

Form 1040NR Instructions Electronic Filing

Open the link to the FSA Taxslayer site. Below is the first screen you will see.

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.



Click continue. You will be directed to the Login screen. You will need to create an account.



Log In

Need a TaxSlayer account? [Create account.](#)

Username

Password

[Forgot Username](#) | [Forgot Password](#)

LOG IN

By clicking 'Log In', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).

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Language:

SAVE



Prepared by Kyla McGregor, modeled after the NRV TAP presentation



Create your account.

Already have an account? [Log In](#)

Email address

Username

Password

Mobile phone

CREATE ACCOUNT

By clicking 'Create Account', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).



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
Language:


SAVE



Once you have set up your account you will click continue to enter the tax software.

 > 2022 | AMERICAN PLEDGE

Help & Support 



Success! Your TaxSlayer account has been created.

Now, let's keep going.

CONTINUE

You can personalize your experience as seen below or you can skip this.

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Help & Support

Personalize your TaxSlayer experience.

Before you get started, please review the following disclosure. Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of tax return information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your tax return information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

Please review the information below and sign to agree to the terms and conditions.

Use of Information

As permitted by law, we may use the information you provide to address questions submitted to our customer or technical support systems; to send updates or security alerts; to provide notification of related tax return preparation products or services, or product enhancements; to monitor and investigate fraud, identity theft, and other illegal activity; and to personalize and improve our services.

Note that if you are not eligible for the Free File product, you may switch to a commercial product which may include offers for additional related products and services. By signing below, you allow us to use your information to show you additional products or services (if applicable) or to provide tax reminders or helpful tax tips. These offers may come from us or a service

PRINT

Ensure the details below are accurate:

Full Name*

Date

03/04/2023

☐ I am filing a joint return with my spouse.


REMIND ME LATER

You have the option to upload your tax return from last year but you do not have too.

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Help & Support

If you have a copy of your 2024 return, you can easily upload it here.



Tap here to upload

You may upload up to 1 document (up to 5 MB).





Upload Tips:


1. Make sure your file is saved as a PDF.
2. Only upload your prior year tax return here. We will ask for other forms later.
3. Make sure your PDF is not password-protected.

Skip

UPLOAD

Enter in you legal first name (given name), last name (family name), Social Security or ITIN number, birth date and occupation (you can put student).





Personal Information

Taxpayer's Information

Primary taxpayer first name

MI

Last name

Suffix (Jr, Sr, etc.)

SSN *The IRS requires your Social Security Number for e-filing.**

- -





Date of Birth


MM DD YYYY

Occupation

[Skip](#)[CONTINUE](#)

Enter in your current mailing address.





Personal Information

What's your mailing address?

Country

Address (street number & name)

Apartment (provide apartment number only)

ZIP code


-












City, town, or post office

State

Residency Status

There is additional information to indicate about you. You do not need to mark any of these, this is for if you are filing a Form 1040.

 **Additional Information**




Taxpayer's Information

Check any of these that apply to you:

- ☐ Jane can be claimed as a dependent on someone else's return. [? Learn more](#)
- ☐ Jane was over age 18 and a full-time student at an eligible educational institution. [? Learn more](#)
- ☐ Jane is blind.
- ☐ Jane is deceased.
- ☐ Jane wishes to contribute \$3 to the Presidential Election Campaign Fund.
- ☐ Jane served in a combat zone during the current tax year. [? Learn more](#)
- ☐ Jane wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit.
- ☐ Jane was affected by a natural disaster during the current tax year.
- ☐ Jane received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during the current tax year.
- ☐ Jane prefers to receive written communications from the IRS in a language other than English.
- ☐ Jane prefers to receive written communications from the IRS in an accessible format.
- ☐ Jane is at least age 18 and meets the requirements to claim the EIC. [? Learn more](#)

The only filing status you should use is **Nonresident Alien** the other statuses are for resident filers only.



What's your filing status? [? Learn more](#)

☐ Single

☐ Married Filing Jointly

☐ Married Filing Separately

☐ Head of Household

☐ Qualifying Widow(er) with Dependent Children

☐ Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

Mark single if you are single married if you are married and Qualifying surviving spouse only if you are from Canada, Mexico, India, or South Korea and have a spouse who died and you have a child.

What's your filing status? ?

☐ Single nonresident alien

☐ Married nonresident alien

☐ Qualifying surviving spouse

WAIT! This isn't what I wanted!

SHOW RESIDENT OPTIONS

BACK

CONTINUE

Generally, answer NO. Only answer yes if the following applies.

A spouse is never a dependent.

You must be from Canada, Mexico, India, or S. Korea to claim an exemption for your dependent. Your dependent must be a citizen or resident alien for 2025 and have a SSN or ITIN. This is quite unusual.

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Help & Support ?

Dependents or Qualifying Person(s)

Do you have children or relatives who rely on you for support and live in your home? If so, you might be able to receive potential tax credits and tax exemptions that could save you money on your tax bill. But before you get too excited, there are some situations when a child's exemption status is a little more complicated. The IRS does have special rules for those situations. ?

Do you have any dependents or qualifying person(s) to claim on your return?

☐ Yes

☐ No

BACK

Skip

CONTINUE

Dependent/Qualifying Child Information

First name *

MI

Last name *

Date of birth *

MM ▾	DD ▾	YYYY ▾
------	------	--------

Social Security number (ITIN & ATIN also accepted)

The IRS requires a tax ID number for everyone included on your tax return.

▯	- ▯	- ▯
---	-----	-----

☐ Check here if the individual does not have an SSN, ITIN, or ATIN.

Was this individual a U.S. citizen, U.S. national, or U.S. resident alien? If they were not, you can't claim the child tax credit or the credit for other dependents for this person. *

☐ Yes

☐ No

Relationship *

Please select
▾

[illegible]

After you finish with the IRS PIN page the next page will have you review your personal information then click continue, then this is the next page you will see, just click continue.

The image is a screenshot of the TurboTax website's 'Quick File' section. At the top, the heading 'Add your forms quickly with Quick File' is displayed in a large, bold, black font. Below the heading, a subtext reads: 'If you know which forms you need, easily search and add them to your tax return.' In the center of the page is a stylized illustration of a laptop. The laptop screen shows a 'Form Search' interface. At the top of the screen is a search bar with the text 'W-2 Forms' and a magnifying glass icon. Below the search bar, a result for 'Form W-2' is listed, with a green highlight and a cursor pointing to it. At the bottom of the page, there are two buttons: a grey 'BACK' button on the left and a green 'CONTINUE' button on the right. The 'CONTINUE' button is highlighted with a red rectangular border. Below the buttons, there is a small copyright notice: 'Copyright © 2023 TaxDay.com | Privacy Policy'. The overall layout is clean and modern, with a white background and a dark blue sidebar on the left containing various icons.

Once you click continue the following page will come up, click skip on this page.

[illegible]

The next screen you will come to is the Income section. Before you enter any income click on Basic Information on the left navigation bar.

The screenshot shows the 'Income' section of a tax software interface. On the left is a dark navigation bar with a red box around the 'Basic Information' option. The main area is titled 'Income' and lists various income sources with 'BEGIN' buttons: W-2 (Most Common Form), 1099-G Box 1, 1099-G Box 2, 1099-INT, DIV, OID, 1099-K, 1099-MISC, 1099-NEC, 1099-R, RRB, SSA, 8915-F, Capital Gains and Losses, Profit or Loss from Business, and Profit or Loss from Farming. On the right, a vertical bar shows 'Federal' with a value of '\$1,292'.

If you need to adjust something you can always go back to this screen to edit something. The bottom line on this page is what you will enter information for next. The 1040 NR Schedule OI. You will click Begin.

The screenshot shows the 'Basic Information' section of a tax software interface. On the left is a dark navigation bar with a red box around the 'Basic Information' option. The main area is titled 'Basic Information' and lists various information sections with 'EDIT' or 'BEGIN' buttons: Personal Information, Filing Status, Dependents / Qualifying Person, IRS Identity Protection PIN, and 1040NR Schedule OI. The '1040NR Schedule OI' button is highlighted with a red box. At the bottom are 'BACK' and 'CONTINUE' buttons. On the right, a vertical bar shows 'Federal' with a value of '\$0'. At the very bottom, there is a copyright notice: 'Copyright © 2022 TaxSlayer | Privacy Policy'.

The next four screen shot show the information that need to enter on Schedule OI. Start with General Information. You only need to enter information in General Information and Dates Entered and Departed the US in current year.

This screenshot shows the main menu for Schedule OI in the TaxSayer software. The interface includes a dark sidebar on the left with various icons, a top navigation bar with a hamburger menu, the year '2021', and the text 'American Pledge'. A 'Help & Support' link is in the top right. The main area is titled 'Schedule OI' and contains three sections: 'General Information' with a dark green 'BEGIN' button, 'Dates Entered and Departed the U.S. in Current Year' with a light green 'BEGIN' button, and 'Income Exempt from Tax' with a light green 'BEGIN' button. A large dark green 'CONTINUE' button is at the bottom right. A 'RETURN SUMMARY' sidebar on the far right shows 'Federal' with a value of '\$0'. A footer at the bottom center reads 'Copyright © 2022 TaxSayer | [Privacy Policy](#)'.

The type of entity will be Individual. Country of residence is the country you lived prior to the United States. The Visa type will be nonimmigrant visa.

This screenshot shows the 'General Information' form for Schedule OI. The title bar reads 'Schedule OI - General Information'. The form contains several dropdown menus: 'Type of 1040NR Entity' (set to '- Please Select -'), 'Country of Citizenship' (set to '- Please Select -'), 'Country of Residence' (set to '- Please Select -'), 'U.S. Travel Information' (set to '-- Please Select --'), and 'Select type of U.S. Visa' (set to 'Please Select'). Below these are four checkboxes with labels: 'Check if you have ever applied for a U.S. Green Card', 'Check if you have ever been a citizen of the U.S.', 'Check here if you have ever had a green card.', and 'Check if you have ever changed your Visa Type.' The 'RETURN SUMMARY' sidebar on the right shows 'Federal' with a value of '\$0'. The sidebar has a vertical scrollbar.

- ☐ Check if you have ever been a citizen of the U.S.
- ☐ Check here if you have ever had a green card.
- ☐ Check if you have ever changed your Visa Type.

Days Present in the U.S.
Number of days in the U.S. for 2021.

Number of days in the U.S. for 2020.

Number of days in the U.S. for 2019.

Tax Return Filing Information

- ☐ Check if you have filed a U.S. Income tax return for a prior year.
- ☐ Check if you are filing a return for a trust.
- ☐ Check if you received total compensation over \$250,000.

☐ Check if you used an alternate method to determine the source of the income.

Refund Mailing Information

Enter address below if you would like your refund check mailed to an address outside the U.S.

Country

- Please Select -

Address (street number & name)

City, town, or post office

Foreign State or Province

Foreign Postal Code

Income Exempt from U.S. Tax

- ☐ Check if you were subject to tax in a foreign country on U.S. exempt income.
- ☐ Check if you used an alternate method to determine the source of the income.

Wages Exempt by a Treaty (reduces 1040-NR line 8)

Real Property Election

Have you ever made an election to treat income from real property located in the United States as effectively connected with a U.S. trade or business under section 871(d)?

- ☐ Yes
- ☐ No

CANCEL

Enter an address here if you would like your refund check to go to an address outside the US. You do not need to do this if you want direct deposit.

Do not enter anything here

CONTINUE

Here you will enter the days you entered and left the US. If you here prior to the beginning of 2025 just enter January 1 2025. If you came and left multiple times you can add more entries.

TaxSlayer

<≡

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E file

Mailbox

Settings

Toolbox

Save & Log Out

2021 | American Pledge

Help & Support

Schedule OI - Current Year Travel Dates

Date Entered U.S. *

MM

DD

YYYY

Date Departed U.S.

MM

DD

YYYY

CANCEL

CONTINUE

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RETURN SUMMARY

Federal

\$0

After entering the information Schedule OI you will enter your income. Click continue until you get to this page. Generally, you will only need to enter W-2s, Scholarship and Fellowship Grants. The W-2 screen shots are below. For your Scholarship income the amount from box 2 on your 1042-S if you received one.

TaxSlayer

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E file

Mailbox

Settings

Toolbox

Save & Log Out

Income

W-2 <small>(Most Common Form)</small>	BEGIN
Wages and tax statement	
1099-G Box 1	BEGIN
Unemployment compensation	
1099-G Box 2	BEGIN
State or local income tax refunds, credits, or offsets	
1099-INT, DIV, OID	BEGIN
Interest income, dividends, and distributions	
1099-K	BEGIN
Payment card and third party network transactions	
1099-MISC	BEGIN
Miscellaneous income	
1099-NEC	BEGIN
Nonemployee compensation	
1099-R, RRB, SSA	BEGIN
Distributions from pensions, annuities, retirement, IRAs, social security, etc.	
8915-F	BEGIN
Deferred Retirement Income Due to Disaster Relief in a Prior Year	
Capital Gains and Losses	BEGIN
May receive Form 1099-B, reported on Schedule D	
Profit or Loss from Business	BEGIN
Reported on Schedule C	
Profit or Loss from Farming	BEGIN
Reported on Schedule F	
Profit or Loss from Rentals and Royalties	BEGIN
Reported on Schedule E	
Scholarships And Fellowship Grants	BEGIN
Taxable portion of a scholarship/grant must be included in gross income	
SSA-1042S and RRB-1042S	BEGIN
Retirement benefits for nonresident aliens	
Less Common Income	BEGIN
K-1 earnings, gambling winnings, cancellation of debt, etc.	

BACK

CONTINUE

The next three screen shots show what to enter for you W-2. The numbers or letters before each box will be the same number or letter on your actual W-2. Enter in the information for any box that has data in it.

TaxSlayer

<≡

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

W-2

Check any of these that apply to you:
Don't worry, most people won't need to check these boxes.
☐ This is a corrected W-2
☐ This is a substitute W-2
☐ This is a railroad W-2

b Employer identification number (EIN) *

c Employer's name *

Country *

Address (number and street) *

ZIP Code * City * State *

d Control number - Not required for filing taxes online.

e Employer's name

Country *

Address (number and street) *

ZIP Code * City * State *

RETURN SUMMARY

Federal \$0

TaxSlayer

<≡

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

-- Please select --

1 Wages, tips, other

2 Federal tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

7 Social security tips

8 Allocated tips

9 IRS verification code

10 Dependent care benefits

11 Nonqualified plans

Unreported tips

12 [Learn More](#)

a - Code

13 [Learn More](#)

☐ Statutory employee
☐ Retirement plan
☐ Third-party sick pay

14 [Learn More](#)

a - Code

Medicaid Waiver Payment [Learn More](#)

RETURN SUMMARY

Federal \$0

TaxSlayer

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Third-party sick pay

14 [Learn More](#)

a - Code

Medicaid Waiver Payment [Learn More](#)

Railroad tier 1 wages

Railroad tier 1 tax withheld

Railroad medicare wages

Railroad medicare tax withheld

15 State

Employer's state ID number

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

Add another state

CANCEL

CONTINUE

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RETURN SUMMARY

Federal

\$0

For this amount you will use you Box 2 from your 1042-S with Income Code 16 if you received one.

My Account

Basic Information

Federal

Income

W-2 Wage Statement

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Scholarships and Fellowship Grants

Amount of Scholarships and Fellowship Grants Received

\$

CANCEL

CONTINUE

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After you enter you W-2 and scholarship income. You will enter your deductions. The only deductions you will need to enter is Itemized Deductions.

The screenshot shows the 'Deductions' page in a tax software interface. On the left is a dark sidebar with a menu containing: 'My Account', 'Basic Information', 'Federal' (expanded), 'Income', 'Deductions' (highlighted), 'Other Taxes', 'Payments & Estimates', 'Miscellaneous Forms', 'COVID-19 Relief', 'Health Insurance', 'State', 'Summary/Print', 'E-file', 'Mailbox', 'Settings', 'Toolbox', and 'Save & Log Out'. The main content area is titled 'Deductions' and contains three sections: 'Adjustments to Income' with a 'BEGIN' button, 'Credits' with a 'BEGIN' button, and 'Itemized Deductions' with a 'BEGIN' button highlighted by a red rectangle. Below these sections are 'BACK' and 'CONTINUE' buttons. A copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the bottom.

For Itemized Deductions, Taxes you Paid and gifts to charity are the only deductions you might have. You don't need to enter anything under Taxes you Paid because the amount will pull directly from your W-2 and 1042-S inputs.

The screenshot shows the 'Itemized Deductions' page in the same tax software interface. The sidebar is identical to the previous screenshot. The main content area is titled 'Itemized Deductions' and contains a list of deduction categories, each with a 'BEGIN' button: 'Use Standard or Itemized Deduction', 'Taxes You Paid' (with a 'Learn more' link), 'Gifts to Charity' (with a 'Learn more' link), 'Unreimbursed Employee Business Expense' (with a 'Learn more' link), 'Job-Related Travel Expenses Form 2106' (with a 'Learn more' link'), 'Miscellaneous Deductions', and 'Less Common Deductions'. A 'CONTINUE' button is at the bottom right. A copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the bottom.

The next section is Other Taxes. The only other taxes you may have are Tax on Income Not Effectively Connected to US Trade/Business. This would be if you have, Dividends (1099-DIV) or Capital Gains (1099-B).

Other Taxes	
Additional Taxes on Qualified Plans and Other Accounts ⓘ <small>Reported on Form 5329</small>	BEGIN
Alternative Minimum Tax (AMT) ⓘ <small>Reported on Form 6251</small>	BEGIN
Household Employment Taxes ⓘ <small>Reported on Schedule H</small>	BEGIN
Net Investment Income Tax (NIIT) <small>Reported on Form 8960</small>	BEGIN
Parents' Election to Report Child's Interest and Dividends ⓘ <small>Reported on Form 8814</small>	BEGIN
Repayment of First-Time Homebuyer Credit ⓘ <small>Reported on Form 5405</small>	BEGIN
Self-Employment Tax <small>Reported on Schedule SE</small>	BEGIN
Social Security and Medicare Tax on Unreported Tip Income ⓘ <small>Reported on Form 4137</small>	BEGIN
Tax For Certain Children Who Have Unearned Income ⓘ <small>Reported on Form 8815</small>	BEGIN
Tax on Income Not Effectively Connected to US Trade/Business <small>Reported on Schedule NEC</small>	BEGIN
Transportation Tax <small>Tax on U.S. source gross transportation income not effectively connected with a U.S. trade/business (Only for nonresident aliens)?</small>	BEGIN

BACK CONTINUE

You will enter your dividends (1099-DIV) on US Corps Dividends and your Capital Gains (1099-B) on Capital Gains/Losses. You will need to look at the 4011 guide to see what percentage you will enter your interest, dividends and capital gains on. See pages 16-19.

Schedule NEC	
Custom Tax Rates	BEGIN
US Corps Dividends	BEGIN
Foreign Corps Dividends	BEGIN
Dividend Equivalent Payments (Sec. 871(m))	BEGIN
Mortgage Interest	BEGIN
Foreign Corps Interest	BEGIN
Other Interest	BEGIN
Industrial Royalties	BEGIN
Copyright Royalties	BEGIN
Other Royalties	BEGIN
Real Property Income	BEGIN
Pensions & Annuities	BEGIN
Social Security Benefits	BEGIN
Capital Gains/Losses	BEGIN
Gambling - Canada	BEGIN
Gambling - Not Canada	BEGIN
Other Income	BEGIN

CONTINUE

The next section is Payments and Estimates. If you have a 1042-S (with income code 16, 19 or 20) you will need to enter that in Foreign Person’s U.S. Source Income Subject to Withholding.

12

Payments and Estimates

Federal Estimated Tax Payments

Federal tax payments already made for 2022

BEGIN

State Estimated Tax Payments

State tax payments already made for 2022

BEGIN

Other Federal Withholdings

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2023 Estimated Tax Payments

Print vouchers for estimated tax payments

BEGIN

Amount Paid with Extension

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

IRC 1341 Repayment Amount

Claim of Right related tax credit

BEGIN

Other Form 1040-NR Payments

Other nonresident payments

BEGIN

Foreign Partner's Information Statement of Sec. 1446 Withholding Tax

Form 9855

BEGIN

Withholding on Dispositions by Foreign Persons on U.S. Real Property Interests

Form 8879-F

BEGIN

Foreign Persons U.S. Source Income Subject to Withholding

Form 1042-S

BEGIN

BACK

CONTINUE

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Form 1042-S Foreign Person's U.S. Income Subject to Withholding

Corresponding Box from Form 1042-S

Select chapter *

Please Select ▾

Box 3

Tax Rate

Box 3b or 4b rate,
if listed

Unique Form Identifier *

Listed above Box
3

Is this an amended form?

☐ Yes

☒ No

Pro-rata basis reporting?

☐ Yes

☒ No

Have you deposited tax with the IRS pursuant to escrow procedure?

☐ Yes

☒ No

Generally, **Out-of-Scope**.
(Amended Returns are
permitted for current year and
special circumstances based
on the site's established
procedures.)

Select an income code *

- Please Select -

Box 1

Gross Income

Gross Income will not be carried to your return. Please enter it on the applicable form.

\$

Withholding Allowance

\$

Net Income

\$

Federal Tax Withheld

\$

Tax Withheld by Other Agents

\$

Tax Paid by Withholding Agent

\$

Total Withholding Credit

\$

Box 10

Amount Repaid to Recipient

\$

Form 1042-S Foreign Person's U.S. Income Subject to Withholding

Withholding Agent Information

Corresponding Box from Form 1042-S

Agent's Name

Box 12d

Agent's EIN

 -

Box 12a

Chapter 3 Status Code

Box 12b

Chapter 4 Status Code

Box 12c

Agent's GIIN

Box 12e

Agent's Foreign Tax ID Number

Box 12g

Agent's Address

☐ Check here if foreign address

Address (street number & name)

Box 12h

ZIP code

 -

City, town, or post office

Box 12i

State

Box 12i

Recipient Information

Chapter 3 Status Code

Box 13f

Chapter 4 Status Code

Box 13g

Recipient's GIIN

Box 13h

Recipients's Foreign Tax ID Number

Box 13i

LOB Code

Box 13j

Account Number

Box 13k

Form 1042-S Foreign Person's U.S. Income Subject to Withholding

Payer Information

Corresponding Box from Form 1042-S

Payer's Name

Box 16a

Payer's TIN

 - -

Box 16b

Chapter 3 Status Code

Box 16d

Chapter 4 Status Code

Box 16e

Payer's GIIN

Box 16c

Payer's State Tax Number

Box 17b

Name of State

Box 17c

State Income Tax Withheld

Box 17a

Form 1042-S Department of the Treasury Internal Revenue Service		Foreign Person's U.S. Source Income Subject to Withholding Go to www.irs.gov/Form1042S for instructions and the latest information.		2025 OMB No. 1545-0096 Copy A for Internal Revenue Service	
1 Income code		2 Gross income		3 Chapter indicator. Enter "3" or "4" 3a Exemption code 4a Exemption code 3b Tax rate 4b Tax rate	
5 Withholding allowance		6 Net income		7a Federal tax withheld	
7b Check if federal tax withheld was not deposited with the IRS because escrow procedures were applied (see instructions) <input type="checkbox"/>		7c Check if withholding occurred in subsequent year with respect to a partnership interest <input type="checkbox"/>		7d Check if you are a qualified intermediary, withholding foreign partnership, or withholding foreign trust revising its reporting on Form 1042-S to report to a specific recipient <input type="checkbox"/>	
8 Tax withheld by other agents		9 Overwithheld tax repaid to recipient pursuant to adjustment procedures (see instructions) ()		10 Total withholding credit (combine boxes 7a, 8, and 9)	
11 Tax paid by withholding agent (amounts not withheld) (see instructions)		12a Withholding agent's EIN 12b Ch. 3 status code 12c Ch. 4 status code		12d Withholding agent's name	
12e Withholding agent's global intermediary identification number (GIIN)		12f Country code 12g Foreign tax identification number, if any		12h Address (number and street)	
12i City or town, state or province, country, ZIP or foreign postal code		13a Recipient's name 13b Recipient's country code		13c Address (number and street)	
13d City or town, state or province, country, ZIP or foreign postal code		13e Recipient's U.S. TIN, if any 13f Ch. 3 status code 13g Ch. 4 status code		13h Recipient's GIIN 13i Recipient's foreign tax identification number, if any 13j LOB code	
13k Recipient's account number		13l Recipient's date of birth (YYYYMMDD)		14a Primary withholding agent's name (if applicable)	
14b Primary withholding agent's EIN		15 Check if pro-rata basis reporting <input type="checkbox"/>		15a Intermediary or flow-through entity's EIN, if any 15b Ch. 3 status code 15c Ch. 4 status code	
15d Intermediary or flow-through entity's name		15e Intermediary or flow-through entity's GIIN		15f Country code 15g Foreign tax identification number, if any	
15h Address (number and street)		15i City or town, state or province, country, ZIP or foreign postal code		16a Payer's name 16b Payer's TIN	
16c Payer's GIIN 16d Ch. 3 status code 16e Ch. 4 status code		17a State income tax withheld 17b Payer's state tax no. 17c Name of state			

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Cat. No. 11386R

Form **1042-S** (2025)

Once you have your 1042-S entered if you had one. You will go to Miscellaneous Forms page and fill out Form 8843. You can only use this electronic version for the main taxpayer on the return. For any other family members, you will have to fill out a paper version.

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Miscellaneous Forms

Aliens Exempt for Medical Conditions/Other Reasons

Reported on Form 8843

BEGIN

Allocation of Tax Amounts for Individuals in Certain States

Reported on Form 8958 (Only for married filing separately and some domestic partnerships)

BEGIN

Application for Automatic Extension of Time to File

Applied for on Form 4868

BEGIN

Closer Connection Exception Statement for Aliens

Reported on Form 8840

BEGIN

Initial and Annual Expatriation Statement

Reported on Form 8854

BEGIN

Injured Spouse Allocation

Reported on Form 8379

BEGIN

Installment Agreement Request

Requested on Form 9465

BEGIN

IRS Identification Pin

This is the PIN you need if you received a CP01A notice from the IRS

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer

Claimed on Form 1310

BEGIN

Statement of Specified Foreign Financial Assets

Form 8938

BEGIN

BACK

CONTINUE

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Below are screen shots of the information you will need to enter for the 8843. Everyone will fill out Part I. Students will fill out Part III and Teachers will fill out Part II.

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Form 8843 - Exempt and Individuals With a Medical Condition

Part I - General Information

EDIT

Part II - Teachers and Trainers

BEGIN

Part III - Students

BEGIN

Part IV - Professional Athletes

BEGIN

Part V - Individuals with a Medical Condition

BEGIN

CONTINUE

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My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Form 8843 Part I - General Information

Type of U.S. Visa/Immigration Status

Select type of U.S. Visa *

Nonimmigrant Visa

Nonimmigrant visa type code

F1

Date entered U.S.

MM

DD

YYYY

Visa Change Information

Have you changed your visa type (nonimmigrant status)?

☐ Yes

☒ No

Current non-immigrant status

General Information

Of what country were you a citizen during 2021?

China

What country issued you a passport?

- Please Select -

Passport number

Days in the U.S. in 2021

Days in the U.S. in 2020

Days in the U.S. in 2019

Days in 2021 you claim you can exclude (substantial presence test)

DELETE

CANCEL

CONTINUE

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These two screen shot are what students will need to enter on part III.

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

TaxSlayer

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Form 8843 Part III - Students

Academic institution where you attended

Institution Name *

Institution Phone Number *

Institution Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

Director of Academic Program

Director Name *

Director Phone Number *

Director Address *

Country *

United States of America

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

U.S. presence

U.S. presence

Were you present in the U.S. as a teacher, trainee, or student for any part of more than 5 calendar years?

During the tax year, did you apply for, or take affirmative steps to apply for, lawful permanent resident status or have an application pending to change your status to that of a lawful permanent resident?

Visa held during 2015

Did you have a visa in this year?

Visa held during 2016

Did you have a visa in this year?

Visa held during 2017

Did you have a visa in this year?

Visa held during 2018

Did you have a visa in this year?

Visa held during 2019

Did you have a visa in this year?

Visa held during 2020

Did you have a visa in this year?

DELETE

CANCEL

CONTINUE

See the Deans and Colleges List for Form 8843 attachment for the names and addresses of your specific college

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These two screen shot are what students will need to enter on part II.

My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Form 8843 Part II - Teachers and Trainers

Academic institution where you taught

Institution Name *

Institution Phone Number *

() - -

Institution Address

Country

United States of America

Address (street number & name)

ZIP code

City, town, or post office

State

Please Select

Director of Academic Program

Director Name *

Director Phone Number *

() - -

Director Address

Country

United States of America

Address (street number & name)

ZIP code

City, town, or post office

State

Please Select

U.S. presence

State

Please Select

U.S. presence

Were you present in the U.S. for 2 of the 6 prior years?

Yes

No

Visa held during 2015

Did you have a visa in this year?

Yes

No

Visa held during 2016

Did you have a visa in this year?

Yes

No

Visa held during 2017

Did you have a visa in this year?

Yes

No

Visa held during 2018

Did you have a visa in this year?

Yes

No

Visa held during 2019

Did you have a visa in this year?

Yes

No

Visa held during 2020

Did you have a visa in this year?

Yes

No

DELETE

CANCEL

CONTINUE

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The next screen you will come to is a question regarding health insurance. It asks if you had health insurance through the Market Place. You will only answer yes if you have a 1095-A.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2021? [Learn more](#)

If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☐ Yes

☐ No

BACK

CONTINUE

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The next screen you will come to is the State Return. Nebraska does not allow electronically filed returns so you will click skip state return. See the final instructions later on how to file your Nebraska return.

My Account

Basic Information


Federal

Health Insurance

State

Summary/Print

E-file



Let's get started on your state return

We'll transfer your information from your federal to your state return automatically, so this should be quick! You'll enter some state-specific information, and we'll help you find all possible tax breaks.

If you qualify for a free federal return, you can file a free state return for the following states:
Arkansas, Arizona, Dist of Columbia, Georgia, Iowa, Idaho, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, Mississippi, Montana, North Carolina, North Dakota, New York, Oregon, Rhode Island, South Carolina, Virginia, Vermont, West Virginia

Returns for all other states are \$0.00

BACK

[Skip state return](#)

GET STARTED

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After you indicate you want to skip the state return you will come to the Tax Return Summary screen. On this screen it shows your income, deductions, amount of tax and if you are getting a refund or owe. This screen is also where you can print your return. If you think you need to adjust something you can go back to any section using the navigation bar on the left side of the screen.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

Summary

Print Results

E-file


Mailbox

Settings


Toolbox

Save & Log Out

Tax Return Summary



Total Income	\$20,000.00	▼
Adjusted Gross Income	\$20,000.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$748.00	▼
Payments	\$3,000.00	▼
Refund	\$2,252.00	▼

 PRINT ▼

VIEW RETURN

BACK

CONTINUE

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The next several screens shot go through the information you need to fill out to file your return. This is where you would stop if you want on of our tax preparers to review you return or you can go ahead and file if you feel comfortable. Once you are ready to file you will click Yes, I am done with my return and ready to file.

The screenshot shows the 'Ready to file?' screen in the TaxSlayer app. On the left is a dark sidebar with navigation options: My Account, Basic Information, Federal, Health Insurance, State, Summary/Print, E-file (highlighted), Mailbox, Settings, Toolbox, and Save & Log Out. The main content area has the heading 'Ready to file?' and a subtext: 'If you're done with all the returns you need to file, we can get some final details and finish up!'. Below this is a question: 'Are you ready to keep going?' with two radio button options. The first option, 'Yes, I'm done with my return(s) and ready to file', is selected and highlighted with a red rectangular box. The second option is 'No, I'm not ready'. To the right of the text is an illustration of a laptop with two green checkmarks on its screen and a small potted plant next to it. At the bottom are two buttons: 'BACK' on the left and 'CONTINUE' on the right. A small copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the very bottom.

The next screen goes through a few other items needed to file the return. You will start with the box that says Federal. Here you will indicate how you want your refund or how you want to make a payment.

The screenshot shows the 'Let's get a few more details' screen in the TaxSlayer app. The sidebar is identical to the previous screen. The main content area has the heading 'Let's get a few more details' and a subtext: 'You're almost ready to file!'. Below this is a vertical list of four items, each in a box. The first item, '1 Federal', shows a refund of '\$2,252'. It includes a 'Refund:' section with 'Refund Method: Select method below' and a 'Choose how you want to receive your federal refund.' prompt. A green 'CONTINUE' button is highlighted with a red rectangular box. The second item is '2 State' with a green checkmark icon. The third item is '3 Products & Services' with a value of '\$0'. The fourth item is '4 Sign & File'. At the bottom are 'BACK' and 'CONTINUE' buttons. A small copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the very bottom.

The next screen you will indicate if you want direct deposit or a paper check for you refund or if you want to direct withdrawal or write a paper check if you owe. Once you answer this questions it will take you back to prior screen. You do not need to do anything with the state section since we are not going to file the state electronically.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox


Settings

Toolbox


Save & Log Out

Federal Refund Method

How would you like to receive your \$2,252 federal refund?



Direct deposit



Mailed check

I understand that TaxSlayer has no control over the IRS or the bank and therefore makes no guarantees as to the number of days it takes for you to receive your refund. TaxSlayer will make every effort to expedite your filing process; however, if the IRS delays or holds your refund, TaxSlayer will not be held responsible.

BACKCONTINUE

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My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox


Settings

Toolbox


Save & Log Out

Federal Payment Method

How would you like to pay your federal amount due of \$760?



Direct debit



Mailed payment

I understand that TaxSlayer has no control over the IRS or the bank and therefore makes no guarantees as to the number of days it takes for you to receive your refund. TaxSlayer will make every effort to expedite your filing process; however, if the IRS delays or holds your refund, TaxSlayer will not be held responsible.

BACKCONTINUE

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The next section is Products & Services. All you have to do is click continue as this is a free service. Last you will click continue on step 4 Sign and File. If you are getting a refund it will as you if you want to invest your refund. Indicate no on this.

The screenshot shows the 'Want to invest your refund?' screen. On the left is a dark sidebar with a menu: 'My Account', 'Basic Information', 'Federal', 'Health Insurance', 'State', 'Summary/Print', 'E-file' (highlighted), 'Mailbox', 'Settings', 'Toolbox', and 'Save & Log Out'. The main content area has the title 'Want to invest your refund?' and a question: 'Do you want to put any of your refund toward savings bonds for yourself or someone else?'. There are two radio buttons: 'Yes' and 'No'. The 'No' option is selected. At the bottom, there are 'BACK' and 'CONTINUE' buttons. The 'CONTINUE' button is highlighted with a red rectangle. A copyright notice 'Copyright © 2023 Taxpayer | Privacy Policy' is visible at the bottom center.

If you are getting a refund it will then ask if you want have your direct deposit go to on bank account.

The screenshot shows the 'Federal Direct Deposit Details' screen. The sidebar is identical to the previous screen. The main content area has the title 'Federal Direct Deposit Details' and a question: 'Do you want to deposit your full federal amount into a single bank account?'. There are two radio buttons: 'Yes (most common)' and 'No, I want to split my refund between 2-3 bank accounts.'. The 'Yes (most common)' option is selected. At the bottom, there are 'BACK' and 'CONTINUE' buttons. A copyright notice 'Copyright © 2023 Taxpayer | Privacy Policy' is visible at the bottom center.

Once you have indicated how many banks you want your refund to go to. It will have you enter your bank information. If you owe and you indicated you want a direct withdrawal it will skip the prior two screens and come straight to this screen.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Bank Account Info

Enter your account information below.

Account nickname

Account type

-Select account type-

Bank routing number

Account number

BACK

CONTINUE

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If you owe it will then as you to indicate how much you want to pay, your phone number and the date you want the money taken out of your account.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

Confirm payment details

Payment amount *

Amount owed: \$760

\$

Phone number

Payment date

MM

DD

YYYY

* **Note:** If you have selected to mail payment for states, this payment only applies to federal tax due and you must still mail the payment in. If payment amount is less than the amount due, you will have to mail the rest of the payment to the IRS with a payment voucher. Please allow 5 business days for the transaction to post to your account.

If you are receiving a refund from your state and have elected for a direct deposit, this bank account will also be used.

BACK

CONTINUE

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The next screen you will come to is ID information. This is optional.

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

ID Information

☐ I do not wish to provide

☐ ID was NOT issued by the United States of America

ID type

-Please select-

Issuer

-Please select-

ID Number

Issue date

MM

DD

YYYY

Expiration date

MM

DD

YYYY

Citizenship

-Please select-

BACK

CONTINUE

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It will then go to a screen to help identify you. It will ask you for our 2024 return. If you filed in 2024 all the information you will need will be on there if not you will indicate you did not file a return.

TaxSlayer

<≡

My Account

Basic Information

Federal

Health Insurance

State

Summary/Print

E-file

Mailbox

Settings

Toolbox

Save & Log Out

2023 | AMERICAN PLEDGE

Help & Support

John, we need the adjusted gross income (AGI) from your 2023 return. Do you have access to it?

The IRS requires this information to confirm your identity when you file.

☐ Yes, I have my 2023 tax return with me.

☐ No, I can't locate my 2023 tax return.

☐ No, I didn't file a 2023 tax return.

BACK

CONTINUE

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RETURN SUMMARY

Federal

\$1,817

If you did file last year it will ask what type of return you filed. You will Indicate 1040NR. If you did not file it will skip the next two screen shots to entering a PIN number.

Jane, which type of tax return did you file last year?

Look for the form name in the top-left corner of your federal return.

☐ 1040

☒ 1040NR

☐ 1040X

☐ 1040SR

CANCEL **CONTINUE**

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You will then need to enter you Adjusted Gross Income from 2024. It is Line 11 of your 2024 1040NR.

TaxSlayer 2023 | AMERICAN PLEDGE Help & Support

Enter your 2023 Adjusted Gross Income (AGI)

Located on last year's tax return (Line 11 Form 1040NR)
This amount is used by the IRS to confirm your identity. It must be correct for your return to be accepted.

Primary taxpayer - John Doe
2023 Adjusted Gross Income (AGI) *
Located on line 11 of your 2022 form 1040NR. Round to the closest dollar if your AGI includes cents.

\$

CANCEL **CONTINUE**

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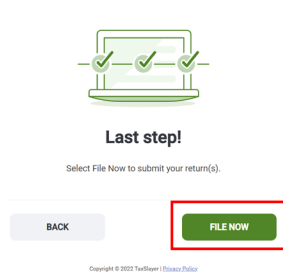
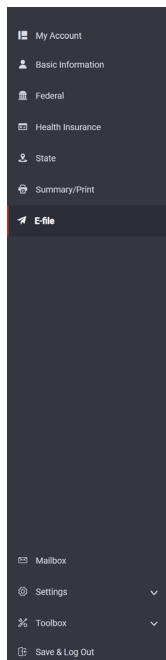
Then it will take you to this screen where you will create a PIN number. If you did not file last year, it will take you directly to this screen. You can make the PIN number what ever you want.

The screenshot shows the TaxSlayer interface with a dark sidebar on the left containing menu items: My Account, Basic Information, Federal, Health Insurance, State, Summary/Print, E-file (highlighted), Mailbox, Settings, Toolbox, and Save & Log Out. The main content area is titled 'Now, create a Self-Select PIN for this year'. Below the title, it says 'Create a 5-digit PIN for this year's tax return. We'll import it for you when you file next year.' and a note: '*You may be asked for this PIN in the future so the IRS can confirm your identity. We recommend making note of your PIN and keeping track of it.' There is a text input field labeled 'Taxpayer's 5-digit PIN *'. At the bottom, there are two buttons: 'CANCEL' and 'CONTINUE'. A copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the very bottom.

Last it will take you back to this screen where you will click Sign and File your Return.

The screenshot shows the TaxSlayer interface with the same dark sidebar. The main content area is titled 'You're almost ready to file!'. It displays a summary of the tax return with four sections: 'Federal' with a refund of \$2,252, 'State' with 'No State Returns.', 'Products & Services' showing 'TaxSlayer Efile' for free, and 'Sign & File'. A red box highlights a green button labeled 'SIGN AND FILE YOUR RETURN' in the 'Sign & File' section. A 'BACK' button is at the bottom left. A copyright notice 'Copyright © 2022 TaxSlayer | Privacy Policy' is at the bottom.

It will then take you to this screen where you will click File now.



Congratulations you have completed you Federal Return. See Final Instructions for Electronic Filing for information on filing the Nebraska return.