

GLACIER GUIDE – Tax Summary Report & Next Steps

To avoid a delay by UC Merced Tax Services in processing your GLACIER documents and forms, please review this GLACIER Tax Summary guide before submitting your forms and documentation via the email provided GLACIER Box Folder link.

Due to US federal tax regulations, we must receive scanned signed paper copies of your forms and photos of your immigration documentation via the Box folder link provided to users in a separate email. We do not accept any GLACIER forms or document copies by US Mail, campus mail, e-mail or fax.

Each number on the sample Tax Summary Report corresponds to an item noted on the next page. If you find errors in the Tax Summary Report, go back to GLACIER and make the appropriate changes. Once the updates are completed, reprint and sign your GLACIER prepared forms.



Tax Summary Report

Summary of Information Entered Into GLACIER™:	
Name: Rufus Bobcat SSN / ITIN: 123-45-6789 Email Address: gsweet@fullerton.edu Country of Tax Residence: Germany Country of Citizenship: Germany CURRENT Immigration Status: F1 Student Original Immigration Status: Immigration Status Expiration: May 22, 2022 1 UID: 87328477 2 UC Path EmplID: 100009999 Student ID (SID): 889659972	2020 - 275 Days 2019 - 360 Days Changed Immigration Status? No Immigration Status Change Date: Date of Entry to U.S.: January 6, 2019 3 Estimated Date of Departure: May 22, 2022
Tax Determinations and Results Based on the data entered, GLACIER has made the following determinations:	
Tax Residency Status: Nonresident Alien for U.S. Tax Purposes	
Residency Status Change Date: July 2, 2024 to Resident Alien	
Residency Status Start Date: January 1, 2024 to Resident Alien	
Residency Status Change Date 2 (if applicable):	
Residency Status Start Date 2 (if applicable):	
Employee Compensation: Wages/Salary	
Applicable Tax Withholding Rate: Single (Monthly) <i>(If Tax Treaty Does Not Apply or Form Is Not Submitted)</i> Exempt	EX
Tax Treaty Exemption Status: Four Calendar Years	
Tax Treaty Time Limit: January 6, 2019 - December 31, 2022	
Tax Treaty Exemption Period:	
Tax Treaty Dollar Limit: \$9,000 per calendar year	
Scholarship/Fellowship: Award	
Applicable Tax Withholding Rate: 14 Percent <i>(If Tax Treaty Does Not Apply or Form Is Not Submitted)</i>	EX
Tax Treaty Exemption Status: Exempt	
Tax Treaty Time Limit: Unlimited Time Period	
Tax Treaty Exemption Period: January 6, 2019 - unlimited	
Tax Treaty Dollar Limit: Unlimited Dollar Amount	
FICA Tax Status: Exempt	FICA Tax Start Date: January 1, 2024
Required Forms and Document Copies Attach the following Forms and Documents to the Tax Summary Report	
<i>Please print, sign and submit with Tax Summary Report</i>	
Required Forms:	
4 Form W-4	5
Form W-8BEN	
Form 8233 - 2020	
Treaty Attachment	
Restrictive Clause Statement(s)	
<i>Please copy and submit with Tax Summary Report</i>	
Required Document Copies:	
Form I-20	
Form I-94/I-94W Card	
Visa Sticker/Stamp (in Passport)	
Certification	
I hereby declare that the information provided by me to University of California, Merced and/or entered into the GLACIER Online Tax Compliance System for purposes of making the tax determinations above is true and correct. If any of the information provided changes or if other relevant information becomes available, I will notify University of California, Merced as soon as possible so that this information and/or my U.S. tax status may be updated.	
6 Signature:	Date:

The information contained on this statement was generated using GLACIER™ Online Tax Compliance System.
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GLACIER GUIDE – Tax Summary Report & Next Steps (Continued)

Tax Summary Report Number References

- 1 – Date of Entry to U.S.
 - This is the **FIRST** time you entered into the U.S. under your **CURRENT visa status**.
- 2 – Immigration Status Expiration
 - This date must be your Work Authorization Expiration date (on the Form I-20/DS-2019 or I-797 it is the permission expiration date to stay in the US OR your degree completion date, whichever comes first).
 - For F-1 visa holders, this date is on your Form I-20.
 - Enter the date where you see the Program End Date OR the "complete studies no later than ____." date (old version of Form I-20).
 - For J-1 visa holders, this date is on your Form DS-2019, line 3.
 - For H1-B/TN visa holders, this date is on your Form I-94 or Employment Authorization Document (EAD card).
 - Enter the "Admit Until Date" from the Form I-94 (Departure Record) OR the "Card Expires Date" from your EAD card).
- 3 – Estimated Date of Departure
 - Due to system limitations this should be the same date as your Immigration Status Expiration date
- 4 - Required Forms (*Note: Your list may vary from the sample Tax Summary Report shown.*)
 - Make sure everything that is listed in this Tax Summary Report section is electronically submitted to UC Merced Tax Services via your email provided Box Folder link.
 - Verify that each document or form has been signed and dated (where appropriate).
 - Make sure to scan both sides of the documents so UC Merced Tax Services receives all the pages.
- 5 – Required Document Copies (*Note: Your list may vary from the sample Tax Summary Report shown.*)
 - Make sure everything that is listed in this Tax Summary Report section is electronically submitted to UC Merced Tax Services via your email provided Box Folder link.
 - If you have an EAD card, provide a scanned copy in your Box folder for UC Merced Tax Services.
 - Note: This will not be listed on the Tax Summary Report, but it is needed.
 - If the UC Merced Payroll Office does not have your Social Security Number, please make an appointment with Payroll Services hiring intake staff to provide them your Social Security Card. If you do not have a Social Security Card, this does not apply at this time.
- 6 – Glacier Tax Summary Report
 - Make sure that you have signed and dated (bottom of page 1) of the report. Include the signed Tax Summary Report with all your electronically submitted documents to UC Merced Tax Services.

Need Additional Assistance?

Contact UC Merced Tax Services at tax@ucmerced.edu.