

## J-1 Scholar Tips for filling out Form 8843

Follow these instructions to complete the 8843 if you were in the USA last year. The purpose of the Form 8843 is to determine if you are considered exempt from filing resident taxes. You are considered exempt if you did not meet the requirements of the [Substantial Presence Test](#).

Use this instruction sheet if you are one of the following categories of the J-1 Exchange Visitor:

- Professor
- Research Scholar
- Short-Term Scholar
- Non-enrolled graduate student (in Research Scholar or Short-Term Scholar categories)

### Follow these steps:

1. Have your passport handy (passports for the past 6 years)
2. Download [Form 8843 with instructions](#)
3. Read the instructions on pages 3 and 4
4. Complete the form electronically

### Top Portion of Form

- First name and initial of middle name(s) –(if you have a middle or middle names)
- Last name (surname)
- US taxpayer identification number – if you have a Social Security Number or ITIN, put that here. Otherwise leave it blank.
- Fill in your address (only if you are NOT filing a tax return)

### Part I – General Information

- 1a Enter your visa type (J) and the date you entered the USA in J status. Use the date of the first J-1 stamp in your passport for the exchange program you were in last year. Use the 'Get Travel History' button on the [Electronic I-94 web page](#) to look this up.
- 1b Enter the same as 1a
- 2 Country of Citizenship (the passport that has your current visa stamp in it)
- 3a Country that issued your passport – same as 2
- 3b Current passport number
- 4a Number of days in the USA during the last 3 years - check your passport for entry and exit dates or use the [Electronic I-94 web page](#)
- 4b Total of values entered in 4a

**Part II – Teachers and Trainees** - J-1 visiting scholars (Research Scholar, Professor, Short-term Scholar) and J-2 dependents complete this section (even if you were not a teacher or trainee).

- 5 Enter 'California Polytechnic State University, San Luis Obispo, CA 93407 805-756-4111'
- 6 Leave blank
- 7 Leave blank for the years you were not in the USA
- 8 **If you were not in the USA** for any part of 2 out of the last 6 years – answer 'No,' and submit this form with your 1040NR tax return. If you did not work, then only submit the Form 8843.

**If you were in the USA** for any part of 2 out of the last 6 years, then review the substantial presence test. If you meet the substantial presence test, then you don't fill out this form and you should be considered a Resident for Tax Purposes. If you are filing a tax return fill out the regular 1040 form instead of the 1040 NR Form. If you did not work the previous year, then you don't have to submit the 1040 or the Form 8843.

**Skip Parts III, IV, and V**

**Sign and date the bottom of page 2**

**Mail the form:**

- **If you had earnings last year** (funds from U.S. sources) and you are filing a tax return (Form 1040NR or Form 1040NR-EZ) attach Form 8843 to it. Mail your tax return by the due date (including extensions) to the address shown in your tax return instructions.
- **If you did not have any earnings last year**, you do not have to file a tax return. Mail Form 8843 to:

Department of the Treasury  
Internal Revenue Service Center  
Austin, TX 73301-0215

Mail by the due date (including extensions) for filing Form 1040NR or Form 1040NR-EZ. Be sure it is postmarked by the deadline date.