

NoRTH & NRVTAP International Tax Clinic

DIY-Taxes using TaxSlayer

Basic Scenario 2

For NRA with Tax Treaty

An IRS FSA (Facilitated Self-Assistance) Tax Clinic

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

IRS Required Disclosures

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 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 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 wI.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 / MN Department of Revenue.

Have you confirmed your federal tax residency?

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

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

Select Tax Year

2022

Enter Your Visits

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

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

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

[Add another visit](#)

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

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

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

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

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

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

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

2023.02.03
Print Results

Have you checked your treaty benefits?

Select Visa

F-1 Student

Select Country of Tax Residency

China

Select Federal Tax Residency

Nonresident Alien

Did you receive dividends from U.S. Corporations

No

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

No

Check Treaty Benefits

Clear Treaty Benefits

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

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

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

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

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

Document Type	Income Code (if 1042-S)	Income	
W-2	Select Income Code	7800	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	7800
			1042-S	5000
5000	No Limit	20(c)	Total	12800

Your treaty benefits match

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

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

Basic Scenario #2 Details

- This scenario is intended to assist in federal tax return preparation for nonresident aliens who **have** treaty benefits for wages and/or scholarships:
 - May have wage income
 - This may be reported on a W-2
 - This may be reported on a 1042-S form with income code 19 or 20
 - Your treaty benefit either matches the amount of the 1042-S form, or you have no treaty benefit
 - May have scholarship or fellowship income
 - This would be reported on a form 1042-S form with income code 16
 - Your treaty benefit either matches the amount, or you have no treaty benefit
 - May have filed a federal and state income tax return last year
 - May have received a state income tax refund
 - May have paid additional state income tax
- If this scenario doesn't represent your basic situation, please go back to the main website and choose a different scenario, or use our personalized guide tool to create your customized guide.

Special Circumstances Scenarios

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

Out of Scope Income & Situations

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

- If you have a type of income that is out of scope you can still use TaxSlayer to prepare your return, but we will not be able to provide guidance about the out of scope income.
- You can find reference materials for preparing your federal return / reporting out of scope income here:
 - <https://www.irs.gov/>

Basic Scenario 2 Steps

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

Access TaxSlayer Software

Go to NRVTAP Member Site, Step 2

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

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

5 - Prepare your return using a basic scenario

Basic Scenario 1: Students from India +

Basic Scenario 2: Treaty Benefits +

Basic Scenario 3 - No Treaty Benefits +

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

Accessing TaxSlayer – Make sure the link takes you here.

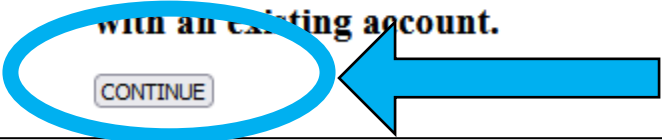
Welcome to the TaxSlayer VITA/TCE self-prep kiosk

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

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

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

CONTINUE



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

Do NOT go to the main TaxSlayer website.

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

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

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

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

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

Creating your TaxSlayer account



Log In

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

Username

Password

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

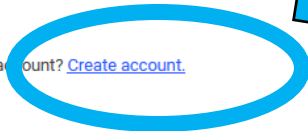
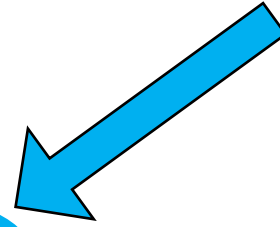
LOG IN

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

Copyright © 2022 TaxSlayer

Language:

SAVE



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.

Would you like us to import this data?

[BACK](#)



Get Started Now

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

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

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

Taxpayer's SSN

 - -

[No, thanks](#)

VERIFY

[No, thanks](#)

YES

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

Creating your TaxSlayer account



Create your account.

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

Email address

! Email address is required.

Username

Password

No prohibited characters

At least 8 characters long

Must contain at least one upper and one lower case letter

One number

One special character

Confirm password

! Please confirm your password.

Mobile phone (recommended)

CREATE ACCOUNT

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

Recommend entering your mobile phone number if you have one.

It will be required for e-filing.

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

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

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



Check your phone

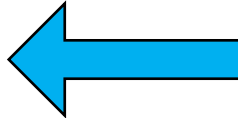
Enter the verification code we sent you to verify.

We sent a code to:
(***)***.***36

Enter the 6-digit code

[Resend Verification Code](#)

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



[Skip](#)

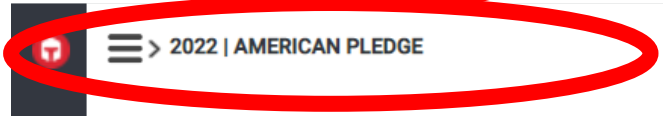
If you skip you should get an email asking you to verify your account that way.

VERIFY

Language:

SAVE

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



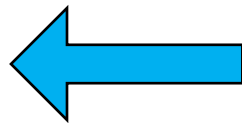
Help & Support



Success! Your TaxSlayer account has been created.

Now, let's keep going.

CONTINUE



Personalize your TaxSlayer experience

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

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

Use of Information

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

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

PRINT

Ensure the details below are accurate:

Full Name

Date
01/23/2023

I am filing a joint return with my spouse.

Leave blank!

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

REMIND ME LATER

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

Want to get a head start on your Tax Return?

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



Drag and Drop PDF here, or
click to upload

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



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

Personal Information

Taxpayer's Information

Primary taxpayer first name

NRVTAP

MI

Last name

TaxSupport

Suffix (Jr, Sr, etc.)

SSN *

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

Date of Birth

MM DD YYYY

Occupation

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

BACK

CONTINUE

Personal Information

Taxpayer's Information

Primary taxpayer first name

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

Personal Information

What's your mailing address?

Country

United States of America

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

 -

City, town, or post office

State

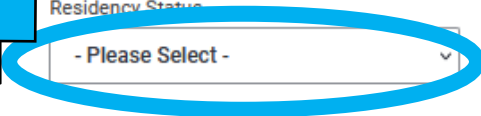
- Please Select -

Residency Status

- Please Select -

I have a stateside military address.

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



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.

Fill out all boxes, then continue

BACK

[Skip](#)



CONTINUE

Additional Information

Taxpayer's Information


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

Check any of these that apply to you:

- NRVTAP can be claimed as a dependent on someone else's return. 
- NRVTAP was over age 18 and a full-time student at an eligible educational institution. 
- NRVTAP is blind.
- NRVTAP is deceased.

✘ Do NOT put a check mark in this box!

✘ NRVTAP wishes to contribute \$3 to the Presidential Election Campaign Fund.

- NRVTAP served in a combat zone during the current tax year. 
- NRVTAP was affected by a natural disaster during the current tax year.
- NRVTAP received, sold, exchanged, gifted, or disposed of a digital asset (or financial interest in a digital asset) in the current tax year.
- NRVTAP prefers to receive written communications from the IRS in a language other than English.
- NRVTAP prefers to receive written communications from the IRS in an accessible format.

Crypto?

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

Check to see language options!

BACK

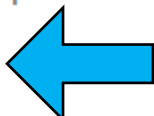
Skip

CONTINUE

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

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

Nonresident Alien



Need help determining your filing status?

FILING STATUS WIZARD

Do NOT click

BACK

Do NOT click 'BACK'

CONTINUE

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

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

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

Nonresident option is missing!

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

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

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

Transaction History

Account Charges [hide](#)

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

PRINT

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

Banking Information [hide](#)

No information to display

IRS Payment Information [hide](#)

No information to display

Deactivate Tax Return [hide](#)

Tax Year 2021 (111-12-3333)

- Please Select -

CLEAR YOUR RETURN AND RESTART

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

MY ACCOUNT

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

Single nonresident alien

Married nonresident alien

Qualifying widow(er) with dependent child

If you are single

If you are married

WAIT! This isn't what I wanted!

SHOW RESIDENT OPTIONS

BACK

Must be from Canada, Mexico, India, or S. Korea, have child that is U.S. citizen, have spouse that died in 2020 or 2021, + 4 other criteria.
Email us to discuss if you think you qualify.

CONTINUE

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

Dependents or Qualifying Person(s)

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

[? Learn more](#)

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

Select which applies to you

YES

NO

Notes:

A spouse is never a dependent.

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

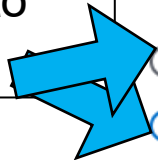
This scenario answer is NO

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

IRS Identity Protection PIN

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

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

CONTINUE

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

Let's do this! #slayit

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

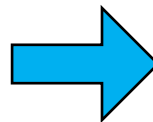


Add your forms quickly with Quick File

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



BACK



I don't know which forms I need

~~CONTINUE~~

TaxSlayer ×

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

Federal
\$0

Income

W-2 *(Most Common Form)* ?

Wages and tax statement

BEGIN

1099-G Box 1 ?

Unemployment compensation

BEGIN

1099-G Box 2 ?

State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID ?

Interest income, dividends, and distributions

BEGIN

1099-K ?

Payment card and third party network transactions

BEGIN

1099-MISC ?

Miscellaneous income

BEGIN

1099-NEC

Nonemployee compensation

BEGIN

1099-R, RRB, SSA ?

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

BEGIN

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Capital Gains and Losses ?

May receive Form 1099-B, reported on Schedule D

BEGIN

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

When you log back in to TaxSlayer:



SEND

VERIFY



You've entered your password.

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

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

How would you like to receive your unique code?

- Phone: (***)***.**27
- Email: ****ort@****ap.com [Can't access your email?](#)

Select which method you prefer

SEND CODE

[Cancel](#)

Language:

en (US) ▾

SAVE

Enter your code



SEND

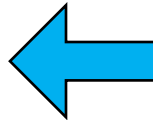
VERIFY



Check your device.

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

Enter your verification code



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



VERIFY CODE

[Cancel](#)

Language:

en (US) ▾

SAVE

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



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



RETURN	STATUS	REFUND AMOUNT
Federal	Created i	\$0.00

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

2023.02.03
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 2022 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



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Schedule OI - General Information

General Information

Type of 1040NR Entity *

Individual

Individual

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

Country of Citizenship *

India

Country of Residence *

India

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

U.S. Travel Information

Other not listed

Other Not Listed

Studying in another country may not establish tax residency.

Select type of U.S. Visa *

Nonimmigrant Visa

Nonimmigrant Visa

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

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

F1

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

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

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

Nature of Change

F1 to J1 student

Example of what to put IF you changed your visa

Date Changed

8 2021 02 03 2021

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

Days Present in the U.S.

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

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

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

Tax Return Filing Information



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

Last Year Filed

2021

Form Title

1040NR

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

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

- Check 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.

Select Tax Year

2022

Enter Your Visits

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

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

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

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

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

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

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

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

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

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

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)

\$ ~~XXXX~~

Leave blank!

Real Property Election

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

Yes

No

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

CANCEL

2023.02.03



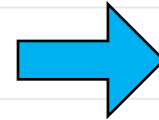
Schedule OI



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 2022. 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 2022. Either date you entered during 2022, or 01/01/2022 if you were already here at start of 2022.

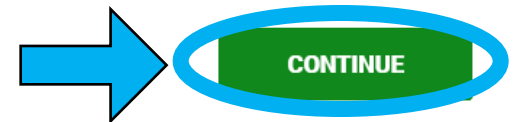
Date Departed U.S.

MM DD YYYY

CANCEL

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

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

Click here to edit or delete this info.

Schedule OI - Current Year Travel Dates

 Schedule OI Travel Dates

1/1/2022
5/31/2022 

8/23/2022
N/A 

When all 2022 visits entered, click continue

CONTINUE

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Schedule OI



General Information

EDIT

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

EDIT

Income Exempt from Tax

EDIT



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

2023.02.03
Log Out

2022 | AMERICAN PLEDGE

Help & Support ?

RETURN SUMMARY

Federal \$0

Income

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

Tax Year 2022 Basic Scenario 2

Click on Federal Section

TaxSlayer ☰

- My Account
- Basic Information
- Federal**
- Income
- Deductions
- Other Taxes
- Payments & Estimates
- Miscellaneous Forms
- Health Insurance
- State
- Summary/Print
- E-file
- Mailbox
- Settings
- Toolbox
- 2023.02.03
- Log Out

2022 | AMERICAN PLEDGE

Help & Support ?

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

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

2023.02.03

2022 | AMERICAN PLEDGE

Help & Support ?

Income

- W-2** *(Most Common Form)* ?
Wages and tax statement **BEGIN**
- 1099-G Box 1** ?
Unemployment compensation **BEGIN**
- 1099-G Box 2** ?
State or local income tax refunds, credits, or offsets **BEGIN**
- 1099-INT, DIV, OID** ?
Interest income, dividends, and distributions **BEGIN**
- 1099-K** ?
Payment card and third party network transactions **BEGIN**
- 1099-MISC** ?
Miscellaneous income **BEGIN**
- 1099-NEC**
Nonemployee compensation **BEGIN**
- 1099-R, RRB, SSA** ?
Distributions from pensions, annuities, retirement, IRAs, social security, etc. **BEGIN**
- 8915-F**
Deferred Retirement Income Due to Disaster Relief in a Prior Year **BEGIN**
- Capital Gains and Losses** ?
May receive Form 1099-B, reported on Schedule D **BEGIN**
- Profit or Loss from Business** ?
Tax Year 2022 Basic Scenario 2 **BEGIN**

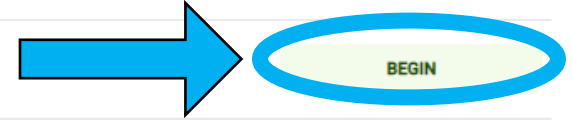
RETURN SUMMARY

Federal \$0

Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons

Reported on Form 8843



BEGIN

Allocation of Tax Amounts for Individuals in Certain States [?](#)

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

BEGIN

Application for Automatic Extension of Time to File [?](#)

Applied for on Form 4868

BEGIN

Closer Connection Exception Statement for Aliens

Reported on Form 8840

BEGIN

Initial and Annual Expatriation Statement

Reported on Form 8854

BEGIN

Injured Spouse Allocation [?](#)

Reported on Form 8379

BEGIN

Installment Agreement Request [?](#)

Requested on Form 9465

BEGIN

IRS Identification PIN [?](#)

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

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer [?](#)

Claimed on Form 1310

BEGIN

Statement of Specified Foreign Financial Assets

Form 8938

BEGIN

BACK
2023.02.03

CONTINUE
51

Form 8843 Part I - General Information

Type of U.S. Visa/Immigration Status

Select type of U.S. Visa *

Nonimmigrant Visa



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

Nonimmigrant visa type code

F1



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

Date entered U.S.

MM DD YYYY



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

Notes:

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

Visa Change Information

Have you changed your visa type (nonimmigrant status)?

Yes



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).

No

Current non-immigrant status



Current visa type (F1, etc)

General Information

Of what country were you a citizen during 2022?

India



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

What country issued you a passport?

- Please Select -



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

Passport number

2023.02.03



Current Passport #

Tax Year 2022 Basic Scenario 2

Text

Days in the U.S. in 2022

282



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

Days in the U.S. in 2021

365



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

Days in the U.S. in 2020

146



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

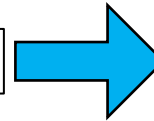
Days in 2022 you claim you can exclude (substantial presence test)

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

DELETE

CANCEL

Once all information entered



CONTINUE

If needed, 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.

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

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

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

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

Add another visit

Check Status

Clear Visits

You are a Nonresident Alien for Tax Year 2022.

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

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

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

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

Note: Use output from the "Am I A Nonresident Alien" tool for the Days Present boxes. Use GTP produced Form 8843 to report your Exempt days for 2022.

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

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information

EDIT

Part II - Teachers and Trainers

BEGIN

Part III - Students

F-1 or J-1 Student visas



EDIT

Part IV - Professional Athletes

BEGIN

Part V - Individuals with a Medical Condition

BEGIN

CONTINUE

Form 8843 Part III - Students

Academic institution where you attended

Institution Name *

Institution Phone Number *

Institution Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

 -

City, town, or post office *

State *

- Please Select -

Enter your school information

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

Director of Academic Program

Director Name *

Director Phone Number *

Director Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

 -

City, town, or post office *

State *

- Please Select -

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

Answer Yes or No

Visa held during 2016

Did you have a visa in this year?

- Yes
- No

Visa held during 2017

Did you have a visa in this year?

- Yes
- No

Visa held during 2018

Did you have a visa in this year?

- Yes
- No

Visa held during 2019

Did you have a visa in this year?

- Yes
- No

Visa held during 2020

Did you have a visa in this year?

- Yes
- No

Visa held during 2021

Did you have a visa in this year?

- Yes
- No

U.S. presence

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

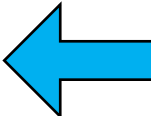
- Yes
- No

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

- Yes
- No

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

Once all information entered



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 2016

Did you have a visa in this year?

- Yes
- No

Visa held during 2017

Did you have a visa in this year?

- Yes
- No

Visa held during 2018

Did you have a visa in this year?

- Yes
- No

Visa held during 2019

Did you have a visa in this year?

- Yes
- No

Visa held during 2020

Did you have a visa in this year?

- Yes
- No

Visa held during 2021

Did you have a visa in this year?

- Yes
- No

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

Once all information entered



Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information

EDIT

Part II - Teachers and Trainers

BEGIN

Part III - Students

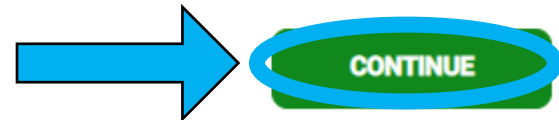
EDIT

Part IV - Professional Athletes

BEGIN

Part V - Individuals with a Medical Condition

BEGIN



Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons

Reported on Form 8843

BEGIN

Allocation of Tax Amounts for Individuals in Certain States [?](#)

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

BEGIN

Application for Automatic Extension of Time to File [?](#)

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Closer Connection Exception Statement for Aliens

Reported on Form 8840

BEGIN

Initial and Annual Expatriation Statement

Reported on Form 8854

BEGIN

Injured Spouse Allocation [?](#)

Reported on Form 8379

BEGIN

Installment Agreement Request [?](#)

Requested on Form 9465

BEGIN

IRS Identification PIN [?](#)

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

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer [?](#)

Claimed on Form 1310

BEGIN

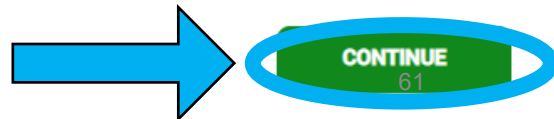
Statement of Specified Foreign Financial Assets

Form 8938

BEGIN

BACK
2023.02.03

Tax Year 2022 Basic Scenario 2



NOT married, skip this section and go to page 70.

Entering Spouse Information

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

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

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

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

Do NOT click on General Information

2021 | American Pledge

Help & Support

Personal Information

General Information

Mailing Address

Phone Number

Additional Personal Information

BACK

CONTINUE

RETURN SUMMARY

Federal \$356

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

Click on Basic Information



The image shows the left-hand navigation menu of the TaxSlayer mobile application. The menu is dark-themed and contains several items. At the top, there is a 'Basic Information' item with a person icon, which is circled in blue and has a blue arrow pointing to it from the top right. Below it is 'Federal' with a building icon. Under the 'Health Insurance' section, there are 'State', 'Summary/Print', and 'E-file' options. At the bottom of the menu, there are 'Mailbox', 'Settings', and 'Toolbox' (with a dropdown arrow), followed by the date '2023.02.03' and a 'Log Out' option.

2022 | AMERICAN PLEDGE

Help & Support ?

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2022? [?](#)

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

Yes

No

BACK

CONTINUE

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RETURN SUMMARY

Federal \$0

Click on Personal Information

TaxSlayer

My Account

Basic Information

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

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

2023.02.03

Log Out

2022 | AMERICAN 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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RETURN SUMMARY

Federal **\$0**

TaxSlayer <≡

My Account

Basic Information

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

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings ▾

Toolbox ▾

Log Out

Personal Information

- General Information **EDIT**
- Mailing Address **EDIT**
- Phone Number **EDIT**
- Additional Personal Information **EDIT**

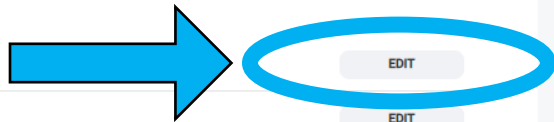
BACK

CONTINUE

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RETURN SUMMARY

Federal **\$0**



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

Spouse's Information

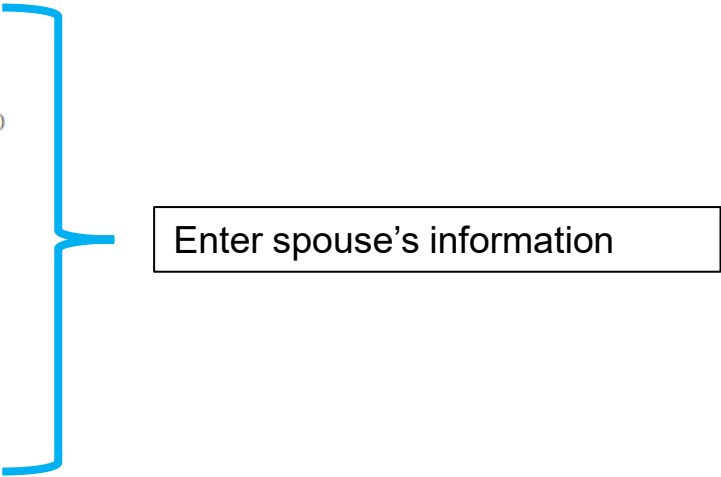
Spouse first name MI

Last name Suffix (Jr, Sr, etc.)

SSN

Date of Birth

Occupation





TaxSlayer ☰

My Account

Basic Information

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

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings ▼

Toolbox ▼

Log Out

Personal Information

General Information	EDIT
Mailing Address	EDIT
Phone Number	EDIT
Additional Personal Information	EDIT

BACK



CONTINUE

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RETURN SUMMARY

Federal \$0

Basic Scenario #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 79.**

If you have no wage income, you can skip directly to the section on
scholarships **go to pg 98.**

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

You do not create this document yourself.

Click on Federal Section to enter income

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Deductions
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Payments & Estimates
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Help & Support ?

Other Taxes

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

BACK

CONTINUE

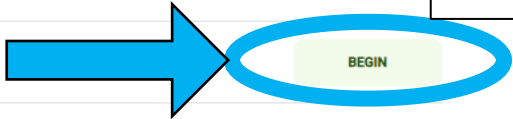
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RETURN SUMMARY

Federal \$0

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!
- 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.

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 \$


12 ?
a - Code

13 ?
 Statutory employee
 Retirement plan
 Third-party sick pay

14 ?
a - Code

Medicare Waiver Payment \$
Railroad tier 1 wages \$ **Railroad tier 1 tax withheld** \$
Railroad medicare wages \$ **Railroad medicare tax withheld** \$

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



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

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

CANCEL

When all info entered,
click continue

CONTINUE

If you have more W-2 Forms to enter

Click here to edit or delete this info.

W-2 Wage Statement

+ Add a W-2 Wage Statement

Taxpayer
University of Minnesota 41-6007513

Income \$18,740.00

Tax Withheld \$2,311.00



BACK

When all W-2 forms entered, click continue

CONTINUE

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 - W-2 Wage Statement
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- 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**

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 98.

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 <≡

- My Account
- Basic Information
- Federal**
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 - Deducti
 - GM
 - Payments & Estimates**
 - Miscellaneous Forms
- Health Insurance
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- Mailbox
- Settings
- Toolbox
- Log Out

2023.02.03

2022 AMERICAN PLEDGE Help & Support ?

Income

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

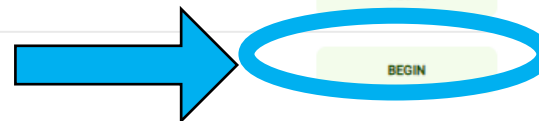
Form 8288-A

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 screenshot shows the entry interface for Form 1042-S. The following fields are annotated with callouts:

- Box 3:** Select chapter * (Please Select)
- Box 3b:** Tax Rate
- Boxes along top of form:** Unique Form Identifier *, Is this an amended form (Yes/No), Pro-rata basis reporting? (Yes/No), Have you deposited tax with the IRS pursuant to escrow procedure? (Yes/No)
- Box 1:** Select an income code *
- Box 2:** Gross Income (Gross Income will not be carried to your return. Please enter it on the applicable form.)
- Box 5:** Withholding Allowance
- Box 6:** Net Income
- Box 7a:** Federal Tax Withheld
- Box 8:** Tax Withheld by Other Agents

READ THIS BEFORE TYPING:

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

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
 ← **Box 12b**

Chapter 4 Status Code
 ← **Box 12c**

Agent's GIIN
 ← **Box 12e**

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

Agent's Address
 Country

Address (street number & name)

ZIP code
 -

City, town, or post office

State

Box 12h-12i

Recipient Information

Chapter 3 Status Code
 ← **Box 13f**

Chapter 4 Status Code
 ← **Box 13g**

Recipient's GIIN
 ← **Box 13h**

Recipients's Foreign Tax ID Number
 ← **Box 13i**

LOB Code
 ← **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

CANCEL


When all info entered, click continue

CONTINUE

Click here to edit or delete this info.



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

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

3 20	Gross Income \$5,000.00	Tax Withheld \$0.00	...
----------------	----------------------------	------------------------	-----



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Help & Support ?

Payments and Estimates

Federal Estimated Tax Payments ?

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments ?

State tax payments already made for 2022

BEGIN

Other Federal Withholdings ?

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ?

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ?

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

BEGIN

Apply Overpayment to Next Year's Taxes ?

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

BEGIN

Vouchers for 2023 Estimated Tax Payments ?

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension ?

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

BEGIN

IRC 1341 Repayment Amount ?

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

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

Form 8805

BEGIN

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

Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

EDIT

BACK

CONTINUE

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RETURN SUMMARY

Federal **\$623**

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

If you have this treaty benefit, not everyone does.

go to pg 98 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 131 State Income Tax section.

You should have already determined your treaty benefit information.

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

Document Type

Income Code (if 1042-S)

Income

1042-S

20

5000

Remove Document

W-2

Select Income Code

7800

Remove Document

[Add another document](#)

Check if treaty benefits match

Clear All Documents

Example for a student whose treaty benefit matches their income documents

Match Status for Wages

Treaty Information

My Information

Maximum Dollar Amount	Maximum Years in the U.S.	Treaty Article	Income Document Type	Income Amount
			1042-S	5000
			W-2	7800
5000	No Limit	20(c)	Total	12800

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

Document Type

Income Code (if 1042-S)

Income

1042-S x ▾

19 x ▾

28000 ▾ ▿

Remove Document

Add another document

Check if treaty benefits match

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

Clear All Documents

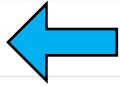
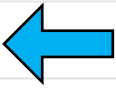
Match Status for Wages

Treaty Information

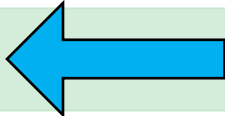
My Information



Maximum Dollar Amount	Maximum Years in the U.S.	Treaty Article	Income Document Type	Income Amount
No Limit	3	19	1042-S	28000
			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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- Log Out

Click on Basic Information at Main Page





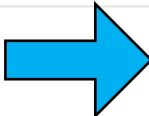
Payments and Estimates

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

BACK **CONTINUE**

Schedule OI

General Information

EDIT

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

EDIT

Income Exempt from Tax

BEGIN

CONTINUE



Schedule OI - Income Exempt from Tax

Name of the Country *



Select country of tax residence

Tax Treaty Article *



Select treaty article from My Treaty Benefits results

Number of months claimed on prior tax returns



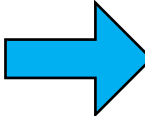
Number of months you previously claimed this treaty on a tax return

Amount of exempt income




Number from 1042-S box 2

CANCEL



CONTINUE

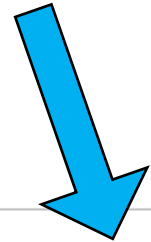
Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00



Click here to edit or delete this info.



Schedule OI

General Information

EDIT

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

EDIT

Income Exempt from Tax

EDIT



Back to Main Page



TaxSlayer <☰

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

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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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This completes entering
wage income and treaty
benefits for wages

Entering scholarship income reported on a 1042-S

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

If you have this document, not everyone does.

If you don't have this document, then skip to State Income Tax Refund or Payment section **go to pg 131.**

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 <☰

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

2023.02.03

2022 AMERICAN PLEDGE

Help & Support ?

Income

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

RETURN SUMMARY

Federal **\$1,733**

Payments and Estimates

Federal Estimated Tax Payments [?](#)

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments [?](#)

State tax payments already made for 2022

BEGIN

Other Federal Withholdings [?](#)

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings [?](#)

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax [?](#)

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

BEGIN

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

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

BEGIN

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

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension [?](#)

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

BEGIN

IRC 1341 Repayment Amount [?](#)

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

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

Form 8805

BEGIN

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

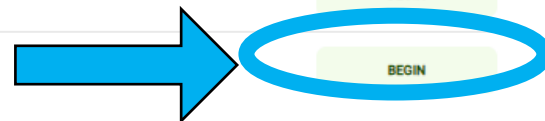
Form 8288-A

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

BEGIN



Enter 1042-S information directly from form.

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

Select chapter *
Please Select

Tax Rate

Unique Form Identifier *

Is this an amended form?
 Yes
 No

Pro-rata basis reporting?
 Yes
 No

Have you deposited tax with the IRS pursuant to escrow procedure?
 Yes
 No

Select an income code *
- Please Select -

Gross Income
Gross Income will not be carried to your return. Please enter it on the applicable form.

Withholding Allowance

Net Income

Federal Tax Withheld

Tax Withheld by Other Agents

2023-12-03

Box 3

Box 3b

Boxes along top of form

Box 1

Box 2

Box 5

Box 6

Box 7a

Box 8

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

READ THIS BEFORE TYPING:

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

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

Total Withholding Credit
 ← **Box 10**

Amount Repaid to Recipient
 ← **Box 9**

Withholding Agent Information

Agent's Name
 ← **Box 12d**

Agent's EIN
 - ← **Box 12a**

Chapter 3 Status Code
 ← **Box 12b**

Chapter 4 Status Code
 ← **Box 12c**

Agent's GIIN
 ← **Box 12e**

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

Agent's Address
 Country

Address (street number & name)

ZIP code
 -

City, town, or post office

State

Box 12h-12i

Recipient Information

Chapter 3 Status Code
 ← **Box 13f**

Chapter 4 Status Code
 ← **Box 13g**

Recipient's GIIN
 ← **Box 13h**

Recipients's Foreign Tax ID Number
 ← **Box 13i**

LOB Code
 ← **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

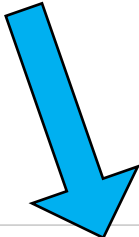
State Income Tax Withheld
\$ ← Box 17a

CANCEL

When all info entered, click continue

CONTINUE

Click here to edit or delete this info.



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

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

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



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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

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

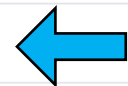
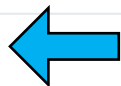
Example for a student whose treaty benefit matches their income documents

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)	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

2023.02.03

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

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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





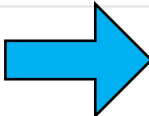
Form 1042-S

EDIT

BACK

CONTINUE

Basic Information

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

Schedule OI

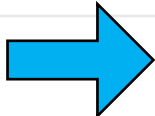
General Information

EDIT

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

EDIT

Income Exempt from Tax




BEGIN

CONTINUE

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

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

Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00



CONTINUE

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



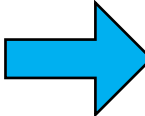
Number of months you previously claimed this treaty on a tax return

Amount of exempt income




Number from 1042-S box 2

CANCEL



CONTINUE

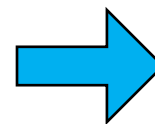
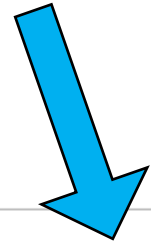
Schedule OI - Income Exempt from Tax

 Schedule OI Exempt Income

Korea South
2000.00



Click here to edit or delete this info.



CONTINUE

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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Help & Support ?

Basic Information

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

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Entering Scholarship income with no treaty exemption

If this doesn't apply to you, skip to State Income Tax Refund or Payment
section [go to pg 131.](#)

If you don't have a treaty exemption, you have to enter the scholarship
information again after you enter your 1042-S document.

A note about how scholarships are taxed

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

Click on Income

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Payments and Estimates

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

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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

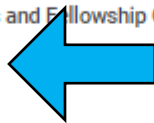


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CONTINUE

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received



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

CANCEL



CONTINUE

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Help & Support ?

Income

W-2 <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 Macalester students since scholarship generally go to direct payments for tuition, room, or board. If did happen need to show receipt paid for books, etc.

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

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

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

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

If this does not apply to you, skip to State Income Tax Refund or Payment section [go to pg 131](#)

Click on Deductions

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Payments and Estimates

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

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CONTINUE

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RETURN SUMMARY

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Deductions

Adjustments to Income [?](#)

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

Credits [?](#)

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

Itemized Deductions [?](#)

Charitable contributions, mortgage interest, property taxes, etc.



BEGIN

BEGIN

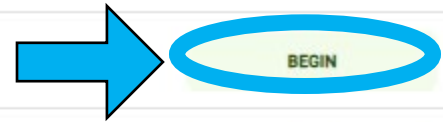
BEGIN

BACK

CONTINUE

Adjustments

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



Scholarships and Fellowship Grants Excluded

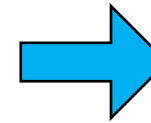
Amount of Scholarships and Fellowship Grants Excluded



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

CANCEL

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



CONTINUE

Adjustments

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



Deductions

Adjustments to Income [?](#)

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

BEGIN

Credits [?](#)

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

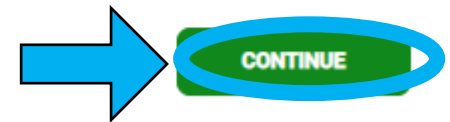
BEGIN

Itemized Deductions [?](#)

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

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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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CONTINUE

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RETURN SUMMARY

Federal **\$683**

This completes entering
scholarship income and treaty
benefits for scholarships

Entering state income tax payment made during 2022.

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


If you didn't pay additional state tax with your state tax return last year, you can skip to state refund section. [Go to pg 141.](#)

If you didn't get a refund, you can skip to the end section. [Go to pg 149.](#)

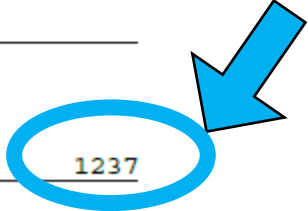
Example MN Return

2021 M1, page 2



11	Alternative minimum tax (enclose Schedule M1MT)	11	
12	Add lines 10 and 11	12	1751
13	Full-year residents: Enter the amount from line 12 on line 13. Skip lines 13a and 13b. Part-year residents and nonresidents: From Schedule M1NR, enter the amount from line 32 on line 13, from line 28 on line 13a, and from line 29 on line 13b (enclose Schedule M1NR)	13	1751
	13a <input type="checkbox"/> _____ 13b <input type="checkbox"/> _____		
14	Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes)		
	<input type="checkbox"/> (a) Schedule M1HOME <input type="checkbox"/> (b) Schedule M1529 <input type="checkbox"/> (c) Schedule M1LS	14	
15	Tax before credits. Add lines 13 and 14	15	1751
16	Amount from line 18 of Schedule M1C, Nonrefundable Credits (enclose Schedule M1C)	16	
17	Subtract line 16 from line 15 (if result is zero or less, leave blank)	17	1751
18	Nongame Wildlife Fund contribution (see instructions) This will reduce your refund or increase the amount you owe	18	
			
19	Add lines 17 and 18	19	1751
20	Minnesota income tax withheld. Complete and enclose Schedule M1W to report Minnesota withholding from Forms W-2, 1099, and W-2G (do not send)	20	514
21	Minnesota estimated tax and extension payments made for 2021	21	
22	Amount from line 11 of Schedule M1REF, Refundable Credits (see instructions; enclose Schedule M1REF)	22	
23	Total payments. Add lines 20 through 22	23	514
24	REFUND. If line 23 is more than line 19, subtract line 19 from line 23 (see instructions). For direct deposit, complete line 25	24	
25	Direct deposit of your refund (you must use an account not associated with a foreign bank):		
	<input type="checkbox"/> Checking <input type="checkbox"/> Savings _____ Routing Number Account Number		
26	AMOUNT YOU OWE. If line 19 is more than line 23, subtract line 23 from line 19 (see instructions)	26	1237
27	Penalty amount from Schedule M15 (see instructions). Also subtract this amount from line 24 or add it to line 26 (enclose Schedule M15)	27	
	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 2022 estimated tax	29	

Additional tax you should have paid



Click on Deductions

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Other Taxes

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

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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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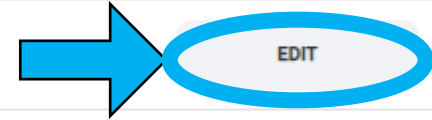
CONTINUE

Itemized Deductions

Use Standard or Itemized Deduction

BEGIN

Taxes You Paid [?](#)



EDIT

Gifts to Charity [?](#)

BEGIN

Unreimbursed Employee Business Expense [?](#)

BEGIN

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

BEGIN

Other Itemized Deductions

BEGIN

Less Common Deductions

BEGIN

CONTINUE

Schedule A - Taxes You Paid



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

Taxes Paid

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



Enter amount of tax paid with your state return

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

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

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

CANCEL



Schedule A - Taxes You Paid

\$0.00
\$0.00



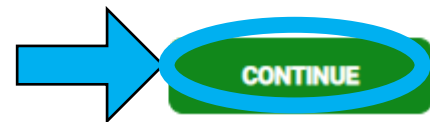
TaxSlayer shows \$0 here but the data is properly entered and will be used in the calculations if you are itemizing.



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Itemized Deductions

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



Deductions

Adjustments to Income [?](#)

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

BEGIN

Credits [?](#)

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

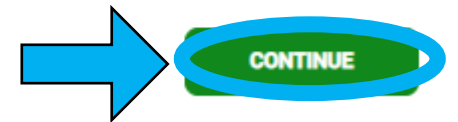
BEGIN

Itemized Deductions [?](#)

Charitable contributions, mortgage interest, property taxes, etc.

BEGIN

BACK



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2022 | 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

Entering state income tax refund received during 2022.

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

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

If you didn't file a state tax return last year, you can skip to the end section. [go to page 149.](#)

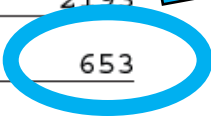
Example MN Return

2021 M1, page 2



11	Alternative minimum tax (enclose Schedule M1MT)	11	■	_____
12	Add lines 10 and 11	12	■	<u>1540</u>
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	■	<u>1540</u>
	13a ■ _____ 13b ■ _____			
14	Other taxes, such as recapture amounts and the tax on lump-sum distributions (check appropriate boxes) <input type="checkbox"/> (a) Schedule M1HOME <input type="checkbox"/> (b) Schedule M1529 <input type="checkbox"/> (c) Schedule M1LS	14	■	_____
15	Tax before credits. Add lines 13 and 14	15	■	<u>1540</u>
16	Amount from line 18 of Schedule M1C, <i>Nonrefundable Credits</i> (enclose Schedule M1C)	16	■	_____
17	Subtract line 16 from line 15 (if result is zero or less, leave blank)	17	■	<u>1540</u>
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	■	<u>1540</u>
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	■	<u>2193</u>
21	Minnesota estimated tax and extension payments made for 2021	21	■	_____
22	Amount from line 11 of Schedule M1REF, <i>Refundable Credits</i> (see instructions; enclose Schedule M1REF)	22	■	_____
23	Total payments. Add lines 20 through 22	23	■	<u>2193</u>
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	■	<u>653</u>
25	Direct deposit of your refund (you must use an account not associated with a foreign bank):			

Refund



Checking Savings _____ _____
 2023.02.03 Routing Number Account Number Tax Year 2022 Basic Scenario 2

Where to find itemized deduction information on your 2021 federal return

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

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

Total Itemized Deductions	8	Add the amounts in the far right column for lines 1b through 7. Also, enter this amount on Form 1040-NR, line 12a	8	1574	

Click on Income

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2022 | 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
---------	--------------

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

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

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

Bypass State Refund Worksheet

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

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

State & Local Refunds

2021 state tax refunds (not refunds from 1099-G or similar statements)

Enter total state income tax from 2021 1040-NR schedule A line 1a

Prior Year Taxes

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

Enter total itemized deductions from 2021 1040-NR schedule A line 8

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

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

Enter total state income tax from 2021 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

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

Last Year's (Tax Return) Filing Status *

Check here if your spouse itemized in 2021

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

Check here if NRV TAP claimed the Age 65 and older deduction last year.

Check here if NRV TAP claimed the Blind deduction last year.

Check box if any apply (usually no).

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

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Help & Support ?

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

BACK

CONTINUE

RETURN SUMMARY

Federal **-\$727**


This completes entering
state income tax refunds and
payments


Congratulations!

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

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



 My Account

 Basic Information

 Federal

Income


- W-2 Wage Statement


Deductions


Other Taxes

Payments & Estimates

Miscellaneous Forms

 Health Insurance

 State

 Summary/Print

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

Less Common Income

Other Income Not Reported Elsewhere

BEGIN

Gambling Winnings W-2G 

BEGIN

Other Compensation

BEGIN

Payments from Qualified Education Programs 1099-Q 

BEGIN

Cancellation of Debt 1099-C, 982

BEGIN

Net Operating Loss (NOL) Carryover from Prior Year(s)

BEGIN

1. Enter INCOME

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

2. Enter TAX withheld if any

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

TaxSlayer <≡

- My Account
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 - Payments & Estimates
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- Health Insurance
- State
- Summary/Print

Other Income

Form belongs to

Other Income Description *

Other Income

Description of other income *

Amount of other income *

\$



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

CANCEL

CONTINUE

2. Enter TAX withheld if any

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

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

TaxSlayer <≡

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 - Payments & Estimates
 - Foreign Person's U.S. Source Income Subject to Withholding
 - Miscellaneous Forms
- Health Insurance
- State
- Summary/Print

2022 | AMERICAN PLEDGE

Help & Support ?

Other Federal Withholdings



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

Federal withholding from Form 1099 *

Other Federal withholding (not from Form 1099) *

CANCEL

CONTINUE

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Next Steps

- Prepare your state return.
 - Our state guides are on the NRVTAP member site, under Step 2 in the special circumstances guides section
 - We have guides for
 - Minnesota
 - Pennsylvania
 - North Carolina
 - California
 - Maryland
- Update your return with any other special circumstances guides that apply
- File your tax return
 - Filing instructions guide is on the 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

Minnesota State Income Tax Return

Accessing TaxSlayer – Make sure the link takes you here.

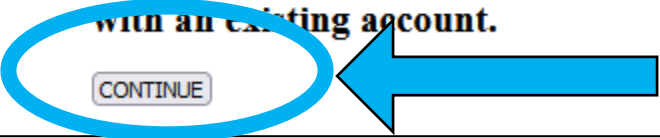
Welcome to the TaxSlayer VITA/TCE self-prep kiosk

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

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

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

CONTINUE



Do NOT go to the main TaxSlayer website.

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

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

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

Log into your TaxSlayer account



Log in

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

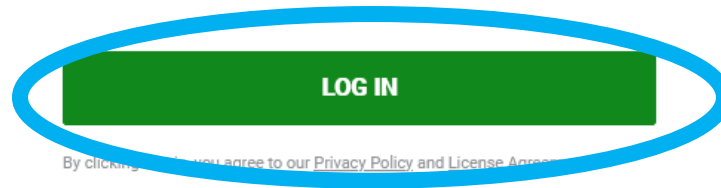
Username



Password



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



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

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

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



RETURN	STATUS	REFUND AMOUNT
Federal	Created i	\$386.00

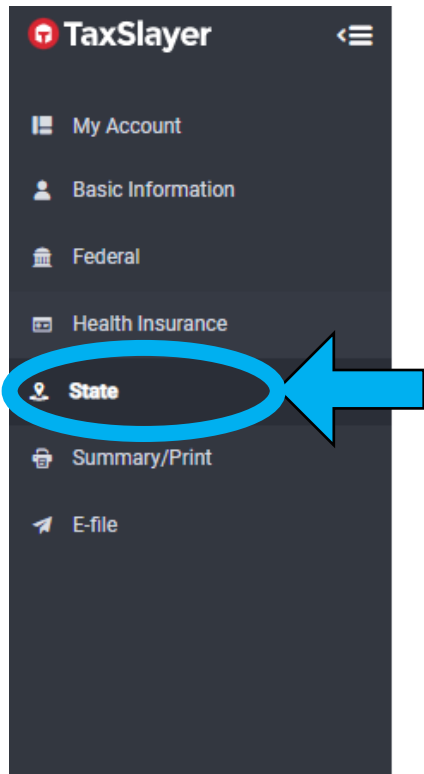
If you do have a state, you need to delete it.

The screenshot shows the TaxSlayer mobile app interface. The top navigation bar is dark grey with the TaxSlayer logo and a hamburger menu icon. Below the navigation bar, the text 'My Account' is visible. The main content area has a header with 'MY ACCOUNT' on the left and '2022 Tax Return' on the right. The main message reads 'Welcome back! Let's finish your 2022 tax return.' To the right of this message is an illustration of a laptop with a progress bar showing two green checkmarks and one empty circle. Below the message is a green 'CONTINUE' button, which is circled in blue with a blue arrow pointing to it from the right. Below the button is a table with three columns: 'RETURN', 'STATUS', and 'REFUND AMOUNT'. The table contains two rows: 'Federal' with status 'Created' and a refund amount of '-\$63.00', and 'Minnesota' with status 'Created' and a refund amount of '-\$73.00'. At the bottom right, there is a copyright notice 'Copyright © 2023 TaxSlayer' and a link to the 'Privacy Policy'.

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

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[Privacy Policy](#)

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



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Help & Support ?

State Return

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

[+ Add Another State Return](#)

Minnesota + Property Tax Refund ...
Resident

CONTINUE

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State Return

Click here to delete this state.



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

+ Add Another State Return

Minnesota
NonResident

+ Property Tax Refund



CONTINUE

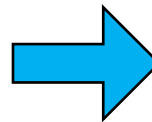
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Are you sure that you want to delete this State Return?

Minnesota State Return

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

CANCEL



DELETE



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](#)

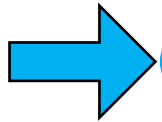


GET STARTED

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Select your Minnesota Return Residency

Please choose a return type

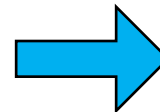


Resident: You are a Resident if Minnesota was your domicile for the entire year OR you owned, rented or leased a home in Minnesota for the tax year AND spent more than 183 days in the state.

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

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

CANCEL



CONTINUE

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

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.

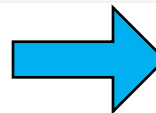
Minnesota Return

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.



Recommend No Contribution



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

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

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

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

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

State Return



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



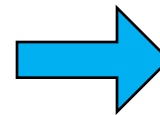
Add Another State Return

Minnesota

Resident



Property Tax Refund



CONTINUE

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

Minnesota Return

Basic Information



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

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?

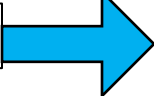
Yes  Yes to indicate a new address


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



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



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Minnesota Front Line Worker's Pay








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

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

What is the Minnesota Front Line Worker's Pay?

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

TaxSlayer 

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Tax Return Summary



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

 PRINT ▼

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My Account

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Income

- W-2 Wage Statement

- Scholarships and Grants

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Other Taxes

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Income

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

EDIT

1099-G Box 1 ⓘ
Unemployment compensation

BEGIN

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

BEGIN

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

BEGIN

1099-K ⓘ
Payment card and third party network transactions

BEGIN

1099-MISC ⓘ
Miscellaneous income

BEGIN

1099-NEC
Nonemployee compensation

BEGIN

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

BEGIN

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

BEGIN

Alimony Received ⓘ
Payments from a former spouse under a legal agreement

BEGIN

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

BEGIN

Profit or Loss from Business ⓘ
Reported on Schedule C

BEGIN

Profit or Loss from Farming ⓘ
Reported on Schedule F

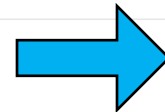
BEGIN

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

BEGIN

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

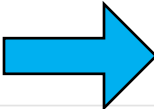
EDIT



BACK

CONTINUE

Less Common Income

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

Other Income

Form belongs to
NRVTAP TaxAssistance

Other Income Description *

Select Other Income

Description of other income *

Description

Amount of other income *

Amount same for everyone



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

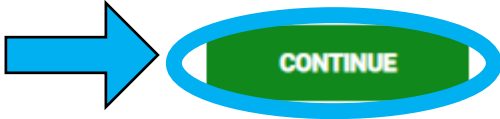
CANCEL

CONTINUE

Other Income Item

 Add an Other Income Item

MN Frontline Worker Pay \$487.00	...
--	-----

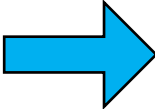


Less Common Income

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



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



TaxSlayer <≡

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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
Alimony Received ⓘ Payments from a former spouse under a legal agreement	BEGIN
Capital Gains and Losses ⓘ May receive Form 1099-B, reported on Schedule D	BEGIN
Profit or Loss from Business ⓘ Reported on Schedule C	BEGIN
Profit or Loss from Farming ⓘ Reported on Schedule F	BEGIN
Profit or Loss from Rentals and Royalties ⓘ Reported on Schedule E	BEGIN
Less Common Income ⓘ K-1 earnings, gambling winnings, cancellation of debt, etc.	EDIT

BACK

CONTINUE

State Return



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

 Add Another State Return

Minnesota
Resident

 Property Tax Refund




[Edit](#)

[Delete](#)

Minnesota Return

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

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

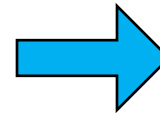
 

Congratulations! You have completed your standard Minnesota state return!

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

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

NO



YES

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

BEGIN

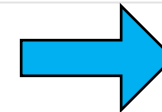
Additions to Income

Adjustments for income taxed by MN but not the federal government

BEGIN

Subtractions from Income

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



BEGIN

Credits

State-specific tax credits

BEGIN

Contributions

Option to contribute various MN funds

BEGIN

Payments

Apply refund to next years taxes & other MN withholding info

BEGIN

Miscellaneous Forms

Estimated payment vouchers, underpayment of estimated tax, etc.

BEGIN

Additional Nontaxable Income (Forms M1ED or M1PR)

Adjustments specific to M1ED and M1PR

BEGIN

EXIT MINNESOTA RETURN

Minnesota Return

Subtractions From Income

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

K-12 Education Expense Subtraction

BEGIN

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

BEGIN

Education Savings account Contribution Subtraction

BEGIN

First-Time Homebuyer Savings Account Subtraction

BEGIN

Active Duty Military Pay

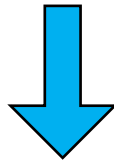
BEGIN

Depreciation Subtraction

BEGIN

Enter certain Interest and/or Dividends on US Obligations

\$



Scroll Down to Bottom

Payment from the Minnesota Frontline Worker Pay Program.

\$ 487.45



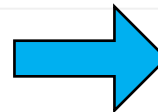
Itemized Deductions - Amount of mortgage interest reported on the Federal Schedule A that is from equity loan interest.

\$

Federal Adjustments not adopted by MN (Form M1NC)

BEGIN

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CONTINUE

Minnesota Return

Basic Information

Personal info needed for MN return

BEGIN

Minnesota Property Tax Rebate M1PR

Only accessible after exiting MN main menu

BEGIN

Additions to Income

Adjustments for income taxed by MN but not the federal government

BEGIN

Subtractions from Income

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

BEGIN

Credits

State-specific tax credits

BEGIN

Contributions

Option to contribute various MN funds

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Payments

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Miscellaneous Forms

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Additional Nontaxable Income (Forms M1ED or M1PR)

Adjustments specific to M1ED and M1PR

BEGIN



State Return

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

 Add Another State Return

Minnesota
Resident  Property Tax Refund 



Congratulations!!!

You have prepared your state tax return!

Tax Return Summary



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

 **PRINT** ▼ **VIEW RETURN**

Download a pdf of your completed returns to review

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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



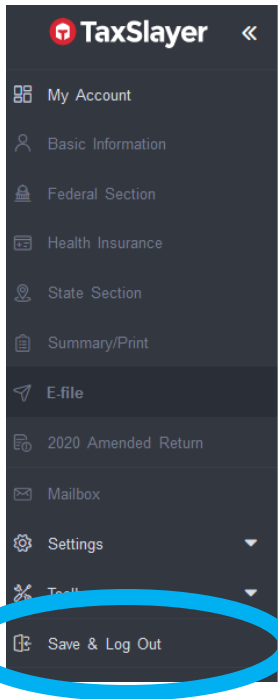
Total Income	\$7,800.00	▼
Adjusted Gross Income	\$7,800.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$743.00	▼
Payments	\$780.00	▼
Refund	\$37.00	▼
Minnesota Amount due	\$30.00	

 **PRINT** ▼

VIEW RETURN

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 **CONTINUE**



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1040NR e-Filing Not Yet Available

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

BACK

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