1. The 2016 Citizenship Status Form (CSF) is available on the PHR website under User Resources, and at the Human Resources site under “Payroll forms”. Please do not use any other versions of the CSF for the 2016 NRA forms renewal process (all prior versions should be discarded).

2. To continue the fellowship paid through Payroll the 2016 forms must be in Payroll Services no later than November 13th, 2015 (disregard the Payroll calendar “NRA Forms Due Date for this one pay period). NRA Fellowship forms received after that date will be processed as quickly as possible for 2016.

3. The 2016 NRA Fellowship Request Form is also available at the PHR website. This form lists the required documents, as do the NRA “tip” sheets.

4. All 2016 NRA forms should be clearly identified as 2016. (Note: the 2016 W-4 form may not be available online until January, 2016. It is alright to use the 2015 version. Just cross out the 2015, and write 2016 at the top of the W-4 form). The W-4 should clearly be marked in red “fellow” at the top, and the Agency Code is 360292 (UMCP only).

5. Any fellowship for international students who are Resident Aliens for Tax Purposes (RAFTPs) should be processed through the Student Award System as if this fellow was not an international student. A list of these individuals will be sent to the departments using the Check Distribution Number on file in Payroll. This is effective for the first pay period in 2016.

6. Do NOT submit: instructions for any of the tax forms, “tip sheets”, blank and/or decorated pages from a passport, page 2 of the I-20, I-9 forms or Direct Deposit forms to me. The I-9 form should remain in your department. These pages will be returned to you.

7. Please try to avoid multiple staples.

8. All tax forms must be originals and completed. No entries in a required space will definitely mean all the forms will be returned to the department. All forms MUST have a SSN, or a temporary “SSN” or Student ID (SID) number (EXAMPLE: xxx-00-xxxx) if the individual does not yet have a SSN. Tax treaty benefits are not available with temporary “SSNs”.

9. NRA Fellows who wish to be exempt from federal taxes (and there is a tax treaty with their country of residence) on the fellowship disbursements must have a SSN and must complete Part II of the W8-BEN Form. W8-BEN forms without Part II completed will not be eligible for the tax treaty exemption from federal taxes even if the fellow has a valid SSN. 2016 fellows should complete the most current W8-BEN form which available at PHR User Resources.

10. The Affidavit of Compliance is a REQUIRED document for NRAs without Social Security Numbers.

11. If an NRA individual has both a fellowship & an assistantship, Payroll no longer needs a 2nd copy of the CSF and second copies of immigration documents! NRA fellows are required to complete an original W-4 (marked “fellow” in red) & a W8-BEN. A second original W-4 should be submitted for the assistantship paperwork. ALL of the required forms for an individual should come together.

12. Direct Deposit is available for NRA fellowships! Use Agency Code 360292 on the regular Direct Deposit Form. Please request all NRA SSN changes via the PHR Service Center (from temporary numbers to valid SSNs), ASAP to prevent problems with the 2015 W-2 & 1042-S forms. The email address for PHR is phrserv@umd.edu.

If you have any questions, I can be reached at 301-405-7477 or jmh@umd.edu.