

## Tax FAQs

### [Tax FAQs \[1\]](#)

#### [Can OISS help me file my taxes?](#)

OISS staff are not tax experts and cannot provide tax advice. To assist our international population, OISS has provided access to Sprintax, a tax preparation software created specifically for international students and scholars who are nonresident tax filers with no U.S. source income.

Sprintax will help you navigate the U.S. tax system, including:

- federal tax forms
- residency status
- tax treaties
- exemptions
- deductions

Sprintax is accessible from around the world. The Sprintax access codes are made available each year at the end of February, and cover the federal income tax return only. Sprintax can also help you prepare your state returns for an additional charge.

[Learn more about Sprintax here, including how to contact them for tax questions \[2\].](#)

#### [Do I have to file a tax return?](#)

Yes. ALL international students and scholars who were in the U.S. for any period of time during any calendar year must file a federal tax statement, called an income tax return. Some international students and scholars will also need to file [state tax return\(s\)](#) [3].

If you did not have any U.S. source income, you will only file [Form 8843](#) [4]. If you have U.S. source income, your next step is to determine your tax filing status. Income that is taxed includes wages, scholarships and earnings on investments.

The most common type of income is wages; the money withheld from each paycheck is an estimated payment of the federal and state income tax obligation. This money is sent by the employer to the IRS and the Connecticut Department of Revenue Services in the employee's account (your account number should be your Social Security or ITIN number). Taxable scholarship payments may have federal tax withholdings similar to wages. Investment income (not including bank interest) rarely has an amount withheld in advance; the applicable tax is paid when filing the tax forms.

#### [Do I need a SSN or an ITIN to file taxes?](#)

If you had no U.S. source income, you do **not** need a SSN or an ITIN to file Form 8843. However, If you have U.S. source income you will need either an [SSN or ITIN to file your return.](#) [5]

### [What forms \(income statements\) am I likely to receive for tax filing purposes?](#)

Before you begin your tax return using Sprintax, you will need to collect your income statements. If you did not have any U.S. source income, then you will not receive the following documents and will only need to file [Form 8843](#) [4]. If you had U.S. source income you will receive one or more forms indicating the type, source and amount of income received

- W-2 form - issued by the end of January for wages earned
- 1042-2 form - issued by March 15th for income exempt from tax withholding under a tax treaty, a taxable fellowship/scholarship or grant or a non-employee service payment.
- 1099 form - issued for miscellaneous income
- [Information about important tax documents issued by the University](#) [6]

[See a list of all these forms, as well as other documents you may need, on our nonresident tax page](#) [5].

### [What should I do if I didn't receive or if I lost Form W-2?](#)

If you received wages from Yale University and gave consent to receive an electronic version of the W-2 form, you will find your W-2 in the My Pay section of WorkDay. [More information about receiving your Yale W-2 form](#) [7].

If you have not received Form W-2 or received an incorrect form or information, contact your employer. You may not have received the form because of an incorrect or incomplete address. Be sure to verify the address used if already mailed. If the form was returned to the employer because of an incorrect address, or never mailed, and the employer intends to issue or re-mail, allow a reasonable amount of time for this action to occur before calling the IRS for help.

Students or scholars who were employed at Yale University and did not receive their W-2 Form by the end of January should email Employee Services at [employee.services@yale.edu](mailto:employee.services@yale.edu) [8] or call them at (203) 432-5552.

### [What should I do if I didn't receive Form 1042-S from Yale University?](#)

Not all students and scholars will receive a Form 1042-S. This form is only issued to students and scholars who receive a stipend, scholarship, fellowship and/or income covered by a tax treaty.

Yale University will distribute Form 1042-S no later than March 15. If you expect to receive a Form 1042-S and have not received it by March 15, please email [askfinance@yale.edu](mailto:askfinance@yale.edu) [9].

### [Do I qualify as a nonresident or resident for federal tax purposes?](#)

See [the instructions on the main U.S. Taxes page](#) [10] for help. If you are still not certain, you should create a Sprintax account as described in our [Sprintax page](#) [2]. Sprintax will ask you a series of questions based on the substantial presence test to determine your residence status for federal tax filing purposes. If you qualify as a nonresident for tax purposes, you can use the Sprintax program to assist you with federal tax filing. If you qualify as a resident for tax purposes, you **cannot** use the Sprintax tax preparation software. [Find out more on our Resident Tax Filing page](#) [11]. Generally, tax treaties do not apply to individuals who qualify as a resident for tax purposes, but there are a few exceptions. For more information on exceptions, consult the [IRS publication 901](#) [12].

### [How can Sprintax help me complete my tax forms?](#)

- Sprintax offers tax preparation workshops. [Find out more and sign up for a free Sprintax workshop here](#) [2].
- Determines if you are a resident or nonresident for U.S. tax purposes.

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- Checks each type of payment against any applicable tax treaty to ensure you take advantage of any tax treaty benefits.
- Chooses any relevant personal allowances, credits and income tax deductions.
- Completes the correct U.S. federal income tax form (Form 1040NR).
- Provides your tax return and any attachments for you download, print and mail. Sprintax is working with the IRS to transition from a paper tax return to electronic filing. Do not mail any returns to the IRS before this is verified later in February. OISS will post a news announcement and update this site when we have more information.. Always keep a copy.
- Provides detailed instructions about how, when and where to submit the tax forms.
- Offers assistance with your state tax return for an additional fee.

### [How do I obtain an access code for Sprintax?](#)

See [our Sprintax page](#) [2] for information on using OISS-subsidized Sprintax .  
[Access to Sprintax](#) [2]

### [Does Sprintax offer software and tax support?](#)

Sprintax has a robust [FAQ library](#) [13]. Sprintax also offers live chat when you are logged into your account. [See more options on our Sprintax page](#) [2].

### [Can I submit my tax forms electronically through Sprintax?](#)

Many students and scholars qualify for e-filing. [Learn more on our Sprintax page](#) [2].

### [Can I use other tax software, like TurboTax or H&R Block instead of Sprintax to file my taxes?](#)

If you are a [non-resident tax filer](#) [14], then you cannot use tax software such as TurboTax or H&R Block to file your taxes. This is because this software is meant for U.S. residents, so it will not file the correct forms for you. You must use Sprintax, or file the required forms yourself.

### [What is the deadline to file tax forms?](#)

If you received taxable income in 2023, the filing deadline is April 15, 2024. If you had no U.S. income and are only filing [Form 8843](#) [4], the deadline is April 18 as well. The deadline refers to the date the envelope is postmarked by the post office.

### [What should I do if I am unable to file my tax form by the deadline?](#)

If you need more time, you can file [Form 4868](#) [15] to request an automatic extension of time. You must file this extension before April 18. You will not be notified if the extension request is approved, it is automatic. If you owe any taxes, you must still mail the estimated tax payment by October 17 or you will be assessed penalties and interest on any payment owed. Be sure to sign and date the forms and keep copies for your records.

### [There is a tax treaty between the U.S. and my country. Should I file a tax form?](#)

Yes, since you were present in the U.S., you are required to complete and file a tax form.

### [I'm an F-1/J-1 student with no U.S. income or scholarships for 2023. Do I need to file anything?](#)

All nonresident aliens for tax purposes, in F or J status, are required to complete [Form 8843](#) [4] with the IRS regardless, if payment was received or not. This also includes dependents in F-2 and J-2 status, regardless of age.

### [I arrived in the U.S. late in 2023 and I didn't have any U.S. source income. Do I still have to file Form 8843?](#)

Yes, All nonresident aliens for tax purposes, in F or J status, are required to complete [Form 8843](#) [4] with the IRS, if they were present in the U.S in 2023.

### [Does my F-2 or J-2 dependent need to file a tax form?](#)

Yes, anyone in F or J status, present in the U.S. and a nonresident for tax purposes are required to complete a tax form. If your F-2 or J-2 dependent did not earn any income, they would be required to fill out the [Form 8843](#) [4]. J-2 dependents who received an EAD, and earned an income, may be required to complete additional tax forms. They would be eligible to gain access to Sprintax to assist in the federal tax form process.

### [Do I need to file a Form 8843 for my U.S. citizen child?](#)

No, if your child is a U.S. citizen and did not earn any income, no tax forms need to be completed.

### [I worked in 2023 but returned to my home country. Must I file taxes in the U.S.?](#)

Yes, all students or scholars who were in F or J status, a nonresident for tax purposes and were present in the United States in 2023, must file a tax report for that year. Ask your employer to mail the Form W-2 to your home country address or explain how you may access it online. If you overpaid federal tax, the IRS can mail a refund check overseas or deposit it in a U.S. bank account if you still have one.

### [Do I have to file taxes with the State of Connecticut?](#)

The State of Connecticut (through the Department of Revenue Services) requires an annual report of income, and assesses tax on the same type of income that is taxed by the federal government. Individuals who earned less than the [minimum filing requirement](#) [16] do not have to file. However, if any tax was withheld by the employer, the individual would want to file a return in order to be refunded for the withholding. Learn more on the [CT State Income Tax page](#) [3].

### [Do I have to file taxes in Connecticut if I did not earn income?](#)

Unlike federal rules, Connecticut does not require an annual tax report from those who made less than the minimum filing requirement or had no income at all. Visit the [Individual Filing Requirements](#) [16] section of the Connecticut Department of Revenue Services for more information. If you do not have a filing requirement but had taxes withheld from your income, the only way you can get your money back is to file a Connecticut tax return. Students or scholars, who are considered a resident for Connecticut state tax filing, will complete and file Connecticut Tax [Form 1040](#) [17]. Learn more on the [CT State Income Tax page](#) [3].

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### [What are the consequences of not filing?](#)

Payment of income tax due is not voluntary, it is required by law. One of the conditions of your visa is to comply with U.S. law. If you owe taxes and don't file, the IRS can assess penalties, interest and seize U.S. bank assets for repayment. Fines and penalties can often amount to more than the original tax debt. There can also be immigration consequences for failing to file taxes. Applicants for permanent residency or "green cards" are frequently asked to show proof of tax filing for previous years in the U.S.

### [I filed my tax report and am expecting a refund, but haven't received it.](#)

Go to [Where's My Refund?](#) [18] to track your federal refund. Where's My Refund? will usually have information about the refund six to eight weeks after filing a paper return. Check weekly for any updates to your refund information.

### [I did not file a tax return for the previous year\(s\). What should I do?](#)

If you were present in the U.S. in 2021, you will need to file a tax return for that year. Depending on your status as a resident or nonresident, you may be able to use Sprintax for the three prior years.

[You may find prior years' versions of Form 8843 here](#) [19].

**Note:** The information above was adapted from tax FAQs written by our friends and colleagues at the [UC Berkeley International Office](#) [20].

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**Source URL:**<https://oiss.yale.edu/employment-taxes/for-scholars/us-taxes/tax-faqs>

#### Links

[1] <https://oiss.yale.edu/employment-taxes/us-taxes/tax-faqs> [2] <https://oiss.yale.edu/federal-income-tax-filing-nonresident/sprintax-tax-preparation-software> [3] <https://oiss.yale.edu/state-income-tax-filing> [4] <https://oiss.yale.edu/federal-income-tax-filing-nonresident/irs-form-8843> [5] <https://oiss.yale.edu/federal-income-tax-filing-nonresident> [6] <https://your.yale.edu/work-yale/financial-management/tax-compliance-planning/graduate-professional-students-and-0> [7] <https://your.yale.edu/work-yale/financial-management/accounting-controllers-office/payroll/instructions-view-and-pdfprint> [8] [&#109;&#97;&#105;&#108;&#116;&#111;&#58;&#101;&#109;&#112;&#108;&#111;&#121;&#101;&#101;&#46;&#115;&#101;&#114;&#118;&#105;&#99;&#101;&#115;&#64;&#121;&#97;&#108;&#101;&#46;&#101;&#100;&#117;](#) [9] [&#109;&#97;&#105;&#108;&#116;&#111;&#58;&#97;&#115;&#107;&#102;&#105;&#110;&#97;&#110;&#99;&#101;&#64;&#121;&#97;&#108;&#101;&#46;&#101;&#100;&#117;](#) [10] <https://oiss.yale.edu/..us-taxes%23taxfilingstatus> [11] <https://oiss.yale.edu/federal-income-tax-filing-resident> [12] <http://www.irs.gov/forms-pubs/about-publication-901> [13] <https://www.sprintax.com/faq.html> [14] <https://oiss.yale.edu/employment-taxes/us-taxes/federal-income-tax-filing-nonresident> [15] <https://www.irs.gov/pub/irs-pdf/f4868.pdf> [16] <http://www.ct.gov/drs/cwp/view.asp?a=1462&amp;q=499520> [17] <http://www.ct.gov/drs/cwp/view.asp?a=1509&amp;q=443614> [18] <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp> [19] <https://apps.irs.gov/app/picklist/list/priorFormPublication.html?resultsPerPage=200&amp;sortColumn=sortOrder&amp;indexOfFirstRow=0&amp;criteria=formNumber&amp;value=8843&amp;isDescending=false> [20] <http://internationaloffice.berkeley.edu/tax-faqs>

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