

Non-Employee Information Form

The Pennsylvania State University

I. GENERAL INFORMATION		PLEASE PROVIDE ALL INFORMATION REQUESTED	IMPORTANT INFORMATION ON THE SECOND PAGE
This form is for collection of information and does not cover all documentation that may be required for payments to all non-employees. For additional information see: https://guru.psu.edu/tools/NRAPaymentGuidelines.html			
Last or Family Name	First or Given Name	Middle Initial	Country of Residence
Street Address		Telephone Number	Fax Number
City	State or Province	Zip or Postal Code	Country

II. RESIDENCY STATUS - For Tax Purposes Only

- I AM A UNITED STATES CITIZEN** I hereby certify that I am a citizen of the United States of America.
- I AM A PERMANENT RESIDENT** I hereby certify that I have been given privilege, according to U.S. Immigration Laws, of residing permanently in the United States as an immigrant, and that this status has not been revoked, and has not been administratively or judicially determined to have been abandoned. Attach a W-9 Form if receiving income other than expense reimbursement. **Do not attach a W-9 Form if only being reimbursed for expenses.**
- I AM A RESIDENT FOR TAX PURPOSES** I hereby certify that I am a resident of the United States of America, for tax purposes, because I have met the Substantial Presence Test for residency. **Attach a copy of your Admission Stamp or I-94 card.** Attach a W-9 Form if receiving income other than expense reimbursement. **Do not attach a W-9 Form if only being reimbursed for expenses.**
- I AM A NON-RESIDENT FOR TAX PURPOSES** I DO NOT meet the requirements for residency in the United States of America. **Attach a copy of your Admission Stamp or I-94 card.**

III. Admission Classification Please indicate the classification with which you will enter the United States or with which you are currently in the US.

If you are not listed below, you must indicate your status above. Do not combine with another.

B-2 or WT (visa waiver tourist classification) Entering the U.S. on this admission class will prohibit Penn State from making any payments or expense reimbursements to you, unless each requirement in Part IV is satisfied. (Canadian and Mexican residents without an Admission Stamp must check this designation.)

B-1 or WB (visa waiver business classification) Entering the U.S. on this admission class will prohibit Penn State from making any payments to you other than the reimbursement of actual travel expenses, unless each requirement in Part IV is satisfied.

F-1 Student **H-1B**

J-1 Exchange Visitor **Other - please specify:** _____

IV. PAYMENTS TO B-1/WB and B-2/WT Admission Classes

Acknowledgement of individuals on a B-1, B-2, WB, WT visa status or those who are exempt from visa requirements. Check those that apply:

The honorarium payment and/or expense reimbursement will relate to an academic activity.

In the last six months, I have not accepted an honorarium or expense reimbursement from more than four other institutions of higher education and/or research institutions within the United States of America.

My activity at The Pennsylvania State University will be for 9 days or less.

Treaty Usage: In order to claim treaty exemption from U.S. Federal Income Tax, you must submit a completed IRS form 8233 (Exemption from Withholding for Compensation of Independent Personal Services of a Non Resident Individual). These forms (8233 and VISIT forms) must be completed EACH time you wish to claim exemption, even within the same tax year.

I hereby certify, under penalties of perjury, that all of the above information is true and correct.

Signature _____ Date _____

SPECIAL NOTE: A Social Security Number is required only for income payments, but is NOT required for expense reimbursement. When required for payments, Non-Residents for tax purposes should supply their Social Security Number or Individual Tax Identification Number directly to their host department.