

Foreign Students Tax Workshop

U.S Tax Filling Requirement Via GLACIER Tax
Prep



How to complete your tax returns using Glacier Tax Prep via GLACIER

Methods of getting into GLACIER Tax Prep (GTP)

- **Accessing GTP via GLACIER does not require an access code <https://www.online-tax.net/glogin.asp>: Read attached instructions carefully.**
- **Persons with No Income from US: Read attached instruction carefully.**
- **Accessing GTP with code www.glaciertax.com/login; Read attached instructions carefully.**



Your institution has licensed **GLACIER Tax Prep ("GTP")** for you to use in the preparation of your U.S. income tax return. Your institution also uses **GLACIER Online Tax Compliance Software**, in which you have previously completed an Individual Record. You will be able to access GTP by going through **GLACIER**. To do so, you'll simply access **GLACIER** using your existing **UserID** and **Password** and **GLACIER** will transfer certain data to **GTP** – making your tax return preparation even easier!

How Do I Get Started? You may access **GTP** through **GLACIER** from any computer with internet access from anywhere in the world! Simply log into **GLACIER** at <https://www.online-tax.net/glogin.asp> and enter your **GLACIER** login information. If you have forgotten your login information, simply click on "Forgot Login".

What Documents and Information Do I Need BEFORE I Login? Some of the information you will need for **GTP** will already have been entered in **GLACIER** and will be transferred. Please make sure you have the following documents and information available **BEFORE** you log into **GTP** via **GLACIER**:

- Academic Institution or Host Sponsor Information (name/address/phone for Academic Director); and Forms W-2, 1042-S and/or 1099 (if you received any).

How Do I Log Into GTP Through GLACIER? To access **GTP** through **GLACIER**, simply log into your **GLACIER** Individual Record at <https://www.online-tax.net/glogin.asp> and enter your **UserID** and **Password**. Continue to the **GLACIER** activities menu and select "Complete my U.S. tax return using **GLACIER Tax Prep**" and click "Next". You must first verify information contained in **GLACIER** before you continue to **GTP**. If the information in **GLACIER** requires edits, you must first update the information in your **GLACIER** record and repeat the previous steps. When the information in **GLACIER** is complete and correct, select "Yes" and click "Next" to continue to the "Welcome to GTP" screen where you can complete your U.S. income tax return. **GLACIER** will transfer some of your information into **GTP** so you will not have to enter all of your personal information again. Please review this information carefully to ensure that it is accurate and up-to-date.

Note: if you have never accessed Glacier before, then you may need more than just the above-mentioned items. You will need to update your information in Glacier using immigration information before you complete your U.S. income tax returns.

What documents and information do I need to have available BEFORE I login to GTP if I have never used Glacier?



What is Form 8843? Form 8843 is not an income tax return. Form 8843 is merely an informational statement required by the U.S. government for certain Nonresident Aliens (including the spouses or dependents of Nonresident Aliens).

Who must file Form 8843? All Nonresident Aliens who are present in the U.S. under an F-1, F-2, J-1, J-2, M-1, M-2, Q-1, or Q-2 immigration status **MUST** file Form 8843 "Statement for Exempt Individuals and Individuals With a Medical Condition" **even if they received NO income during 2020**. Form 8843 must be filed if an individual is:

- ✓ present in the U.S. during 2020;
- ✓ a Nonresident Alien; and
- ✓ present in the U.S. for at least one day as an F, J, M or Q immigration status (either the "-1" or the "-2").

If an individual meets all three qualifications above, the individual **must** file Form 8843, regardless of his or her age and even if he or she is not required to file a U.S. income tax return (Form 1040-NR).

Is a Social Security Number ("SSN") or Individual Taxpayer Identification Number ("ITIN") required to file ONLY Form 8843? If you already have an SSN or ITIN, the number must be included on Form 8843. However, if you do not have an SSN or ITIN, you do not need to apply for one if you have no U.S.-source income and only need to file Form 8843.

How do I submit Form 8843? Form 8843 is typically attached to an income tax return. If, however, you have NO income and are ONLY filing Form 8843, you must print, sign and mail it by **June 15, 2021** to:

Department of the Treasury
Internal Revenue Service Center
Austin, TX 73301-0215
USA

(there is no street address needed)

Note: EACH individual who has NO income and files ONLY a Form 8843 **MUST** send the form in a separate envelope. Do not include more than one Form 8843 per envelope.

For example, Juanita Garcia is present in the U.S. under an F-1 immigration status with her husband and 3 year old daughter (both present on F-2 immigration status). Juanita is the only person in the family who received U.S. source income during the tax year. Therefore, Juanita will file an income tax return (Form 1040-NR) with Form 8843 attached. Juanita's husband will file Form 8843 and mail in a separate envelope. Juanita must complete a Form 8843 for her daughter and must submit her daughter's Form 8843 in a separate envelope.



You are a few simple steps away from completing your U.S. federal tax forms in an easy and efficient way! Your institution has licensed **GLACIER Tax Prep ("GTP")** to assist you in this process. Following is some information to assist you in getting started.

What documents and information do I need to have available BEFORE I login to GTP?

- Passport;
- Visa/Immigration Status information, including Form DS-2019 (if J status) or Form I-20 (if F status);
- Social Security Number or Individual Taxpayer Identification Number (if you have been assigned one);
- U.S. Entry and Exit Dates for current and all past visits to the U.S.; and
- Forms W-2, 1042-S and/or 1099 (if you received any).

How do I access GTP? You may access **GTP** via the internet from any computer in the world! www.glaciertax.com/login

- **If you used GTP last year**, simply enter your **UserID** and **Password**. If you do not remember your **UserID** and **Password**, select "Forgot Login" to receive an email with a link to reset your login information. The email will be sent instantly. If you do not receive it, please be sure to check your spam filter. Once you have successfully logged into **GTP**, you will be prompted to enter the one-time use Access Code assigned to you by your **GTP Primary Contact**. You must have a new Access Code for this new tax year.
- **If you did not use GTP last year and this is your FIRST time logging into GTP this year**, select "Create New Account." You will then be prompted to enter the one-time use Access Code assigned to you by your **GTP Primary Contact**. Create your **GTP User Account** by selecting a **Password** and **UserID**. Be sure to remember your **Password** and **UserID** as you will use them to access **GTP** if you need to login again.
- **If you need to modify or reprint your tax return**, simply access **GTP** at www.glaciertax.com/login using the **Password** and **UserID** you selected at the time you created your **GTP User Account**. Do not create a new account. To ensure that your information remains private and secure, **DO NOT** share your **Password** or **UserID** with anyone. Please use a valid and current email address. If you forget your **Password** and/or **UserID**, it can only be retrieved by you via an email to the email address in your **GTP User Account**. We do not sell or share your email address or any of your information with any third party.

What if I have trouble logging in? If you experience any issues while trying to set up your **GTP User Account** or login again, please select "Having Trouble Logging In" for assistance.

For how long is my GTP User Account accessible to me? You may use the one-time use Access Code only initially to set up your **GTP User Account**. Each time you return to **GTP**, you will use the **Password** and **UserID** you selected when you



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Forms: What forms should I have received?

Form	Type of Income	Situation
W-2	Wages or Salary as an Employee	You should get Form W-2 to report the wages or salary on which you <u>DID NOT</u> claim a tax treaty exemption
<p>1042-S (income code 18 , 19 and/or 20) (if you received any)</p> <p>1042-S (income code 16) (if you received any)</p>	<p>Wages or Salary as an Employee</p> <p>Scholarship or Fellowship (no services performed)</p>	<p>You Should receive Form 1042-S with income code 18 ,19 and/or 20 to report wages or salary on which you claimed a tax treaty exemption.</p> <p>Form 1042-S is not issued for each international student. Only students who received more scholarship than the tuition charge was during calendar year 2020 will receive Form 1042-S.</p>
1099 (if you received any)	Interest, Misc etc.	See more in GTP



Enter Login Info and Click on Submit button

GLACIER Nonresident Alien Tax Compliance

ARCTIC INTERNATIONAL LLC
International Tax Consulting

Welcome to **GLACIER** Nonresident Alien Tax Compliance

To access **GLACIER**, please enter the following information:

UserID:

Password:

[Forgot Login?](#)
If you have forgotten your UserID and/or Password, please select **Forgot Login?** An email will be sent to the email address in your **GLACIER** Individual Record.

GLACIER supports Internet Explorer, FireFox (On Windows or MAC platforms), and Apple Safari. Javascript must be enabled to use **GLACIER**. Please direct any questions about using **GLACIER** to: support@online-tax.net **GLACIER** is a product of Arctic International LLC

Submit



Check box referring to 1042-S forms and click “I Accept button to Continue”

GLACIER Nonresident Alien Tax Compliance



User Agreement

- **GLACIER** is an online tax compliance software system designed to assist Andrews University to quickly, efficiently and securely collect information necessary to determine your U.S. tax residency status.
 - **GLACIER** will ask you a series of questions - all of which are necessary to determine whether tax must be withheld from payments made to you.
 - The entire process should take approximately 15-20 minutes, depending on your individual situation. Please have your passport and immigration documents available before you begin.
 - When you have finished entering all of the required information into **GLACIER**, you will be prompted to print, sign and submit your forms. Please read the instruction document accompanying your forms; it will provide the address to which your forms must be submitted.
 - All information entered into **GLACIER** is securely transmitted via ssl and is securely maintained. Your information will be used only by Andrews University in connection with U.S. tax rules, regulations, and laws.
 - Form 1042-S is issued to certain individuals to report certain types of income; you may or may not be eligible to receive a Form 1042-S. If a Form 1042-S is applicable to you, Andrews University may choose to provide Form 1042-S to you electronically and notify you via email with instructions to log into your **GLACIER** Individual Record to view and print the form. Because providing the form to you electronically is more convenient for you and administratively efficient for Andrews University, individuals who are eligible to receive Form 1042-S may do so via **GLACIER**. If you cannot or will not accept Form 1042-S may do so via **GLACIER**, please uncheck the box below; the form will be printed and mailed to you.
- Andrews University may provide my Form 1042-S (if any) to me electronically via the GLACIER Online Tax Compliance System.**

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The **GLACIER** software, Online Help, and any other materials related to **GLACIER** may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable format without prior consent in writing from Arctic.

Subject to the terms and conditions of this User Agreement, Arctic grants you the right to use the **GLACIER** System.

GLACIER is designed primarily for use by and/or in connection with foreign students, scholars, teachers, researchers, trainees, and other international educational visitors (i.e., F, J, M, or Q visa statuses (including dependents), A-1, G-4, H-1B, H-4, O-1, B-1, B-2, WB, WB); however, other individuals may also be able to use the program, depending upon their individual circumstances. It is up to you to determine whether **GLACIER** is appropriate for your individual circumstances.



Select 'Complete my U.S Tax Returns using Glacier Tax Prep'. Grey out means, create /update individual record

The screenshot shows a web browser window displaying the GLACIER Nonresident Alien Tax Compliance portal. The page has a dark blue header with the GLACIER logo and the text 'Nonresident Alien Tax Compliance'. The main content area is white and features a welcome message: 'Welcome to GLACIER for Andrews University'. Below this, a dark blue bar contains the user's name and the question 'Lilian Akawobsa, What Would You Like To Do Today?'. A list of options is provided, each with a radio button. The option 'Complete my U.S. tax return using GLACIER Tax Prep' is highlighted in red, indicating it is the selected action. Other options include 'Create/update/view my Individual Record', 'View/print my forms (no changes may be made)', 'Learn about General U.S. Tax Issues and FAQs', 'Change my GLACIER Login Information', and 'Exit GLACIER'. At the bottom of the page, there are navigation buttons '<Back' and 'Next>' and a link for 'Contact GLACIER Support'.

GLACIER Nonresident Alien Tax Compliance

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International Tax Consulting

Welcome to **GLACIER** for Andrews University

Lilian Akawobsa, What Would You Like To Do Today?

- Create/update/view my Individual Record
- View/print my forms (no changes may be made)
- Complete my U.S. tax return using GLACIER Tax Prep
- Learn about General U.S. Tax Issues and FAQs
- Change my GLACIER Login Information
- Exit GLACIER

<Back Next> [Contact GLACIER Support](#)

Select 'Complete my U.S Tax Returns using Glacier Tax Prep'. See green highlight

Sample Test, What Would You Like To Do Today?

- Create/update/view my Individual Record
- View/print my forms (no changes may be made)
- View/print my Form 1042-S
- Complete my U.S. tax return using GLACIER Tax Prep
- Learn about General U.S. Tax Issues and FAQs
- Change my GLACIER Login Information
- Exit GLACIER

<Back

Next>

[Contact GLACIER Support](#)



Select yes, after verifying that info is accurate

GLACIER	Nonresident Alien Tax Compliance	
GLACIER Information Verification		
Please Verify The Following Information		
Name (Last or Family):	Test	
(First or Personal):	Sample	
Middle:		
Social Security Number or Individual Taxpayer Identification Number:	121111221	
Country of Citizenship:	Mexico	
Country of Tax Residence:	Mexico	
Country of Permanent Residence:	Mexico	
Current Immigration Status as of December 31, 2011:	F1-Student	
Expiration Of Current Immigration Status:	January 01, 2016	
Is ALL of the above information complete and correct?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
<Back Next>		Contact GLACIER Support

Update any needed info and click next to continue



GLACIER

Nonresident Alien Tax Compliance

GLACIER Information Update or Verification

Please Enter and/or Verify The Following Information

Email Address:

* Indicates Required Field

jodirkessler@gmail.com *

U.S. Address

(Street 1):

123 Any other st

(Street 2) :

(City):

Columbus

(State):

Ohio

(Zip Code):

43210

Individual does NOT live in the U.S.

Home Country Address

(Street 1):

333 Other st *

(Street 2):

(City):

Mexico City *

State/Province:

(Canada Only)

(Country):

Mexico

(Postal Code):

Passport Number:

123456789 *

<Back

Next>



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Check box indicating that GTP wouldn't file the returns electronically, since IRS does not permit that now, click on Continue to GTP

GLACIER

Nonresident Alien Tax Compliance



You are about to leave GLACIER and access GLACIER Tax Prep ("GTP")

Please read the following information before continuing!

A Few Things BEFORE Accessing GLACIER Tax Prep:

- GTP is an internet-based software system and has its own internal navigation buttons. Please **DO NOT use your internet browser's navigation buttons (at the top left hand corner of your screen) to move forward and backward in GTP.** Using the <Back and Forward> buttons on your internet browser navigation bar **WILL NOT** allow GTP to function properly and may result in an incorrect calculation.
- Although GTP is an online system, you **MUST print, sign, and mail the tax return generated by GTP.** The IRS does not allow Forms 1040NR or 1040NR-EZ to be electronically submitted; therefore, GTP **CANNOT** and **WILL NOT** file your tax return electronically.
- GTP only generates a U.S. Federal tax return and all accompanying statements. You may also be required to file a state tax return for the state(s) in which you lived or worked; however, to do so, please review the tax return filing rules for the applicable state(s). GTP allows you to link directly to the state's tax website, as applicable.

What Information Will You Need BEFORE You Begin?

Before accessing GTP, please be sure you have all of the following items ready and available:

- Academic Institution or Host Sponsor Information; and
- Forms W-2, 1042-S and/or 1099 (if you received any).

- I understand that GTP will NOT electronically file my tax return because the IRS does not allow electronic filing by nonresident aliens. I further understand and agree that I MUST PRINT, SIGN, and MAIL the tax forms generated by GTP to the address on the instruction page that will print with my tax documents.**

How Do I Get Assistance?

If you experience any issues using GTP, please contact the GTP Support Center at support@glaciertax.com. In your email message, please tell us the screen you were on when running GTP and the exact nature of the issue.

Thank you and best wishes in filing your U.S. income tax return!

Return to GLACIER

Continue to GTP



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GTP to generate tax forms, Start Step 1



[LOG OUT](#) | [MENU](#) | [HELP](#) | [FAQ](#)

More Info

Steps:
Please complete all four steps. After you complete all four steps, **GLACIER Tax Prep** will determine which forms you should file.

Welcome to GLACIER Tax Prep

To prepare your federal tax return, simply start on Step One and enter your information until you have completed Step Four. You may save and exit **GLACIER Tax Prep** at any time by selecting "Log Out" at the top right of any screen. You may then return to **GLACIER Tax Prep** at any time and continue to enter your information until you have completed your federal tax return – **GLACIER Tax Prep** will keep track of where you are in the process!

Prepare a 2015 Federal Tax Return

→ **Step ONE: Determine U.S. Tax Residency Status**

Step TWO: Select and Complete Income Forms

Step THREE: Complete Additional Information

Step FOUR: Generate and Print Forms

[FAQ and BLANK Tax Forms for Prior Years](#)

[Change UserID and/or Password](#)

[HELP!](#)

[View 2015 GTP Tutorial Video](#)

[View 2015 "Welcome to the U.S. Tax System" Informational Video](#)

[Purchase a GTP Access Code to Prepare a Prior Year Federal Tax Return](#)

[Activate New GTP Access Code](#)

[Log Out](#)

Enter the request info and click next to continue

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Test, Sample LOG OUT | HELP | FAQ

Tell Us About Yourself . . .

Please answer the questions below so that we can determine your U.S. tax residency status and determine what tax forms are applicable to you.

Personal Information

First / Personal Name *:

Middle Name (if any):

Last/Sur/Family Name *:

Primary Email *:

Alternate Email:

Passport Number *:

Country That Issued Your Passport *:

Country of Citizenship *:

Country of Tax Residence *:

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Check to ensure info on summary page is accurate and next to continue

Step One Summary

Based on the information entered, the following results have been calculated with respect to your U.S. tax residency status. For more information about the results below, select **FAQ** or **More Info** at the top right of this screen.

Personal Information Summary

First/Personal Name: Jane
Middle Name (if any):
Last/Sur/Family Name: Doe
Primary Email Address: tracy.lee@ucsf.edu
Alternate Email Address:
Passport Number: 1234
Country Issuing Passport: Germany
Country of Citizenship: Germany
Country of Tax Residence: Germany

[Edit](#)

Current Visit For Tax Purposes Summary

	Current Immigration Status or Immigration Status at Departure from U.S.	Date of Arrival for Tax Purposes	Date of Departure
Current Visit	J-1 Research Scholar	April 18, 2013	Still Present in the U.S.

[Edit](#)

U.S. Visits Summary

Year	Immigration Status	Total Number of Days Present in the U.S.
2013	J-1 Research Scholar	258

[Edit](#)

Change of Immigration Status during Current Visit? No

More Info

Personal Information Summary:

To edit the information, click on "Edit" for the section you wish to edit and you will go back to the first screen of that section. If the information is correct, select "Next" to continue.

Done

Internet | Protected Mode: Off

100%



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Only nonresident aliens may continue to use GTP by clicking on the Go To Step



Doe, Jane

[LOG OUT](#) | [MENU](#) | [HELP](#) | [FAQ](#)

U.S. Tax Residency Determination Results

You Are A **NONRESIDENT ALIEN** for U.S. Tax Purposes

Based on the information entered into **GLACIER Tax Prep**, you are a **Nonresident Alien** for U.S. federal tax purposes for 2013!

A Nonresident Alien for Tax Purposes is required to file **different** tax forms than a U.S. Citizen or Resident Alien and is not eligible to claim the same deductions and allowances as a U.S. Citizen or Resident Alien.

Please select "Go to Step Two" to complete your federal tax return.

[Back to Menu](#)

[Go To STEP TWO](#)

More Info

U.S. tax residency determination:
For more information about how your U.S. tax residency status was determined, select "FAQ" at the top right of the screen.



Enter forms you received, add forms as needed



Doe, Jane

[LOG OUT](#) | [MENU](#) | [HELP](#) | [FAQ](#)

What Income Statements Did You Receive in 2013?

For **EACH UNIQUE** Form that you received, select "Add Form" to enter the information for that form. DO NOT combine information from different forms, even if the forms have the same amounts; **enter EACH form separately**. You may enter as many of each form as necessary until you have entered all of your U.S. income.

If you did not receive any income from U.S. sources during 2013, select "I Did Not Receive ANY Income From U.S. Sources During 2013".

Income Statements

Form	Payor	
Form W-2		Add Form
Form 1042-S		Add Form
Form 1099-B		Add Form
Form 1099-DIV		Add Form
Form 1099-G		Add Form
Form 1099-INT		Add Form
Form 1099-MISC		Add Form
Form 1099-R		Add Form
I Received Additional Income From U.S. Sources Not Reported On Any of the Forms Above		Add Income
<input type="checkbox"/> I Did Not Receive ANY Income From U.S. Sources During 2013		

[Back](#)

[Next](#)

More Info

Income Statements:

Only enter income statements that pertain to you. For example, if you did not and should not have received Form 1099-G, do not try to enter Form 1099-G.

On the other hand, if you should have received an income statement but did not receive one, please contact your institution.

If you were not present in the U.S. during 2013, you should not have received a Form 1042-S with income codes 17 or 19.

Only Enter U.S. Income

Please note that the following amounts should not be considered U.S. Income and should not be included above:

Amounts credited directly to your account for Tuition, Required Fees and other charges, if applicable.

Interest paid by a U.S. bank for money in a checking or savings account or a certificate of deposit.

Any income that you received from outside the U.S. or for work performed outside the U.S.

Gifts you received from friends or relatives.

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Sample W-2 Form, enter info in fields



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LOG OUT | MENU | HELP | FAQ

Form W-2

Enter the information below exactly as it appears on your form. Enter information for **EACH UNIQUE** form separately; DO NOT combine information from multiple forms even if the forms have the same amounts.

You ONLY need to enter information into the boxes that are provided below. While the other information on your form may be important for other reasons, if a box is not provided on the screen below, the data in that box is not relevant to your federal tax return. If your form does not have a value in a box that is provided below, enter 0.

22222		a Employee's social security number		OMB No. 1545-0008	
b Employer identification number (EIN)		1 Wages, tips, other compensation		2 Federal income tax withheld	
c Employer's name, address, and ZIP code		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		11 Nonqualified plans		12a	
Last name		13 Statutory employee Retirement plan Third-party sick pay		12b	
Suff.		14 Other		12c	
f Employee's address and ZIP code				12d	
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
20		0	0	0	0

Form W-2 Wage and Tax Statement Department of the Treasury — Internal Revenue Service
 Copy 1 — For State, City, or Local Tax Department

Institution Type

Please select the type of Institution that provided this income reporting form to you:

- College or University
- Research Institute, Foundation, Hospital, Health Science Center Directly Affiliated with College or University
- Research Institute or Foundation, NOT Directly Affiliated with College or University
- Hospital or Health Science Center NOT Directly Affiliated with College or University
- Government Agency
- Corporate Entity

Cancel Save

Sample 1042-S Form, enter info in fields

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Form 1042-S

Enter the information below exactly as it appears on your form. Enter information for **EACH UNIQUE** form separately; DO NOT combine information from multiple forms even if the forms have the same amounts.

You ONLY need to enter information into the boxes that are provided below. While the other information on your form may be important for other reasons, if a box is not provided on the screen below, the data in that box is not relevant to your federal tax return. If your form does not have a value in a box that is provided below, enter 0.

Form 1042-S		Foreign Person's U.S. Source Income Subject to Withholding				OMB No. 1545-0096	
Department of the Treasury Internal Revenue Service		▶ Information about Form 1042-S and its separate instructions is at www.irs.gov/form1042 .				Copy C for Recipient Attach to any Federal tax return you file	
		<input type="checkbox"/> AMENDED		<input type="checkbox"/> PRO-RATA BASIS REPORTING			
1 Income code	2 Gross income	3 Withholding allowances	4 Net income	5 Tax rate	7 Federal tax withheld		
18	20000				0		
				6 Exemption code	8 Withholding by other agents		
				04	9 Total withholding credit		
10 Amount repaid to recipient				14 Recipient's U.S. TIN, if any ▶			
				<input type="checkbox"/> SSN or ITIN <input type="checkbox"/> EIN <input type="checkbox"/> QI-EIN			
11 Withholding agent's EIN ▶		946036493		15 Recipient's foreign tax identifying number, if any		16 Country code	
<input type="checkbox"/> EIN <input type="checkbox"/> QI-EIN						Germany	
12a WITHHOLDING AGENT'S name				17 NQI's/FLOW-THROUGH ENTITY'S name		18 Country code	
REGENTS OF CALIFORNIA - SAN FRANCISCO							
12b Address (number and street)				19a NQI's/Entity's address (number and street)			
12c Additional address line (room or suite no.)				19b Additional address line (room or suite no.)			
12d City or town, province or state, country, ZIP or foreign postal code				19c City or town, province or state, country, ZIP or foreign postal code			
13a RECIPIENT'S name			13b Recipient code	20 NQI's/Entity's U.S. TIN, if any ▶			
13c Address (number and street)				21 PAYER'S name and TIN (if different from withholding agent's)			
13d Additional address line (room or suite no.)				22 Recipient account number (optional)			
13e City or town, province or state, country, ZIP or foreign postal code				23 State income tax withheld	24 Payer's state tax no.	25 Name of state	
				0		Select a State	

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 1042-S

Institution Type

Please select the type of Institution that provided this income reporting form to you:



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Sample 1042-S Form, enter info in fields

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Doe, Jane

Form 1042-S

Enter the information below exactly as it appears on your form. Enter information for **EACH UNIQUE** form separately; DO NOT combine information from multiple forms even if the forms have the same amounts.

You ONLY need to enter information into the boxes that are provided below. While the other information on your form may be important for other reasons, if a box is not provided on the screen below, the data in that box is not relevant to your federal tax return. If your form does not have a value in a box that is provided below, enter 0.

Form 1042-S		Foreign Person's U.S. Source Income Subject to Withholding				OMB No. 1545-0096	
Department of the Treasury Internal Revenue Service		▶ Information about Form 1042-S and its separate instructions is at www.irs.gov/form1042 .				Copy C for Recipient Attach to any Federal tax return you file	
		<input type="checkbox"/> AMENDED		<input type="checkbox"/> PRO-RATA BASIS REPORTING			
1 Income code	2 Gross income	3 Withholding allowances	4 Net income	5 Tax rate	7 Federal tax withheld		0
18	20000				6 Exemption code	8 Withholding by other agents	
					04	9 Total withholding credit	
10 Amount repaid to recipient				14 Recipient's U.S. TIN, if any ▶			
				<input type="checkbox"/> SSN or ITIN <input type="checkbox"/> EIN <input type="checkbox"/> QI-EIN			
11 Withholding agent's EIN ▶		946036493		15 Recipient's foreign tax identifying number, if any		16 Country code	
<input type="checkbox"/> EIN <input type="checkbox"/> QI-EIN						Germany	
12a WITHHOLDING AGENT'S name				17 NQI's/FLOW-THROUGH ENTITY'S name		18 Country code	
REGENTS OF CALIFORNIA - SAN FRANCISCO							
12b Address (number and street)				19a NQI's/Entity's address (number and street)			
12c Additional address line (room or suite no.)				19b Additional address line (room or suite no.)			
12d City or town, province or state, country, ZIP or foreign postal code				19c City or town, province or state, country, ZIP or foreign postal code			
13a RECIPIENT'S name			13b Recipient code	20 NQI's/Entity's U.S. TIN, if any ▶			
13c Address (number and street)				21 PAYER'S name and TIN (if different from withholding agent's)			
13d Additional address line (room or suite no.)				22 Recipient account number (optional)			
13e City or town, province or state, country, ZIP or foreign postal code				23 State income tax withheld	24 Payer's state tax no.	25 Name of state	
				0		Select a Stat	

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 1042-S

Institution Type

Please select the type of Institution that provided this income reporting form to you:



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Not receive income or Form 8843, click on the box “I did not receive any income...” and click next button

Test, Sample

LOG OUT | HELP | FAQ

What Income Statements Did You Receive in 2019 ?

For EACH UNIQUE Forms that you received, select "Add Form" to enter the information for that form. DO NOT combine information from different forms, even if the forms have the same amounts; enter EACH form separately. You may enter as many of each form as necessary until you have entered all of your U.S. income.

If you did not receive any income from U.S. sources during 2019, select "I Did Not Receive ANY Income From U.S. Sources During 2019."

Income Statements

Form	Payor	
Forms W-2		Add Another Form
	Form W-2 316025986	Edit Form Delete Form
Forms 1042-S		Add Another Form
	Form 1042-S 316025986	Edit Form Delete Form
Forms 1099-B		Add Form
Forms 1099-DIV		Add Form
Forms 1099-G		Add Form
Forms 1099-INT		Add Form
Forms 1099-MISC		Add Form
Forms 1099-R		Add Form
I Received Additional Income From U.S. Sources Not Reported On Any of the Forms Above		Add Income
<input checked="" type="checkbox"/> I Did Not Receive ANY Income From U.S. Sources During 2019		

Back

Next



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Indicates whether or not an Income Tax Treaty will apply, click on the next button to continue

The screenshot shows the Glacier Tax Prep website interface. At the top left is the logo for "glacier tax prep" with a mountain icon. Below the logo is a navigation bar with "Test, Sample" on the left and "LOG OUT | HELP | FAQ" on the right. The main content area is titled "Income Tax Treaty Verification" and contains the following text: "GLACIER Tax Prep has made the following tax treaty exemption determination." Below this are two green-bordered boxes. The first box contains the text: "Based on the information provided, you do not qualify for an exemption from tax withholding for your **Compensation / Salary / Wages**." The second box contains the text: "Based on the information provided, you do not qualify for an exemption from tax withholding for your **Scholarship or Fellowship (non-service)**." At the bottom of the content area are two blue buttons labeled "Back" and "Next". A footer at the bottom of the page reads "Copyright 2011 © Arctic International LLC. All rights reserved."

Click on Go To Step Three



Doe, Jane

[LOG OUT](#) | [MENU](#) | [HELP](#) | [FAQ](#)

Summary of Total Income From U.S. Sources

Based on the information entered from the IRS Statements and other documents you received, along with your eligibility and preference to claim an income tax treaty exemption, following is a summary of your Total Income From U.S. Sources.

Type of U.S. Income	Taxable Amount	Tax Treaty Exempt Amount
Compensation / Salary / Wages	\$0.00	\$20,000.00
TOTAL U.S. Income (Taxable and Tax Treaty Exempt)		\$20,000.00

Please note that the following amounts are NOT considered U.S. Income and should NOT be included above:

- Amounts credited directly to your student account for Tuition, Required Fees and Books, if applicable.
- Interest paid by a U.S. bank for money held in a checking or savings account or a certificate of deposit.
- Any income that you received from sources outside the U.S. or for work performed outside the U.S.

If the amounts above do not represent your TOTAL INCOME FROM U.S. Sources, click on Back to update your information. Otherwise, continue to Step Three.

[Back](#)

[Go To STEP THREE](#)

More Info

Deductions:

IF you are eligible to claim deductions or dependents, you will be asked to enter such information in Step 3.

Part of Step Three: Enter and click next

The screenshot shows the Glacier Tax Prep software interface. At the top left is the logo for 'glacier tax prep' with a mountain icon. Below the logo, it says 'Test, Sample'. On the right side of the top bar, there are links for 'LOG OUT | HELP | FAQ'. The main content area is titled 'General Information'. Under this title, there are two sections: 'Marital Status' and 'Children'. The 'Marital Status' section asks 'What was your Marital Status as of the last day of 2019?' and has two radio button options: 'Married' and 'Single', with 'Single' selected. Below this is a note: 'Note: If you are married but your spouse is not with you in the U.S., you are still married!'. The 'Children' section asks 'Do You have Any Children Who Received NO Income From U.S. Sources?' and has three radio button options: 'I have NO children.', 'Yes I have 0 children AND my children received NO income from U.S. Sources.', and 'Yes, I have children, but they received income from U.S. Sources.'. The number '0' is in a dropdown menu. At the bottom of the form are two buttons: 'Back' and 'Next'.

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Test, Sample

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General Information

Marital Status

What was your Marital Status as of the last day of 2019 ?

Married

Single

Note: If you are married but your spouse is not with you in the U.S., you are still married!

Children

Do You have Any Children Who Received NO Income From U.S. Sources?

I have NO children.

Yes I have children AND my children received NO income from U.S. Sources.

Yes, I have children, but they received income from U.S. Sources.

Back Next



Use ISS information, if not already entered



Doe, Jane

LOG OUT | MENU | HELP | FAQ

Information About The Institution That Sponsored Your Immigration Status

The IRS requires certain information about the academic institution that sponsored your immigration status. If you were associated with more than one college or university during 2013, enter the information about the LAST college or university you attended or at which you worked. If you are not at a college or university, instead enter the information about the institution that sponsored your immigration status.

If this screen was already completed, your institution has pre-populated the data as it generally applies to everyone at your institution. If you disagree, you may simply update it; however, we suggest that you leave it as pre-populated by your institution.

Academic Institution Details

To answer the questions below, enter information shown on your Form DS-2019 about the Responsible Officer.

Name of Responsible Officer *:

Telephone Number of Responsible Officer *:

Name of Academic Institution*:

Street Address One*:

Street Address Two:

City*:

State*:

Zip Code*:

Back

Next

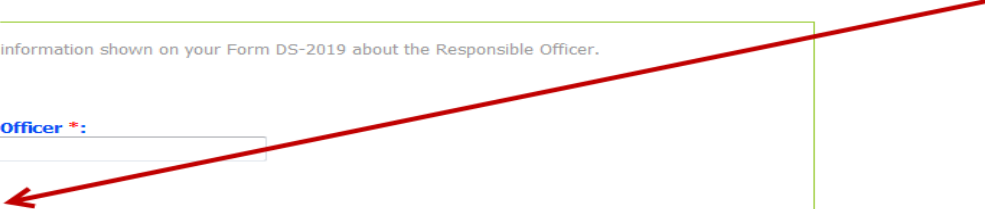
More Info

Academic Institution:

Please enter the information about the Institution (including the Responsible Officer or Designated School Official, DSO) that sponsored your immigration status for this visit to the U.S.

If you are unsure of who sponsored your immigration status, refer to your immigration documentation (e.g., Forms I-20, DS-2019, I-797) for this information.

If this screen was already completed, your institution has pre-populated the data as it generally applies to everyone at your institution. If you disagree, you may simply update it; however, we suggest that you leave it as pre-populated by your institution.



Enter amounts if this applies

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Test, Sample [LOG OUT](#) | [HELP](#) | [FAQ](#)

Additional Information

Non-Service / Scholarship Expenses

Did you use any portion of the \$5,000.00 scholarship to purchase tuition or fees directly from your college or university? If so, please list the amount you paid for the following items.

Tuition and Required Fees for Enrollment at Institution:

Books and Supplies (purchased from any source):

If your tuition and required fees were paid directly to your student account, DO NOT include those amounts above because they were not included as income to you. You may ONLY include amounts above for which you have a receipt to show that you purchased tuition and required fees. If your scholarship was used to purchase housing, meals, food, travel, etc, DO NOT include those amounts above.

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Additional Information

Student Loan Interest

During 2019, did you pay any interest on a loan from a U.S. bank or financial institution to pay for tuition at a U.S. college or university?

No

YES, during 2019, I paid interest of \$ to a U.S. bank for a loan used to pay for tuition.

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Income Tax Treaty will applies or not



TESTING, TERRY

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Income Tax Treaty Verification

GLACIER Tax Prep has made the following income tax treaty exemption determination.

Review of Income Tax Treaty Exemption for Compensation / Salary / Wages

Based on the information entered, the U.S.- Germany Income Tax Treaty allows an exemption from tax for your Compensation / Salary / Wages.

Article 20(1) of the U.S.- Germany Income Tax Treaty allows an exemption for 2 years from the date of arrival for the Compensation / Salary / Wages. Therefore, the possible tax treaty exemption period is Mar 19, 2014 - Mar 17, 2016.

The possible tax treaty exemption applies to an Unlimited Amount of your Compensation / Salary / Wages.

The U.S.- Germany Income Tax Treaty contains a BACK-to-BACK Clause. If you previously claimed an exemption from tax for compensation/salary/wages received as a Student or Trainee, an exemption from tax as a Professor or Researcher may be limited.

You have indicated you DID NOT previously claim an exemption from tax for Compensation / Salary / Wages received as a Student or Trainee.

Would you like to claim the maximum amount of exemption from tax allowed under the income tax treaty?

- Yes, I would like to claim the maximum amount of exemption from tax for the Compensation / Salary / Wages; I understand that I must meet any qualifications listed above.
- No, I DO NOT want to claim an exemption from tax for my Compensation / Salary / Wages.

More Info

Treaty Verification:

IF you are eligible for a tax treaty, you must determine whether you can claim the treaty based on the information presented on this screen. GLACIER Tax Prep will show you the conditions for the treaty; however, you must choose to claim or deny the treaty by selecting "Yes" or "No".



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Form 8843 must be filed for each dependent

All Nonresidents are required to complete **Form 8843**

-This includes any dependents regardless of any US income source or age

-GTP will generate a 8843 for your nonresident alien dependents

-If your spouse and/or child has his/her own independent immigration status (J-1, F-1, etc), s/he is no longer your dependent

The screenshot shows the Glacier Tax Prep website interface. At the top left is the logo for "glacier tax prep". Below it, the user's name "Doe, Jane" is displayed. On the right side of the header, there are links for "LOG OUT | MENU | HELP | FAQ". The main content area is titled "Do You Have Any Dependents Who Need Form 8843?". Below this title is a question: "Do You Have Any Dependents Who Were Present in the U.S. during 2013 under a J-2 immigration status?". There are two radio button options: "Yes" and "No". Below the options is a note: "DO NOT include children who were born in the U.S.". At the bottom of the question area are two buttons: "Back" and "Next". To the right of the question area is a "More Info" section. The "More Info" section contains three paragraphs of text. The first paragraph is titled "Who Must File Form 8843?" and explains that each individual who is a Nonresident Alien and present in the U.S. under an F, J, M, or Q immigration status (both the "-1" and the "-2") is required to file a Form 8843. The second paragraph provides an example: "For example, if your spouse is present in the U.S. under an F-2 immigration status, he or she must file Form 8843. If your spouse was born in the U.S., your spouse does not have to file Form 8843." The third paragraph explains: "Likewise, if your son, who is 3 years old, is present in the U.S. under an F-2 immigration status, he must file Form 8843 (or more likely, you must complete the form and sign it on his behalf). If you have a child who was born in the U.S., Form 8843 should not be filed for that U.S.-born child." Below the "More Info" section is a section titled "Form 8843 For Dependents:" which states: "GLACIER Tax Prep may only prepare Form 8843 for your dependents. If your spouse and/or child has his or her own independent immigration status (e.g. F-1, J-1, etc.), s/he is no longer considered your dependent. Your spouse and/or child will need to prepare a Form 8843 manually." At the bottom left of the page, there is a copyright notice: "Copyright 2014 © Arctic International LLC. All rights reserved." At the bottom right of the page, there is a small "GTP" logo.

Click on the Print/View Forms, read instructions

Save and PRINT Your Tax Documents

Based on the information entered, the following tax documents were prepared for you.

You **MUST** review each document to ensure that the information is correct and complete. If you need to make changes, please update your **GLACIER Tax Prep** record and review the updated documents.

Once you have reviewed the documents, you **MUST PRINT, SIGN and MAIL** the forms to the IRS. Please note that **GLACIER Tax Prep CANNOT** electronically submit your documents because the IRS does not allow any nonresident alien to file their tax documents electronically.

YOU MUST MAKE A COPY OF THE SIGNED TAX DOCUMENTS BEFORE YOU MAIL THEM TO THE IRS. Then, keep that copy of your signed tax documents for THREE CALENDAR YEARS. The copies are very important.

You may also wish to save your forms to your computer. For security reasons, Do **NOT** save the tax documents to a computer that is not your computer.

BE SURE TO FOLLOW the instructions for **How to File Your Tax Return** that will print as the first page of your forms. The document contains all of the instructions you will need so please read AND FOLLOW the instructions carefully.

- Instruction Sheet
- Form 1040NR-EZ
- Form 8843

[Print/View Forms](#)



WAIT – you are NOT FINISHED. Click **NEXT** to find out if you may be required to file a **STATE** tax return. If you are using a tablet device, after viewing your tax return, please remember to return to **GTP** so that you can finish the entire **GTP** process.

[Back](#)

[Next](#)

More Info

Revisions:

After you print/view your forms, you will still be able to make any necessary corrections. If you need to make a correction, please click on the Menu link above and go to the relevant section.

No Tax Return?

If **GLACIER Tax Prep** did not generate a tax return (Form 1040NR or 1040NR-EZ), please go back to Step 2 and ensure that you entered and saved the appropriate income statements.

Form 1040NR or 1040NR-EZ?

GLACIER Tax Prep will determine the appropriate tax return based on your unique situation. You cannot pick and choose which tax return you want to file.

Determine whether you need to file a State Income Tax Return



Doe, Jane

[LOG OUT](#) | [MENU](#) | [HELP](#) | [FAQ](#)

Congratulations!! You Are Finished.

Remember to:

- **Follow EACH STEP on the Instruction Sheet so that you submit your tax documents correctly and on time!**
- **PRINT and Review each document to ensure that the information is correct and complete.**
- **SIGN and MAIL the forms to the IRS. Please note that GLACIER Tax Prep CANNOT electronically submit your documents because the IRS does not allow any nonresident alien to file their tax documents electronically.**
- **MAKE A COPY OF THE SIGNED TAX DOCUMENTS BEFORE YOU MAIL THEM TO THE IRS.**

Do You Need To File a STATE Tax Return Also?

Many states require that you file a state tax return in addition to any federal tax return for any income you received while you lived in that state. **GLACIER Tax Prep** does not handle state tax issues; however, based on the information you entered it does appear that you **may** need to file a state tax return.

For more information or to verify your state tax return filing requirements, please go to your state's tax website by clicking on the name(s) of the states with which you lived and/or received income:

[California](#)

If you need anything else, please contact GLACIER Tax Prep Support.

[Back](#)

[Next](#)

More Info

State Income Tax:

You may have a state income tax filing requirement. Please visit your state's tax revenue website for additional information. **GLACIER Tax Prep** may only be used to prepare your U.S. federal income tax return. **GLACIER Tax Prep** Support cannot assist you with questions regarding the filing of a state tax return.

[Link to Sprintax for the state tax return preparation assistance](#)

How To Get Assistance

- “More Info” is available on every screen to answer questions specifically about that screen’s information
- FAQ provides answers to the questions most frequently received at the **GTP** Support Center
- **GTP** Help allows the foreign national to send a message from within the **GTP** record– the response is usually within the hour, if not immediate. Also, this is for questions that are very specific to the individual’s Federal tax situation.
- **GTP** Tutorial Videos provide six short videos of approximately 10 minutes or less, specifically about how to use **GTP**, how to enter data into **GTP**, and general Nonresident Alien Tax information
- LIVE Nonresident Alien Tax Information and **GTP** Q&A sessions offer the opportunity to ask questions and hear answers in a Live format.

How To Get Assistance

- The NEXT Live Nonresident Alien Tax Information and GTP Q&A sessions will be:
- Wednesday, March 10
- 11:00 am – 12:00 noon ET (*adjust for your time zone*)
- - 11:00 – 11:20 - General Nonresident Alien Tax Information or GTP
 - 11:20 – 12:00 - Q&A in Breakout Room
- **To participate, your foreign national should**
- log into **GTP**
- from the menu, select “LIVE Tax Information and **GTP** Q&A Session”
- click on the link and enter the Passcode found with the link
- There is also a link to take a Survey after the session – we want to know what your foreign nationals liked and didn’t like so that we can make the sessions as helpful as possible.



More Information

- Nonresidents must file as individuals, and cannot file as “Married filing Jointly”. Glacier will guide that.
- Those who status is “Residents for US tax purposes”, if indicated in Glacier, should consider using other tax software or consulting a tax professional. Must file a U.S. federal tax return in the same manner as a U.S. citizen and report ALL income from ALL sources.
- Do not file your tax return late!
- Deadline is April 15, 2021

