



FOREIGN NATIONAL TAX ASSESSMENT FORM
Northern Illinois University

This Form must be completed before you can receive any form of payment for employment wages or student financial aid. All applicable questions below must be answered. Attach a copy of your I-94 Form (Arrival/Departure Record), a copy of your Passport, a U.S. VISA page from your passport, I-20 Form or DS-2019, a copy of your Social Security Card or ITIN (Individual Tax Identification Number), or EAD (Employment Authorization Documents).

Last or Family Name		First Name		Middle Name
Date of Birth (month/day/year) / /	Student/Employer ID Number	Social Security Number or Individual Taxpayer Identification No ("ITIN")		If you have no Social Security Number or ITIN, have you applied for one? Yes <input type="checkbox"/> No <input type="checkbox"/>
Department where you work	Position Title	Job Description	Date of Employment / /	

Residency Information

U.S. Local Address	Foreign Permanent Address
Address: _____	Address: _____
City: _____ State: _____ Zip code: _____	City: _____ Postal Code: _____
Phone Number: _____ Email: _____	Province: _____ Country: _____

Current Immigration Status

<input type="checkbox"/> B-1 or B-2 Business purpose / Non-business tourism	<input type="checkbox"/> F-1 Student
<input type="checkbox"/> H-1B Foreign Worker in Specialty Occupation	<input type="checkbox"/> J-1 Exchange Visitor/Student
<input type="checkbox"/> H-4 Dependent of Foreign Worker in Specialty Occupation	<input type="checkbox"/> J-2 Dependent of Exchange Visitor
<input type="checkbox"/> U.S. Immigrant /Permanent Resident	<input type="checkbox"/> VWP Visa Waiver Program (WT/WB status)
If F-1 Student, what category?	
<input type="checkbox"/> Undergraduate <input type="checkbox"/> Graduate <input type="checkbox"/> Doctoral <input type="checkbox"/> Other: _____	<input type="checkbox"/> Other (please specify): _____
If J-1 Exchange Visitor, what category?	
<input type="checkbox"/> Student <input type="checkbox"/> Research Scholar <input type="checkbox"/> Short-term Scholar <input type="checkbox"/> Professor <input type="checkbox"/> Other: _____	
Primary Activity During this Visit	
<input type="checkbox"/> Studying in a degree program	<input type="checkbox"/> Observing
<input type="checkbox"/> Studying in non-degree program	<input type="checkbox"/> Consulting
<input type="checkbox"/> Teaching	<input type="checkbox"/> Conducting Research
<input type="checkbox"/> Lecturing	<input type="checkbox"/> Training
<input type="checkbox"/> Demonstrating Special Skills	<input type="checkbox"/> Clinical Activities
<input type="checkbox"/> Temporary Employment	<input type="checkbox"/> Here with a Spouse
Estimate of wages to be paid by the university: \$_____ Are you a recipient of a Grant? (scholarship, fellowship) <input type="checkbox"/> Yes <input type="checkbox"/> No Amount: \$_____	
If you are a Consultant or Self employed individual, do you/will you have an office or fixed base) in the US? <input type="checkbox"/> Yes # of Days:_____ No <input type="checkbox"/>	

Tax Exemption and Treaty Benefit Information

Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single Is spouse here in the U.S? <input type="checkbox"/> Yes <input type="checkbox"/> No Is Spouse working? <input type="checkbox"/> Yes <input type="checkbox"/> No
Number of Dependents: _____ Are dependents US Citizens or Permanent Residents? <input type="checkbox"/> Yes <input type="checkbox"/> No
Country of Citizenship: _____ Country of Residency if different than the Country of Citizenship: _____
Do you wish to claim Tax Treaty benefits if they are available? <input type="checkbox"/> Yes (Please complete the additional IRS Form W-8BEN or Form 8233) <input type="checkbox"/> No
Have you taken any action to become a US lawful Permanent Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No

Visa History Information

Passport Number:	Passport Expiration Date: / /	Country that Issued Passport:
Visa Number:	Visa Issue Date: / /	I-20/DS-2019 Expiration Date: / /
First Day in the U.S: / /	Last Day in the U.S on Your Current Immigration Status: / /	

Please list ALL U.S. immigration activity during the CURRENT AND FOUR PREVIOUS years, and ANY immigration activity before that time if you had an F, J, Q or M issued visa.

Date of Entry	Date of Exit	Immigrations Status	J-1 Subtype	Visa Number	Primary Activity	Tax Residency Country	Have you Taken Any Tax Treaty Benefits?
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No
/ /	/ /						<input type="checkbox"/> Yes <input type="checkbox"/> No

I hereby certify that all of the above information is true, complete and correct. I understand that if my status changes from that which I have indicated on this form, I must complete and submit a new Foreign National Tax Assessment Form to Human Resource Services (Swen Parson Room 110) or the Controller’s Office (Lowden Hall Room 201).

Signature: _____ Date: _____

Instructions for Completing the Foreign National Tax Assessment Form

Name: List your full name as it appears on your Social Security Card, ITIN letter, or your passport if you do not have a U.S. taxpayer ID number.

Birthdate: List your birthdate in the format mm/dd/yy.

Student/Employee ID number: All students, faculty and staff affiliated with Northern Illinois University are issued an 8-digit identification number. For most students and recently hired employees, this 8-digit number is the same as their Z- or A-ID number used for login purposes. Please list on the form the ID number issued to you.

Social Security Number or ITIN: Enter the U.S. Social Security number issued to you by the U.S. Social Security Administration or the Individual Taxpayer Identification Number issued to you by the U.S. Internal Revenue Service. Do NOT list temporary numbers, school assigned numbers or foreign social security numbers.

Department or College: List the NIU Department or College where you will be employed, job title description and initial date of employment.

Residency Information:

U.S. Local Address: List the local address where you will reside during your stay in the U.S.

Foreign Permanent Address: List the address you consider to be your foreign permanent address.

Current Immigration Status: Check the box for the type of U.S. Visa that you currently hold.

Student Type F-1: If you entered the U.S. in student status, please check the appropriate box.

Exchange Visitor Type J-1: Check the appropriate J-1 subtype. You can find this on your DS-2019.

Primary Activity During this Visit: Check only one activity that represents the purpose of your visit.

Employment wages and/or Student financial aid: Please provide estimates for the total dollar amount expected of wages and/or student financial aid in the form of scholarships, awards, room & board credits, etc...

Consultants/Self-employed: Please check the appropriate box. This includes any office at any location specifically identified with you. This is important for analysis of tax treaty benefits.

Tax Exemption and Treaty Benefit Information:

Marital Status: Please provide the requested information about your marital status and dependents.

Country of Citizenship: List your country of citizenship.

Country of Residence: This is your tax residence. Tax residence is where you were last subject to income taxes as a resident of that country. This can be different from legal residence or country of citizenship. Do NOT include the U.S. as Country of Residence.

Treaty Benefits: You may receive the benefit of a reduction in or elimination of U.S. income taxes on compensation earned or financial aid received should a tax treaty exist between your home country and the United States. Should you elect to receive this benefit, you must complete IRS Form W-8BEN in addition to this NIU form.

Visa History Information:

Passport Number: Enter your passport number.

Passport Expiration: Enter the expiration date of your passport.

Actual Date of Entry: Include the month, day and year of U.S. entry for your current status. Approximate if you do not know the exact date.

Status End Date: Include the end date of your current immigration status found on immigration documents such as your I-20, DS-2019 or I-94. Otherwise list the date you plan to leave the U.S. Typically dates of exits are needed for those in the U.S. on visitor visas or visa waivers.

Immigration Activity: List ALL U.S. immigration activity during the CURRENT AND FOUR PREVIOUS years, and ANY immigration activity before that time if you had an F, J, Q or M issued visa.

Country that issued your Passport: List the name of the country that issued your passport.