

**University of California, Campus Name - Statement of Citizenship and Federal Tax Status**

**Purpose:** In order to comply with applicable tax provisions of the Internal Revenue Code, the information requested on this form is required. The University will use this information to determine the appropriate rate of Federal tax withholding. Your submission of this form is required each calendar year.

**Directions:** **PERMANENT RESIDENTS** – • Complete Sections A and E only. • Attach photocopy of your alien registration card ("green card"). You are a resident alien for Federal tax purposes.  
**ALL OTHERS** – • Complete entire form. • Attach a copy of your I-94 ("Arrival and Departure Record"), if you are an employee or contractor; attach a copy your work authorization paperwork (IAP66, I-20, Notice of Action, Employment Authorization Card.)  
**RETURNING THE FORM** – • Return the completed form to the office that issued the form to you. If you are unsure where to return the form, please contact your department.

**SECTION A. PAYEE INFORMATION**

1. Name (Last, First Middle)		2. Department		3. Emp ID #		4. SSN or ITIN	
5. Street Address In U.S.				6. Street Address In Country Of Residence			
Street Line 2				Street Line 2			
City, State, Zip Code				City, Province, Country, Postal Code			
7. Country Of Citizenship				8. Country Of Residence			
9. Passport Number		10. Passport Issued By		11. Occupation In Country Of Residence			
12. Previous Employer		13. Name Of U.S. Health Insurance Carrier					
14. What types of income will you be receiving? Check all that apply <input type="checkbox"/> Employee Wages <input type="checkbox"/> Fellowship/Scholarship Award <input type="checkbox"/> Grad Fee Remissions <input type="checkbox"/> Travel <input type="checkbox"/> Honorarium <input type="checkbox"/> Without Salary Appointment <input type="checkbox"/> Other							
15. Visa Type		16. Date You First Entered U.S.		17. Expiration Date Of Current Visa		18. Intended Length Of Stay	19. Anticipated Departure Date
20. What is the primary purpose of your visit to the U.S.? Check only one							
<input type="checkbox"/> Studying in a degree program		<input type="checkbox"/> Conducting Research		<input type="checkbox"/> Teaching		<input type="checkbox"/> Lecturing <input type="checkbox"/> Consulting	
<input type="checkbox"/> Studying in a non-degree program Training		<input type="checkbox"/> Temporary Employment		<input type="checkbox"/> Here with spouse		<input type="checkbox"/> Visiting	

**SECTION B. DETERMINATION OF RESIDENCY STATUS (Permanent Residents do not complete.)**

There are two tests used to determine whether a non-U.S. citizen should be classified for tax purposes as a U.S. resident or as a nonresident alien. They are the "green card" test and the substantial presence test. An alien who does not qualify under either test is defined for income tax purposes as a nonresident alien. The information requested in the table below will determine your U.S. residency status. Therefore, it is important that the correct information is entered into each column. For each preceding calendar year, enter the visa type(s), date of entry, date of departure, and total days of U.S. presence. FOR the current year, ENTER ANTICIPATED DATES OF PRESENCE.

YEAR	VISA TYPE(S)	DATE ENTERED	DATE DEPARTED	TOTAL DAYS OF U.S. PRESENCE	X RATIO	DAYS TO COUNT
Current Year					x 1 =	
1st Preceding Year					x 1/3 =	
2 <sup>nd</sup> Preceding Year					x 1/6 =	
					<b>TOTAL # OF DAYS</b>	

**CHECK ONE OF THE FOLLOWING BASED ON YOUR RESPONSE IN THE TABLE ABOVE:**

- If "total days to count" is less than 183 days, check here .

You are nonresident alien for tax purposes. Skip to section E "Summary of Federal Tax Status" and check the box next to "Nonresident Alien for Federal Tax Purposes".

- If "total days to count" is equal to or greater than 183 days, check here . Go to section C, "Exempt Individual Test".

**CERTIFICATION FOR FEDERAL TAX EXEMPTION (Note that this does not apply to State of California Withholding Taxes)**

You may be eligible for exemption from Federal tax withholding because there is an applicable tax treaty between your country of residence and the U.S. and your duties while in the U.S. make you eligible for the exemption.

Yes I certify that I am not a citizen or resident of the U.S., that I am eligible for federal tax exemption because there is a current tax treaty between my country of residence and the U.S., and my duties while here are  Teaching  Research  Other (describe \_\_\_\_\_ Treaty Article \_\_\_\_\_)

No, I am not exempt from Federal tax withholding.