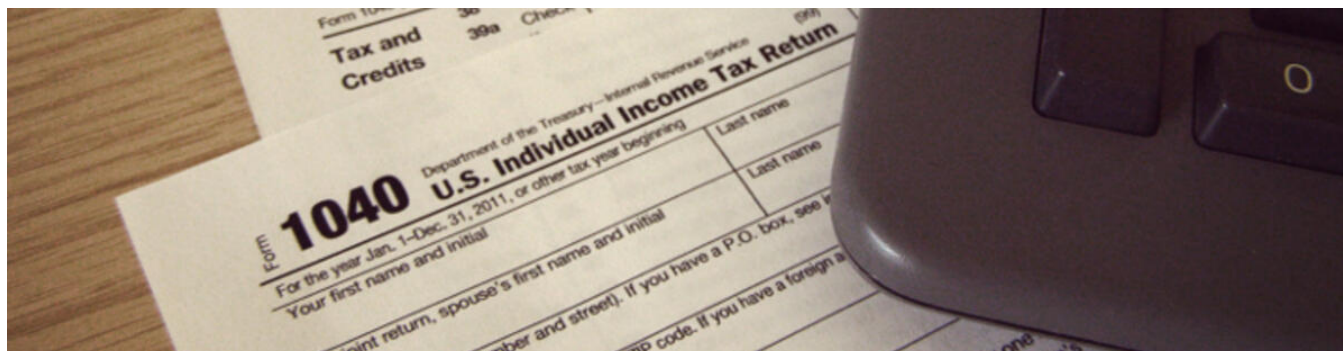


Federal Income Tax Filing (Resident)



Am I Considered a Resident for Tax Purposes?

Verify that you are considered a **resident** tax filer by [following the instructions here](#) [1].

If you are considered a **nonresident** for tax purposes, please check out our [Federal Income Tax Filing for Nonresidents page](#) [2] instead for more information and your next steps.

Filing As A Resident

If you have determined that you are a resident for tax purposes, the following information applies to you.

- you will file Form [1040](#) [3], [1040EZ](#) [4], or [1040A](#) [5]
- you are not required to file Form 8843
- you must declare your worldwide income, not just your U.S. earned income
- your bank interest is considered taxable income
- Social Security taxes (FICA including Medicare) should be withheld from your wages
- Some resident tax filers may still qualify for [treaty benefits](#) [6] if the maximum presence limitation has not been met for that particular tax treaty benefit (refer to [IRS Publication 901](#) [7]); you will need to complete [Form 8833](#) [8] and submit it along with your 1040.
- If you are claiming a tax treaty benefit as a resident for tax purposes, mail your return to:

Department of the Treasury
Internal Revenue Service
Austin, TX 73301-0215

Need Help Filing?

OISS is unable to provide personal assistance with the completion of Forms 1040, 1040EZ, and 1040A. Federal income tax forms, instructions, and publications may be downloaded from the [IRS website](#) [9]. Here are additional resources for completing your federal income tax filing obligations:

- [Yale's Tax Office](#) [10]
 - From the IRS website, you can [link to free services for e-filing and free tax preparation software](#) [11] (such as Turbo Tax) for individuals with a 2023 Adjusted Gross Income (AGI) of \$79,000 or less
 - Refer to IRS Publication 17: [Your Federal Income Tax](#) [12]
-

Federal Income Tax Filing (Resident)

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- Consult a paid tax preparation professional who is certified and who is familiar with nonresident/resident filing issues
 - Purchase commercial tax preparation software for individual use (such as Turbo Tax or H&R Block)
-

Keep Copies!

Remember to keep copies of what you file each year (in case your return gets reviewed and there is a problem or if the IRS audits you in the future).

Where's My Refund?

If you have determined that you are due a refund for federal income tax purposes, it will take the IRS some time to process your refund. If you submit your return(s) on or close to the filing deadline, it is not uncommon to have to wait several weeks (sometimes 16 to 20 weeks) before receiving your refund or a notice. [You can check the status of your return at the IRS website](#) [13].

Source URL:<https://oiss.yale.edu/employment-taxes/us-taxes/federal-income-tax-filing-resident>

Links

[1] <https://oiss.yale.edu/./us-taxes%23taxfilingstatus> [2] <https://oiss.yale.edu/federal-income-tax-filing-nonresident> [3] <https://www.irs.gov/pub/irs-pdf/f1040.pdf> [4] <https://www.irs.gov/pub/irs-pdf/f1040ez.pdf> [5] <https://www.irs.gov/pub/irs-pdf/f1040a.pdf> [6] <https://your.yale.edu/work-yale/finance-and-business-operations/tax-compliance-and-planning/international-tax-office/tax-6> [7] <https://www.irs.gov/pub/irs-pdf/p901.pdf> [8] <https://www.irs.gov/pub/irs-pdf/f8833.pdf> [9] <https://apps.irs.gov/app/picklist/list/formsPublications.html> [10] <https://your.yale.edu/work-yale/financial-management/tax-compliance-and-planning/international-tax-office> [11] <https://www.irs.gov/filing/free-file-do-your-federal-taxes-for-free> [12] <https://www.irs.gov/pub/irs-pdf/p17.pdf> [13] <https://www.irs.gov/Refunds/Where%27s-My-Refund-It%27s-Quick,-Easy,-and-Secure>.