

INSTRUCTIONS FOR COMPLETING FORM 8233

Enter the current tax year

PART I

- 1) Name of individual (Surname, First, Middle)
- 2) Enter your (U.S) Social Security Number (enter "APPLIED FOR" if you have not received your permanent Social Security Number).
- 3) **DOES NOT APPLY** --Please see footnote below (3)
- 4) Permanent resident address in your home country; this cannot be a U.S. address
- 5) Provide a local U.S. address
- 6) Enter your U.S. Visa type (F-1, J-1 etc.)
**** Spouses and dependents with "F-2, J-2 or H-4 visas are **NOT** eligible to claim treaty benefits ****
- 7A) Enter your home country's name
- 7B) This number is found on your Visa under **passport** number
- 8) Enter the earliest date of your arrival into the U.S.
- 9A) Enter your current nonimmigrant status shown on your current INS form I-94
- 9B) This date is found on your I 20 or your DS 2019
- 10) Please check the box if you are claiming tax exemption

PART II

- 11 A) Description of personal services you are providing to receive wages
EXAMPLE: Correcting papers in English Dept., answering the phone etc.
 - 11 B) Enter the amount (or estimated) wages you expect to be paid you
 - 12 A) Please refer to the attached Tax Treaty Article Number chart
EXAMPLE:
U.S.& China tax treaty, Article number 20(c)
U.S.& Korea tax treaty, Article number 21(1)
 - 12 B) The amount for a F-1 or J-1 student can be found on the Revenue Procedure 87-8 form
 - 12 C) Enter the country that you claim permanent residence
EXAMPLE: China, Korea, India etc.
 - 13A,B) **DOES NOT APPLY**
 - 14) Provide in more detail your job duties
EXAMPLE:
I am a wage payroll employee working in the HUB answering phones and sorting mail
I am a grad assistant that teaches two classes per week in the Department of AG Sciences
- 15,16,17,18 **DO NOT APPLY**

Part III

Sign and date the form.

**PAYROLL CAN ONLY PROCESS THE ORIGINAL 8233 AND THE
REVENUE PROCEDURE FORM 87-8
ALL FORMS NEED TO BE COMPLETELY FILLED OUT, SIGNED AND DATED**

*****Important Reminder*****

Form 8233 expires every year on December 31. A new Form 8233 must be completed and submitted by December 1 of each year for the following calendar year.

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Form 8233 and Revenue Procedure 87-8 **For Students**

These forms are to be completed by anyone that qualifies for the Federal Tax Exemption.

(If you entered of a F-2 or a J-2 Visa and then CHANGED to a F-1 or J-1 Visa
YOU DO NOT QUALIFY FOR FEDERAL TAX EXEMPTION)

(Instruction Sheet Enclosed)

To see if you qualify for Federal Tax Exemption please review the tax treaty and provision list that is enclosed in your information packet.

NOTE:

Form 8233 and the Revenue Procedure 87-8 both need to be completed to be exempt from Federal Tax.