

# What Tax Forms Do I Need to File?



In the United States, most employees are required to submit information about their income and taxes paid to the government in the previous year. The deadline to submit this information, or "Tax Day" as it is known colloquially, is April 15, 2020.

**START HERE:** Determine if you are a Resident for Tax Purposes or a Non-Resident for Tax Purposes by taking a quick pre-test at <https://tax.dissa.global.psu.edu>.

I am designated as a Non-Resident for Tax Purposes

I am designated as a Resident for Tax Purposes

**Did you earn U.S.-based income last year?**  
(This includes assistantships & fellowships)

You can use free software available from the U.S. Internal Revenue Service for assistance with filing your taxes.

<https://www.irs.gov/uac/free-file-do-your-federal-taxes-for-free>

No

Yes

You and each dependent member of your family here with you in the U.S. must complete IRS Form 8843.

IRS Form 8843

<http://www.irs.gov/pub/irs-pdf/f8843.pdf>

You must complete IRS Form 8843 AND Form 1040NR or 1040NR-EZ.

You can use Sprintax software provided by the Directorate of International Student and Scholar Advising to complete these forms.

If you qualify, you will be sent instructions after taking the pre-test from Step 1.

and...

You must also file state taxes.

Sprintax can assist you with filing your state taxes for a fee (from \$29.95).

*Pennsylvania Taxes*

[https://www.revenue.pa.gov/FormsandPublications/FormsforIndividuals/PIT/Documents/2019/2019\\_pa-40.pdf](https://www.revenue.pa.gov/FormsandPublications/FormsforIndividuals/PIT/Documents/2019/2019_pa-40.pdf)

then...

You may also need to file local tax forms (depending on where you live).

These forms cannot be completed using the Sprintax software. You can view and download local tax forms using the links below.

*State College and Surrounding Municipalities*

<https://www.statecollegepa.us/DocumentCenter/View/20718/-Final-Earned-Income-Net-Profits-Tax-Return-and-Instructions>

## Additional Help

### Non-Residents for Tax Purposes:

In Global Programs, the office of Community Engagement Programs provides Annual Tax Workshop in March and April. Volunteers can help you understand the filing process of federal, state, and local taxes through appointments and workshop sessions.

- To sign up for an appointment/workshop session, you must have downloaded the Sprintax tax software provided by the Directorate of International Student and Scholar Advising and filled out the federal forms as much as possible before you can make an appointment.
- Before coming to your session, complete your tax form using the Sprintax software.
- When you come to your session, bring your PSU id card, **completed 2019 tax forms**, all tax documents for 2019 and any previous years you have available. Receptionists won't let you enter the session without a finished 2019 tax form.

For more information, please contact the Community Engagement Programs Office by phone at 814-863-3927 or email [gp-cep@psu.edu](mailto:gp-cep@psu.edu).

### Residents for Tax Purposes:

• In State College / University Park: You may get help from VITA the Volunteer Income Tax Assistance program, which is supported by the IRS. For more information, or to schedule an appointment online, go to: <http://www.psuvida.org/>. Appointments can also be made by phone by calling 814-863-4147 (M-F, 9 am to 4 pm). When you come to your appointment, bring the following: (a) Social Security card(s); (b) ID or driver's license; (c) 2019 tax documents; (d) 2018 tax return; (e) blank check to direct-deposit any refund from IRS; (f) spouse, if filing jointly; (g) Form 1095-A, B, or C to document any health insurance coverage.

• In other cities in Pennsylvania or other states: You may get help from VITA the Volunteer Income Tax Assistance program, which is supported by the IRS. To find a nearby VITA office, go to: <https://irs.treasury.gov/freetaxprep/>