

Filling out the EFC Worksheet for International Students:

Assumptions:

Am I a Dependent?

If you are supported by your parents then you are a dependent. If you are not or if you are married, then you are an independent. If you are an independent, only fill out the column beneath the "Independent" label.

Tax Info:

State of Legal residence

Utah

Marital status?

Are you married?

Age of older student?

If you have more than one student in your family, put in the age of the oldest one. If you are the only student at in your family, put your age. Family includes spouse and children.

Required to file a tax return?

ALL international students are required to file Form 8843 even if they have no U.S. income to report (or if their only income was bank interest). This form subtracts the days of presence in United States from the Substantial Presence Test. Otherwise, if you have been in the U.S. for 31 days, you will be considered a resident for tax purposes.

F, J, M, or Q visa students *with* U.S. income over \$3,300 from sources such as dividends from stocks, salary or wages, scholarships or fellowships, prizes or awards will need to file form 1040NR or 1040NR-EZ (if Nonresident for tax purposes). Income from bank interest also requires Form 8843. F-2 and J-2 dependents *also* need to file.

What form do I need?

Either the 1040NR or the 1040NR-EZ. These are tax return forms for Non-Residents. If you are married and/or have children, you are not eligible to fill out the 1040NR-EZ.

Household size?

This is you and your family. If you are single, do not count your roommates.

Number in college? This is the number of people in your family who are students at a university or college. This doesn't include any children in an elementary or secondary school.

Financial Info:

Even if you did not file a tax return and/or are not required to file a tax return, you are encouraged to use the 1040NR or 1040NR-EZ form to calculate this information for the GSS application.

Adjusted gross income This is line 35 on the 1040NR and line 10 from the 1040NR-EZ. This is your income once all available deductions have been made.

Federal tax paid If you are receiving a wage, the federal taxes will have already been taken out of your wages. State taxes may also have been taken out (if they have, you will also need to file a tax return with the state of Utah).

Earned Income This can be found on your W-2 forms sent to you by the U.S. Government. This is also line 23 on form 1040NR and line 7 on form 1040NR-EZ. This includes awards, scholarships, wages, as well as any income that is exempt by treaty.

Untaxed Income Untaxed income may include cash support, untaxed portions of government benefits, child support and income tax credits. Scholarships and fellowships that are used to pay tuition, registration, and other mandatory fees are not taxable.

Retirement Plan Deductions Any income that is directly put into a retirement plan, i.e. IRAs, SEP, SIMPLE, Keogh, etc. If none of these sound familiar to you, you probably don't have any retirement plan deductions.

Reductions to Total Income This is line 34 on the 1040NR form and the sum of lines 8 and 9 on the 1040NR-EZ form.

Liquid Assets This includes cash, savings accounts, any cash support received from home, etc.

Net Worth This includes assets that aren't cash, savings, etc. Owning a home, business, or farm would be included here. If you are renting an apartment, don't own a business, real estate, or a farm, you won't have anything to enter here.

Other Investments Stocks, bonds, mutual funds, partnership in a business, etc.

School Info:

Tuition If you are currently receiving tuition awards (some departments call them waivers, the Grad School calls them awards, they are the same thing), then enter zero here.

Fees USU Student Fees. If you don't remember how much you've paid in fees, look up the fee tables on USU's website. If a specific course has had an extra fee, include that here.

Room and Board Rent and basic utilities would go here. No cable or satellite TV, internet access, or other unnecessary costs.

Books and Supplies This includes textbooks, copying costs for collected papers and literature, your thesis and/or dissertation costs, etc.

Transportation to/from home You can include the part of the cost of gas if you drive to school. Calculate the total miles you drive to and from school and use the average gas mileage of your car to find out how many gallons of gas it typically takes you to get to school and back over the course of an academic year. Multiply the number of gallons by the price of gas per gallon.

Misc. This may include registration costs for attended conferences (NOT the travel costs, only registration) and other costs that are mandatory for completing your degree, e.g. costs for changing a transcript due to an error or other paperwork fees charged by USU.