

# Filing U.S. Taxes: A Guide for *International Students and Scholars*



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



**LEHIGH**  
UNIVERSITY

# Do I have to file taxes in the U.S.?

- **Yes!** Everybody who was in the U.S. in 2025 needs to file something for tax season.
- Filing is required even if you had no U.S. income.

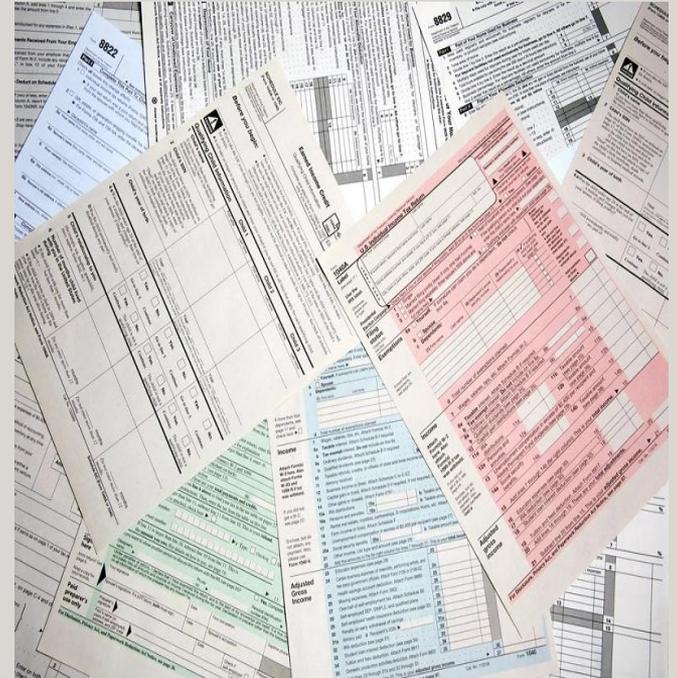
# Who can help me with taxes? (1/2)



- Tax filing is a personal responsibility; neither OISS nor Lehigh can file your taxes for you!
- **Only** those with a degree or other tax training may give tax advice.
- OISS partners with a tax organization called [NoRTH](#) that can give official tax advice on most topics.

# Who can help me with taxes? (2/2)

- Questions about a tax document from Lehigh?
  - 1042-S document: Payroll Office
  - W-2 document: Payroll Office
  - 1098-T: Bursar's Office
- \*more information about tax documents later!\*



# Basic Tax Process (1/2)

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- Nearly all income earned in the U.S. is taxed by the [Internal Revenue Service \(IRS\)](#), a government agency. There are many things about your life that affect how much tax you owe.
- Tax taken out of your income is the government **estimating** how much you owe based on what your employer knows about you.
  - the tax taken out during the year goes towards your total amount - **it's like making small monthly payments to the government**
  - this way, you don't have to make a huge tax payment every April

# Basic Tax Process (2/2)

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- When you file your taxes every spring, you are considering all of your personal details to calculate how much tax you owe the U.S. government.
  - the tax return is basically you comparing your calculations to theirs!



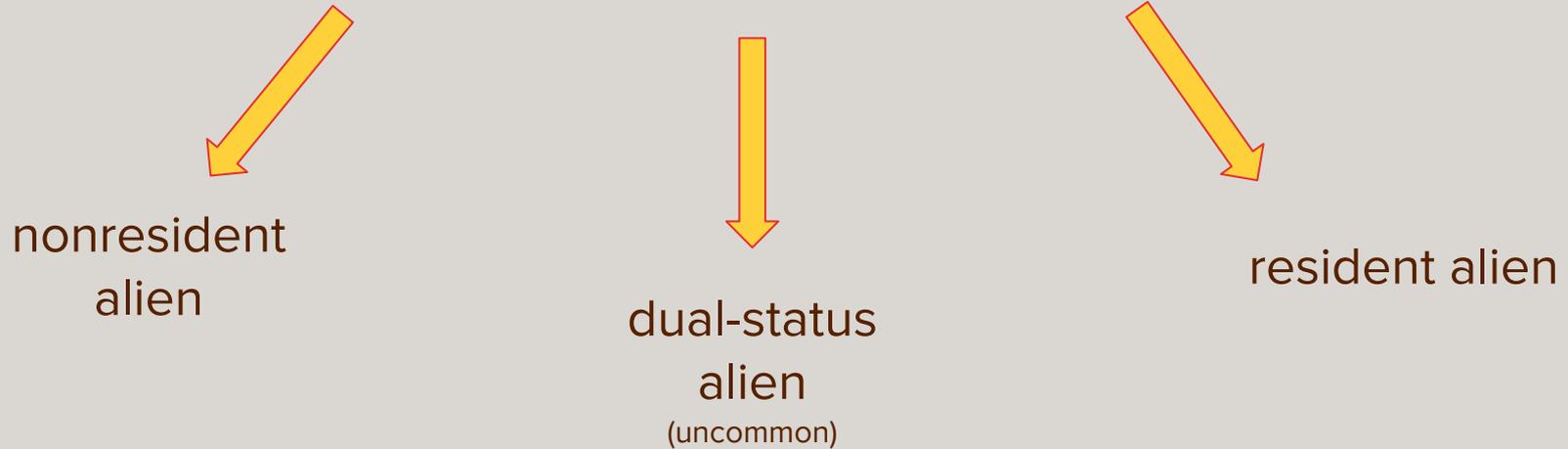
# Basics & Tax Vocabulary

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- Tax Season = February-April, filing for previous tax year
- Tax Year = January 1st-December 31st of any year
  - example: tax year 2024 (TY2024) was January 1st, 2024-December 31st, 2024
  - you would file your 2024 taxes in spring 2025
- **IRS**: Internal Revenue Service, U.S. government agency that handles taxes
- **“file your taxes”**: to submit forms to the IRS
- **tax return**: the form(s) you submitted
- **tax refund**: money you received after filing; this means your withheld taxes from the year was more than you actually owed
- **withholding**: money that is taken out of your income during the year
  - also called “tax withheld”

# What do I do first?

1) determine your residency status



## To determine your residency...

- use your passport information to retrieve your travel history from the [I-94 website](#)
- type in **all** your U.S. entry and exit dates, even for a tourist visa!
- this is what your results will look like →

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://i94.cbp.dhs.gov/i94/#/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	08/06/2019	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](#)

# What does my residency status mean?

- Your residency status determines how you are taxed
- Once you have been in the U.S. for long enough, depending on your visa status, you become taxed as a resident/resident alien.
  - J1 Visa holders have 2 years until they meet significant presence.
  - F1 Visa holders have 5 years until they meet significant presence.
- As a resident alien, you are taxed just like a U.S. citizen

# What's the next step?

## 2) gather your tax documents

- You'll need your tax documents that show money you **earned such as a W-2 form or 1042-S form.**
  - Some of you may receive both of these documents depending on your unique situation and job class.
- **\*you do not file your tax documents; they are informational!**
  - **they contain numbers and information you need to file your taxes accurately**
- Any tax document that you need should be sent to you by the institution involved. Keep an eye on your mailbox and email inbox!
  - tax documents are usually sent around **February**

- Most tax document names are a mixture of letters and numbers!
- Common tax documents for international students and scholars include:
  - **W-2**: wages (comes from employer)
  - **1042-S**: (comes from Lehigh - Payroll)
  - **1098-T**: tuition you paid Lehigh; only for resident aliens (comes from Lehigh - Bursar)

# STATE INCOME TAX

- If you had taxable income for Pennsylvania, you must file a Pennsylvania tax return by April 15th. To determine if you had PA income, take a look at Boxes 15 and 16 on your W-2. If **Box 15 = PA and Box 16 = a number other than zero**, you had PA income.
- The NoRTH tax software will prepare federal **and** state income tax returns.



QR Code for [Pennsylvania State Personal Income Tax Website](#)

## LOCAL INCOME TAX

- If you had taxable income for the City of Bethlehem (**W-2's Box 20 = BETHLEHEM, Box 18 = number (not zero)**), you must file a local tax return by April 15th. If you had taxable income for another locality (**Box 20 = city other than BETHLEHEM, Box 18 = number (not zero)**), you may also need to file a return for that locality.
- NoRTH's tax software does not prepare local tax returns itself, but the Personalized Guide tool does provide **instructions** for preparing a local Bethlehem tax return.



SCAN ME  
QR Code for [Keystone  
Collections](#)

For additional tax information, please scan this QR code.

Scanning this QR code will direct you to the [OISS website](#) where you can find additional Income Tax information.



# Okay...what next?

## 3) choose filing method/software

- Your **residency** determines what softwares you can use to file
- Resident aliens may use **any** software!
- Nonresident aliens have fewer options; only **some** softwares have the nonresident forms.

## Common Filing Softwares

### TurboTax

resident aliens

fee 

some help available ?

can file for past years 

### Sprintax

nonresident & resident aliens 

fee 

more help available ? ?

can file for past years 

### H&R Block

nonresident & resident aliens 

fee 

some help available ?

can file for past years 

### NoRTH (OISS partner)

nonresident & resident aliens 

no fee 

lots of help available  ? ? ?

cannot file for past years 

## If you need professional help...

- If you'd like to pay a tax professional to complete your taxes, contact OISS for assistance with locating a CPA.
- tax professionals are also called CPAs (the title of their certification)
- the cost will depend on how complicated your tax situation is.



# What do I have to file?

4) depends on your residency and income!



## Filing Deadlines & Submission

- **Income (income tax return) → April 15th**
- **No income (only 8843) → June 15th**
  - 8843 must be mailed
  - submission instructions on page 3 of 8843



- Lehigh Partners with NoRTH so that International students can receive free tax filing assistance. You'll need to create your account on the NoRTH website using your [@lehigh.edu](mailto:@lehigh.edu) email address.
- Through this website, you will be able to:
  - learn more about taxes
  - create your personalized guide for filing your taxes
  - schedule an appointment for remote tax clinics to answer any of your tax related questions, [these clinics span from February to April](#)
  - prepare your federal and state return in TaxSlayer.



SCAN ME

This QR Code will direct you to the [NoRTH website](#).

## Frequently Asked Questions (FAQs)

- Do I need an SSN or ITIN to file?
  - SSN (Social Security Number): must have a job to be eligible
  - ITIN (individual tax identification number): only for those who are ineligible for a SSN, but earned income
  - If you are filing an income tax return (so, anything more than 8843), you **do** need a SSN **or** ITIN to file. If you are only filing the 8843, no SSN or ITIN is needed.
- Where do I find my travel history?
  - On the **I-94 website**
- What happens if I don't file?
  - Failure to file taxes **may** affect future immigration applications if you want to stay in the U.S. long-term.
  - Some softwares allow you to file for previous years.

## Resources

- **OISS: [intnl@lehigh.edu](mailto:intnl@lehigh.edu)**
  - [OISS tax website](#)
  - [NoRTH website](#)
- **Payroll Office: [inpayrol@lehigh.edu](mailto:inpayrol@lehigh.edu)**
- [Internal Revenue Service \(IRS\) website](#)





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