The 2017 NRA renewal process consists of submitting a combination of all required tax forms along with copies of the required and most current immigration documents.

1. To ensure an individual using a tax treaty is exempt from federal taxes in the first pay period in 2017, the deadline for submission of the 2017 tax treaty paperwork is the close of business, Wednesday, November 15, 2016. All 2017 forms received after this deadline will be processed as quickly as possible, but the initial 2017 payment may be taxed due to the forms being submitted late. A tax refund will not be processed due to documents being submitted after the deadline.
   a. If the employee does not have a valid Social Security Number (SSN), then a Student ID or PHR generated temporary number can be used to complete the forms. The Student ID/temporary number both contain two zeros in the middle, e.g. 123-00-4567.
   b. If the employee does not have a valid SSN, DO NOT submit the 8233 Form & Tax Treaty Representation Letter. Tax treaty benefits are only available to employees with a valid SSN.
   c. The Affidavit of Compliance is a required document for NRAs WITHOUT a valid SSN and must be submitted with the other required documents as indicated on the NRA “Tip” Sheet.

2. The NRA “Tip” sheet, a helpful guide to documentation needed by the various VISA types, is available on the University Human Resources (UHR) website https://uhr.umd.edu/phr/ and can be found by clicking on “NRA Resources” on the right-hand side of the screen.

3. The 2017 Citizenship Status Form (CSF) is available on the UHR website https://uhr.umd.edu/phr/ and can be found by clicking on “NRA Resources” on the right-hand side of the screen. Please do not use any other year’s version of the CSF for the 2017 NRA Tax Forms renewal process. (All prior year’s versions should be discarded.)

4. All three (3) pages of the 2017 CSF must be completed and the employee’s SSN or temporary ID number should be written on each page (unless the individual is a Permanent Resident).

5. All 2017 NRA Forms should be clearly identified as 2017. (Note: the 2017 W-4 Form may not be available online until January, 2017; in the meantime use the 2016 W-4 Form. Just cross out 2016 and write 2017 on the top of the form.) W-4 Forms that are not clearly marked as 2017 will be considered to be 2016 forms.

6. NRA forms for 2017 must be submitted for anyone who is not a U.S. Citizen (CB) nor a Lawful Permanent Resident (PR). PR’s are required to complete page one (1) ONLY of the CSF upon initial hiring and do not need to participate in the yearly renewal.
   a. NRAs with Non-Paid appointments must also submit a 2017 CSF with copies of supporting immigration documents. They do not need to submit a W-4 Form; W9 Form or Affidavit of Compliance.

7. If an individual has BOTH a fellowship and an assistantship, submit only one (1) 2017 CSF with copies of the other immigration forms. However, an original 2017 W-4 Form must be submitted for both the assistantship (Agency Code 360222) and the fellowship (Agency Code 360292). The fellowship W-4 Form should be marked on the top of the form, in red - “FELLOW”.
   a. All other required tax forms that apply to each category (per Tip sheet’) must be submitted.
   b. Submit all paperwork as one packet.

8. Please do not send to Payroll: Instructions for any tax forms; copies of the “Tip Sheet’, blank or decorated pages from a passport and/or the I-9 Form. The original I-9 Form must be kept in the Department. These unneeded pages will not be returned to you and will be shredded by Payroll.
9. All tax forms must be the original and be completed correctly.
   a. On the 8233 Form the “Withholding Agent Acceptance and Certification” (Part IV) must be completed by someone in the Department. The Employer Identification Number (EIN) for all University of Maryland campuses is 52-6002033.
   b. On the 2017 CST there must be entries on page 2, in the “View Detail History” section and in the Substantial Presence Test (SPT) section for all VISA types other than ‘F’, ‘J’, ‘A’ and ‘G’.
   c. Incomplete forms and the copies of the tax forms will be returned to the Department/Campus thus running the risk of the employee not being taxed correctly.

10. Please try to avoid multiple staples. One staple or one paperclip per packet makes our required copying much easier and less time consuming.

SSN CHANGES

A permanent SSN should be requested from the Social security Administration ASAP to prevent problems with the individual’s tax filing documents (e.g. W-2 Form and/or 1042-S Form).

Request all NRA SSN changes (from temporary to permanent) by emailing payroll@umd.edu; in the email include the individual’s name, UID, temp # and permanent SSN.

NOTE: Direct Deposit Forms must be an original and completed correctly. Direct Deposit Forms should be submitted SEPARATELY to Payroll Services.

Questions?? Call Gloria Coates at 301-405-7477 or Jeen Rajesh at 301-405-5671.