

# International Tax Office

## Substantial Presence Test Questionnaire

### Purpose

Details provided on this form will be used to determine and document resident or nonresident status for U.S. tax purposes.

### Information

First name: \_\_\_\_\_ Last name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

### Questions

1. Are you a lawful permanent resident of the U.S. (i.e., green card holder)?  
No      Yes (skip to certification)
2. What is your current immigration status? \_\_\_\_\_  
Not currently present in the U.S. (skip to question 4)
3. What was your first date of U.S. entry in your current immigration status? \_\_\_\_\_  
Have you changed your immigration status since entering in the U.S.? Yes      No
4. Please write the dates you were physically present in the U.S. and the corresponding statuses for the current and previous two calendar years, including B1/B2 or ESTA visits. If you were not present in the U.S. in any status, write 'not present'. (Example: F-1 January 1, 2021 to May 21; June 13 to December 31)
  - Current year: \_\_\_\_\_
  - First previous year: \_\_\_\_\_
  - Second previous year: \_\_\_\_\_
5. Have you previously held F- student or J- exchange visitor status (including F-2 and J-2 dependent status)? If so, please indicate the dates (mm/yyyy) below:
  - F Student: \_\_\_\_\_
  - J Exchange Visitor: (please include the [J category](#)): \_\_\_\_\_
6. Have you been present in M- or Q- visa status? If so, what years? \_\_\_\_\_

### Certification

I certify that the information provided above is true and that I agree to notify the International Tax Office of Employee Services immediately if any of the information provided on this form changes. If I fail to do so, Employee Services is authorized to begin withholding taxes in accordance with IRS procedures.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_