(REV 120122 ADA)

UNIVERSITY OF HAWAII STATEMENT OF CITIZENSHIP AND FEDERAL TAX STATUS



Anticipated Departure Date

PURPOSE:

This form is for individuals. To comply with applicable tax provisions of the Internal Revenue Service(IRS) regulations, the information requested on this form is <u>required</u> to determine the appropriate federal tax withholding and is required for each calendar year. (Business entities should use IRS Form W-9)

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| UNITED STAT | ES (US) CITIZENS: | 1. Complete Sections A | and E only. |
|-------------|--|---|---|
| PERMANENT | RESIDENT ALIENS: | Complete Sections A Attach a photocopy (f | and Eonly. ront and back) of your Alien Registration Card. |
| ALL OTHERS: | Complete Sections 2 Complete Section D Submit copy of your Passport ID Page at Submit IRS Form W | if applicable. | For J-1 visaholders, submit copy of DS-2019. For B visaholders, submit DISB-45. For F-1 visaholders, submit copy of I-20. Submit IRS Form 8233 if performing services as independent contractor (Treaty only). |

Section A. PERSONAL INFORMATION

| 1. General Information | | | | |
|------------------------------|---------------|---|---------------------------|-------------------|
| Last Name | First | Middle | US Social Security Number | er or ITIN Number |
| | | | | |
| Country of Citizenship | | Country of Residence for Tax Purpose | E-Mail Address | |
| | | | | |
| [FOR NON-UH PERSONNEL] | | | | |
| |]YES []NO | | | |
| Are you employed anywhere? [|]YES []NO If | you answered "YES", please provide your employer' | s information: | |
| Employer's Name | Number | r & Street City / Province | e State | Postal Code |
| | | | | |
| | | | | |
| 2. US Mailing Address | | | | |
| Number and Street | | City | State | Zip Code |
| | | | | |
| | | | | |
| 3. Foreign Mailing Address | | | | |
| Number and Street | | City/Province | Country | Postal Code |
| | | | | |

Intended Length of Stay (Days)

Section B. US IMMIGRATION ACTIVITY

Expiration Date of Current Visa

1. Current Visa Status
Date of US Entry

| Current Visa Type (check appropriate box): | | What is the primary purpose of the visit? (check appropriate box) | | | | | |
|--|--|---|--|-----------------------------------|-----------------|--|--|
| []F-1 Student []J-1 Student []J-1 Visitor (Non-Student) []B-1/WB Visitor for Business []B-2/WT Visitor for Pleasure (Tourist) []Other INS Classification (list status): 2. Is this the first time you have entered the United States? 3. Past Visa History | | | [] Studying/Training/Research in a Degree Program [] Studying/Training/Research in a Non-Degree Program [] Training/Research as a Post-Doctoral Fellow [] Providing Service as an Independent Contractor | | | | |
| T TOVIGO UT | | | - | | y i Boomboi oi. | | |
| held while present in the US present in the US du | | you were or will be physically ring the listed calendar year. d/yy, e.g., 01/01/12 – 12/31/12 | Number of days present in the United States | Are you leaving the US this year? | | | |
| | | | | | []YES []NO | | |
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | |

| | Calendar Year | Enter Visa Type/INS classification held while present in the US during the listed calendar year Enter Visa Type/INS classification held while present in the US during the listed calendar year (list dates as mm/dd/yy, e.g., 01/01/12 – 12/31/12 | | | Number of day present in the United States | |
|--|---|---|--|---|--|----------------|
| TEP 1: Complete the Substantial Presence Test (SPT) by completing the table below. For F, J, M or Q Visa holders, please note the following. For F, J, or M Student Visa holders: For J or Q Non-Student Visa holders: Do NOT count any days during your first 5 calendar years in the United States in which you hand. The student visa holders: Do NOT count any days during your first 2 calendar years in the United States in which you had a J or Q Non-Student visa. Do NOT count any days during your first 2 calendar years in the current and previous 6 caler years in the United States in which you had a J or Q Non-Student visa. Do NOT count any days during your first 2 calendar years in the Current and previous 6 caler years in the United States in which you had a J or Q Non-Student visa. CALCULATE TOTAL NUMBER OF DAYS TO COUNT for count any days during your first 2 calendar years in the Current Calendar years in which you had a J or Q Non-Student visa. TOTAL # OF DAYS TOTAL # OF DAYS TO COUNT for the current calendar year equal to 31 days or more? [] YES [] NC TOTAL # OF DAYS for all three years equal to 183 days or more? [] YES [] NC TOTAL # OF DAYS TO TOTAL NUMBER OF DAYS TO COUNT for the current calendar year acqual to 31 days or more? [] YES [] NC TOTAL # OF DAYS TOTAL # OF DAYS TO TOTAL NUMBER OF DAYS TO COUNT for the current calendar year acqual to 31 days or more? [] YES [] NC TOTAL # OF DAYS [] YES [] NC TOTAL # OF DAYS TOTAL | | | | | | |
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| CALENDAR YEAR WRE OR WILL BE PRESENT IN THE UNITED STATES FOR EACH YEAR (A) ENTER TOTAL NUMBER OF DAYS YOU WRE OR WILL BE PRESENT IN THE UNITED STATES FOR EACH YEAR (B) 113 176 176 177 176 177 176 177 176 177 177 176 177 177 177 177 178 179 179 179 | TEP 1: Co | omplete the Substantial Presenc | ce Test (SPT) by completi ders: Do NOT count ar | ny days during your firs | | |
| CALENDAR CALENDAR WERE OR WILL BE PRESENT IN THE UNITED STATES FOR EACH YEAR (A) | • | For J or Q Non-Student Visa ho | aldoro | | at 2 calendar years in the current and pre held a J or Q Non-Student visa. | vious 6 calend |
| TEP 2: Please answer the following questions: A. Does the TOTAL MUMBER OF DAYS TO COUNT for the current calendar year equal to 31 days or more? B. Does the TOTAL # OF DAYS for all three years equal to 183 days or more? []YES []NC TEP 3: Determine your tax status: If you marked "YES" to both questions A and B, then you passed the Substantial Presence Test and will be treated as a RESIDENT ALIEN (RA) FOR TAX PURPOSES for this calendar year. Go to and sign Section E below. If you marked "YES" to both questions, then you did not pass the Substantial Presence Test and will be treated as a RESIDENT ALIEN (RA) FOR TAX PURPOSES for this calendar year. Go to and sign Section E below. If you marked "No to one or both questions, then you did not pass the Substantial Presence Test and will be treated as a NONRESIDENT ALIEN FOR TAX PURPOSES for this calendar year. Go to Section D below. ection D. EXEMPTION FROM WITHHOLDING FOR THE NONRESIDENT ALIEN All Payments made to Nonresident Aliens are subject to US federal tax withholding at a statutory rate of 30%. However, you may claim an exemption from withholding or reduced rate via a US Tax Treaty if you meet the following requirements: a. You must be a resident of a country that has a tax treaty with the US. (Consult IRS Publication 901, US Tax Treaties, at http://www.irs.gov/publirs-pdf/p901.pdf. The tax treaty must have a treaty article applicable to the type of payment you'll be receiving: • Scholarship or Fellowship Article for Fee for Services, Honoraria, and Reportable Travel payments. b. You must meet all requirements regarding residency, time, and dollar limitations described in the tax treaty. c. You must have a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) to claim a treaty exemption. Do you want to claim a treaty exemption from US tax withholding? (Check one box only.) []YES I am a resident of a country that has a tax treaty with the US and has an applicable tax treaty article. Therefore, I claim exemption from US t | | DAR WERE OR WILL B R UNITED STATES | MBER OF DAYS YOU E PRESENT IN THE FOR EACH YEAR | RATIO | CALCULATE TOTAL NUMBER O | F DAYS TO |
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| NO <u>I cannot claim a treaty exemption</u> from US tax withholding because I do not meet the requirements stated in Part 1 above. I understand taxes will be withheld at 14% (Scholarships, Fellowship, Traineeship, or Stipend) or 30% (All other payments). | - | IRS Form W8-BEN choose not to claim a treat treaty with the US and an ap | for Scholarship, Fellowsh aty exemption from US ta plicable treaty article. I ur | ip, Traineeship, Stipen ax withholding, even th nderstand taxes will be | d, and Royaltypayments. lough I am a resident of a country that | |
| ection E. CERTIFICATION OF INFORMATION PROVIDED ON THIS FORM | [] NO | I cannot claim a treaty exemp | otion from US tax withhold | ling because I do not m | • | |
| | ection E | CERTIFICATION OF INF | ORMATION PROVID | ED ON THIS FORM | Λ | |

Date:

Signature: