Submitting FNIS Information for Residency Status and Treaty Eligibility

Attention: All individuals on a non-immigrant visa (J, F, H-1B, TN, 0-1, B1/B2, etc.) who will be receiving any type of payment for services/grant/scholarship/stipend/etc in the U.S or its territories.

The necessary information to determine residency status for tax purposes and eligibility for treaty benefits <u>must be submitted online</u> using the following procedures:

1. Contact <u>nonresident.tax@emory.edu</u> to obtain a userID and temporary password for the FNIS System.
2. Log on to the website <u>EMORY FNIS</u> with your userID and temporary password. You will be asked to change your password after logging in. **PLEASE MAKE SURE TO WRITE DOWN AND KEEP YOUR USER ID AND FINAL PASSWORD IN A SAFE PLACE! YOU MAY NEED THEM TO ACCESS FORMS LATER ON! Note that Institution Code: Emory**
3. <u>Complete all sections</u> of the questionnaire as indicated (instructions below). If you are accidentally logged out, all information you have saved will still be there. Log on again and continue until finished.
4. Click the **?** button by a line item for additional information regarding that line. You can also email the system administrators at <u>nonresident.tax@emory.edu</u> with any additional questions.
5. Click **"Save Changes"** to advance to the next section. If some information is missing or not applicable, please click **"Save Anyway"** If page will not save because of missing info, enter N/A to fill in section.
6. Once you have reviewed the information, mark the box and click the **"Submit Confirmation"** button on the confirmation page to submit your data to the System Administrator, who will review the data and respond back to you if additional information is needed. Please allow 3-5 business days for a response.
7. Once your submission is approved, the administrator will send you an email with additional information on how to access forms.
8. Make sure to also select "**IRS Forms**" and "**Consent**" to receive tax forms and summaries electronically.

To complete FNIS information: Select Data Entry from the menu at the top of the screen
- **Basic Information** – Name, SSN or ITIN, Department. Anything that does not apply to your visit/status, please leave blank.
- **Individual Information –** Enter all Individual Information as indicated. Please be sure to include an email address.
- **Address Information** - Enter your U.S. and foreign address.
- **Additional Information** – Enter your passport information. Please answer all questions to the best of your ability. If not applicable to your situation, you may leave as unknown.
- **Immigration Status History** – Please add records as follows:
    - **2019 – current**: ALL immigration activity <u>including B1/B2 and WB/WT</u>
    - **Prior to 2015:** F, J, M, and Q immigration activity **or** activity for which you received a treaty benefit since 1985
    - **MAKE SURE TO INCLUDE YOUR CURRENT U.S. VISIT INFORMATION.** If this information is not included, the form will be REJECTED.
    - **NOTE:** If you have not arrived in the United States, you may not be able to complete information for the current visit in the section "ADD A RECORD". Please SAVE and log out. Once you receive this vital information, LOG ON and ENTER information.
- **Confirmation** – Read information and click the **"View Data"** button to review the summary copy of the information (Immigration Status Data) supplied on the questionnaire. You can make any corrections by clicking on the sections at the left of the screen. Make sure to check the box indicating the information is correct and you wish to submit.

In order to receive Treaty benefits (**Note: must have valid SSN or ITIN**):

1. You must send the signed tax and immigration documentation to the tax office. You will receive an email once your submission is approved with instructions for accessing, printing, and submitting the necessary copies and documentation.
2. This process MUST be done 15 days prior to your pay date in order to receive benefits for that payment.

Form 8233 is valid only for the calendar year in which it is filed
and must be refiled each year that you are entitled to an exemption.