

Last or Family Name First Middle Initial

ITIN or Social Security # Visa # Passport #

Date of Birth: (mm/dd/yyyy) Telephone # e-mail Address

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

U.S. Local Street Address

City State Zip Code

Foreign Residence Address

Address Line 2

Foreign Country Province/County Postal Code

Country of Citizenship Country that issued Passport

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

If "YES", is it recognized by the State where you will be filing? Yes No

Are you a U.S. National Resident of Canada Resident of Mexico Resident of South Korea Resident of India
 Yes No Yes No Yes No Yes No Yes No

Dependent Information

First Name	Last or Family Name	Date of Birth (mm/dd/yyyy)	ITIN or SSN	Relationship to you (son, daughter, none, etc.)	Number of months lived with you in the U.S. in 2021	U.S. citizen, U.S. resident alien, U.S. national, or a resident of Canada, Mexico, or South Korea	Did person file joint return?	Did person provide more than 50% of their own support?	Did you provide more than 50% of their support?	Did the person have Gross Income of \$4,300 or more?

What is the date you FIRST entered the United States? ____ / ____ / ____

Were you prevented from exiting the U.S. due to COVID-19, Emergency Travel Disruptions on or after 2-1-2020 and before 4-2-2020? (This may affect the substantial presence test) Yes No

Entry Immigration Status - Check one

U.S. Immigrant/Permanent Resident F-1 Student F-2 Spouse or child of Student
 H-1 Temporary Employee *J-1 Exchange Visitor J-2 Spouse or child of Exchange Visitor
 Other (list)

Current Immigration Status - Check one

U.S. Immigrant/Permanent Resident F-1 Student F-2 Spouse or child of Student
 H-1 Temporary Employee *J-1 Exchange Visitor J-2 Spouse or child of Exchange Visitor
 Other (list)

Have you ever changed your visa type or U.S. immigration status? Yes No

If "Yes", indicate the date and nature of the change. ____ / ____ / ____

Enter the type of U.S. visa you held during these years

2015 _____ 2016 _____ 2017 _____ 2018 _____ 2019 _____ 2020 _____

*** If Immigration status is J-1, what is the subtype? Check one**

01 Student 05 Professor 12 Research Scholar
 02 Short Term Scholar Other (list)

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

01 Studying in a Degree Program 04 Lecturing 07 Conducting Research 10 Clinical Activities
 02 Studying in a Non-Degree Program 05 Observing 08 Training 11 Temporary Employment
 03 Teaching 06 Consulting 09 Demonstrating Special Skills 12 Here with Spouse

Check the years you were present in the United States as a teacher, trainee, student or as an accompanying spouse or dependent of a person in such status for any part of the year. 2015 2016 2017 2018 2019 2020

Have you ever been present in the U.S. PRIOR to 2015 on a teacher, trainee, student visa, or as their accompanying spouse or dependent? Yes No If so, what years and visa type _____

How many days (including vacations, nonworkdays and partial days) were you present in the U.S. during

2019 _____ 2020 _____ 2021 _____

List the dates you entered and left the United States during 2021

Date entered United States mm/dd/yyyy	Date departed United States mm/dd/yyyy	Date 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 before 2021? Yes No

If "Yes", give latest year ____ / ____ / ____ Form number filed

During 2021, 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 your status to lawful permanent resident? Yes No

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

If "Yes", enter the appropriate information in the columns below

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

2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above? Yes No

Information about academic institution you attended in 2021

Name	Telephone number
Address	
Name of your academic/specialized program director	Telephone number
Address	

During 2021 did you receive

Did you have

Scholarships or Fellowship Grants <input type="checkbox"/> Yes <input type="checkbox"/> No	Casualty Losses in a Declared Disaster Area <input type="checkbox"/> Yes <input type="checkbox"/> No
Wages, Salaries or Tips <input type="checkbox"/> Yes <input type="checkbox"/> No	Student Loan Interest Paid <input type="checkbox"/> Yes <input type="checkbox"/> No
Interest <input type="checkbox"/> Yes <input type="checkbox"/> No	State or Local Income Taxes <input type="checkbox"/> Yes <input type="checkbox"/> No
Distributions from IRA, Pension or Annuity <input type="checkbox"/> Yes <input type="checkbox"/> No	U.S. Charitable Contributions <input type="checkbox"/> Yes <input type="checkbox"/> No
State or Local Tax Refunds <input type="checkbox"/> Yes <input type="checkbox"/> No	Child/Dependent Care Expenses <input type="checkbox"/> Yes <input type="checkbox"/> No
Unemployment Compensation <input type="checkbox"/> Yes <input type="checkbox"/> No	IRA Contributions <input type="checkbox"/> Yes <input type="checkbox"/> No
Dividend income or capital gains or losses <input type="checkbox"/> Yes <input type="checkbox"/> No	Any Other Income (<i>gambling, lottery, prizes, awards, self-employment, rents, royalties, virtual currency, etc.</i>) <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you or any dependent have health insurance coverage through HealthCare.gov (The Marketplace)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, was any Advanced Premium Tax Credit received? (<i>Provide Form 1095-A</i>) <input type="checkbox"/> Yes <input type="checkbox"/> No	

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The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-2075. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.