### How to complete Form 1007 (for student on F1 visa)

#### Part I. Personal Information

- **Enter your U.S. social security number (SSN) or ITIN.** If you have SN or ITIN, it is okay. You can leave this blank.

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name (Last)</td>
<td>Provide your name as it appears on your passport or SSN card</td>
</tr>
<tr>
<td>Citizenship and Nonimmigrant Visa Status Information</td>
<td>Enter your country of citizenship</td>
</tr>
<tr>
<td>Visa Status</td>
<td>Enter your visa status for your first visit to the U.S. (e.g. F-1)</td>
</tr>
<tr>
<td>Activity</td>
<td>Enter your activity for your first visit to the U.S. (e.g. Student)</td>
</tr>
<tr>
<td>Date entered U.S.</td>
<td>Enter the date you first entered the U.S. (e.g. 9/15/14)</td>
</tr>
<tr>
<td>Date departed U.S.</td>
<td>Enter the date you first left the U.S. (e.g. 8/10/16)</td>
</tr>
</tbody>
</table>

**NOTE:** Attach another piece of paper if you need room to list more visits.
Part II. Tax Treaty Information

Go to UW Payroll Office website: http://f2.washington.edu/fm/payroll/foreign-nationals/tax-treaty

Before answering section 16, check if your country of residence is listed under **Students Country**.

If you don’t see your country of residence, check **No** and proceed to Part III.
If you find your country of residence, check **Yes**.

If you want to be exempt from paying tax, check **Yes**, otherwise **NO**.

IF Yes to both questions and you are being paid, complete **IRS Form 8233** or **W8-BEN**, then choose one.
Part III.
If you are a resident from BARBADOS, GREECE, JAMAICA, REPUBLIC OF KOREA, MOROCCO, PHILIPPINES, THAILAND, TRINIDAD AND TOBAGO, and TUNISIA, please complete Part III.

If you are not a resident from the countries listed above, you can skip to Part V.

Payment history in the U.S.: List all payment you have received during each visit in the U.S.

<table>
<thead>
<tr>
<th>Payment For</th>
<th>Amount</th>
<th>Payer</th>
</tr>
</thead>
</table>

Part III. TO BE COMPLETED BY VISITORS FROM BARBADOS, GREECE, JAMAICA, REPUBLIC OF KOREA, MOROCCO, PHILIPPINES, THAILAND, TRINIDAD AND TOBAGO, AND TUNISIA:

17. Earnings Information: Excluding this payment, please list all payments you have received during each visit in the United States during this calendar year. If necessary use an additional sheet of paper.

Part IV. TO BE COMPLETED BY VISITORS IN B-1, B-2 OR WB/WT STATUS ONLY AND CANADIANS ARRIVING WITHOUT A VISAA:

18. The American Competitiveness and Workforce Improvement Act grants non-immigrant international visitors in Business or Tourist (B-1/B-2, WB/WT) travel status to be paid honoraria or be reimbursed for travel expenses only if all of the following conditions are met:

- You are a visitor performing services of academic exchange (short term instruction, guest lectures, seminars, presentations, workshops, laboratory demonstrations, and special events; research; consultation and collaboration; participation in consortium activities; or, advisory committees) associated with the University of Washington. Payment is made for services conducted for the benefit of the UW. Participation as a trainee only does not qualify as performance of service conducted primarily for the benefit of the UW.

- Your activity being compensated is engagement of nine days or less at the University of Washington, and

- You have not been paid or reimbursed by more than five U.S. institutions or organizations during the past six months including the University of Washington.

All of the above statements are true (check one):
Part V Test for Determining Residency for Tax Purposes

1. Skip Section 19!!
2. Choose one that applies to your situation.
3. Skip Section 21 and 22!!
4. In section 23, check NON-RESIDENT ALIEN

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### Part V. Test for Determining Residency for Tax Purposes

**Determination of Residence Status for Federal Withholding Tax**

An alien will not be considered a United States resident for tax purposes unless the individual:
- a. is a lawful permanent resident of the U.S. Attach a copy of your Alien Registration (Green Card).
- b. is able to meet the substantial presence test as specified by IRS regulations.

**Please complete the following TESTS FOR DETERMINING RESIDENCY FOR TAX PURPOSES**

#### Test 1. Residence Status Test

- [ ] I am a lawful permanent resident of the U.S. Attach a copy of your Alien Registration (Green Card).
- [ ] I am an immigrant or refugee seeking asylum in the U.S.

If either box is marked, you are a RESIDENT ALIEN for tax purposes. STOP. Enter this in Question 23, Summarize Results, below, otherwise continue to Test 2.

#### Test 2. Prevention From Substantial Presence Test

- [ ] I am in the United States as a teacher, trainee or researcher on a J-1 visa for less than two of the preceding six calendar years.
- [ ] I am a student on a F-1 or J-1 visa and have been in the United States for five or fewer calendar years.
- [ ] I am a student on a F-1 or J-1 visa and have been in the United States for more than five calendar years and have established with the IRS that I do not plan to reside in the United States when my education is completed. Attach proof from IRS.

If any box is marked, you are a NON-RESIDENT ALIEN for tax purposes. Enter in Question 23, Summarize Results, below, otherwise continue to Test 3.

#### Test 3. Substantial Presence Test

Complete the spaces below indicating the number of days present or will be present in the U.S. during the years listed. Do not count days you were "exempt." If you are a student on a F or J visa, generally you are "exempt" for the first 5 calendar years you are in the U.S. If you are a teacher or researcher on a J visa, generally you are "exempt" for the first 2 calendar years you are in the U.S.

<table>
<thead>
<tr>
<th>Year</th>
<th>Date Entered</th>
<th>Date Departed</th>
<th>Days in U.S.</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>X 1 =</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>X 1/3 =</td>
<td>0.00</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>X 1/6 =</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TOTAL =</td>
<td>0.00</td>
</tr>
</tbody>
</table>

If the total is less than 183, you are a NON-RESIDENT ALIEN for tax purposes. Enter in Question 23, Summarize Results, below. If total is 183 or greater, complete Test 4.

#### Test 4. Alternate Substantial Presence Test

Have you been or do plan to be in the U.S. for fewer than 183 days in the current year, and do you pay taxes in your country of residence, and do you have a closer connection to that country than to the U.S.?
- [ ] Yes. I am a NON-RESIDENT ALIEN for tax purposes
- [ ] No. I am a RESIDENT ALIEN for tax purposes

Enter in Question 23, Summarize Results, below.

#### Summarize Results

Check the appropriate box for tax purposes:
- [ ] RESIDENT ALIEN
- [ ] NON-RESIDENT ALIEN

### Part VI. Certification of Information Provided

I certify that to the best of my knowledge and belief, all the information that I have provided on this form is true and correct.

<table>
<thead>
<tr>
<th>Department</th>
<th>Box Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Email</th>
<th>Contact Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

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1. Department you work at
2. The campus box number of the department
3. Supervisor’s email address
4. Supervisor’s phone number