

1. The 2012 Citizenship Status Form (CSF) is available on the PHR website. <http://www.inform.umd.edu/PHR/PayPers/NRA%20Resources.htm> Please do not use any other versions of the CSF for the 2012 NRA forms renewal process (all prior versions should be discarded).
2. 2012 NRA Fellowship forms should not be sent to Payroll Services before November 11th, 2011. **To continue the fellowship paid through Payroll the 2012 forms must be in Payroll Services no later than December 2nd, 2011** (disregard the Payroll calendar "NRA Forms Due Date for this one pay period). NRA Fellowship forms received after that date will be processed as quickly as possible for 2012.
3. The NRA Fellowship Request Form is also available at the PHR website. This form lists the required document, as do the NRA "tip" sheets.
4. All 2012 NRA forms should be clearly identified as **2012**. (Note: the 2012 W-4 form may not be available online until January, 2012. It is alright to use the 2011 version. Just cross out the 2011, and write 2012 at the top of the W-4 form). The W-4 should clearly be marked in red "**fellow**" at the top, and the Agency Code is 360292.
5. Any fellowship for international students who are Resident Aliens for Tax Purposes (RAFTPs) should be processed through the Student Award System. A list of these individuals will be sent to the departments using the Check Distribution Number on file in Payroll.
6. **Do NOT submit: instructions for any of the tax forms, "tip sheets", blank and/or decorated pages from a passport, page 2 of the I-20, I-9 forms or Direct Deposit forms to me. The I-9 form should remain in your department. These pages will be returned to you.**
7. **Please try to avoid multiple staples.**
8. All tax forms must be originals and **completed**. No entries in a required space will definitely mean all the forms will be returned to the department. All forms MUST have a SSN, or a temporary "SSN" or Student ID (SID) number (EXAMPLE: xxx-00-xxxx) if the individual does not yet have a SSN. Tax treaty benefits are not available with temporary "SSNs".
9. **The Affidavit of Compliance is a REQUIRED document for NRAs without Social Security Numbers.**
10. If an NRA individual has both a fellowship and an assistantship, Payroll no longer needs a 2nd copy of the Citizenship Status Form and second copies of immigration documents! NRA fellows are required to complete an original W-4 (marked "fellow" in red) & a W8-BEN. A second original W-4 should be submitted for the assistantship paperwork. ALL of the required forms for an individual should come together.
11. NRA Fellows who wish to be exempt from federal taxes (and there is a tax treaty with their country of residence) on the fellowship disbursements must have a SSN or Individual Taxpayers Identification Number (ITIN) **and must complete Part II of the W8-BEN Form (blocks 9a and 10)**. If these blanks are not completed, the tax treaty exception will NOT be allowed.
12. Please request all NRA SSN changes via the PHR Service Center (from SIDs to valid SSNs), ASAP to prevent problems with the 2011 W-2 & 1042-S forms. The email address for PHR is phrserv@umd.edu.

If you have any questions, I can be reached at 301-405-7477 or jmh@umd.edu.