LOUISIANA STATE UNIVERSITY

Louisiana State University
Office of Accounting Services
Payroll
204 Thomas Boyd Hall

ALIEN TAX INFORMATION REQUEST (ATAX) AS565

See instuctions on the back of this form.

All non-US citizens who receive compensation from LSU must complete this form. To ensure correct determination of your tax status, all applicable questions below must be answered and a copy of the following documents must be attached: Unexpired passport; 1-94 Form "Arrival and Departure Record" (a small white card inside your passport); U.S. Visa from your passport; and I-20, IAP66, DS2019, or I-797 (H1-B).

SECTION A: PERSONAL INFORMATION

1. First Name	2. Middle	3. Last Name
4. LSUID or ITIN		5. Date of Birth
6. Street Address		
7. City	8. State	9. Zip

SECTION B: STUDENT INFORMATION

1. Name of Academic Department	2. Are you a student? ☐ Yes ☐ No
3. If you have attended or currently are attending another U.S. educational institution, provide: Name of Educational Institution _____ Period of Attendance: From _____ to _____ Degree Granted (if any): _____	4. Did you receive Tax Treaty benefits at another U.S. educational institution during the current year? ☐ Yes ☐ No

SECTION C: IMMIGRATION & ALIEN TAX INFORMATION

(Permanent Residents with Green Cards may skip Section C as long as a copy of documentation is provided)

1. Date of 1st U.S. Entry	2a. Visa Type upon U.S. Entry	2b. Visa type of the primary Visa holder? (Ex: Student, Non-student, etc.)

3. Current Visa Type (check appropriate box)

- ☐ F-1 Student
- ☐ F-1 Student (on Practical Training)
- ☐ F-2 Spouse/Dependent of F-1
- ☐ H-1 Distinguished Worker
- ☐ J-1 Student
- ☐ J-1 Student (on "Academic Training")
- ☐ J-2 Spouse/Dependent of J-1 Student
- ☐ TN- NAFTA Free Trade
- ☐ Other J-1 Visitor:
  - ☐ Short-term scholar
  - ☐ Professor
  - ☐ Research Scholar
  - ☐ Other_____
- ☐ Other INS Classification (list status) _____
- ☐ U.S. Permanent Resident (must provide documentation)

4. Country of Birth	5. Country of Citizenship	6. Country of Residence (for tax purposes)

7. Furnish the requested information to detail the number of days you were physically present in the United States during the calendar year listed below. Note: The term "calendar year" refers to the period January 1 to December 31.

	Calendar Year	Number of Days present in the U.S. during the year	Date of Entry	Date of Exit	Visa	J-1 Sub Type (if applicable)	Did you receive Tax Treaty benefits?
Current Calendar							☐ Yes ☐ No
Last Calendar Year							☐ Yes ☐ No
Two (2) years ago							☐ Yes ☐ No
Three (3) years ago							☐ Yes ☐ No
Four (4) years ago							☐ Yes ☐ No
Five (5) years ago							☐ Yes ☐ No
Six (6) years ago							☐ Yes ☐ No

8. Residence for Tax Purposes Under IRS definitions, for tax purposes I am considered a ☐ Resident Alien ☐ Nonresident Alien

SECTION D: CERTIFICATION OF INFORMATION

I certify to the best of my knowledge, all of the information I have provided above is true, correct and complete. Also, I understand it is my responsibility to keep my employment authorization documents (including passport, IAP-66, I-20, I-688B, DS2019, or other INS employment authorization) current (unexpired) at all times. To avoid being removed from the University payroll, I will inform Payroll of any extensions, renewals, or changes in status by completing an I-9 form in the International Services Office by the expiration of the employment documentation.

Signature _____ Date _____

AS565, "ALIEN TAX INFORMATION REQUEST (ATAX)"
INSTRUCTIONS

The AS565, "Alien Tax Information Request", must be completed because you are receiving income from the University. Since the tax withholding requirements are different for resident aliens and nonresident aliens, it is essential to establish the residency status of non U.S. citizens. Therefore, this form must be complete annually to assist us the Payroll Office in determining whether you should be classified for federal tax withholding purposes as a resident alien or a nonresident alien. The instructions below will assist you in completing the AS565. **Other questions can be directed to the Payroll Office by calling 578-4844.**

Section A – Personal Information

1 – 3. Enter your full name: First Name, Middle, Last Name

4. Enter your LSUID number or your Individual Taxpayer Identification Number (ITIN). All employees must have a U.S. Social Security Number (SSN) in order to work. You will not receive payment until an SSN is obtained and reported to the Payroll Office. Individuals ineligible for a SSN may apply for an ITIN by filing form W-7, along with necessary documentation, in the Payroll Office.

5. Enter your Date of Birth

6 - 9. Enter your local address - Street Address, City, State, Zip

Section B – Student Information

1. Enter the name of the department where you are studying or working.

2. Indicate whether or not you are a student by checking the appropriate box.

3. Indicate whether or not you are currently attending or have previously attended another U.S. educational institution and the dates of attendance. Indicate any degree you may have already received.

4. Indicate whether or not you have previously received Tax Treaty benefits during the current year at another institution by checking the appropriate box.

Section C – Immigration & Alien Tax Information

1. Enter the calendar date on which you entered the U.S. for the first time. You must include the month, day and year. If you are uncertain, approximate the date.

2a. Enter the Visa type you held when you first entered the U.S.

2b. If you entered on a Spouse/Dependent Visa, enter the Visa type of the primary Visa holder.

3. Indicate your current Visa type by checking the appropriate box.

4. Enter the name of the country where you were born.

5. Enter the name of the country of your citizenship.

6. Enter the name of the country of which you are a tax resident.

7. Complete each row and column in this chart. For each year, enter the Visa type(s) under which you were present. If you were present under several Visas during the same calendar year, enter all of the Visas. Enter the total days of **U.S. presence** for each calendar year; this total should include all days of presence under all Visa types. For the current year, estimate to the best of your ability the exact number of days you will be present in the U.S. Also indicate if you received Tax Treaty benefits during any of these periods.

8. Indicate if you are a resident alien or nonresident alien for tax purposes by checking the appropriate box.

Section D – Certification of Information

Sign and date

Return to the Office of Accounting Services, Payroll division, 204 Thomas Boyd Hall, as soon as possible.