

Filing Form 8843: A Guide for International Students and Scholars



Created in collaboration between the
Payroll Office and the *Office of
International Students & Scholars*



LEHIGH
UNIVERSITY

What is Form 8843?

Form 8843 Statement for Exempt Individuals and Individuals With a Medical Condition
For use by alien individuals only.

OMB No. 1545-0074
2024
Attachment Sequence No. 102

Department of the Treasury Internal Revenue Service
Go to www.irs.gov/Form8843 for the latest information.
For the year January 1—December 31, 2024, or other tax year beginning _____, 2024, and ending _____, 20_____.

Your first name and initial _____ Last name _____ Your U.S. taxpayer identification number (TIN), if any _____

Fill in your addresses only if you are filing this form by itself and not with your U.S. tax return.
Address in country of residence _____ Address in the United States _____

Part I General Information

1a Type of U.S. visa (for example, F, J, M, Q, etc.) and date you entered the United States: _____
b Current nonimmigrant status. If your status has changed, also enter date of change and previous status. See instructions. _____

2 Of what country or countries were you a citizen during the tax year? _____

3a What country or countries issued you a passport? _____
b Enter your passport number(s): _____

4a Enter the actual number of days you were present in the United States during:
2024 _____ 2023 _____ 2022 _____

b Enter the number of days in 2024 you claim you can exclude for purposes of the substantial presence test: _____

- The [8843](#) is a form stating your visa type, days in the U.S. (in that tax year), and contact information for your school.
- **The 8843 is required even if you had no U.S. income.**

Who Must File an 8843?

- Nonresident aliens!
 - for more information about residency, see general tax presentation
 - determine residency [here](#) using your [travel history](#)
- Dependents on F-2 & J-2 visas **must file their own 8843.**
 - child dependents: completed by parents
 - spouse dependents: completed by spouse

General Rules

- If you **earned income in the U.S.**, file the Form 8843 **with** your income tax return (Form 1040-NR).
- If you **did NOT earn U.S. income**, file **Form 8843 alone**.
 - No SSN or ITIN is required if filing Form 8843 alone.

Filing Deadlines & Submission

- **earned income: April 15th**
 - file with your income tax return
 - will likely be submitted online

- **no income: June 15th**
 - file 8843 alone
 - **Mail to address on 8843 page 3:**
*Department of the Treasury
Internal Revenue Service Center
Austin, TX 73301-0215*



How to Find 8843 Info

- Passport & visa details
- All U.S. entry/exit dates
 - Retrieve travel history from [I-94 website](#)
- School information (name, address, director's contact)
 - Retrieve from [OISS website](#)

	Date	Type	Location
1	2017-06-29	Arrival	CLT
2	2014-08-08	Departure	ORL
3	2014-05-23	Arrival	ORL
4	2013-08-08	Departure	ATL
5	2013-07-15	Arrival	ATL

The easiest way to file the 8843...

- OISS partners with a tax organization called NoRTH
- Once you use your Lehigh email to [request a NoRTH membership](#), you can use their **Personalized Guide** tool to auto-fill the 8843.

Nonresidents: Prepare Your Return with a Personalized Guide

Our Personalized Guide tool will help you create a customized guide that gives you a screenshot by screenshot, step by step set of instructions for how to prepare your return based on your individual situation. This guide includes only the pages and instructions that you need to prepare and file your return.

When you finish the interview questions you will be able to download a pdf of your personalized guide.

New - 8843 Only Option: If you only need to file a form 8843 and don't have a SSN or ITIN, you can answer a few more questions in the interview, and our personalized guide tool will fill in your information on the form for you. All you'll need to do is print and review, sign and date, and then mail it in!

Step 1: Create your Personalized Guide

Personalized Guide Tool
(updated for 2024!)

Step 2: Prepare your Tax Return

Click Here to Access TaxSlayer
Software

Information for the 8843

Part I: General Information (All Filers)

- Name, address (U.S. **and** home country)
- Visa type (F-1, J-1, etc.)
- Passport details
- Number of days present in the U.S. in previous 3 years
 - the [residency tool](#) also tells you these numbers

Information for the 8843

*ONLY for J or Q visa holders

Part II: Teachers/Trainees

- Name, address, and phone number of institution where you worked
- Previous J or Q visa details (if applicable)

Information for the 8843

Part III: Students

- Name, address, and phone number of school's OISS
 - put [OISS address](#)
- Name, address, and phone number of program director
 - repeat OISS address and add Olga Scarpero's name
- Previous visa history

Example Case - Lisa Hui

Example - Lisa Hui

- F1 student from China
- Arrived in U.S. on 8/8/2019
 - She went home to China 5/24/2020 – 8/31/2020
- No SSN or ITIN
 - Address for OISS:
 - Coxe Hall 32 Sayre Drive Bethlehem, PA 18015-3123
 - OISS Contact: Olga Scarperp
- Passport # 123456789

Lisa's residency tool results:

Select Tax Year

2021

Enter Your Visits

Please enter the entry and exit dates, along with the visa you held for that visit, for **all** of your visits to the United States. If you do not enter all of your lifetime visits and your correct visa information, then the results provided in this tool may not be accurate. You can view your travel history at (<https://94.cbp.dhs.gov/94/#/home>).

Your most recent visit can have no exit date, if you are still present in the US on that same visit.

Visa	Entry Date	Exit Date	
F-1 Student	08/08/2019	05/24/2020	Remove Visit
F-1 Student	08/31/2020	MM/DD/YYYY	Remove Visit

Add another visit

Check Status Clear Visits

You are a Nonresident Alien for Tax Year 2021.

Number of days **Present in 2021**: 365

Number of days **Present in 2020**: 268

Number of days **Present in 2019**: 146

Number of days **Exempt in 2021**: 365

We strongly recommend that you print your results or take screenshots for reference. [Print Results](#)

Lisa's 8843: Part I

Form 8843	Statement for Exempt Individuals and Individuals With a Medical Condition For use by alien individuals only. ▶ Go to www.irs.gov/Form8843 for the latest information. For the year January 1 – December 31, 2021, or other tax year , 2021, and ending , 20 .		OMB No. 1545-0074 2021 Attachment Sequence No. 102
Department of the Treasury Internal Revenue Service	beginning	Last name	Your U.S. taxpayer identification number, if any
Your first name and initial	Last name	Your U.S. taxpayer identification number, if any	
Your first name and initial	Last name	Your U.S. taxpayer identification number, if any	
Fill in your addresses only if you are filing this form by itself and not with your tax return	Address in country of residence	Address in the United States	
	Chunjiu Rd. Songjiang District Shanghai, China	200 University Ave #1 Bethlehem, PA 18015	
Part I General Information			
1a Type of U.S. visa (for example, F, J, M, Q, etc.) and date you entered the United States ▶ <u>F1 08/08/2019</u>			
b Current nonimmigrant status. If your status has changed, also enter date of change and previous status. See instructions. <u>F1</u>			
2 Of what country or countries were you a citizen during the tax year? <u>China</u>			
3a What country or countries issued you a passport? <u>China</u>			
b Enter your passport number(s) ▶ <u>123456789</u>			
4a Enter the actual number of days you were present in the United States during: 2021 <u>365</u> 2020 <u>268</u> 2019 <u>146</u>			
b Enter the number of days in 2021 you claim you can exclude for purposes of the substantial presence test ▶ <u>365</u>			

Lisa's 8843: Part II (blank)

- ONLY teachers or trainees on a J or Q visa complete Part II!

Enter the number of days in 2021 for which you were either present in person or in substantial presence in the United States. 302

Part II Teachers and Trainees

5 For teachers, enter the name, address, and telephone number of the academic institution where you taught in 2021 ▶ _____

6 For trainees, enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2021 ▶ _____

7 Enter the type of U.S. visa (J or Q) you held during: ▶ 2015 _____ 2016 _____
2017 _____ 2018 _____ 2019 _____ 2020 _____. If the type of visa you held during any
of these years changed, attach a statement showing the new visa type and the date it was acquired.

8 Were you present in the United States as a teacher, trainee, or student for any part of 2 of the 6 prior
calendar years (2015 through 2020)? Yes No
If you checked the "Yes" box on line 8, you cannot exclude days of presence as a teacher or trainee unless
you meet the *Exception* explained in the instructions.

Part III Students

Lisa's 8843: Part III

Part III		Students
9	Enter the name, address, and telephone number of the academic institution you attended during 2021 ▶ (610) 758-4977	<u>Lehigh University, Coxe Hall 32 Sayre Drive Bethlehem, PA 18015-3123</u>
10	Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2021 ▶ Olga Scarpero (610) 758-4977	<u>Coxe Hall 32 Sayre Drive Bethlehem, PA 18015-3123</u>
11	Enter the type of U.S. visa (F, J, M, or Q) you held during: ▶ 2015 _____ 2016 _____ 2017 _____ 2018 _____ 2019 <u>F</u> 2020 <u>F</u> . If the type of visa you held during any of these years changed, attach a statement showing the new visa type and the date it was acquired.	
12	Were you present in the United States as a teacher, trainee, or student for any part of more than 5 calendar years? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If you checked the "Yes" box on line 12, you must provide sufficient facts on an attached statement to establish that you do not intend to reside permanently in the United States.	
13	During 2021, did you apply for, or take other affirmative steps to apply for, lawful permanent resident status in the United States or have an application pending to change your status to that of a lawful permanent resident of the United States? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
14	If you checked the "Yes" box on line 13, explain ▶ _____	

Lisa's 8843: Part IV

Sign and date at the bottom of the second page

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Part IV Professional Athletes

15 Enter the name of the charitable sports event(s) in the United States in which you competed during 2021 and the dates of competition ▶ _____

16 Enter the name(s) and employer identification number(s) of the charitable organization(s) that benefited from the sports event(s) ▶ _____

Note: You must attach a statement to verify that all of the net proceeds of the sports event(s) were contributed to the charitable organization(s) listed on line 16.

Part V Individuals With a Medical Condition or Medical Problem

17a Describe the medical condition or medical problem that prevented you from leaving the United States. See instructions. ▶ _____

b Enter the date you intended to leave the United States prior to the onset of the medical condition or medical problem described on line 17a. ▶ _____

c Enter the date you actually left the United States ▶ _____

18 Physician's Statement:

I certify that _____
Name of taxpayer

was unable to leave the United States on the date shown on line 17b because of the medical condition or medical problem described on line 17a and there was no indication that his or her condition or problem was preexisting.

Name of physician or other medical official

Physician's or other medical official's address and telephone number

Physician's or other medical official's signature

Date

Sign here only if you are filing this form by itself and not with your tax return

Under penalty of perjury, I declare that I have examined this form and the accompanying attachments, and, to the best of my knowledge and belief, they are true, correct, and complete.

Lisa Hui

Your signature

03/01/2022

Date

Form 8843 (2021)

Final Steps

- Double-check all information.
- Sign and date the second page.
- Mail the form before the deadline.
- Keep a copy for your records.

Resources

- [IRS Form 8843](#)
- [I-94 Travel History](#)
- [OISS tax website](#)

Contact Information

- Office of International Students & Scholars: intnl@lehigh.edu
- The NonResident Tax Help Group (NoRTH):
<https://www.nrtaxhelp.org/free-tax-assistance>
- IRS Help Center: <https://www.irs.gov/>





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