**Who must file tax forms for 2020 tax season?**

If you were physically in the U.S. in F or J status anytime between January 1 - December 31, 2020 you're obligated to send one form, Form 8843, to the U.S. tax agency IRS (Internal Revenue Service), even if you had no income. For the 2020 tax season, if you earn $1 of US source income or greater, you may need to file a federal tax return with the IRS. Depending on your individual circumstances, you may also need to file a state tax return(s).

**Tax Filing Deadline:**

April 15, 2021 is the last day for residents and non-residents who earned U.S. income to file Federal tax returns for 2020.

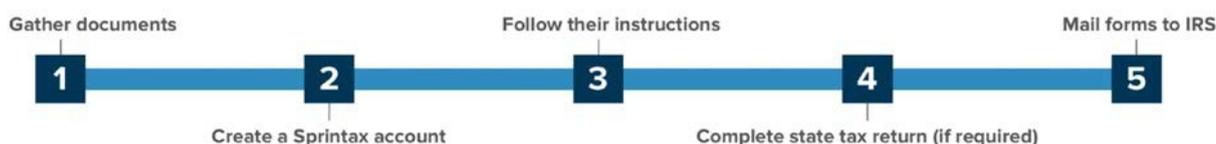**Resident or Non-Resident for Federal Tax Purposes:**

*Generally*, most international students & scholars who are on F, J, M or Q visas are considered non- residents for tax purposes. International undergraduate students on J1 & F1 visas are automatically considered non-resident for their first 5 calendar years in the US, whilst Scholars/Researchers on J visas are automatically considered non-residents for 2 out of the last 6 calendar years in the US. If you've been in the US for longer than the 5 or 2 year periods, the Substantial Presence Test will determine your tax residency.

**How to File:**

We have teamed up with Sprintax (https://sprintax.com/louisiana-edu ) to provide you with easy-to-use tax preparation software designed for non-resident students and scholars in the U.S. We (and all other university staff) are not qualified or allowed to provide individual tax advice.

After you login to Sprintax, it will ask you a series of questions about the time you have spent in the United States and in which immigration status, looking back over a period of years. Sprintax will then determine your tax status. If it determines that you are a "nonresident alien" (NRA) for federal tax purposes, you can continue to use it to respond to a series of guided questions. Sprintax will complete and generate the forms you need to print, sign, and mail to the IRS (Internal Revenue Service). If it determines you are a resident alien for federal tax purposes, you won't be able to continue using the software, but can use TurboTax instead.

**Step by Step guide on How to File Your Non-Resident Tax Forms (F and J)**



Gather documents | Follow their instructions | Mail forms to IRS
1 — 2 — 3 — 4 — 5
Create a Sprintax account | Complete state tax return (if required)

Steps to File Your Non-Resident Tax Forms (F and J)

**1) Gather the documents you may need for Sprintax**

| Document | Description |
|---|---|
| ✓ Passport | |
| ✓ Visa/Immigration information, including form I-20 (F status) or form DS- 2019 (J status) | |
| ✓ Social Security Number or Individual Taxpayer Identification | This is not needed if you had no income and the 8843 is the only form you have to file. |

*DISCLAIMER: The Division of Global Engagement and the school are NOT permitted to assist any student/scholar with any IRS tax form preparation or tax related questions. The information provided is intended for your benefit. Any questions or concerns should be directed to Sprintax, a certified tax preparer or a local IRS field office.*

| | | |
|---|---|---|
| ✓* | W-2 | This form reports your wage earnings if you worked. If you had more than one employer, you should get a W-2 from each employer. It is issued by the end of January for the previous year. Make sure all employers from last year have an up-to-date address for you. |
| ✓* | 1042-S | This form is used to report: <br> 1. stipend, scholarship, fellowship income and travel grants (not tuition reduction or exemption) <br> 2. income covered by a tax treaty <br> 3. payment for other types of services (e.g. by the semester as a note-taker) <br><br> If you received this type of income, the 1042-S will be mailed to you by March 15th by the payer. <br><br> **Note:** Only Nonresident Aliens receive this form. If your tax status changes to a Resident Alien you will not get a 1042-S. Login to Sprintax to check your tax status if you're not sure. |
| ✓ | U.S. entry and exit dates for current and past visits to the U.S. | In addition to passport stamps, you can review or print your U.S.travel history here |
| ✓* | 1099 | This form reports miscellaneous income. Can be interest on bank accounts, stocks, bonds, dividends, earning through freelance employment |
| ✗ | 1098-T | This form is is NOT needed and can NOT be used for a nonresident tax return because NRAs are **not** eligible to claim education expense tax credits. |

## 2) Create a Sprintax Account:
Visit https://sprintax.com/louisiana-edu to create an account. Use discount code **SpR20ULL101F5** to receive a $5 discount on federal tax return (1040NR). Open your new Sprintax account by creating a UserID and password or if you have an existing account on Sprintax you can log in using your existing credentials.

## 3) Follow the Sprintax Instructions
If you had No U.S. Income: Sprintax will generate a completed Form 8843 for you and each of your dependents (if you have any).

With U.S. Income: Sprintax will generate your "tax return documents", including either a 1040NR-EZ or a longer form 1040NR, depending on your circumstances.

## 4) (With U.S. income only) If required, complete your state tax return
After you finish your federal return, Sprintax will inform you if you need to complete a state tax return. If so, they will give you the option to use Sprintax for an individual fee. However, it is your choice to use them or to do the state tax return on your own.

**Mail your completed federal and/or state forms to IRS and/or state tax authorities** Remember to read the mailing instructions that Sprintax provides. If you have dependents, each one must mail their 8843 in a separate envelope.

## Need Sprintax Support?
Sprintax offers 24/7 Live Chat Help. You can also contact them through email at hello@sprintax.com or Call 1-866-601-5695.

## Sprintax Educational Tax Videos and Blog:
You also have access to the Sprintax YouTube account where there are a number of educational videos on nonresident taxes to provide further clarity on the subject of using Sprintax and nonresident tax. There is also a Sprintax Blog which go through tax related topics and be of use to you