TAXES:

What You Need to Know & Do <u>AFTER</u> You Arrive in the U.S.

Berkeley International Office

Do I need to pay U.S. income tax?

If you earn any U.S.-source income^{*} while you are **in the U.S.**, the answer is **YES**. You are required to pay both federal and state income tax.

*Income can be:

- ▷ Wages from employment
- Scholarship/fellowship/stipend/grant in excess of tuition and fees

Income tax will be withheld from your payments.

I will be receiving payments from UC Berkeley. What do I need to do?

Complete a GLACIER record **if you are in the U.S.**

What is GLACIER? GLACIER is an online tax compliance system.

Who needs to complete a GLACIER record?

Any foreign national who is **in the U.S.** and receiving payments from UC Berkeley.

- Student employees, including GSIs and GSRs.
- Students receiving non-service UCB fellowship/scholarship income in excess of required tuition and fees.

What does GLACIER do?

Determines your tax residency.
 Calculates the correct withholding rate.
 Determines if you are the beneficiary of a tax treaty.

International students with a GLACIER record must update their record if there is any change in income or appointment type, immigration status, or departure dates.

What is a tax treaty?

An agreement between the U.S. and another country.

- Beneficiaries may be exempt from paying federal taxes.
 - This is usually for a limited time and may include a dollar limit.

Tax treaties do not apply to state taxes.

How do I set up a GLACIER record?

Three options if you are **in the U.S.**:

- 1. Contact your Human Resources (HR) partner.
- 2. Email glacieradmin@berkeley.edu.
- 3. Complete a GLACIER set up form, available at <u>https://controller.berkeley.edu/payroll/glacier-tax-compliance-system</u>

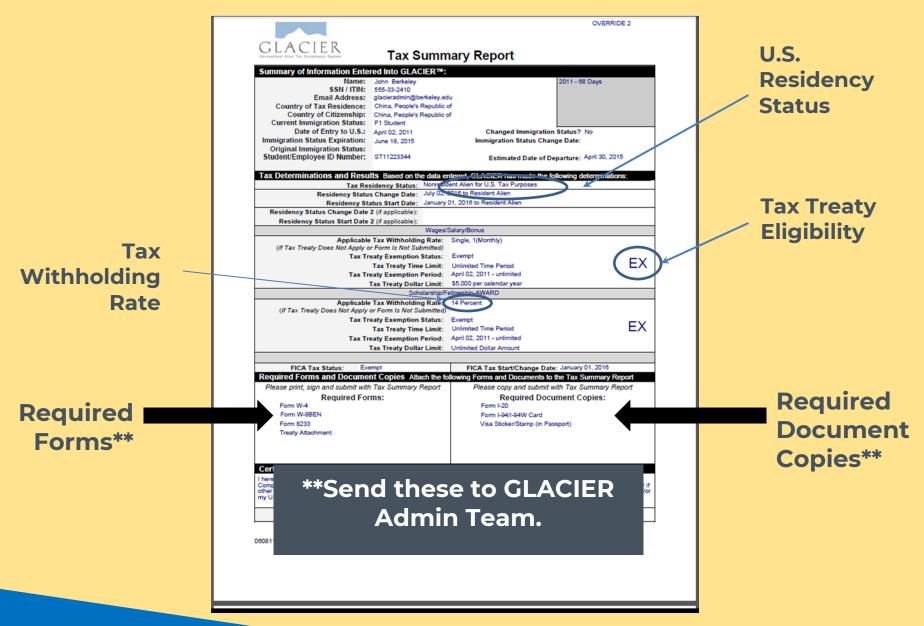
What do I do next?

- 1. Log in and provide all requested information.
- 2. GLACIER will generate forms for you.
- 3. Send your completed GLACIER forms and immigration documents to the GLACIER Admin team.

Email: glacieradmin@berkley.edu

4. Apply for a Tax ID.

GLACIER Tax Summary Report



Berkeley International Office

IRS Form 8233

Nepartment of the Treasury Internal Revenue Service		53 Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual					
Who Should							
Jse This Form?	IF you are a nonresident alien individual who is receiving		THEN, if you are the beneficial owner of that income, use this form to claim				
Note: For definitions of terms used in this section and detailed nstructions on required	Compensation for independent personal services performed in the United States Compensation for dependent personal services performed in the United States		A tax treaty withholding exemption (Independent personal services, Business profits) for part or all of that compensation and/or to claim the daily personal exemption amount. A tax treaty withholding exemption for part or all of that compensation. Note: Do not use Form 8233 to claim the daily				
withholding forms for each type of ncome, see Definitions on							
pages 1 and 2 of he instructions.	Noncompensatory scholarship or fellowship income and personal services income from the same withholding agent			personal exemption amount. A tax treaty withholding exemption for part or all of both types of income.			
DO NOT Use	IF you are a beneficial	owner who is	IN	STEAD, use			
This Form	Receiving compensation for dependent personal services performed in the United States and you are not claiming a tax treaty withholding exemption for that compensation		for	rm W-4 (See page 2 of th Form 8233 for how to co -4.)			
	Receiving noncompensatory scholarship or fellowship income and you are not receiving any personal services income from the same withholding agent		Form W-8BEN or, if elected by the withholding agent, Form W-4 for the noncompensatory scholarship or fellowship income				
	Claiming only foreign status or treaty benefits with respect to income that is not compensation for personal services		Form W-8BEN				
nd ending Part I Identific	ation of Beneficial O	n for calendar year2013 wner (See instructions.) 2 U.S. taxpayer identifying num 888888888		ther tax year beginning .			
	e address (street, apt. or su	ite no., or rural route). Do not use	e a P.O.	box.			
1234 French Way							
City or town, state of Paris, 123456	or province. Include postal c	code where appropriate.		Country (do not abbreviate) France			
5 Address in the Unite	ed States (street, apt. or suit	te no., or rural route). Do not use	a P.O. I	box.			
333 My Street							
City or town, state, a Berkeley, CA 9472							
	Canada or Mexico are no	ot required to complete lines 7	a and				
6 U.S. visa type F1		7a Country issuing passport France		7b Passport number c15a43			
8 Date of entry into th 4/2/2011	e United States	9a Current nonimmigrant status F1 Student		9b Date your current nonimmigrant status expire 6/30/2015			

Cat. No. 62292K

Form 8233 (Rev. 3-2009)

Pa	rt II Claim for Tax Treaty Withholding Ex	xemption and/or Personal Exem	ption Amount
11	Compensation for independent (and certain dep	pendent) personal services:	
a	Description of personal services you are provid	ing	
	Graduate Student Instructor		
b	Total compensation you expect to be paid for t	these convises in this calendar or tax a	roar \$ 28000
12	If compensation is exempt from withholding ba		year a thirthe
	Tax treaty and treaty article on which you are	basing exemption from withholding	
	U.S France Income Tax Treaty, Article 2		
b	 Total compensation listed on line 11b above the Country of permanent residence France 	at is exempt from tax under this treaty	y \$ 5000
	Note: Do not complete lines 13a through 13c u withholding agent.	inless you also received compensation	n for personal services from the same
13	Noncompensatory scholarship or fellowship inc	ome:	
	Amount \$		
b	 Tax treaty and treaty article on which you are 	basing exemption from withholding	
с	Total income listed on line 13a above that is ex	tempt from tax under this treaty \$	
14	Sufficient facts to justify the exemption from wi		ne 13 (see instructions)
	As act forth on this form I qualify for an and	mention from tou withholding	the
	As set forth on this form, I qualify for an exe		
	U:S France Income Tax Treaty, Article 2	1	
	The required additional statement that detain the statement that detain the statement of th	l only for certain independent persona	
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For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Tax Treaty Statement

University of California, Berke

Official Attachment to IRS Form 8233 Additional Statement for Students and Trainees

Name (Last, First)	Country of Tax Residence	Social Security Number/ITIN
Berkeley, John	France	88888888

I was a resident of France on the date of my arrival in the United States. I am not a U.S. citizen. I have not been lawfully accorded the privilege of residing permanently in the United States as an immigrant.

I am temporarily present in the United States for the primary purpose of studying at University of

I will receive compensation for personal services performed in the United States. This compensation qualifies for exemption from withholding of federal income tax under the tax treaty between the United States and France in an amount not in excess of \$5,000 for any tax year. I have not previously claimed an income tax exemption under this treaty for income received as a teacher, researcher, or student before the date of my arrival in the United States.

I will be present in the United States only for such period of time as may be reasonably or customarily required to effectuate the purpose of this visit. I arrived in the United States on 04/02/2011. The treaty exemption is available for compensation paid during a period of five tax years.

I hereby certify that the information provided above is true and correct to the best of my knowledge. If any of the information changes or if I have reason to believe that I no longer qualify for the exemption claimed above, I will notify the Institution Administrator at 510-642-0681.

Signature

Date

Form W-8BEN

(Rev. February 2006) Department of the Treasury Internal Revenue Service		for United S rences are to the In is form to the with		de. 🕨 Se	e separat			OMB No. 1545-1621
Do not use this form for:			0 0 1					Instead, use Form
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 A person claiming that of a trade or business 	it income is effective in the United Stat	es .	the conduct					W-8EC
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claiming the applicabi	lity of section(s) 11	5(2), 501(c), 892, 89	5, or 1443(b) (see in	structions)				.W-8ECI or W-8EXI
Note: These entities she claim they are a foreign	טום use Form W-8 Derson exempt fro	BEN II they are clain In backup withholdir	ning treaty benefits o na.	or are provi	aing the id	эт опу	10	
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Note: See instructions I								
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What tax ID do I apply for?

Students in the US:

Social Security Number (SSN)

If you are **working** on campus, you need an SSN (unless you already have one).

OR

Individual Taxpayer Identification Number (ITIN)

If you are receiving UCB **funding in excess of tuition and fees** AND you don't already have an SSN or ITIN.

Learn how to apply for an SSN/ITIN on the BIO websites.

Am I done now?

No. You will still need to file an annual tax report, called a "tax return."

You will need to do this <u>the year AFTER</u> you arrive in Berkeley.

What is a "tax return"?

An annual tax report you send to the Internal Revenue Service (IRS).

Filing is a requirement of your F-1/J-1 visa status.

For income earned in the U.S. in 2024, you will file a tax return in 2025. The due date is April 15.

Who has to file a tax return?

- Any nonresident alien who earned U.S. income in the U.S. in 2024 needs to file a tax return in 2025.
- If you earned NO income but you were in the U.S. in 2024, you still have to file a "no income" tax report or Form 8843 in 2025.

How do I file a tax return?

- Receive your official tax document in early 2025).
- Follow email instructions from Berkeley International Office.
- Submit your tax return to the IRS. DO NOT submit it to the Glacier Department or to any UC Berkeley office.

BIO offers FREE tax preparation software (<u>Glacier Tax Prep</u> or **GTP**) to help you prepare your tax return.

What official tax documents will I receive from UC Berkeley?

Type of income	Form
 Fellowship or scholarship in excess of tuition/fees 	
 Any income exempt from federal tax withholding due to an income tax treaty exemption 	1042-S
 Wages from employment 	W-2

Berkeley International Office

Summary of What to Do

- ▷ Students receiving payments* from UC Berkeley:
 - Arrive in the U.S.
 - Complete a GLACIER record.
 - Send your documents to the GLACIER admin team.
 - Apply for an SSN or ITIN.
 - Receive your official tax document (W-2 or 1042-S) next year.
- ▷ All Nonresident Aliens:
 - File a tax report the year after you arrive.

Questions about GLACIER?

Contact the GLACIER Admin Team.

- https://controller.berkeley.edu/payroll/glaciertax-compliance-system
- Email: <u>glacieradmin@berkeley.edu</u>

Questions about annual tax filing?

Contact the Berkeley International Office.

https://internationaloffice.berkeley.edu/taxes

Email: biohelp@berkeley.edu

GENERAL tax questions only. BIO advisors are <u>not</u> trained tax professionals and <u>cannot</u> advise on specific cases.

ITIN Drop-off Events

If you are receiving a fellowship, scholarship, grant, or stipend from UC Berkeley that is *in excess of tuition and fees* (e.g., a living stipend) and you do not already have an SSN or an ITIN, you will need to apply for an <u>ITIN</u>.

For your convenience, the Berkeley International Office will hold two ITIN drop-off events in the coming weeks.

• Tuesday, August 27th, 2:10-3:10 PM, Dwinelle 88 Level C (part of <u>New Graduate</u> Student Orientation)

• Tuesday, September 3rd, 10:00 AM - 12:00 PM, BIO Conference room, 2150 Shattuck Ave, Suite 500

Please see <u>this pdf guide</u> for instructions on what to do before attending the event as well as what documents to bring.

For detailed instructions and to RSVP for this event, <u>click here</u>.

Thank You!

Berkeley International Office