



# GLACIER STEP-BY-STEP GUIDE

**Non-Resident Alien Tax Compliance System**



# WHAT IS GLACIER?

GLACIER is a secure online tax compliance system that foreign individuals use to provide immigrant and tax data to Oklahoma State University. GLACIER helps determine tax residency, withholding rates, and federal income tax treaty eligibility; it also manages paperwork, prepares tax forms and required statements. Foreign nationals receiving payments from the University are required to have a GLACIER record.

A foreign national is an individual who is not a citizen of the United States (US), and for US federal income tax purposes, is classified by the Internal Revenue Service (IRS) as either resident or nonresident aliens.

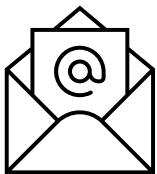


# WHO SHOULD USE THIS GUIDE?

All foreign nationals who are:

- ✓ **Student Employees**
  - ✓ Graduate Assistants
  - ✓ Interns
  - ✓ Hourly Employees





**You should have received an e-mail from [support@online-tax.com](mailto:support@online-tax.com)**  
**Subject: Payments from Oklahoma State University**  
***(see below example)***

Dear [Employee],

The Internal Revenue Service (IRS), the U.S. government tax authority, requires Oklahoma State University to collect information from all non-U.S. citizens and non-permanent resident aliens to determine the appropriate rate of tax withholding and reporting for any payments that may be made to such individuals.

You have received this email because you may receive payments from Oklahoma State University. For your convenience, Oklahoma State University allows you to provide the required information and complete the necessary forms via the Internet from any web-accessed computer using the GLACIER Online Tax Compliance System. The information and forms must be provided prior to any payment so that the correct tax withholding and reporting decisions are made; failure to do so may result in the maximum rate of tax withholding and/or delayed payment. Information provided to GLACIER is transmitted and stored securely and will only be used by Oklahoma State University for purposes of tax withholding and reporting.

You must access GLACIER and provide the requested information within 10 days of receiving this message. If you do not provide the requested information within 10 days, the maximum amount of U.S. tax will be withheld from any payments made to you.

To login to GLACIER, follow the steps below:

Click on the following web link: <http://www.online-tax.net>; if the link does not automatically open, simply open your Internet Browser (preferably Internet Explorer) and enter the website address <http://www.online-tax.net>.

Click on the GLACIER logo to enter the website.

*At the login screen, enter your temporary access information from below; you will be required to select a new UserID and Password at the time of first access to GLACIER.*

UserID: [redacted]  
Password: [redacted]

If you have any questions or need additional information about why you have been asked to use GLACIER, please contact me.

Thank you and have a great day.

Trisha Lyonsi  
Oklahoma State University  
[tax@okstate.edu](mailto:tax@okstate.edu) or 1-800-744-6888

*Note: This email might be directed to your spam/junk folder. Be sure to check there if you don't see it in your inbox.*

## STEP 1:

**Click on the GLACIER web link.**

**Make note of the temporary User ID and Password provided in the email. You will need them to log in to the Glacier system in step 3.**

Dear [Employee],

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UserID:   
Password: 

If you have any questions or need additional information about why you have been asked to use GLACIER, please contact me.

Thank you and have a great day.

Trisha lyonsi  
Oklahoma State University  
[tax@okstate.edu](mailto:tax@okstate.edu) or 

*Note: This email might be directed to your spam/junk folder. Be sure to check there if you don't see it in your inbox.*

**STEP 2:**

**Click on the Glacier image or “Login Now” link.**



Click on the Image Above to Enter GLACIER  
or [Login Now](#)

Please direct any questions about using GLACIER to: [support@online-tax.net](mailto:support@online-tax.net)

### STEP 3:

Use the temporary User ID and Password from the support@online-tax.com e-mail to log in.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                  |                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-------------------------------------------------------------------------------------|
| <b>GLACIER</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Nonresident Alien Tax Compliance |  |
| <p>Welcome to <b>GLACIER</b> Nonresident Alien Tax Compliance</p> <p>To access <b>GLACIER</b>, please enter the following information:</p> <p>UserID:<br/><input type="text"/></p> <p>Password:<br/><input type="password"/></p> <p><a href="#">Forgot Login?</a><br/>If you have forgotten your UserID and/or Password, please select <b>Forgot Login?</b> An email will be sent to the email address in your <b>GLACIER</b> Individual Record.</p> <p><small><b>GLACIER</b> supports all current versions of modern browsers on all major computing platforms. Javascript must be enabled to use <b>GLACIER</b>. Please direct any questions about using <b>GLACIER</b> to: <a href="mailto:support@online-tax.net">support@online-tax.net</a> <b>GLACIER</b> is a product of Arctic International LLC</small></p> |                                  |                                                                                     |
| <div>Submit</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                  |                                                                                     |

## STEP 4:

**You will be prompted to set up a new User ID and Password.**

- The User ID must be 8-30 alphanumeric characters.
- The Password must be 8-20 alphanumeric characters.

| GLACIER | Nonresident Alien Tax Compliance                                                                                                                                                                                                         |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         | <b>Update GLACIER Login Information</b>                                                                                                                                                                                                  |
|         | <b>Individual Record Account Creation Successful!</b>                                                                                                                                                                                    |
|         | <b>Please create your own new UserID and Password for all future logins to GLACIER.</b>                                                                                                                                                  |
|         | <b>Please choose a different UserID</b>                                                                                                                                                                                                  |
|         | <div><b>UserID:</b> (Must be 8-30 alphanumeric characters)<br/><input type="text"/></div> <div><b>Password:</b> (Must be 8-20 alphanumeric characters)<br/><input type="password"/><br/><input type="password"/> re-enter password</div> |



## STEP 5:

Log in using your new User ID and Password.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| <b>GLACIER</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Nonresident Alien Tax Compliance |
| <p>Welcome to <b>GLACIER</b> Nonresident Alien Tax Compliance</p> <p>To access <b>GLACIER</b>, please enter the following information:</p> <p>UserID:<br/><input type="text"/></p> <p>Password:<br/><input type="password"/></p> <p><a href="#">Forgot Login?</a><br/>If you have forgotten your UserID and/or Password, please select <b>Forgot Login?</b> An email will be sent to the email address in your <b>GLACIER</b> Individual Record.</p> <p><small><b>GLACIER</b> supports all current versions of modern browsers on all major computing platforms. Javascript must be enabled to use <b>GLACIER</b>. Please direct any questions about using <b>GLACIER</b> to: <a href="mailto:support@online-tax.net">support@online-tax.net</a> <b>GLACIER</b> is a product of Arctic International LLC</small></p> |                                  |
| <div>Submit</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                  |



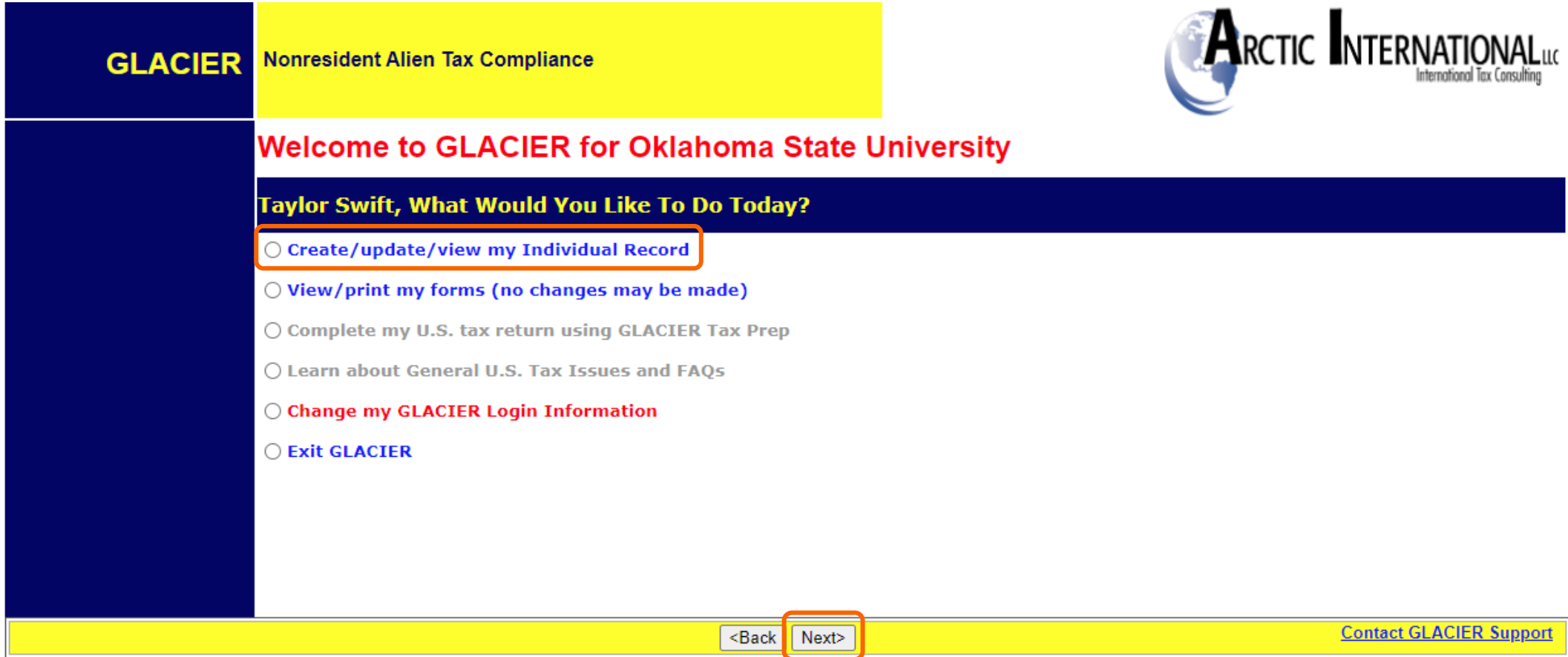
## STEP 6:

The User Agreement must be accepted by clicking the “I Accept” button. Checking the box allows us to provide your tax documents electronically. We strongly recommend keeping this box checked.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                  |                                                                                     |
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| <b>GLACIER</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Nonresident Alien Tax Compliance |  |
| <b>User Agreement</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                  |                                                                                     |
| <ul style="list-style-type: none"><li>• <b>GLACIER</b> is an online tax compliance software system designed to assist Oklahoma State University to quickly, efficiently and securely collect information necessary to determine your U.S. tax residency status.</li><li>• <b>GLACIER</b> will ask you a series of questions - all of which are necessary to determine whether tax must be withheld from payments made to you.</li><li>• The entire process should take approximately 15-20 minutes, depending on your individual situation. Please have your passport and immigration documents available before you begin.</li><li>• When you have finished entering all of the required information into <b>GLACIER</b>, you will be prompted to print, sign and submit your forms. Please read the instruction document accompanying your forms; it will provide the address to which your forms must be submitted.</li><li>• All information entered into <b>GLACIER</b> is securely transmitted via TLS encryption and is securely maintained. Your information will be used only by Oklahoma State University in connection with U.S. tax rules, regulations, and laws.</li><li>• Form 1042-S is issued to certain individuals to report certain types of income; you may or may not be eligible to receive a Form 1042-S. If a Form 1042-S is applicable to you, Oklahoma State University may choose to provide Form 1042-S to you electronically and notify you via email with instructions to log into your <b>GLACIER</b> Individual Record to view and print the form. Because providing the form to you electronically is more convenient for you and administratively efficient for Oklahoma State University, individuals who are eligible to receive Form 1042-S may do so via <b>GLACIER</b>. If you cannot or will not accept Form 1042-S electronically, please uncheck the box below; the form will be printed and mailed to you.</li></ul> <p><input checked="" type="checkbox"/> Oklahoma State University may provide my Form 1042-S (if any) to me electronically via the GLACIER Online Tax Compliance System.</p> |                                  |                                                                                     |
| <div>I Decline   I Accept</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                  |                                                                                     |

## STEP 7:

Select “Create/Update/View my Individual Record”. Then click Next at the bottom of the screen.



**GLACIER** Nonresident Alien Tax Compliance

**ARCTIC INTERNATIONAL LLC**  
International Tax Consulting

**Welcome to GLACIER for Oklahoma State University**

**Taylor Swift, What Would You Like To Do Today?**

- ☐ Create/update/view my Individual Record
- ☐ View/print my forms (no changes may be made)
- ☐ Complete my U.S. tax return using GLACIER Tax Prep
- ☐ Learn about General U.S. Tax Issues and FAQs
- ☐ Change my GLACIER Login Information
- ☐ Exit GLACIER

<Back Next> [Contact GLACIER Support](#)

## STEP 8:

Choose your employment type. Then click Next.



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Nonresident Alien Tax Compliance

### Relationship

What is your relationship with Oklahoma State University?

Please check all that apply:

- ☐ Student Hourly Employee
- ☐ Graduate Teaching Asst or Graduate Research Asst
- ☐ Post Doc
- ☐ Professional Employee (Any Non-student Position)
- ☐ Scholarship or Fellowship Recipient
- ☐ Guest Speaker
- ☐ Consultant
- ☐ Artist/Performer
- ☐ Industrial Royalty Recipient
- ☐ Copyright Royalty Recipient
- ☐ Other

If you are working an hourly job, select  
“Student Hourly Employee”

(For example, dining services.)

If you have an assistantship select

“Graduate Teaching Asst or Graduate Research Asst.”

You should not select any other options.

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## STEP 9:

Choose the type of payments that you will receive.

Check the box next to “Salary or Wages”, and then click Next.



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### Income Type

**What type of payment(s) will you receive from Oklahoma State University?**

Please check all that apply:

☒ Salary or Wages

☐ No Income (I DO NOT currently receive payments from Oklahoma State University)

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## STEP 10:

### Personal Information

Enter your Personal Information:

Name, e-mail address, SSN/ITIN, OSU ID (Banner ID). Then click Next.

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**ARCTIC INTERNATIONAL LLC**  
International Tax Consulting

### Personal Information

Please Enter and/or Verify the Following Information

\* Indicates Required Field

First Name/Personal Name \*: Taylor

Middle Name:

Last Name/Surname/Family Name \*: Swift

Email Address: trisha.lyonsi@okstate.edu

U.S.-Issued Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) 111111112

If you have a Social Security Number (SSN), enter the number. Verify the number is correct.

OR

(Employees and Student Workers)

☐ I do NOT have a U.S.-issued SSN or ITIN

☐ I have applied for an SSN, and I have not yet received the number

(Guest Speakers, Consultants, Non-Service Scholarship/Fellowship and Royalty Recipients)

☐ I do NOT have a U.S.-issued SSN or ITIN

☐ I have applied for an ITIN, and I have not yet received the number

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Foreign Tax Identification Number (if any; otherwise, leave blank) :

OSU ID (Banner ID):

Verify that your OSU ID is correct and update if it is not.

If you have applied for a Social Security Number (SSN) then select that option. Make sure to add the SSN to your record after receiving it and notify your department.

Do not enter any information related to an ITIN or Foreign Tax Identification number.

**STEP 11:** Note: Not everyone will see this screen.

**For Your Information**

If you indicated on the previous screen that you recently applied for a Social Security Number (SSN), then you will see this message. Click next to continue.

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**For Your Information**

Based on the information provided, you have indicated that you have recently or will soon apply for a U.S.-issued Social Security Number ("SSN"). Your Institution is required to collect your ("SSN") from you. To avoid any delay in payment, you MUST provide your SSN to the Institution Administrator IMMEDIATELY upon receipt of the number from the Social Security Administration. Please be advised that any payments may be delayed until your SSN is provided to the Institution Administrator.

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## STEP 12:

### U.S. Address

Enter the US address where you currently live. Then click Next.

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**U.S. Address**

Please enter your U.S. mailing address and telephone numbers

**Street Address 1:**

**Street Address 2:**

**City:**

**State:**

**Zip/Postal Code:**  
(xxxxx or xxxxx-xxxx)

**Home Phone Number:**  
(xxx-xxx-xxxx)

**Work/Department Phone Number:**  
(xxx-xxx-xxxx)

☐ I DO NOT currently live in the U.S. / I DO NOT have a U.S. mailing address

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Enter your Stillwater address. If you do not have a Stillwater address you may enter your department or the International Students and Scholars address.

- Do not enter an out-of-town address.
- You do not need to enter a phone number.
- Do not check the box that says “I do not currently live in the U.S.”

## STEP 13:

### Permanent Foreign Address

Enter your permanent foreign address. Then click Next.



| GLACIER                                                     | Nonresident Alien Tax Compliance                      |
|-------------------------------------------------------------|-------------------------------------------------------|
| <b>Permanent Foreign Address</b>                            |                                                       |
| <b>Please enter your permanent foreign mailing address:</b> |                                                       |
| <small>* Indicates Required Field</small>                   |                                                       |
| <b>Street Address 1*:</b>                                   | <input type="text"/> (Do Not enter a P.O. Box number) |
| <b>Street Address 2:</b>                                    | <input type="text"/> (Do Not enter a P.O. Box number) |
| <b>City*:</b>                                               | <input type="text"/>                                  |
| <b>Postal Code:</b>                                         | <input type="text"/>                                  |
| <b>Country*:</b>                                            | <input type="text" value="Please Select"/>            |
| <b>Province:</b>                                            | <input type="text" value=""/> (Canada Only)           |
| <div>&lt;Back   <b>Next&gt;</b>   Online Help</div>         |                                                       |

*Enter your Permanent Foreign Address. All individuals present in the U.S. under a nonimmigrant immigration status (e.g., F, J, M, Q, H-1B, TN, B, A, G) MUST include an address OUTSIDE the U.S. for which they consider to be their Permanent Foreign Address. You may wish to use the address of a parent or relative, if applicable. If you are a Permanent Resident Alien from China, please include your last known address in China.*

Enter your permanent address used prior to arriving in the United States. This is an address outside the United States that is your permanent address.

## STEP 14:

### Country of Citizenship / Tax Residence

Select your country of Citizenship/Tax Residency from the dropdowns. Then click Next.

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International Tax Consulting

**Country of Citizenship / Tax Residence**

Please select the appropriate country:

**Country of Citizenship:**  
Mexico

*If you are a citizen of two countries, please select the country under whose documents you entered the U.S. If you are a dual citizen of the U.S. and another country, for U.S. tax purposes, you are treated as a citizen of the U.S. Please contact the Institution Administrator as soon as possible.*

**Country of Tax Residence:**  
Mexico

*Although you may pay tax in the U.S., your Country of Tax Residence CANNOT be the U.S. Your Country of Tax Residence is generally the country to which you owe tax on your "worldwide" income. Typically, your Country of Tax Residence is the same as your Country of Permanent Residence; however, if you have lived in a country other than your Country of Permanent Residence immediately before coming to the U.S. to study/work, you may have established Tax Residency in that country.*

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Country of Citizenship – This should be the country you are a citizen of. If you hold dual citizenship, then it is the country whose immigration documents you used when entering the country.

Country of Tax Residence – This is the country that you considered your permanent home just prior to arriving in the United States. It may or may not be the same as your country of citizenship.

## STEP 15:

### Immigration Status

Enter your Sponsoring Institution and U.S. Immigration Status. Then click Next.

**GLACIER** Nonresident Alien Tax Compliance



### Immigration Status

**What is the sponsoring institution?**

Please indicate the Institution that sponsored (or will sponsor) your current U.S. immigration status (as indicated on your official immigration documentation).

☒ Oklahoma State University

☐ Other Institution

☐ No Sponsoring Institution Required (e.g., B-1, B-2, WB, WT, etc)

**What is your current U.S. immigration status?**

Please indicate your current U.S. immigration status. If you have not yet arrived in the U.S., indicate your anticipated immigration status; if you have already returned to your home country, indicate the immigration status on which you were last present in the U.S.

Current Immigration Status

If you are in J status, select the primary purpose as indicated in Section 4 of Form DS-2019.  
If you are from Canada and do NOT have a visa or Form I-94, select "B-1 Visitor".  
If your immigration status is not listed, select "Other Immigration Status or Purpose".

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 U.S. Customs and Border Protection  
Securing America's Borders

Most Recent I-94

---

Admission (I-94) Record Number : 0000000000  
Most Recent Date of Entry : 2021 September 1

Class of Admission **F1**  
Admit Until Date **D/S**

Details provided on the I-94 Information form:

Last/Surname : Husky  
First (Given) Name : Dubs  
Birth Date : 2000 January 1  
Passport Number : 123456789  
Country of Issuance : Utopia

[Get Travel History](#)

**SAMPLE  
I-94**

Select the immigration status you used when arriving in the U.S.  
This should be listed on your I-94 as "Class of Admission".  
(Examples of student status can include F-1 student, J1 Student, etc.)

STEP 16:

Time Spent in the U.S.

Enter your Original Date of Entry, Date Permission To Stay, and your Departure Date. Then click Next.

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Time Spent in the U.S.

How long will you be in the U.S. during this visit?

Original (or anticipated) Date of Entry to the U.S.:

DD

MM

YYYY

Date Permission to stay in the U.S. Expires

DD

MM

YYYY

Estimated or Actual Date of Final Departure from the U.S.:

DD

MM

YYYY

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- Original(or anticipated) Date of Entry to the U.S.:
- This is the date you first came to the US with your current immigration status.
  - If this is your first time, enter your recent arrival date.
  - Transfer students: Enter the date you arrived to attend your previous school.
  - You can find this date on your I-94 document.
- Date Permission to Stay in the U.S. Expires:
- This is the program end date listed on your I-20 or DS-2019 form.
- Estimated or Actual Date of Final Departure from the U.S.:
- It should be the same date you entered for "Permission to Stay" expiration.
  - Both dates come from the program end date on your I-20/DS-2019 form.

Immigration Document Extension?

If your I-20/DS-2019 is extended, please notify Tax & Compliance Services at [tax@okstate.edu](mailto:tax@okstate.edu). They will update your Glacier record with the new dates. They will also inform Payroll Services to avoid any issues with your pay.



U.S. Customs and Border Protection

Securing America's Borders

Most Recent I-94

Admission (I-94) Record Number : 0000000000

Most Recent Date of Entry: 2021 September 1

Class of Admission: F-1

Admit Until Date: D/S

Details provided on the I-94 information form:

Last/Surname : Husky

First (Given) Name : Dubs

Birth Date : 2000 January 1

Passport Number : 123456789

Country of Issuance : Utopia

Get Travel History

SAMPLE I-94

CERTIFICATE OF ELIGIBILITY FOR EXCHANGE VISITOR STATUS (J-NONIMMIGRANT)

U.S. Department of State

EXPIRES: 07-31-2014

ESTIMATED BURDEN TIME: 45 min

\*See Page 2

1. Surname/Primary Name: Sample

Given Name: John

Gender: MALE

N0000147766

Date of Birth (mm-dd-yyyy): 12-09-1980

City of Birth: Anytown

Country of Birth: IRELAND

Citizenship Country Code: EI

Citizenship Country: IRELAND

Legal Permanent Residence Country Code: EI

Legal Permanent Residence Country: IRELAND

Position Code: 215

Position: UNIVERSITY UNDERGRADUATE STUDENTS

Primary Site of Activity: Exempt from Pre-placement

2. Program Sponsor: Acme Trainee

Participating Program Official Description: TRAINEE

Program Number: P-4-16511

J-1

Purpose of this form: Begin new program; accompany

3. Form Covers Period:

From (mm-dd-yyyy): 06-02-2015

To (mm-dd-yyyy): 05-15-2016

4. Exchange TRAINEE

Subject/Field: 04.05

5. During the period covered by this form, the total estimated financial support:

Current Program Sponsor funds : \$5,000.00

Personal funds : \$3,000.00

Total : \$8,000.00

Department of Homeland Security

U.S. Immigration and Customs Enforcement

I-20, Certificate of Eligibility for Nonimmigrant Student Status

OMB NO. 1653-0038

SEVIS ID: N0004720633

SURNAME/PRIMARY NAME: Sample

GIVEN NAME: Student

Class of Admission: F-1

PREFERRED NAME: Student Sample, II

PASSPORT NAME: LAOS

COUNTRY OF BIRTH: LAOS

COUNTRY OF CITIZENSHIP: LAOS

ADMISSION NUMBER: 04 MAY 1985

LEGACY NAME: ACADEMIC AND LANGUAGE

FORM ISSUE REASON: CONTINUED ATTENDANCE

SCHOOL INFORMATION

SCHOOL NAME: SEVP School for Advanced SEVIS Studies

SCHOOL ADDRESS: 9002 Nancy Lane, Ft. Washington, MD 20744

SCHOOL OFFICIAL TO CONTACT UPON ARRIVAL: Helene Robertson

SCHOOL CODE AND APPROVAL DATE: BAL214F4444000

PDSD: 03 APRIL 2015

PROGRAM OF STUDY

EDUCATION LEVEL: BACHELOR'S

MAJOR 1: History and Philosophy of Science and Technology 54.0104

MAJOR 2: None 00.0000

PROGRAM ENGLISH PROFICIENCY: Required

ENGLISH PROFICIENCY NOTES: Student is proficient

EARLIEST ADMISSION DATE: 04 APRIL 2016

START OF CLASSES: 01 JUNE 2016

PROGRAM START/END DATE: 04 MAY 2016 - 30 MAY 2020

20

## STEP 17:

### Immigration Status

**If you have not changed your immigration status since arriving in the United States, then select the first option “I have not changed my immigration status.”**

If you entered the United States and then filed a change of status in the United States through USCIS without leaving the United States, then select the second option “After entering the U.S. for this visit, I changed my immigration status.” (For example, if you entered under the F-2 status and then filed a change of status through USCIS without leaving the U.S. and received an approval you would select this option. However, if you exited the U.S. and re-entered the country under another status do not select this option.)

**Then click Next.**

**GLACIER** Nonresident Alien Tax Compliance

**Immigration Status**

**Have you changed your immigration status since you arrived in the U.S. for this visit?**

☒ My current immigration status is the SAME as the immigration status under which I originally entered the U.S. for this visit--I have NOT changed my immigration status.

☐ My current immigration status is DIFFERENT than the immigration status under which I originally entered the U.S. for this visit--After entering the U.S. for this visit, I changed my immigration status.

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**ARCTIC INTERNATIONAL LLC**  
International Tax Consulting

*\*This screen can be confusing if you have had status changes. So, if you are unsure how to answer this question, you can reach out to Glacier Support at [Support@online-tax.net](mailto:Support@online-tax.net) or OSU Tax & Compliance Services at [tax@okstate.edu](mailto:tax@okstate.edu).*

STEP 18: Note: Not everyone will see this screen.

Immigration Status

If you indicated on the previous screen that your immigration status has changed since you entered the U.S. for your current visit, this screen will appear. Enter your previous immigration information here.

GLACIER

Nonresident Alien Tax Compliance



Original Immigration Status

When did you change your immigration status?

☒ I have changed my immigration status **ONLY ONE TIME** since I originally entered the U.S. for this visit.  
(for example, you originally entered the U.S. for this visit as an F-1 Student on August 1, 2020. On September 22, 2023, while remaining in the U.S., your immigration status changed to H-1B.) DO NOT COMPLETE YELLOW SHADED AREA

☐ I have changed my immigration status **MORE THAN ONE TIME** since I originally entered the U.S. for this visit.  
(for example, you originally entered the U.S. for this visit as a B-2 Tourist on May 25, 2020. On August 1, 2020, while remaining in the U.S., you changed your immigration status to F-1 Student. Then, on September 22, 2023, while remaining in the U.S., your immigration status changed to H-1B.) COMPLETE YELLOW SHADED AREA

|                                                         |  |                     |
|---------------------------------------------------------|--|---------------------|
|                                                         |  |                     |
| I Originally Entered the U.S. on:                       |  | January 1, 2024     |
|                                                         |  |                     |
| I Originally Entered the U.S. Under Immigration Status: |  | Please Select       |
|                                                         |  |                     |
| I Changed My Original Immigration Status on:            |  | DD MM YYYY          |
|                                                         |  |                     |
| I Again Changed My Immigration Status to:               |  | Please Select       |
|                                                         |  |                     |
| The SECOND TIME I Changed My Immigration Status on:     |  | DD MM YYYY          |
|                                                         |  |                     |
| My Current Immigration Status is:                       |  | J1-Research Scholar |

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Online Help

STEP 19:

Days Present In the U.S.

If you just arrived in the U.S. for this visit, then you will leave this box blank.

If you have left the U.S. since your arrival date of your current status, enter the number of days you were outside the U.S.

Note: Do not enter “0” in the ‘days not present’ box.



|         |                                                                                                                                                                                                                                                            |                                                    |                                                                              |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------------------------------------------------------------------|
| GLACIER | Nonresident Alien Tax Compliance                                                                                                                                                                                                                           |                                                    |                                                                              |
|         | Days Present In the U.S.                                                                                                                                                                                                                                   |                                                    |                                                                              |
|         | How long have you been present in the US?                                                                                                                                                                                                                  |                                                    |                                                                              |
|         | Following is a SUMMARY of the TOTAL NUMBER OF DAYS you may have been present in the U.S. based on your date of arrival. Please complete the boxes below to indicate any days YOU LEFT the U.S. to return to your home country or to visit a third country. |                                                    |                                                                              |
|         | Calendar Year                                                                                                                                                                                                                                              | Immigration Status Held During Each Calendar Year  | Estimated Total Number of Days Present in the U.S. During each Calendar Year |
|         | 2024                                                                                                                                                                                                                                                       | F1-Student                                         | 173 Days                                                                     |
|         |                                                                                                                                                                                                                                                            | Less <input type="text"/> Days NOT present in U.S. |                                                                              |
|         |                                                                                                                                                                                                                                                            |                                                    |                                                                              |
|         |                                                                                                                                                                                                                                                            |                                                    |                                                                              |

STEP 20:

Days Present In the U.S.

If you have previously visited the US under any visa type, click the button “I have previously visited the U.S.” and use the dropdowns to indicate year, immigration status and number of days you were present.

Have you ever been to the U.S. PRIOR to this visit?

☐ This is the FIRST time I have ever been to the U.S. (for any reason, under any immigration status).

☒ I have previously visited the U.S. (information regarding all PRIOR visits MUST be entered below).

For each CALENDAR YEAR between 1986 and your date of arrival that you were previously present in the U.S., please select the calendar year of each Prior Visit and the corresponding Immigration Status and Total Number of Days associated with each Immigration Status. You MUST include ALL Prior Visits to the U.S.

DO NOT include in the boxes below any information about your current visit as shown above.

| ENTER<br>Calendar Year<br>(the years do not<br>need to be<br>entered in<br>chronological<br>order) | Immigration Status Held<br>During Each Calendar Year<br>(If you held more than one Immigration Status during the a Calendar year, enter each<br>Immigration Status separately) | ENTER the Approximate<br>Total Number of Days<br>Present<br>in the US During each<br>Calendar Year |
|----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| 2019                                                                                               | B-2 Tourist                                                                                                                                                                    | 60 Days                                                                                            |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |
| Please Select                                                                                      | Please Select                                                                                                                                                                  | Days                                                                                               |

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Online Help

Please answer if you have ever visited the U.S. for ANY reason in prior years. You may wish to refer to your I-94 travel history if you do not remember each visit. You can access your I-94 travel history at [www.cbp.gov](http://www.cbp.gov).

Include all visits going back to 1986. If you run out of space, you can upload a supplemental list with your tax summary report to your UKG portal.

STEP 21:

Tax Residency Status Summary

Please review this screen for accuracy. Then click Next.

Note: If you need to make any changes to your Tax Residency Status Summary page, click the Back button and make the necessary adjustments.

GLACIER

Nonresident Alien Tax Compliance



Tax Residency Status Summary

How long have you been present in the U.S.?

Following is a SUMMARY of the TOTAL Number of Days you have indicated you were present in the U.S. Please ensure that the information below is correct. If you need to add additional Prior Visits and/or subtract days that you left the U.S., click on <BACK to re-enter or update the information.

| Calendar Year | Immigration Status Held During Each Calendar Year | Approximate Total Number of Days Present in the U.S. During each Calendar Year |
|---------------|---------------------------------------------------|--------------------------------------------------------------------------------|
| 2024          | F1 Student                                        | 173                                                                            |
| 2019          | B2 Tourist                                        | 60                                                                             |

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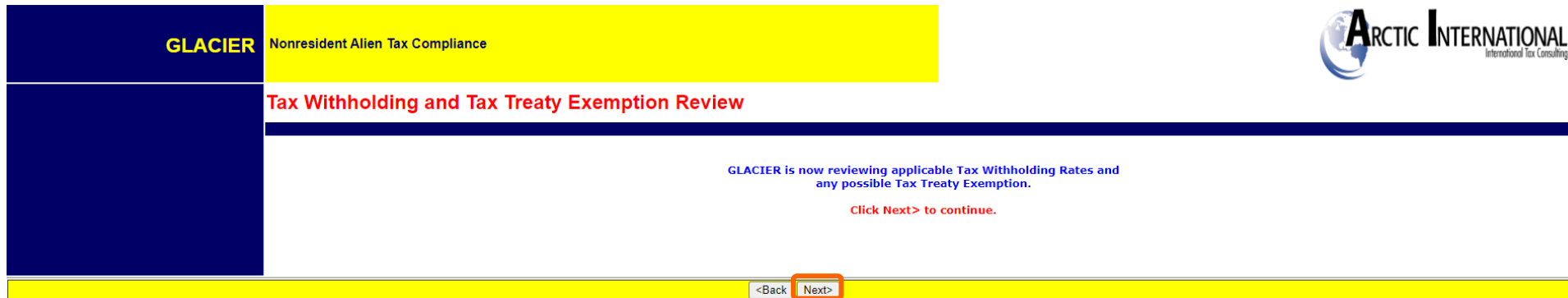
Online Help

## STEP 22:

### **Tax Withholding and Tax Treaty Exemption Review**

**Click Next to continue.**

Glacier will check to see if there is an existing tax treaty between the U.S. and your country of tax residency.



The screenshot shows the Glacier software interface. On the left is a dark blue sidebar with the word "GLACIER" in yellow. The main area has a yellow header bar with "Nonresident Alien Tax Compliance" in black. Below this is a red header bar with "Tax Withholding and Tax Treaty Exemption Review" in white. The main content area is white and contains the text: "GLACIER is now reviewing applicable Tax Withholding Rates and any possible Tax Treaty Exemption." followed by "Click Next> to continue." in red. At the bottom is a yellow bar with "<Back" and "Next>" buttons. The "Next>" button is highlighted with a red border. In the top right corner, there is a logo for "ARCTIC INTERNATIONAL LLC" with the tagline "International Tax Consulting".

For more information regarding OSU's facilitation of tax treaties, see [“Can OSU Facilitate a Tax Treaty?”](#) on our website.

[https://adminfinance.okstate.edu/tax/international\\_tax-tax-treaty-information.html](https://adminfinance.okstate.edu/tax/international_tax-tax-treaty-information.html)

STEP 23:

The Tax Treaty Exemption Verification screen will vary depending on your provided information.

GLACIER

Nonresident Alien Tax Compliance





... For Your Information

Based on the information provided, GLACIER has placed a "HOLD Treaty" on your Individual Record. You may or may not be eligible to claim an exemption from tax based on an income tax treaty; however, such determination must be made by the Institution Administrator. You may continue with the completion of your tax forms; however, GLACIER will not allow any tax treaty exemption at this time and will complete all forms with the maximum rate of tax withholding. To determine whether you qualify to claim an income tax treaty exemption, you must contact the Institution Administrator as soon as possible. Please be prepared to provide your passport and immigration documentation to the Institution Administrator for review.

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GLACIER

Nonresident Alien Tax Compliance



Tax Treaty Exemption Verification

GLACIER has made the following tax treaty exemption determination

Based on the information provided, you do not qualify for an exemption from tax withholding for your [Salary or Wages](#).

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Online Help

GLACIER

Nonresident Alien Tax Compliance



Tax Treaty Exemption Verification

GLACIER has made the following tax treaty exemption determination

Review of Income Tax Treaty Exemption for Salary or Wages

Based on the information entered, the U.S.- Indonesia Income Tax Treaty allows an exemption from tax withholding for your Salary or Wages.

Article 19(1) of the U.S.- Indonesia Income Tax Treaty allows an exemption for Five Calendar Years for the Salary or Wages. Therefore, the possible tax treaty exemption period is January 1, 2024 - December 31, 2027.

The possible tax treaty exemption applies to \$2,000 per calendar year of your Salary or Wages.

Would you like to claim an exemption from tax withholding?

☐ Yes, I would like to claim an exemption from tax withholding for the **Salary or Wages**; I understand that I must meet any qualifications listed above.

☐ No, I DO NOT want to claim an exemption from tax withholding; I understand tax will be withheld from the **Salary or Wages**.

Note: A nonresident alien who receives income in the U.S. generally must pay tax and report that income in both the U.S. and his or her home country. If you are eligible and do claim a tax treaty exemption, you must still file a U.S. federal tax return. Also, you may be required to report and/or pay additional tax on your U.S. income in your home country; you should check with the tax authorities in your home country for any applicable tax reporting or payment requirements.

[Show Treaty Text](#)

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Online Help

Note: Make sure to add your SSN once it becomes available. After adding your SSN, Glacier may or may not generate tax treaty documents.

To learn about the tax treaty process at OSU, visit [https://adminfinance.okstate.edu/tax/international\\_tax-tax-treaty-information.html](https://adminfinance.okstate.edu/tax/international_tax-tax-treaty-information.html).

## STEP 24:

### Tax Summary Report

This is a summary of your tax residency. Click next to continue.

| GLACIER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Nonresident Alien Tax Compliance |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                  |
| <b>Tax Summary Report</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                  |
| Based on the information provided, GLACIER has made the following determination                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                  |
| <p>Name: = Swift, Taylor</p> <p>Tax Residency Status: = Nonresident Alien for U.S. Tax Purposes</p> <p>Tax Residency Status Change Date: = July 3, 2029 to Resident Alien</p> <p>Tax Residency Status Start Date: = January 1, 2029 to Resident Alien</p> <p>Tax Treaty Exemption Status (Compensation): = Taxable</p> <p>Tax Treaty Time Limit (Compensation): = Not Applicable</p> <p>Tax Treaty Exemption Period (Compensation): = Not Applicable</p> <p>Tax Treaty Dollar Limit (Compensation): = Not Applicable</p> <p>Applicable Tax Withholding Rate (If Tax Treaty Not Applicable or Forms Not Submitted) (Compensation): = Single (Monthly)</p> <p>FICA Tax Status: = Exempt</p> <p>FICA Tax Start Date: = January 1, 2029</p> <p>Forms Required: = Tax Summary Report<br/>Form W-4<br/>State Tax Form</p> <p>Document Copies Required: = I-94 / I-94W Card<br/>Visa Sticker (in Passport)<br/>Form I-20</p> |                                  |
| <p>&lt;Back   <b>Next&gt;</b>   Online Help</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                  |

## STEP 25:

### View and Print Forms

Click the “PREVIEW Forms” button to download a PREVIEW Copy of your forms. Review your forms for accuracy.

If the forms are correct, then click on the “CERTIFY and SIGN Forms” button. (Do not select until you have reviewed all forms.)

When finished click Next.

The image displays two side-by-side screenshots of the GLACIER Nonresident Alien Tax Compliance interface, showing the 'View and Print Forms' and 'Signing Your Forms' sections.

**Left Screenshot (View and Print Forms):**

- Header:** GLACIER Nonresident Alien Tax Compliance
- Section:** View and Print Forms
- Message:** GLACIER has generated the following Tax Summary Report and Forms
- Your Forms:**
  - Tax Summary Report
  - Form W-4
  - State Tax Form
  - Tax Information
- Signing Your Forms:**
  - OPTION 1:** You may choose to digitally sign your forms within GLACIER - to do so:
    - select "PREVIEW Forms" and review each form prepared by GLACIER to ensure that the information is accurate and spelled correctly based on the information you entered on the prior screens;
    - if the information is correct, select "CERTIFY and SIGN Forms"; if, instead, the information needs to be updated, select "Back" to return to the data entry screens, update the data, then repeat this process;
    - after reviewing the forms in ADOBE ACROBAT READER, if the information is correct, you must close the window showing the forms – DO NOT close your browser; and
    - select "Next" to continue.
- Buttons:** PREVIEW Forms (highlighted)

**Right Screenshot (Signing Your Forms):**

- Header:** GLACIER Nonresident Alien Tax Compliance
- Section:** View and Print Forms
- Message:** GLACIER has generated the following Tax Summary Report and Forms
- Your Forms:**
  - Tax Summary Report
  - Form W-4
  - State Tax Form
  - Tax Information
- Signing Your Forms:**
  - You MUST** digitally sign your forms within GLACIER:
  - By selecting "CERTIFY and SIGN Forms", I certify:
    - I am Taylor Swift;
    - my email address is trisha.iyonsi@okstate.edu;
    - I have reviewed the forms provided by GLACIER;
    - the forms are correct based on the information that I entered into GLACIER; and
    - after you have digitally signed the forms, select "Next" to continue.
- Buttons:** CERTIFY and SIGN Forms (highlighted), (Do not select until you have reviewed all forms.)
- Footer:** Please note Adobe Acrobat Reader is required. (GET Adobe Acrobat Reader button), Trouble Printing Forms / Forms Come Up Blank? Select Online Help, <Back Next> (Next button highlighted), Online Help

Note: You will be required to upload an electronic copy of the signed and dated Tax Summary Report and any additional tax forms to your UKG portal.

**Important:** All forms must be signed and dated for acceptance.

## STEP 26:

### Review and Sign Your Forms

Carefully review the downloaded forms for accuracy. The specific forms generated will vary based on the information provided. The most common forms include the Tax Summary Report, Form W-4, State Tax Form, and a Tax Information page.

**GLACIER**  
Nonresident Alien Tax Compliance System

### Tax Summary Report

**Summary of Information Entered Into GLACIER™:**

|                                 |                           |                 |
|---------------------------------|---------------------------|-----------------|
| Name:                           | Taylor Swift              | 2024 - 208 Days |
| SSN / ITIN:                     | 111-11-5555               |                 |
| Email Address:                  | trisha.lyonsi@okstate.edu |                 |
| Country of Tax Residence:       | Indonesia                 |                 |
| Country of Citizenship:         | Indonesia                 |                 |
| Current Immigration Status:     | F1 Student                |                 |
| Original Immigration Status:    |                           |                 |
| Immigration Status Expiration:  | January 16, 2027          |                 |
| OSU ID (Banner ID):             |                           |                 |
| Changed Immigration Status?     | No                        |                 |
| Immigration Status Change Date: |                           |                 |
| Date of Entry to U.S.:          | January 1, 2024           |                 |
| Estimated Date of Departure:    | January 16, 2027          |                 |

**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 3, 2029 to Resident Alien          |
| Residency Status Start Date:                            | January 1, 2029 to Resident Alien       |
| Residency Status Change Date 2 (if applicable):         |                                         |
| Residency Status Start Date 2 (if applicable):          |                                         |
| Salary or Wages                                         |                                         |
| Applicable Tax Withholding Rate:                        | Single (Monthly)                        |
| (If Tax Treaty Does Not Apply or Form Is Not Submitted) |                                         |
| Tax Treaty Exemption Status:                            | Taxable (Declined Treaty)               |
| Tax Treaty Time Limit:                                  | Not Applicable                          |
| Tax Treaty Exemption Period:                            | Not Applicable                          |
| Tax Treaty Dollar Limit:                                | Not Applicable                          |

**FICA Tax Status:** Exempt **FICA Tax Start Date:** January 1, 2029

**Required Forms and Document Copies** Attach the following Forms and Documents to the Tax Summary Report

|                                                       |                                                |
|-------------------------------------------------------|------------------------------------------------|
| Please print, sign and submit with Tax Summary Report | Please copy and submit with Tax Summary Report |
| <b>Required Forms:</b>                                | <b>Required Document Copies:</b>               |
| Form W-4                                              | Form I-20                                      |
| State Tax Form                                        | Form I-94/I-94W Card                           |
|                                                       | Visa Sticker (in Passport)                     |

**Certification**

I hereby declare that the information provided by me to Oklahoma State University 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 Oklahoma State University as soon as possible so that this information and/or my U.S. tax status may be updated.

Signature: *Taylor Swift* Date: *7/26/2024*

Ensure your electronic signature is displayed at the bottom of the form along with the date.

You will be required to upload electronic copies of the signed and dated forms to your UKG portal:

- Tax Summary Report
- W-4 Employee's Withholding Certificate
- State Tax Form
- Any other forms generated by Glacier

STEP 26: (continued)

Review and Sign Your Forms

Carefully review the downloaded forms for accuracy. The specific forms generated will vary based on the information provided. The most common forms include the Tax Summary Report, Form W-4, State Tax Form, and a Tax Information page.

Form **W-4**

Employee's Withholding Certificate

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.  
Give Form W-4 to your employer.  
Your withholding is subject to review by the IRS.

2024

Step 1:  
Enter  
Personal  
Information

(a) First name and middle initial  
Taylor

Last name  
Swift

(b) Social security number  
111 11 5555

Address  
300 E Hall of Fame Apt 6  
City or town, state, and ZIP code  
Stillwater, OK 74075

Does your name match the  
name on your social security  
card? If not, to ensure you get  
credit for your earnings,  
contact SSA at 800-772-1213  
or go to [www.ssa.gov](http://www.ssa.gov).

(c) ☒ Single or Married filing separately

☐ Married filing jointly or Qualifying surviving spouse

☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, and when to use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App).

Step 2:  
Multiple Jobs  
or Spouse  
Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.  
Do only one of the following.

(a) Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) for most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use this option; or

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate . . . . . ☐

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3:  
Claim  
Dependent  
and Other  
Credits

If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):  
Multiply the number of qualifying children under age 17 by \$2,000 \$  
Multiply the number of other dependents by \$500 . . . . . \$  
Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here . . . . .

3 \$0.00

Step 4  
(optional):  
Other  
Adjustments

(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . . 4(a) \$

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . . . 4(b) \$

(c) Extra withholding. Enter any additional tax you want withheld each pay period . . . 4(c) \$

NONRESIDENT ALIEN

Step 5:  
Sign  
Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Taylor Swift

Employee's signature (This form is not valid unless you sign it.)

7/26/2024

Date

Employers  
Only

Employer's name and address

First date of employment

Employer identification number (EIN)

Ensure your electronic signature is displayed at the bottom of the form along with the date.

You will be required to upload electronic copies of the signed and dated forms to your UKG portal:

- Tax Summary Report
- W-4 Employee's Withholding Certificate
- State Tax Form
- Any other forms generated by Glacier

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## STEP 26: (continued)

### Review and Sign Your Forms

Carefully review the downloaded forms for accuracy. The specific forms generated will vary based on the information provided. The most common forms include the Tax Summary Report, Form W-4, State Tax Form, and a Tax Information page.

Form OK-W-4  
Revised 3-2021

Oklahoma Tax Commission  
**Employee's State Withholding Allowance Certificate**  
This certificate is for income tax withholding purposes only. Type or print.  
NOTE: Do NOT mail to the Oklahoma Tax Commission.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |               |                                                                      |                                  |    |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|---------------|----------------------------------------------------------------------|----------------------------------|----|--|
| Your First Name and Middle Initial                                                                                                                                                                                                                                                                                                                                                                                                                  |  | Last Name     |                                                                      | Your Social Security Number      |    |  |
| Home Address (Number and Street or Rural Route)                                                                                                                                                                                                                                                                                                                                                                                                     |  | Filing Status | <input type="checkbox"/> Single                                      | <input type="checkbox"/> Married |    |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |               | <input type="checkbox"/> Married, but withhold at higher Single rate |                                  |    |  |
| City or Town                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | State         | ZIP Code                                                             |                                  |    |  |
| 1. Allowance For Yourself: Enter 1 for yourself                                                                                                                                                                                                                                                                                                                                                                                                     |  |               |                                                                      | 1                                |    |  |
| 2. Allowance For Your Spouse: Does your spouse work? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, enter 0. If no, enter 1 for your spouse                                                                                                                                                                                                                                                                                       |  |               |                                                                      | 2                                |    |  |
| 3. Allowance For Dependents: Enter the number of dependents you will claim on your tax return. Do not claim yourself or your spouse or dependents that your spouse has already claimed on his or her Form OK-W-4                                                                                                                                                                                                                                    |  |               |                                                                      | 3                                |    |  |
| 4. Additional Allowances: You may claim additional allowances if you itemize your deductions or have other state tax deductions or credits that lower your tax. Enter the number of additional allowances you would like to claim                                                                                                                                                                                                                   |  |               |                                                                      | 4                                |    |  |
| 5. Total Number of Allowances You Are Claiming: Add Lines 1 through 4 and enter total here                                                                                                                                                                                                                                                                                                                                                          |  |               |                                                                      | 5                                |    |  |
| 6. Additional Withholding: If you expect to have a balance due (as a result of interest income, dividends, income from a part-time job, etc.) on your tax return, you may request your employer to withhold an additional amount of tax from each pay period. To calculate the amount needed, divide the amount of the expected balance due by the number of pay periods in a year. Enter the additional amount to be withheld each pay period here |  |               |                                                                      | 6                                | \$ |  |
| 7. Exempt Status: If you had a right to a refund of all of your Oklahoma income tax withheld last year because you had no tax liability and this year you expect a refund of all Oklahoma income tax withheld because you expect to have no tax liability, write "Exempt" on Line 7. See information below                                                                                                                                          |  |               |                                                                      | 7                                |    |  |
| 8. If you meet the conditions set forth under the Servicemember Civil Relief Act, as amended by the Military Spouses Residency Relief Act and have no Oklahoma tax liability, write "Exempt" on line 8 and complete Form OW-9-MSE. See information below                                                                                                                                                                                            |  |               |                                                                      | 8                                |    |  |
| 9. If income earned as a member of any active duty component of the Armed Forces of the United States is eligible for the military income deduction write "exempt" on Line 9                                                                                                                                                                                                                                                                        |  |               |                                                                      | 9                                |    |  |
| Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or I am entitled to claim exempt status.                                                                                                                                                                                                                                                                              |  |               |                                                                      |                                  |    |  |
| Employee's Signature (Form is not valid unless you sign it)                                                                                                                                                                                                                                                                                                                                                                                         |  |               |                                                                      | Date (MM/DD/YYYY)                |    |  |

Form OK-W-4 is completed so you can have as much "take-home pay" as possible without an income tax liability due to the state of Oklahoma when you file your return. Deductions and exemptions reduce the amount of your taxable income. If your income is less than the total of your personal exemption plus your standard deduction, you should mark "Exempt" on Line 7 above. The following amounts of your annual Oklahoma adjusted gross income will not be taxed by the state of Oklahoma when you file your individual income tax return.

| Single                       | Married Filing Joint          |
|------------------------------|-------------------------------|
| \$1,000 - personal exemption | \$ 2,000 - personal exemption |
| \$6,350 - standard deduction | \$12,700 - standard deduction |
| \$7,350 - Total              | \$14,700 - Total              |
| +\$1,000 for each dependent  | +\$1,000 for each dependent   |

#### Items to Remember:

- If your filing status is married filing joint and your spouse works, do not claim an exemption on Form OK-W-4 for your spouse.
- If you and your spouse have dependents, please be sure only one of you claim the dependents on your Form OK-W-4. If both spouses claim the dependents as an allowance on Form OK-W-4, it may cause you to owe additional Oklahoma income tax when you file your return.
- If you have more than one employer, you should claim a smaller number or no allowances on each Form OK-W-4 filed with employers other than your principal employer so the amount withheld will be closer to your amount of total tax.
- If you itemize your deductions, instead of using the standard deduction, the amount not taxed by Oklahoma may be a greater or lesser amount.
- If you are claiming an "Exempt" status due to the Military Spouses Residency Relief Act you must provide Form OW-9-MSE "Annual Withholding Tax Exemption Certification for Military Spouses".

The State Tax Form (Employee's State Withholding Allowance Certificate) is not prefilled with your information. **You must fill out this form, sign it, and date it manually.**

**Personal Information:** Copy information from the pre-filled Form W-4, Employee's Withholding Certificate, provided by Glacier.

- Name:** Enter your full name.
- Social Security Number:** Enter your SSN (leave blank if you don't have an SSN).
- Address:** Enter your local Oklahoma address.
- Filing Status:** Enter "Single" for your filing status (regardless of your actual marital status).

**Box 1 (Allowance for Yourself):** Enter a "1" for yourself.

**Box 2 (Allowance for Your Spouse):** For nonresident aliens, it is recommended to leave this blank.

**Box 3 (Allowance for Dependent Children):** For nonresident aliens, it is recommended to leave this blank.

**Box 4 (Additional Allowances):** For nonresident aliens, it is recommended to leave this blank.

**Box 5 (Total Number of Allowances):** Enter the total number of allowances you're claiming, which is the sum of the allowances from Boxes 1, 2, 3, and 4.

**Box 6 (Additional Taxes Withheld):** If you want extra taxes to be withheld from each paycheck, enter the amount here. If not, leave this blank.

**Boxes 7, 8, and 9:** It is recommended to leave these boxes blank unless specific instructions apply to you.

**Signature and Date:** Your form is not valid without your signature and date.

Employees are responsible for entering accurate information on all tax-related forms. Oklahoma State University cannot be held liable for any taxes owed or penalties incurred due to inaccurate information provided. If you have questions about your tax filing obligations, please consult a tax professional.

**Note: Incomplete forms will default to a filing status of Single with zero allowances.**

## STEP 26: (continued)

### Review and Sign Your Forms

Carefully review the downloaded forms for accuracy. The specific forms generated will vary based on the information provided. The most common forms include the Tax Summary Report, Form W-4, State Tax Form, and a Tax Information page.



U.S. Tax Information For Non-United States Citizens/Non-U.S. Permanent Resident Aliens

For Information Only

DO NOT SUBMIT THIS PAGE WITH YOUR FORMS  
Keep This Document For Your Files

**Why Am I Required to Provide Information in GLACIER?** The Internal Revenue Service ("IRS"), the U.S. government tax authority, has issued strict regulations regarding the taxation and reporting of payments made to non-United States citizens. As a result, payments made to you may be subject to U.S. income tax and reporting.

**Why Is My Tax Status Important?** To comply with the U.S. tax laws, your *U.S. Tax Residency Status* must be determined. The Substantial Presence Test determines whether an individual is a *Nonresident Alien* or *Resident Alien* for U.S. tax withholding and reporting. GLACIER will calculate your *U.S. Residency Status for Tax Purposes* based on the information provided by you.

**What is the Difference between a Nonresident Alien and Resident Alien?** If you are a *Nonresident Alien for Tax Purposes*, you are subject to special tax withholding and reporting regulations; if you are a *Resident Alien for Tax Purposes*, you are taxed in the same manner as a U.S. Citizen.

**How Long Will I Be a Nonresident Alien?** Your *Residency Status Change Date* is the day on which your *U.S. Residency Status for Tax Purposes* will change, generally from *Nonresident Alien for Tax Purposes* to *Resident Alien for Tax Purposes*. The U.S. tax system is based on a calendar year period (January 1 – December 31). In most cases, when your *U.S. Residency Status for Tax Purposes* changes, you will become a *Resident Alien for Tax Purposes* retroactive to the first day of the calendar year during which your status changed; this day is called the *Residency Status Start Date*.

**How Will I Be Taxed on Payments From U.S. Sources?** As a *Nonresident Alien for Tax Purposes*, U.S. tax law requires that you be taxed in the following manner:

- If you are an employee and receive Dependent Compensation (salary or wages), you are required to complete Form W-4 as "Single or Married Filing Separately", regardless of your actual marital status.
- If you receive a Scholarship or Fellowship (for which NO services are required), your scholarship or fellowship may consist of *Nontaxable items* (Tuition, Book Allowance, and Required Registration Fees) or *Taxable items* (including, but not limited to, Room and Board, Stipend, Living Allowance, Travel Payment/Reimbursement). If you are present in the U.S. under an F, J, M, or Q immigration status, the applicable rate of tax withholding is 14 percent; if you are present in the U.S. under any other immigration status, the applicable rate of tax withholding is 30 percent.
- If you receive an Honorarium, Guest Speaker Fee, Consultant Fees, Royalty, or any other type of income, the applicable rate of tax withholding is 30 percent.

**Can I Be Exempt From Tax Withholding?** The U.S. maintains income tax treaties with more than 60 countries. Certain taxable payments made to you may be exempt from U.S. tax based on an income tax treaty entered into between the U.S. and your country of tax residence. The existence of a tax treaty does not automatically ensure an exemption from tax withholding; rather, you must satisfy the requirements for the exemption set forth in the tax treaty and provide all applicable forms and documents to your Institution's GLACIER Administrator. If you qualify for a tax treaty exemption, you must complete and submit Form W-8BEN (for all non-service scholarships and fellowships, or royalty payments) and/or Form 8233 (for all compensation or payments for services).

**What If I Do Not Submit My Forms and Documents?** If you do not complete the information in GLACIER and/or submit the required forms and documents in a timely fashion, the maximum amount of tax will be withheld from all payments made to you. For instructions of how to submit your forms and documents, please refer to the instruction page generated with your forms; DO NOT send your forms to the GLACIER Support Center.

**Where Can I Get More Information?** If you have additional questions about why you were asked to complete GLACIER, please contact your Institution's GLACIER Administrator or the person at your institution who asked you to complete GLACIER. If you have questions about GLACIER or the U.S. tax system, please contact the GLACIER Support Center at [support@online-tax.net](mailto:support@online-tax.net).

DO NOT UPLOAD THIS PAGE TO YOUR UKG PORTAL

For Your Information Only

Keep This Document For Your Files.



ONCE YOU HAVE FINISHED REVIEWING AND SIGNING YOUR FORMS, RETURN TO GLACIER AND CLICK "NEXT".

The screenshot shows the GLACIER web application interface. At the top, there's a header with the GLACIER logo and the title "Nonresident Alien Tax Compliance". Below this is a navigation bar with the text "View and Print Forms". A message states "GLACIER has generated the following Tax Summary Report and Forms". Under "Your Forms", a list includes "Tax Summary Report", "Form W-4", "State Tax Form", and "Tax Information". The "Signing Your Forms" section instructs users to digitally sign forms within GLACIER, listing steps like certifying identity, email address, and form accuracy. A "CERTIFY and SIGN Forms" button is visible, with a note "(Do not select until you have reviewed all forms.)". At the bottom, there's a footer with "Please note Adobe Acrobat Reader is required.", a small Adobe Acrobat Reader icon, and a navigation bar with "<Back" and "Next>" buttons, where "Next>" is highlighted with a red box. An "Online Help" link is also present.

## STEP 27:

### Finishing and Saving Your Individual Record

Review the information on the screen and click Next.

|                |                                         |
|----------------|-----------------------------------------|
| <b>GLACIER</b> | <b>Nonresident Alien Tax Compliance</b> |
|----------------|-----------------------------------------|



### Finishing And Saving Your Individual Record

**Congratulations! You have completed your Individual Record**

You're almost finished . . .

- Review, sign and date each of the Required Forms (see list on previous page);
- Submit the Required Forms and a copy of each of the Required Documents (see list on previous page) following the instructions below.

Please submit all Required Forms and Document Copies to:

For work permits, upload tax summary report and tax documents in UKG by selecting Tax Summary Report as the Document Type. For other payment situations, send an encrypted email with your documents to Trisha Iyonsi at trisha.iyonsi@okstate.edu.

GLACIER Administrator: **Trisha Iyonsi**  
International Tax Accountant  
tax@okstate.edu  
405-744-8205 Telephone

All Required Forms and Document Copies must be submitted within 10 days; failure to submit all Required Forms and Document Copies on time may result in tax withheld from payments made to you.

If any information in your Individual Record changes, you must access GLACIER and update your Individual Record as soon as possible.

If you have any questions, please contact the GLACIER Administrator listed above.

Thank you for your prompt attention to this matter.

<Back

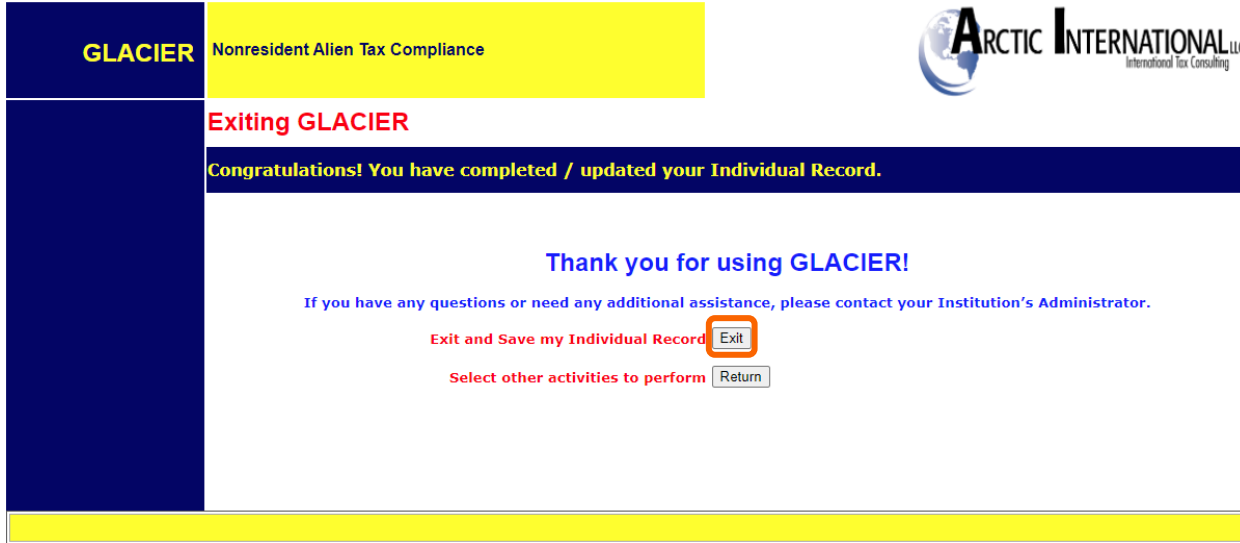
**Next>**

Online Help

## STEP 28:

### Exiting GLACIER

Click Exit to save your tax data and exit the system.



GLACIER Nonresident Alien Tax Compliance

Exiting GLACIER

Congratulations! You have completed / updated your Individual Record.

Thank you for using GLACIER!

If you have any questions or need any additional assistance, please contact your Institution's Administrator.

Exit and Save my Individual Record

Select other activities to perform

Note: Once you have completed part 2 of the onboarding process in UKG, Tax and Compliance Services will be notified by UKG to start the next step of the work permit approval process. Tax and Compliance Services will contact you via email if they have any questions about your GLACIER record. When your work permit is approved, or rejected, you will be notified via an email from UKG.

## REQUIRED FOR WORK PERMIT APPROVAL



UKG Ready

Next return to UKG and complete part 2 of 3 of your New Hires Checklist.

Login to your UKG portal [here](#).

When prompted to upload your Tax Summary Report from Glacier, be sure to choose the file that contains **all signed and dated forms** you downloaded from Glacier. This includes the Tax Summary Report itself and any additional tax documents.

Refer to the [Employee Guide for International Students and J1 Exchange Visitor](#) for additional instructions.

# Support Center



## GLACIER

Arctic International LLC

International Tax Consulting

**[support@online-tax.net](mailto:support@online-tax.net)**

*ALL **GLACIER** Support questions must be sent via email*

The Glacier Support Center is available if you have a question about accessing Glacier, inputting data, understanding a resulting calculation, or anything else that may arise. Each Glacier screen contains Online Help and a direct link to the Glacier Support Center. The Glacier Support Center provides quick responses and accurate problem resolution.



# GLACIER Administrator

**Trisha lyonsi**

Oklahoma State University  
Tax & Compliance Services

**[tax@okstate.edu](mailto:tax@okstate.edu)**

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For more information, visit our website at [tax.okstate.edu](http://tax.okstate.edu)

