

NoRTH & Bard College International Tax Clinic Guide to Services

<https://www.nrtaxhelp.org/free-tax-assistance>

Bard Membership:



The services we provide:

24/7 access to TaxSlayer software online

- Federal and state return preparation
- E-filing both federal and state!

Tools:

- [Am I A Nonresident Alien?](#)
 - Enter your visa type and visits to determine your federal tax residency.
- [My Treaty Benefits](#)
 - Enter your visa and residency information to see your treaty benefits.

Guides

- *Personalized Guide* with only the steps you need to complete your return!
- Step-by-step pdf with screenshots
- Video demos

INDIVIDUALIZED SUPPORT

- Office Hours
 - Remote (Zoom)
 - 20-minute appointments
 - 1 appointment per day
- Email support
 - We can answer almost all tax questions through email.
 - We may refer you back to your personalized guide if your question is covered there.
 - Reviews of completed returns must be done through an appointment, not email.

Eligibility and Access to Our Free Services:

If you have a school, nonprofit, or government email address, you are eligible for membership to access our free tax services. We help U.S. tax residents and nonresidents.

We are now accepting requests for TY2024 memberships and are open to assist members with their returns. You can't access the tax software or guides to prepare your return unless you are a member.

What are the steps in our tax process:

Step 1: Learn – suggested for first time filers

- Watch our tax orientation video covering the basics of the U.S. federal income tax system

Step 2: Get Ready

- Gather your income documents
- Confirm your return is in scope

Step 3: Do Your Taxes

- Create your personalized guide! (Nonresidents only)
- Prepare your return

Step 4: File Your Return

- E-file your return
- Paper file (if you can't e-file)

Get help if you need it throughout the process

Clinic Scope:

Unfortunately, we are not able to provide assistance for all situations. The following is a list of some of the situations that are out of scope for our assistance. If you have a question about if your situation is within scope, please contact us at: bard.taxhelp@nrtaxhelp.org. If you have out of scope income you can still use TaxSlayer to prepare your return, but we will not be able to provide guidance about how to do so.

- **Income over \$84,000.** Note: this is a software limit, and you won't be able to prepare a return if your income is over this amount.
- Some state income tax returns (see our website for the current list)
- Treaty benefits for income types other than wages, scholarships, and capital gains
- Self-employment income (1099-NEC or 1099-MISC) for nonresidents
- Income earned outside of the U.S.
- Amended returns
- Prior year (2023 or earlier) returns
- Cryptocurrency or other digital asset transactions

What documents will you need:

Here is a list of the most common income documents, and the types of income they represent. These documents are all sent to you by the organization / person who paid you - you will never be creating one of these documents yourself. You will only get one of these types of documents if you have that type of income. If you think you should get one of these and haven't received it, contact the organization that paid you.

- W-2: This form reports wages earned while working as an employee.
- 1042-S: This form reports income for a nonresident alien that has special tax treatment. We commonly see 1042-S forms for treaty exempt wage income and scholarships / fellowships, but it is possible to receive this form for other types of income. We have a section about 1042-S forms in our FAQ.
- 1099-INT: The form reports interest you earned, usually from a checking or savings account. Bonuses for opening an account are usually considered interest and reported on this form.
- 1099-B: This form reports the sales of stocks, mutual funds, commodities, and other securities, along with any tax that has been withheld.
- 1099-DIV: This form reports dividends received from U.S. stocks and mutual funds, along with any tax that has been withheld.
- 1099-NEC: This form reports non-employee compensation and is usually received from work as an independent contractor. Please note that income of this type is out of scope for our clinic, so we cannot provide assistance with how to properly report this income.
- 1099-MISC: This form reports other miscellaneous income, including prizes and awards. Please note that income of this type is out of scope for our clinic, so we cannot provide assistance with how to properly report this income.

Thanks to grants from the IRS and Minnesota Department of Revenue, all of these services are provided at **NO COST** to all of our members.