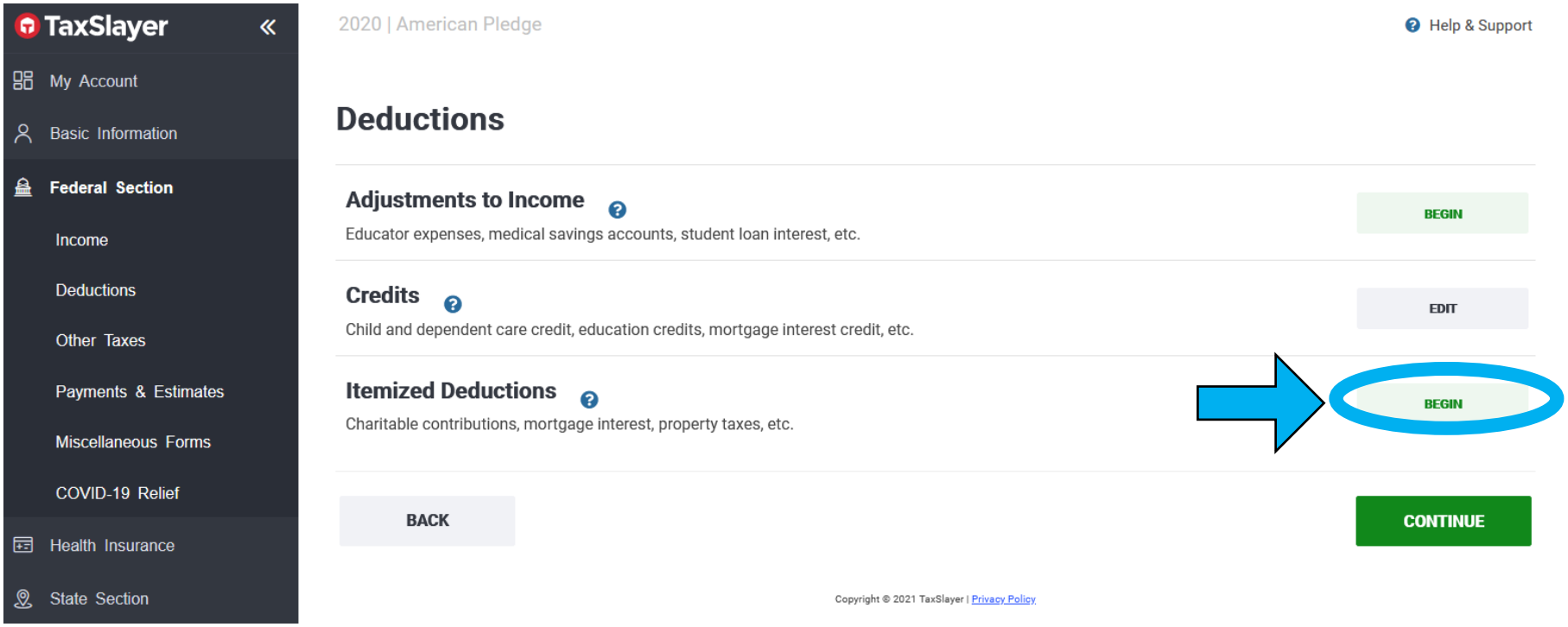
2020 M1, page 2

12	Add lines 10 and 11	12	431
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	431
	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	431
16	Amount from line 17 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	431
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	431
20	**Minnesota income tax withheld.** Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G *(do not send)*	20	400
21	Minnesota estimated tax and extension payments made for 2020	21 ■	
22	Amount from line 9 of Schedule M1REF, *Refundable Credits (see instructions; enclose Schedule M1REF)*	22 ■	
23	Total payments. Add lines 20 through 22	23	400
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)*: ☐ 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 ■	31
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 2021 estimated tax	29 ■	

Additional tax you should have paid

Click on Deductions

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State Section
2020 | American Pledge
Help & Support
Deductions
Adjustments to Income
Educator expenses, medical savings accounts, student loan interest, etc.
BEGIN
Credits
Child and dependent care credit, education credits, mortgage interest credit, etc.
EDIT
Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc.
BEGIN
BACK
CONTINUE
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Itemized Deductions

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

CONTINUE

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Schedule A - Taxes You Paid

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

Taxes Paid

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

$

Enter amount of tax paid with your state return

Prior Year 4th Quarter State Estimates paid after 12/31/2020

$

This is additional state taxes you paid, not what was withheld on your W-2.

☐ 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 2021 or if your state does not have income taxes.

CANCEL

CONTINUE

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Schedule A - Taxes You Paid

$0.00
$0.00

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

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Itemized Deductions

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

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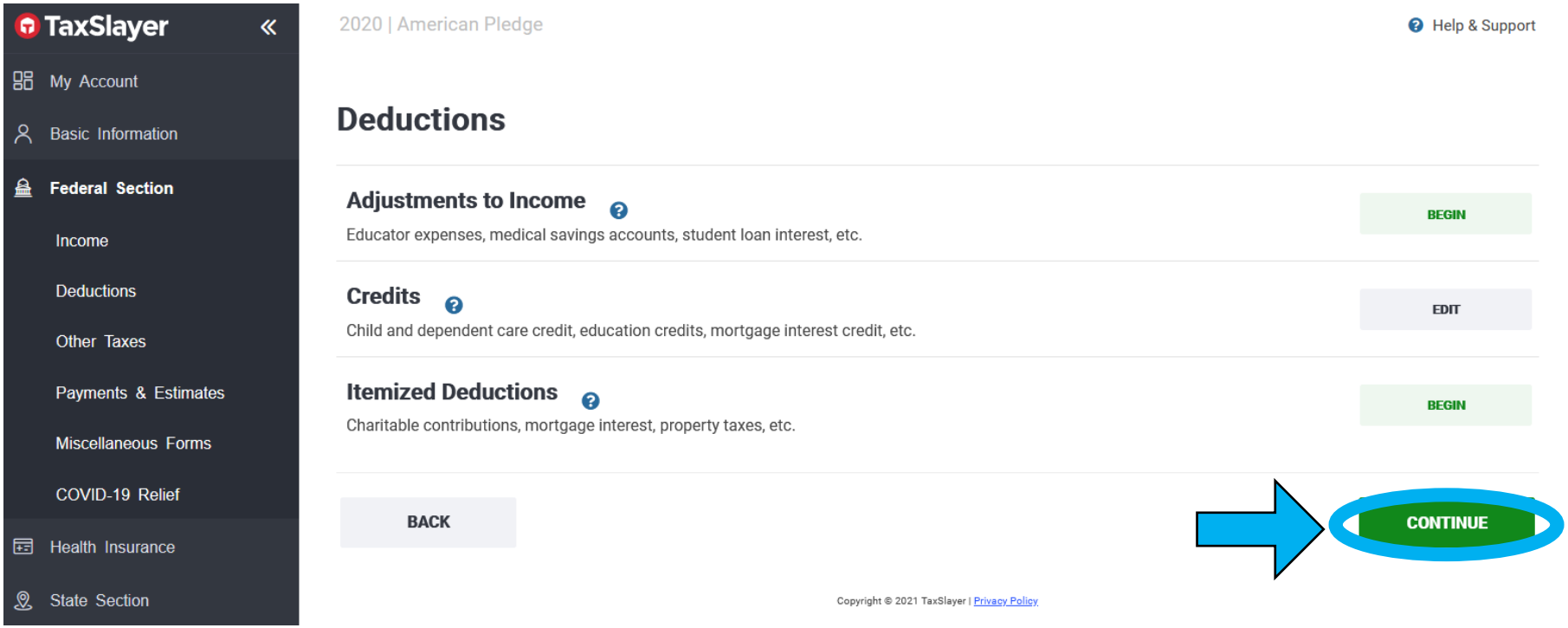
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Health Insurance
State Section
2020 | American Pledge
Help & Support
Deductions
Adjustments to Income
Educator expenses, medical savings accounts, student loan interest, etc.
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Credits
Child and dependent care credit, education credits, mortgage interest credit, etc.
EDIT
Itemized Deductions
Charitable contributions, mortgage interest, property taxes, etc.
BEGIN
BACK
CONTINUE
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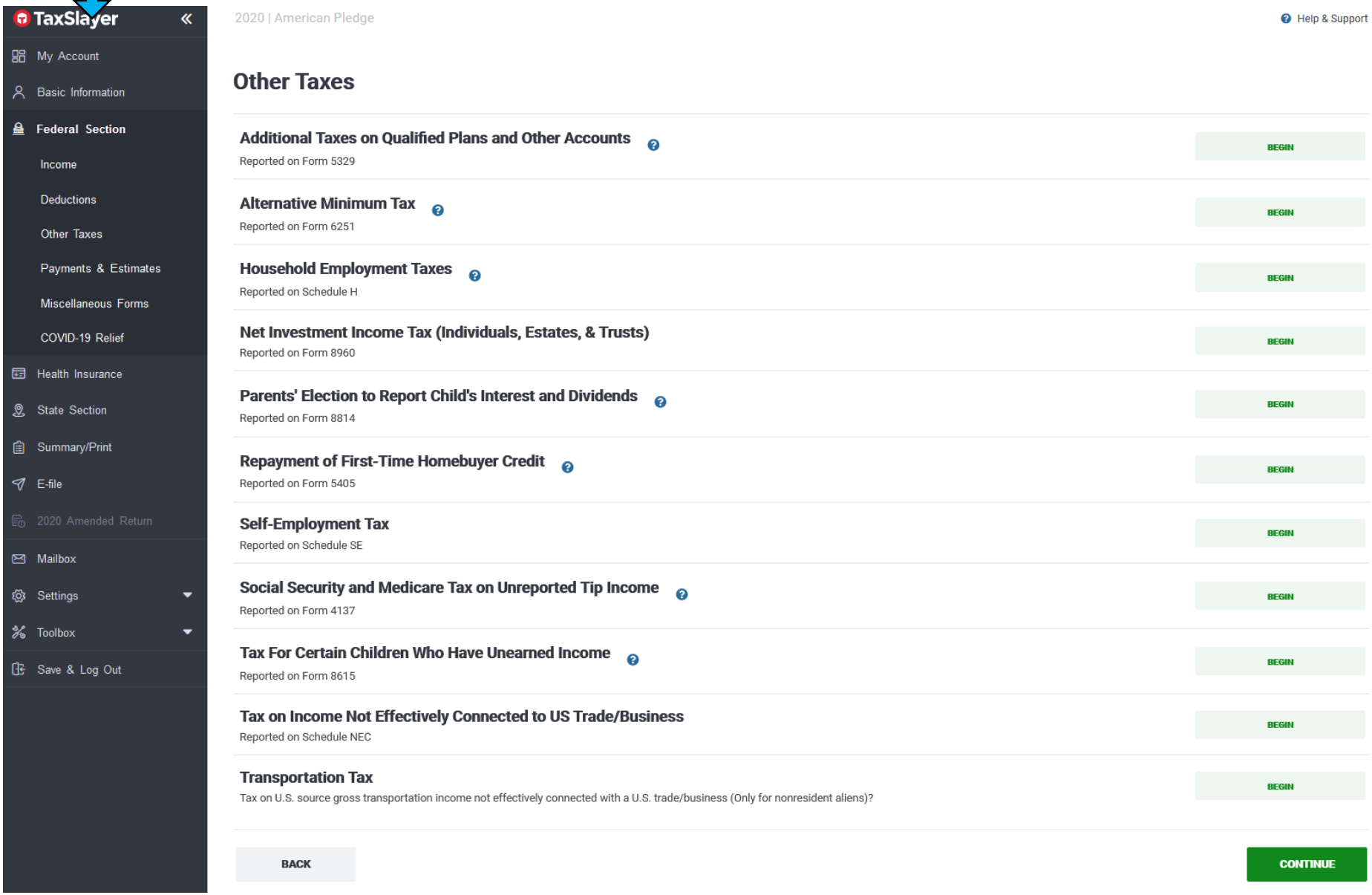


Entering state income tax refund received during 2021.

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 2020 federal return

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

A note about how state refunds are taxed

- If you took the standard deduction on your federal return last year, and you received a state income tax refund during calendar year 2021, that refund is not taxable.
  - This should apply in almost all situations for students from India.
  - If this does apply, you do not need to enter your state tax refund, and can proceed straight to the MN section.
- If you did itemize last year, you will need to enter your refund information to determine if it is taxable
  - Complete the following section to enter your refund and the software will determine if it is taxable and carry it to the appropriate form.

Example MN Return

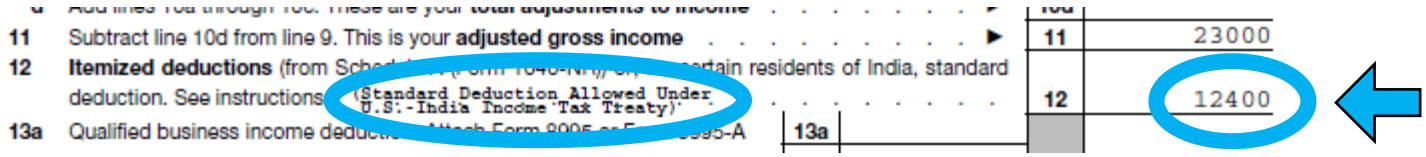
2020 M1, page 2

12	Add lines 10 and 11	12	385
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	385
	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	385
16	Amount from line 17 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	385
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	385
20	**Minnesota income tax withheld.** Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G *(do not send)*	20	400
21	Minnesota estimated tax and extension payments made for 2020	21 ■	
22	Amount from line 9 of Schedule M1REF, *Refundable Credits (see instructions; enclose Schedule M1REF)*	22 ■	
23	Total payments. Add lines 20 through 22	23	400
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 ■	15
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 2021 estimated tax	29 ■	

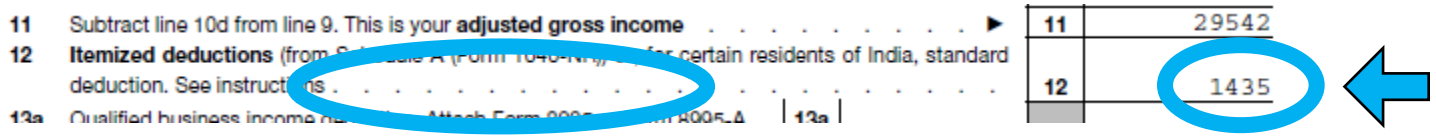
Refund

Where to find itemized deduction information on your 2020 federal return
Form 1040NR, on the first page, line 12

If you took the standard deduction:

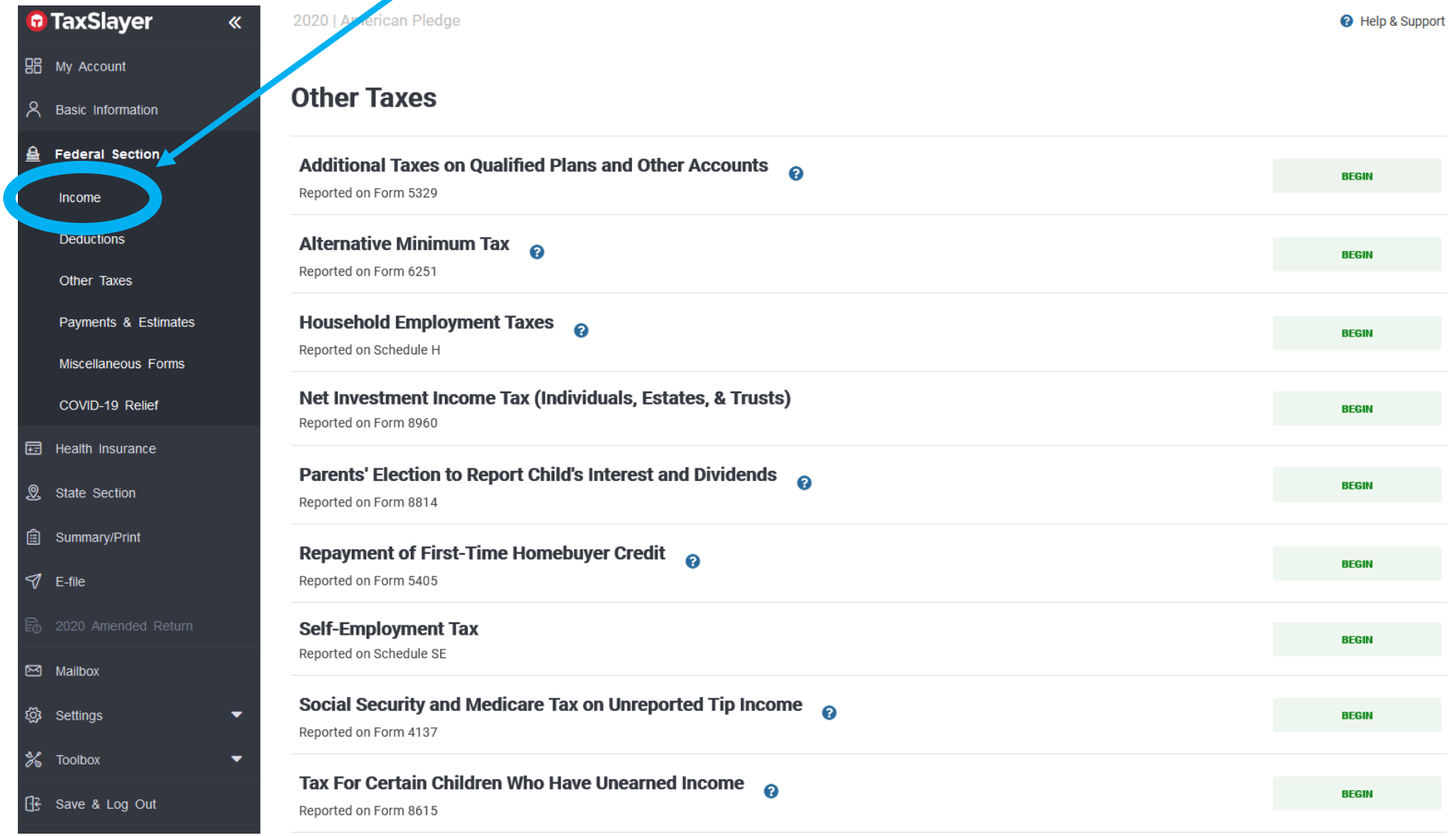


If you itemized deductions:

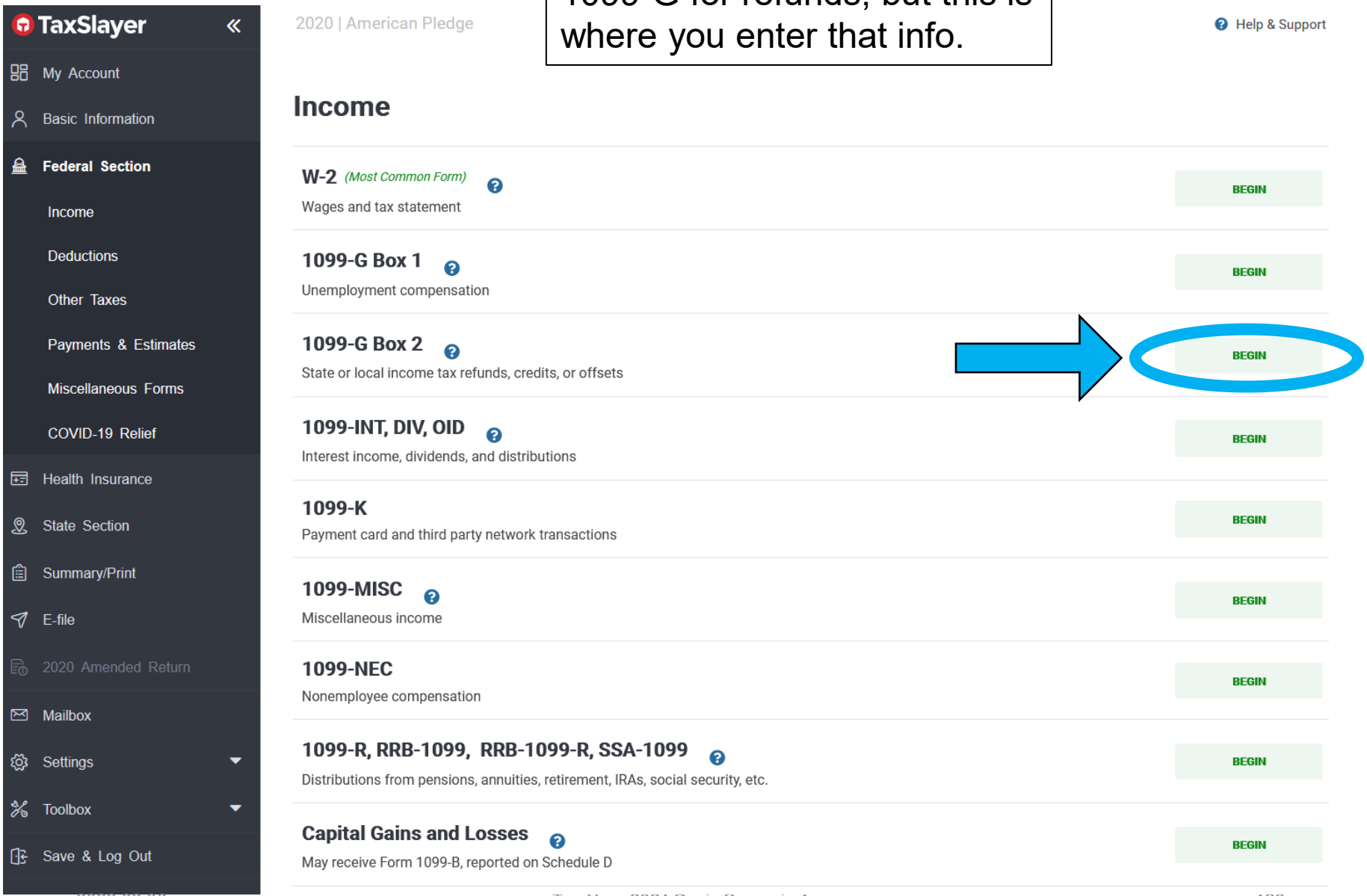


No Standard Deduction Treaty Statement

Click on Income



MN does not send out forms 1099-G for refunds, but this is where you enter that info.



State & Local Refund Worksheet

This is not correct – do not follow these instructions!

Only complete this worksheet if you itemized your 2020 tax return.

To report your Prior Year State and Local Refund(s) on a Nonresident return, click Cancel below and go to Less Common Income > Other Income Not Reported Elsewhere.

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

State & Local Refunds

2020 state tax refunds (all refunds from 1099-G or similar statements)

$

Enter total state income tax refund(s) received during calendar year 2020

Prior Year Taxes

Last year's (2020 tax return) total state and local tax paid (Schedule A line 5d)

$

Enter total state income tax from 2020 1040-NR schedule A line 1a

Last year's (2020 Tax Return) total itemized or standard deductions (Form 1040 line 12)

$

Enter total itemized deductions from 2020 1040-NR schedule A line 8

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

$

Enter total state income tax from 2020 1040-NR schedule A line 1a

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

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

$

Blank

Last Year's (2020 Tax Return) Filing Status *

Select one...

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

Last Year's (2020 Tax Return) Deductions for Age 65 and over or Blind:

Check here if Support claimed the Age 65 and older deduction last year

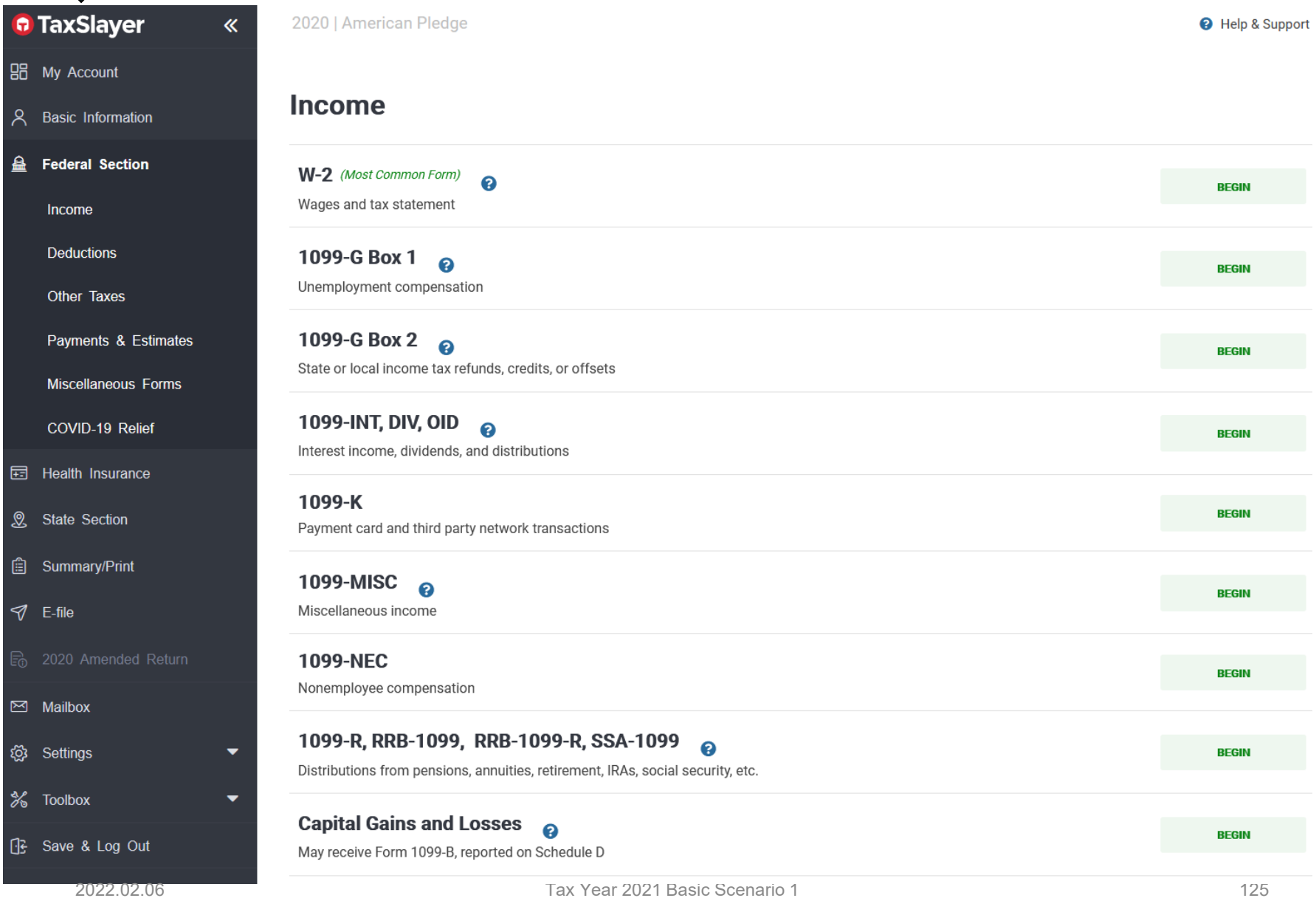
Check here if Support claimed the Blind deduction last year.

Check box if any apply (usually no).

CANCEL

CONTINUE

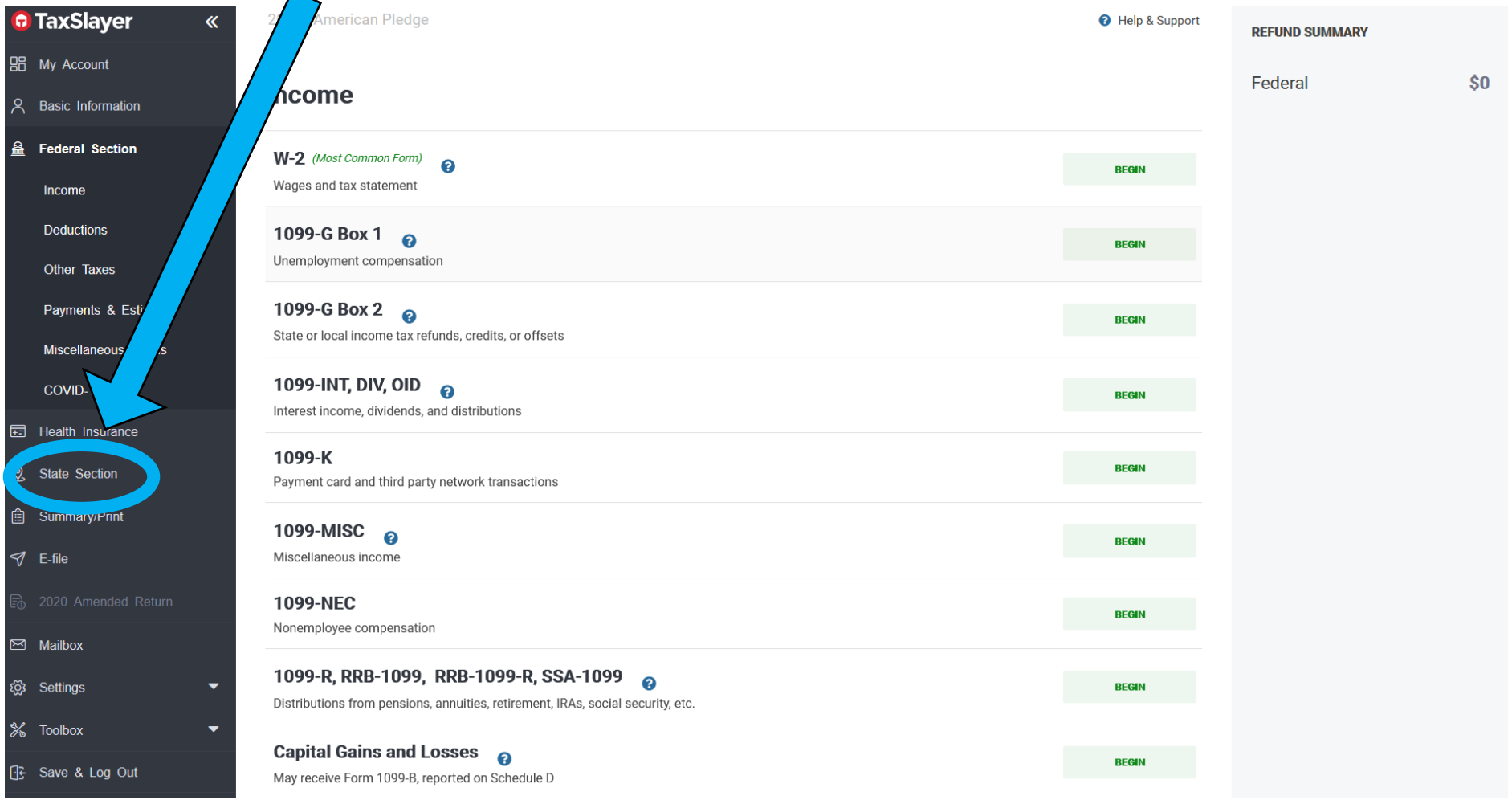
Back to Main Page



This completes entering state income tax refunds and payments

Minnesota State Income Tax Return

Click on State Section



Let's get started on your state return

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

If you qualify for a free federal return, you can file a free state return for the following states:
Arkansas, Arizona, Dist of Columbia, Georgia, Iowa, Idaho, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, Mississippi, Montana, North Carolina, North Dakota, New York, Oregon, Rhode Island, South Carolina, Virginia, Vermont, West Virginia

Returns for all other states are $0.00

BACK

Skip state return

GET STARTED

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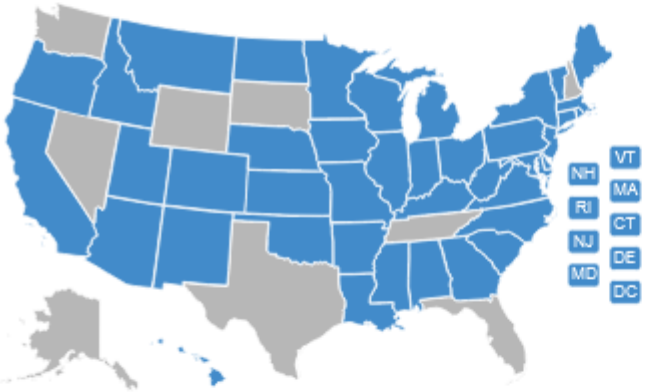
Select your State Return

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

Only states that accept tax returns for which you have not already created a state tax return are listed here. The following states **do not** have individual income tax returns:
Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming



Choose State

- Please Select -

Select Minnesota
or click MN on the map

CANCEL

CONTINUE

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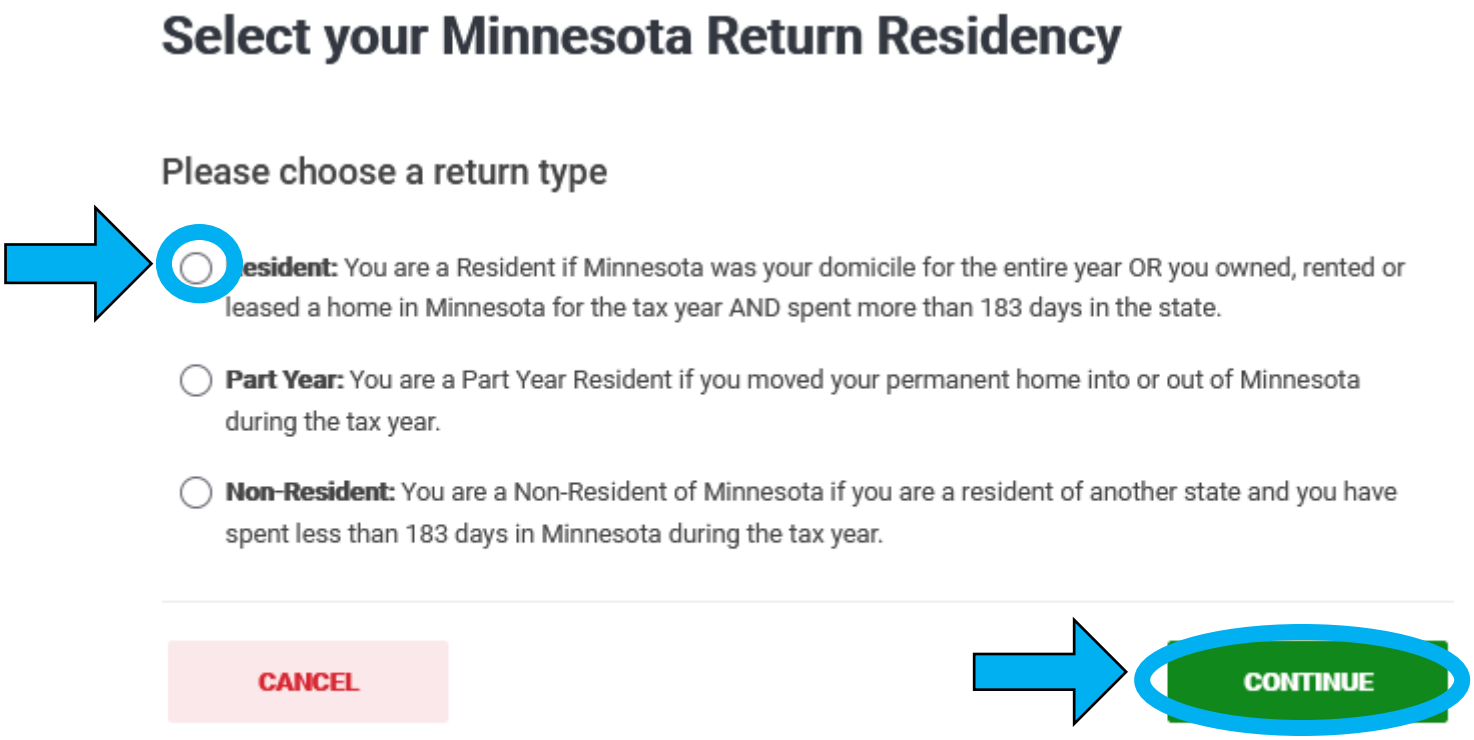

If you didn't work in another state, choose resident.

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

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

Minnesota Return

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

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

--Select--

Recommend No Contribution

CONTINUE

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

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

Congratulations! You have completed your standard Minnesota state return!

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

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

NO

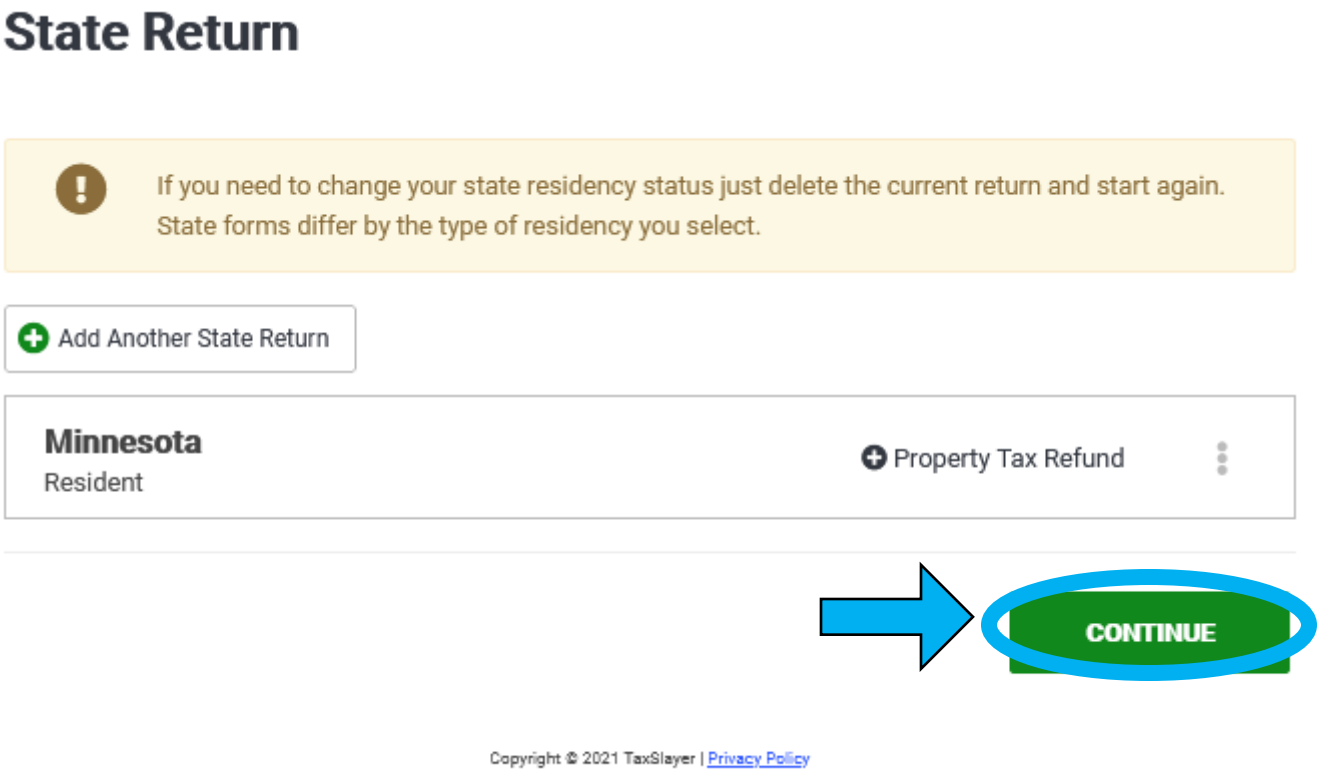
YES

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

No

Yes

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



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

Minnesota Return

Basic Information	BEGIN
Minnesota Property Tax Rebate M1PR	BEGIN
Additions to Income	BEGIN
Subtractions from Income	BEGIN
Credits	BEGIN
Contributions	BEGIN
Payments	BEGIN
Miscellaneous Forms	BEGIN
Additional Nontaxable Income (Forms M1CD or M1ED)	BEGIN

EXIT MINNESOTA RETURN

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Minnesota Return

Basic Information

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

State Election Campaign BEGIN

Is the address on your return a New Address?

- (●) Yes ← Yes to indicate a new address
- ( ) No

Do you want to force the MN Standard Deduction?

- (✖) Yes ← Do NOT say Yes to this!
- (●) No

Scroll down to continue → CONTINUE

Exit Minnesota Return

Minnesota Return

Basic Information	BEGIN
Minnesota Property Tax Rebate M1PR	BEGIN
Additions to Income	BEGIN
Subtractions from Income	BEGIN
Credits	BEGIN
Contributions	BEGIN
Payments	BEGIN
Miscellaneous Forms	BEGIN
Additional Nontaxable Income (Forms M1CD or M1ED)	BEGIN

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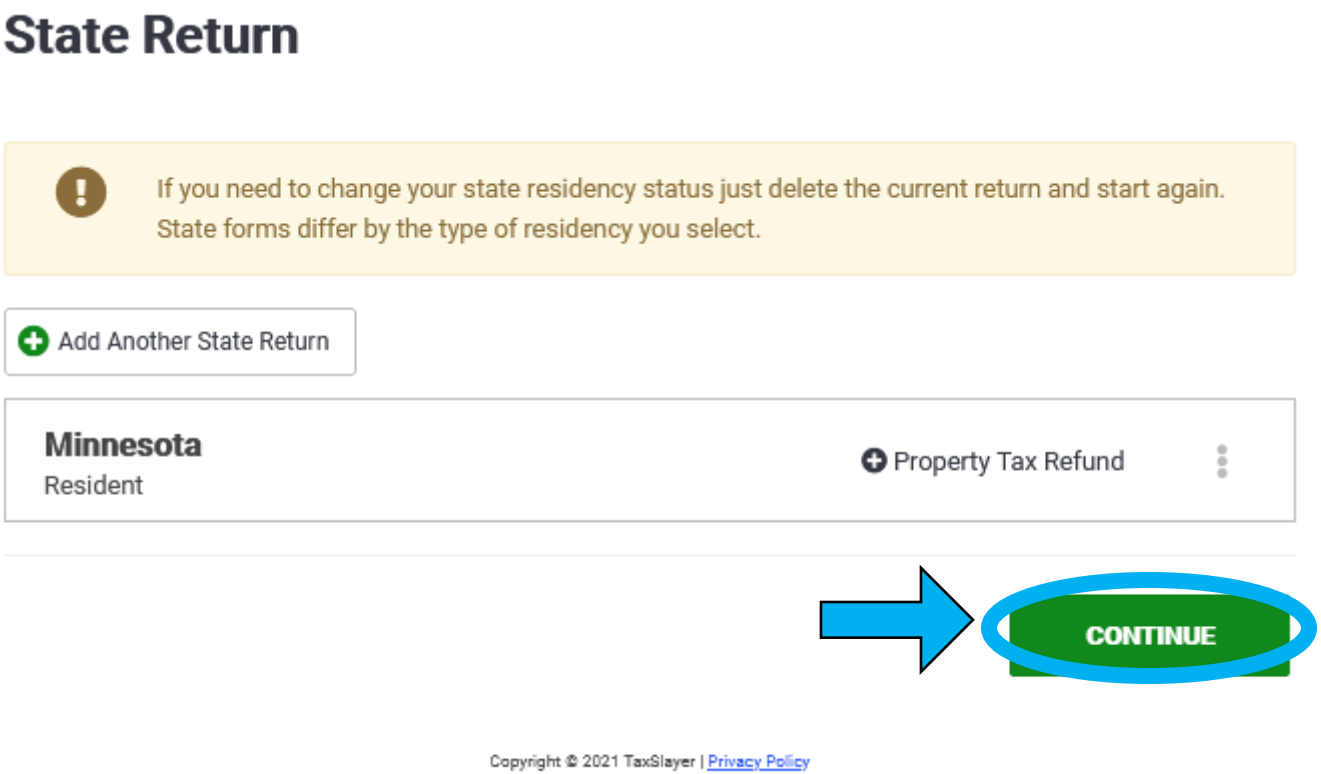
State Return
If you need to change your state residency status just delete the current return and start again.
State forms differ by the type of residency you select.
Add Another State Return
Minnesota
Resident
Property Tax Refund
CONTINUE
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Congratulations!!!

You have prepared your tax return!

Tax Return Summary

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

PRINT | VIEW RETURN

Download a pdf of your completed returns to review

BACK

CONTINUE

Filing instructions guide has been published on the NRVTAP member site

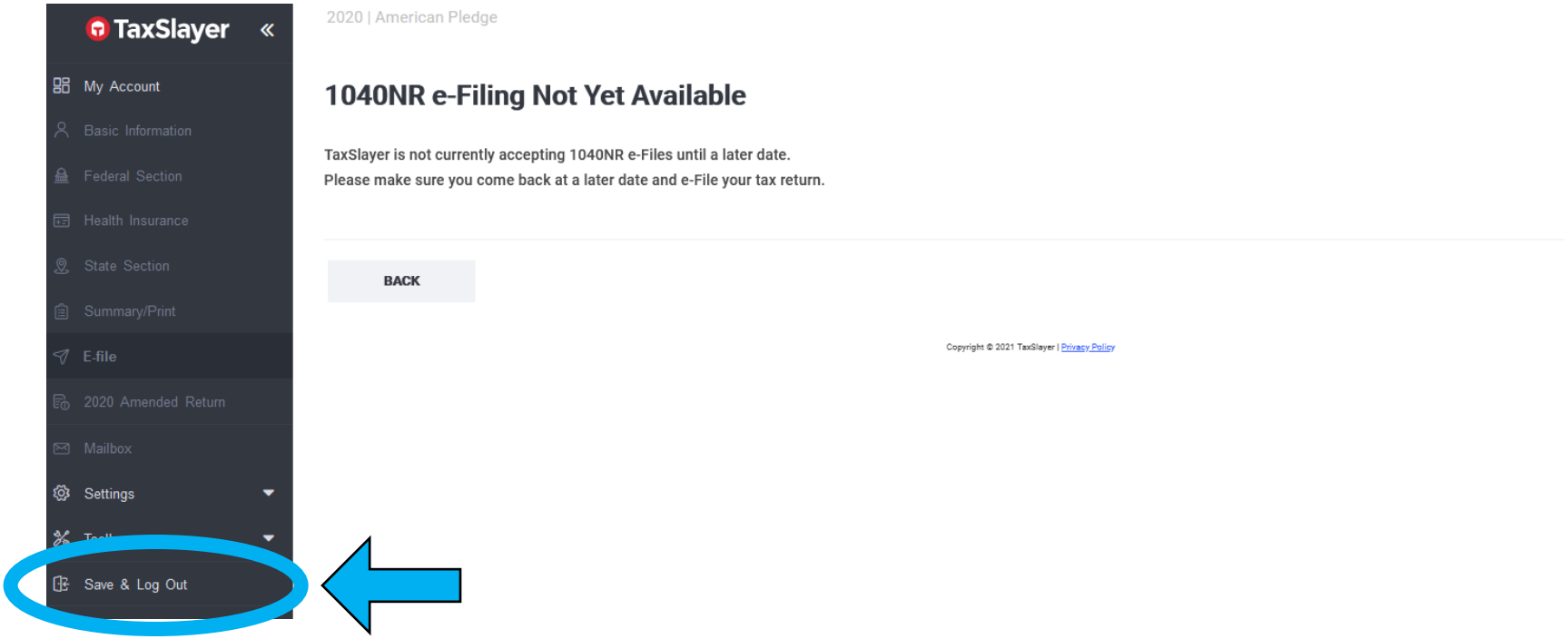
Go to Step 3 to access the link to this guide to complete your returns and file them with the tax authorities

Tax Return Summary

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

PRINT | VIEW RETURN

BACK | CONTINUE



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

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

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