

Part A – Nonresident Alien Information Sheet
2015 Tax Returns

Name _____ ITIN or Social Security # _____
(Last name) (First name) (MI)

Visa # _____ Passport # _____

Date of Birth: _____ Phone # _____ E-mail: _____
(mm)/(dd)/(yyyy)

Were you a U.S. citizen or resident alien the entire 2015 year? Yes No

Local U.S. Street address _____

Foreign residence address _____

Country of citizenship _____ Country that issued passport _____

Are you married? Yes No If YES, is your spouse in the U.S.? Yes No

Are you a: ENTRY Immigration Status –check one

- | | | |
|--------------------------|--|--|
| U.S. National? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> F-1 Student |
| Resident of Canada? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> F-2 Spouse or child of student |
| Resident of Mexico? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> J-1 Student/Scholar* |
| Resident of South Korea? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> J-2 Spouse or child of J-1 holder |
| Resident of India? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Date you FIRST entered U.S. _____ |

CURRENT Immigration Status – check one

- F-1 Student
 F-2 Spouse or child of Student
 J-1 Student/Scholar*
 J-2 Spouse or child of J-1 holder

Type of U.S. visa during each year

_____ 200; _____ 2013 _____ 2015
_____ 2012 _____ 2014 _____ 2016

Visa type ever changed? Yes No

Date and nature of change: _____

*If immigration status is J-1, what is the category? Check one:

- 01 Student 02 Short-term scholar 05 Professor 12 Research Scholar

What is the actual primary activity of your visit? Check one:

- | | | | |
|--|--|--|--|
| <input type="checkbox"/> 01 Studying in a degree program | <input type="checkbox"/> 04 Lecturing | <input type="checkbox"/> 07 Research | <input type="checkbox"/> 10 Clinical Activities |
| <input type="checkbox"/> 02 Studying in a non-degree program | <input type="checkbox"/> 05 Observing | <input type="checkbox"/> 08 Training | <input type="checkbox"/> 11 Temporary employment |
| <input type="checkbox"/> 03 Teaching | <input type="checkbox"/> 06 Consulting | <input type="checkbox"/> 09 Special Skills | <input type="checkbox"/> 12 Here with Spouse |

Were you present in the United States as a teacher, trainee or student for any part of the prior 6 calendar years?

202; Yes No 2012 Yes No 2013 Yes No
 2014 Yes No 2015 Yes No 2016 Yes No

Were you present in the United States as a teacher, trainee or student for any part of more than 5 calendar years? Yes No

How many days (including vacations, non-workdays and partial days) were you present in the U.S. during:

2013 _____ 2014 _____ 2015 _____

List the dates you entered and left the United States during 2015:

Dates entered United States (mm/dd/yyyy)	Date departed United States (mm/dd/yyyy)

Did you file a U.S. income tax return for ANY year prior to 2015? Yes No

If “Yes,” give the latest year _____ and form number _____.

During 2015, did you apply to be a green card holder (lawful permanent resident) of the United States? Yes No

Do you have an application pending to change to lawful permanent resident? Yes No

Are you claiming the benefits of a U.S. income tax treaty with a foreign country? Yes No

Country (a)	Tax Treaty Article (b)	Number of months claimed in prior tax years (c)	Amount of exempt income in 2015 (d)

Were you subject to tax in a foreign country on any of the income shown in column (d)?

Yes No

Part B – Spouse Information Sheet

Name _____ ITIN or Social Security # _____
(Last name) (First name) (MI)

Date of Birth _____
(mm)/(dd)/(yyyy)

Is spouse a U.S. citizen or resident alien the entire 2015 year? Yes No

Street address _____

Part C – Dependent Information Sheet

List names of everyone who lived in your home in 2015 (other than you or spouse). Also list anyone who lived outside your home that you supported during 2015.							
Name (last, first) Do not list self or spouse (a)	Date of birth (mm/dd/yyyy) (b)	Relationship to you (e.g. son, daughter, mother, sister, none) (c)	Number of months lived in your home (d)	U.S. Citizen or resident of Canada or Mexico (yes/no) (e)	Marital status as of 12/31/2015 (f)	Full-time student in 2015? (yes/no) (g)	Received less than \$4,000 income in 2015? (yes/no) (h)

Part D – Refund Information Sheet

If you are entitled to a refund, the fastest way to receive the refund is to have it directly deposited in your bank account. If you want to use the direct deposit, bring a blank check with you so the preparer can enter your bank account information.

During 2015 did you receive?

- Wages, salaries or tips? Yes No

If "Yes," bring copies of:

All forms W-2
Any forms 1042-S
Any forms 1099-MISC

- Scholarships or fellowship grants? Yes No

If "Yes," bring copies of:

All forms 1042-S
Form 1098-T
Estimate dollar amount spent on books during 2015 \$ _____

- State income tax refund? Yes No

If "Yes," bring copies of:

Forms W-2
2014 (last year's) federal income tax return

- Other income? Yes No

If "Yes," bring copies of any tax documents

NOTE: If you received any of these types of income, VITA CANNOT prepare your return:

- ✓ Dividend Income
- ✓ Income from business activities
- ✓ Distributions from IRAs, pensions or annuities
- ✓ Capital gains or losses from the sale of investment securities or other assets

During 2015, did you pay:

- State income taxes? Yes No

If "Yes," bring copies of:

All forms W-2 showing state income taxes withheld
Indicate dollar amount of state (not federal) income tax you paid
by check during 2015 \$ _____

- Contributions to U.S. charities? Yes No

If "Yes," bring copies of receipts.

- Personal property tax on a car you own? Yes No

If "Yes," bring copies of receipts.

Statement for Exempt Individuals and Individuals With a Medical Condition
For use by alien individuals only.

► Information about Form 8843 and its instructions is at www.irs.gov/form8843.

Department of the Treasury
Internal Revenue Service

For the year January 1—December 31, 2015, or other tax year

beginning _____, 2015, and ending _____, 20_____.

Your first name and initial _____ Last name _____ Your U.S. taxpayer identification number, if any _____

Fill in your addresses only if you are filing this form by itself and not with your tax return

Address in country of residence

Address in the United States

Part I General Information

- 1a Type of U.S. visa (for example, F, J, M, Q, etc.) and date you entered the United States ► _____
- b Current nonimmigrant status and date of change (see instructions) ► _____
- 2 Of what country were you a citizen during the tax year? _____
- 3a What country issued you a passport? _____
- b Enter your passport number ► _____
- 4a Enter the actual number of days you were present in the United States during:
2015 _____ 2014 _____ 2013 _____
- b Enter the number of days in 2015 you claim you can exclude for purposes of the substantial presence test ► _____

Part II Teachers and Trainees

- 5 For teachers, enter the name, address, and telephone number of the academic institution where you taught in 2015 ► _____
- 6 For trainees, enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2015 ► _____
- 7 Enter the type of U.S. visa (J or Q) you held during: ► 2009 _____ 2010 _____
2011 _____ 2012 _____ 2013 _____ 2014 _____. If the type of visa you held during any of these years changed, attach a statement showing the new visa type and the date it was acquired.
- 8 Were you present in the United States as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years (2009 through 2014)? Yes No
If you checked the "Yes" box on line 8, you cannot exclude days of presence as a teacher or trainee unless you meet the *Exception* explained in the instructions.

Part III Students

- 9 Enter the name, address, and telephone number of the academic institution you attended during 2015 ► _____
- 10 Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2015 ► _____
- 11 Enter the type of U.S. visa (F, J, M, or Q) you held during: ► 2009 _____ 2010 _____
2011 _____ 2012 _____ 2013 _____ 2014 _____. If the type of visa you held during any of these years changed, attach a statement showing the new visa type and the date it was acquired.
- 12 Were you present in the United States as a teacher, trainee, or student for any part of more than 5 calendar years? Yes No
If you checked the "Yes" box on line 12, you must provide sufficient facts on an attached statement to establish that you do not intend to reside permanently in the United States.
- 13 During 2015, did you apply for, or take other affirmative steps to apply for, lawful permanent resident status in the United States or have an application pending to change your status to that of a lawful permanent resident of the United States? Yes No
- 14 If you checked the "Yes" box on line 13, explain ► _____

Part IV Professional Athletes

15 Enter the name of the charitable sports event(s) in the United States in which you competed during 2015 and the dates of competition ▶ _____

16 Enter the name(s) and employer identification number(s) of the charitable organization(s) that benefited from the sports event(s) ▶ _____

Note: You must attach a statement to verify that all of the net proceeds of the sports event(s) were contributed to the charitable organization(s) listed on line 16.

Part V Individuals With a Medical Condition or Medical Problem

17a Describe the medical condition or medical problem that prevented you from leaving the United States ▶ _____

b Enter the date you intended to leave the United States prior to the onset of the medical condition or medical problem described on line 17a ▶ _____

c Enter the date you actually left the United States ▶ _____

18 Physician's Statement:

I certify that _____
Name of taxpayer

was unable to leave the United States on the date shown on line 17b because of the medical condition or medical problem described on line 17a and there was no indication that his or her condition or problem was preexisting.

Name of physician or other medical official

Physician's or other medical official's address and telephone number

Physician's or other medical official's signature

Date

Sign here only if you are filing this form by itself and not with your tax return

Under penalties of perjury, I declare that I have examined this form and the accompanying attachments, and, to the best of my knowledge and belief, they are true, correct, and complete.

▶ _____
Your signature

▶ _____
Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise specified.

Future Developments

For the latest information about developments related to Form 8843 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/form8843.

Who Must File

If you are an alien individual (other than a foreign government-related individual), you must file Form 8843 to explain the basis of your claim that you can exclude days of presence in the United States for purposes of the substantial presence test because you:

- Were an exempt individual, or
- Were unable to leave the United States because of a medical condition or medical problem.

When and Where To File

If you are filing a 2015 Form 1040NR or Form 1040NR-EZ, attach Form 8843 to it. Mail your tax return by the due date (including extensions) to the address shown in your tax return instructions.

If you do not have to file a 2015 tax return, mail Form 8843 to the Department of the Treasury, Internal Revenue Service Center, Austin, TX 73301-0215 by the due date (including extensions) for filing Form 1040NR or Form 1040NR-EZ.

Penalty for Not Filing Form 8843

If you do not file Form 8843 on time, you may not exclude the days you were present in the United States as a professional athlete or because of a medical condition or medical problem that arose while you were in the United States. Failure to exclude days of presence in the United States could result in your being considered a U.S. resident under the substantial presence test.

You will not be penalized if you can show by clear and convincing evidence that you took reasonable actions to become aware of the filing requirements and significant steps to comply with those requirements.

Substantial Presence Test

You are considered a U.S. resident if you meet the substantial presence test for 2015. You meet this test if you were physically present in the United States for at least:

- 31 days during 2015 and
- 183 days during the period 2015, 2014, and 2013, counting all the days of physical presence in 2015 but only 1/3 the number of days of presence in 2014 and only 1/6 the number of days in 2013.

Note: To claim the closer connection to a foreign country(ies) exception to the substantial presence test described in Regulations section 301.7701(b)-2, you must file Form 8840, Closer Connection Exception Statement for Aliens.

Days of presence in the United States.

Generally, you are treated as being present in the United States on any day that you are physically present in the country at any time during the day. However, you do not count the following days of presence in the United States for purposes of the substantial presence test.

1. Days you regularly commuted to work in the United States from a residence in Canada or Mexico.
2. Days you were in the United States for less than 24 hours when you were traveling between two places outside the United States.
3. Days you were temporarily in the United States as a regular crew member of a foreign vessel engaged in transportation between the United States and a foreign country or a possession of the United States unless you otherwise engaged in trade or business on such a day.
4. Days you were unable to leave the United States because of a medical condition or medical problem that arose while you were in the United States.
5. Days you were an exempt individual.

Exempt Individuals

For purposes of the substantial presence test, an exempt individual includes anyone in the following categories.

- A teacher or trainee (defined on this page).
- A student (defined on the next page).
- A professional athlete temporarily present in the United States to compete in a charitable sports event.

The term exempt individual also includes an individual temporarily present in the United States as a foreign government-related individual under an "A" or "G" visa. If you are present under an "A" or "G" visa, you are not required to file Form 8843.

Specific Instructions

Part I—General Information

If you are attaching Form 8843 to Form 1040NR or Form 1040NR-EZ, you are not required to complete lines 1a through 4a of Form 8843 if you provide the requested information on the corresponding lines of Form 1040NR or 1040NR-EZ. In this case, enter "Information provided on Form 1040NR" or "Information provided on Form 1040NR-EZ" on line 1a of Form 8843.

Line 1b. Enter your current nonimmigrant status, such as that shown on your current Immigration Form I-94, Arrival-Departure Record. If your status has changed while in the United States, enter the date of change.

Part II—Teachers and Trainees

A teacher or trainee is an individual who is temporarily present in the United States under a "J" or "Q" visa (other than as a student) and who substantially complies with the requirements of the visa.

If you were a teacher or trainee under a "J" or "Q" visa, you are considered to have substantially complied with the visa requirements if you have not engaged in activities that are prohibited by U.S. immigration laws that could result in the loss of your "J" or "Q" visa status.

Even if you meet these requirements, you cannot exclude days of presence in 2015 as a teacher or trainee if you were exempt as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years. But see the *Exception* below.

If you qualify to exclude days of presence as a teacher or trainee, complete Parts I and II of Form 8843. If you have a "Q" visa, complete Part I and only lines 6 through 8 of Part II. On line 6, enter the name, address, and telephone number of the director of the cultural exchange program in which you participated.

Exception. If you were exempt as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years, you can exclude days of presence in 2015 as a teacher or trainee only if all four of the following apply.

1. You were exempt as a teacher, trainee, or student for any part of 3 (or fewer) of the 6 prior calendar years.
2. A foreign employer paid all your compensation during 2015.
3. You were present in the United States as a teacher or trainee in any of the 6 prior years.
4. A foreign employer paid all of your compensation during each of those prior 6 years you were present in the United States as a teacher or trainee.

For more details, see Pub. 519, U.S. Tax Guide for Aliens.

If you meet this exception, you must attach information to verify that a foreign employer paid all the compensation you received in 2015 and all prior years that you were present in the United States as a teacher or trainee.

Part III—Students

A student is an individual who is temporarily present in the United States under an “F,” “J,” “M,” or “Q” visa and who substantially complies with the requirements of the visa.

If you were a student under an “F,” “J,” “M,” or “Q” visa, you are considered to have substantially complied with the visa requirements if you have not engaged in activities that are prohibited by U.S. immigration laws and could result in the loss of your visa status.

Even if you meet these requirements, you cannot exclude days of presence in 2015 as a student if you were exempt as a teacher, trainee, or student for any part of more than 5 calendar years unless you establish that you do not intend to reside permanently in the United States. The facts and circumstances to be considered in determining if you have established that you do not intend to reside permanently in the United States include, but are not limited to:

1. Whether you have maintained a closer connection to a foreign country than to the United States (for details, see Pub. 519) and
2. Whether you have taken affirmative steps to change your status from nonimmigrant to lawful permanent resident.

If you qualify to exclude days of presence as a student, complete Parts I and III of Form 8843. If you have a “Q” visa, complete Part I and only lines 10 through 14 of Part III. On line 10, enter the name, address, and telephone number of the director of the cultural exchange program in which you participated.

Part IV—Professional Athletes

A professional athlete is an individual who is temporarily present in the United States to compete in a charitable sports event. For details on charitable sports events, see Pub. 519.

If you qualify to exclude days of presence as a professional athlete, complete Parts I and IV of Form 8843.

Part V—Individuals With a Medical Condition or Medical Problem

For purposes of the substantial presence test, do not count the days you intended to leave the United States but could not do so because of a medical condition or medical problem that arose while you were in the United States. Whether you intended to leave the United States on a particular day is determined based on all the facts and circumstances. For more details, see Pub. 519.

If you qualify to exclude days of presence because of a medical condition or medical problem, complete Part I and lines 17a through 17c of Part V. Have your physician or other medical official complete line 18.

Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Section 7701(b) and its regulations require that you give us the information. We need it to determine if you can exclude days of presence in the United States for purposes of the substantial presence test.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For the estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

22222		Void <input type="checkbox"/>	a Employee's social security number 987-65-4321		For Official Use Only ▶ OMB No. 1545-0008	
b Employer identification number (EIN) 06-6000798			1 Wages, tips, other compensation \$4,900.00		2 Federal income tax withheld \$500.00	
c Employer's name, address, and ZIP code UCONN Payroll Unit 2111 343 Mansfield Road Storrs, CT 06029			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	
d Control number			9		10 Dependent care benefits	
e Employee's first name and initial Choi		Last name Xi		Suff.		11 Nonqualified plans
200 McMahon Hall N Storrs, CT 06269			13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12a See instructions for box 12	
			14 Other		12b	
f Employee's address and ZIP code					12c	
					12d	
15 State CT	Employer's state ID number 0502633-002		16 State wages, tips, etc. \$ 4,900.00	17 State income tax \$5.00	18 Local wages, tips, etc.	19 Local income tax
					20 Locality name	

Form **W-2** Wage and Tax Statement

2015

Department of the Treasury—Internal Revenue Service
For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Copy A For Social Security Administration — Send this entire page with Form W-3 to the Social Security Administration; photocopies are not acceptable.

Cat. No. 10134D

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