

Interface adjustments to HRS: The interface from Glacier to HRS currently runs once per pay period. Account status and information in Glacier at the time Glacier Files 3 and 14 are pulled for the interface will determine any changes the interface will make to HRS.

Timing: The Glacier files to be used for the interface will be pulled sometime after the preceding payroll confirms and before the first calc of the new pay period is processed. OHR will send a Twitter message when the interface process gets kicked off. Any Glacier accounts processed after the interface runs and before final calc will need full manual entry/update in HRS (in addition to regular Glacier processing).

Responsible Administrator actions:

- 1) Glacier account management – review Glacier Individual Record Summary, Tax Summary Report, employee’s immigration documents and tax treaty forms to make sure EE entered data correctly into Glacier resulting in an accurate treaty and substantial presence determination. Also view Glacier Transaction History for account information revision.
- 2) Following review and approval of submitted materials, indicate in Glacier which treaty forms were received, and set tax file status at “complete”
- 3) Passport/visa information needs to be entered into HRS by the responsible administrator (until further notice).
- 4) Enter the number of withholding allowances in HRS - for resident aliens who are not receiving tax treaty.
- 5) If processing file AFTER the interface has run, responsible administrator must also:
  - a. update the tax/treaty settings in HRS and
  - b. notify the service center if the substantial presence and income code settings need to be manually adjusted prior to the calc.

Glacier Account Setup

No one should be manually opening Glacier accounts for employees. Glacier account setup occurs through a mass load process at the Service Center which happens on a weekly basis (approximately).

1. EEs are identified for the next mass load once they have both a visa code and a paid position in HRS.
2. If there’s a valid email address in HRS at the time of the mass load, the employee should receive two emails with instructions. If they do not, contact the Service Center.
  - a. The first email will be sent from the [UWHR\\_Administration@ohr.wisc.edu](mailto:UWHR_Administration@ohr.wisc.edu) mailbox and tells them about the Glacier requirement, what relationship and income types to select in Glacier, and provides them with other important instructions.
  - b. The second email will be sent from [support@online-tax.net](mailto:support@online-tax.net) and provides them with Glacier login information including their user name and initial password.
3. If there was no valid email address in HRS at the time the employee file was created in Glacier, the Responsible Administrator must:
  - a. enter it into HRS (as business other or business – depending on campus/auto email updates from hub)
  - b. forward/recreate the UWHR Administration email to the EE,( See section below on the association between job title in HRS and relationship/income type in Glacier

- c. add the email address to employee's Glacier record, then resend the Glacier access email to the employee. (From the Glacier administrator screen, select 'resend employee access').

Responsible Administrators – Each EE record in Glacier is assigned to one responsible administrator. Only the assigned responsible administrator or Deb Holm (as lead administrator) can manage an employee's Glacier account or reassign the account to another responsible administrator. The responsible administrator can be reassigned on any of the Glacier screens where the responsible administrator name appears in a drop down box, including the Review Individual Record Status page accessible from this screen.

### Glacier File Management:

1. Review employee's entry in Glacier (Review/Update Individual/Entity Record(s)>(enter empl ID) Record data button> Quick View/Forms).

You should also check their transaction history for critical changes: (Review/Update Individual/Entity Record(s)>(enter empl ID) Record data button> View Transaction History).

- a. Look at the Glacier Individual Record Summary and transaction history. Also review the Glacier Tax Summary Report the employee should have signed and delivered to you.
- b. Verify that EE has entered the correct the relationship(s) and income type(s) in Glacier: Look up job data in HRS (Workforce Admin>Job Information>Job Data) to determine all position titles within current calendar year. Employee needs to list all relationships and income codes they've held at any time in calendar year.
  - Relationship: (if wrong, Glacier won't generate correct treaty eligibility/forms & tax withholding may be wrong in HRS)

- Individual needs to select “Employee/Staff/Faculty/Student/Research Asst” if they hold any paid appointments, except:
- Individual needs to select Scholar or Fellow or Trainee for a position with one of these exact job title codes:
  - Fellow Y21NN / Post Doc Fellow X10NN / Adv Opp Fellow Y26NN
  - Scholar Y22NN / Post Doc Scholar X20NN
  - Trainee Y23NN / Post Doc Trainee X30NN / Grad Intern /Grad Trainee X75NN
- Income type: Individual needs to select:
  - Wages if they’re a paid employee holding any job other than one of the 8 titles/codes below.
  - Scholarship or Fellowship (non-service) ONLY if they hold one of these position codes:
    - Y21NN / Post Doc Fellow X10NN / Adv Opp Fellow Y26NN
    - Scholar Y22NN / Post Doc Scholar X20NN
    - Trainee Y23NN / Post Doc Trainee X30NN / Grad Intern /Grad Trainee X75NN

Note: If they have both types of positions in HRS, they need to select both relationship and income types in Glacier.

- c. SSN (EEs including Research Assistants) or ITIN (if not eligible for SSN – i.e., Scholar, Fellow, Trainee job codes listed above). Without SSN/ITIN, Glacier won’t identify treaty eligibility or generate any treaty forms.
- d. All required forms listed on Glacier Tax Summary Report must be signed and submitted. Also need to request copy of EAD card if EE is in F1 status and on OPT.
- e. Double check that Individual entered the correct ‘Entry to US’ date. This should be their last entry to US following an absence of at least 1 year. **Extremely important to ensure correct treaty eligibility determination is made.**
- f. Double check that immigration status listed on documents matches what EE entered into Glacier. Note wording in #4 of DS-2019. Type of J status indicated in Glacier must match exact wording in #4 of DS-2019. (J-1 Student is different from J-1 Scholar)
- g. If any of these are incorrect/missing, e-mail the employee to log back into Glacier to correct as necessary and deliver new Glacier reports and forms.

2. Update Glacier Account Status: If all entry, documents and forms are OK as submitted, Responsible Administrator must indicate in Glacier which check treaty forms were received (On the Review/Update Status of Individual Record page):

- Responsible Administrator will also need to switch account setting from ‘Inactive’ to ‘Active’ if necessary. (Glacier switches account to inactive when the immigration status has expired or the individual indicates they have left the U.S. Does not automatically switch back to ‘active’ upon individual’s updates in Glacier account. Must be reset by Responsible Administrator.)
- Add notes in corresponding Glacier field if unusual situation/treatment and when an individual is a permanent U.S. resident
- Do not override a treaty hold unless you’re sure you want to provide tax treaty despite Glacier’s cautionary hold. H1 holds relate to a missing SSN or ITIN, H2-H4 holds may indicate treaty ineligibility. If you override a hold, the employee will be notified and they may be incorrectly led to believe they are treaty-eligible. A change to the hold page will stick even if you don’t “submit”. Check with Teri Van Genderen or Deb Holm if you have questions
- Place a checkmark in boxes of ALL forms you have received if Glacier-generated and properly signed and reviewed (i.e., both 8233 & W-9)

- If Glacier account/materials are in order, change Tax File Status to 'Complete'
- Click submit to save entry/settings

Notes Regarding Record (e.g., reason for Override):

HOLD Treaty Status: HOLD 1 [Normal (N)]  
HOLD 2 [Normal (N)]  
HOLD 3 [Normal (N)]  
HOLD 4 [Normal (N)]

Processing Status: Normal (N)

Tax File Status: Waiting for Initial Forms/Documents (W)

Update Tax File Status to:  
[Tax File Complete (C)]

Tax Treaty Exemption Forms

Form 8233 Received, if applicable:  
 2007  
 2008  
 2009  
 2010  
 2011


Form W-8BEN Received, if applicable:  
 2005/2006/2007  
 2006/2007/2008  
 2007/2008/2009  
 2008/2009/2010  
 2009/2010/2011  
 2010/2011/2012  
 2011/2012/2013

Form W-9 Received, if applicable:

Admin Activities Menu | Another Search | Submit

3. Run Glacier Reports to help you manage Glacier files. The Glacier Administrator's menu will give you more instructions on how to run the reports available to you.

**CIER** Nonresident Alien Tax Compliance



**Welcome to GLACIER for University of Wisconsin System**

**What Would You Like To Do Today?**

- Add New Individual Record
- Review/Update Individual/Entity Record(s)
- Create/View/Print Report(s)
- Resend Individual Access Information
- GLACIER Administration
- Tax Calculator
- Return to Arctic Client Portal
- Exit GLACIER

Next>
[Support Center](#)

## Create/View/Print Reports

Please select the requested report:

- |                                |                               |
|--------------------------------|-------------------------------|
| <input type="radio"/> Report 1 | SSN/ITIN Status               |
| <input type="radio"/> Report 2 | Individual Record Status      |
| <input type="radio"/> Report 3 | Tax Treaty Time Limit         |
| <input type="radio"/> Report 4 | Tax Treaty Dollar Limit       |
| <input type="radio"/> Report 5 | Residency Status Change Date  |
| <input type="radio"/> Report 6 | FICA Start Date               |
| <input type="radio"/> Report 7 | Immigration Status Expiration |
| <input type="radio"/> Report 8 | Tax File Status               |
| <input type="radio"/> Report 9 | HOLD/OVERRIDE Treaty Status   |

At a minimum, you should be running reports 1-3, 5, 7-9. You can send emails to employees through most of these reports, but will need to select criteria before being able to access that option.


Report 1 - Run & send emails to EEs at least once per month

Report 3 – Run before/after the interface data pull so you know whether to update Glacier/HRS if necessary. Note, if an employee logs into Glacier indicating that they wish to update their account, that could result in the status changing from “complete” to “waiting” even if they didn’t make a change. For that reason, you should review all accounts marked as “waiting” with the indicator that a current year’s treaty forms have been checked in. Reviewing the account history page will show you what critical changes the employee made and whether it’s appropriate to mark the account complete. If an employee has updated their immigration expiration date, they should deliver a new signed tax summary report and copies of their new immigration documents before you re-mark file complete and restore tax treaty settings in HRS. Certain employee changes may impact their continued treaty eligibility or may require us to remove previously awarded tax treaty due to a retro clause. If that happens, please contact the Service Center.

**\*\*Important:** The interface may continue to give tax treaty to an individual whose Glacier account is in ‘Inactive’ status. For this reason, this must be monitored before each calc. If EE has an active job but their immigration docs are out of status, and the EE is not living/working outside the US, set Glacier file status back to ‘Waiting for Forms,’ remove the treaty form receipt indicators, and set the 8233 line in HRS to ‘no’ until EE updates Glacier and delivers new Glacier materials and immigration documents.

Report 7 – Run once each month so employees are reminded to update Glacier with their current immigration information before they lose tax treaty. If you learn that an employee has left the University and will not be returning to employment in the current tax year, you should add a note in the Glacier comments field and terminate their Glacier account. Instruct employee to contact your office if they return to employment in the future so we can reactivate/reload their Glacier account.

In order to obtain the email option for Report 7, you must first select the bullet

**GLACIER** Nonresident Alien Tax Compliance 

### Create/View/Print Reports

Please select the requested report:

- Report 1 SSN/ITIN Status
- Report 2 Individual Record Status
- Report 3 Tax Treaty Time Limit
- Report 4 Tax Treaty Dollar Limit
- Report 5 Residency Status Change Date
- Report 6 FICA Start Date
- Report 7 Immigration Status Expiration
- Report 8 Tax File Status
- Report 9 HOLD/OVERRIDE Treaty Status

Admin Activities Menu | Next > | [Which Report Has The Fields I Need?](#)

Then enter a number of days in the “Search By Immigration Status Expiration” box:

### Immigration Status Expiration Report


Please select search criteria:

Immigration Status Expiration Report

- Search By Immigration Status Expiration Within  number of days from current date  
\* BLANK means list ALL  
\* Enter '0' to list past dates
- Search By Immigration Status   
\* BLANK means list ALL
- Search By Last Name   
\* BLANK means list ALL
- Search By SSN/ITIN   
Do not enter dashes (-)  
\* BLANK means list ALL
- Search By Employee ID   
\* BLANK means list ALL

Return ONLY Individual Records with  Individual Record Status

The resulting screen can be used to send email reminders to individuals whose immigration expiration date needs revision in Glacier.

**GLACIER** Nonresident Alien Tax Compliance 

### Immigration Status Expiration Report

<input checked="" type="checkbox"/> Email	Last Name	First Name	SSN/ITIN	Exp. Date	Immig Status	Tax Residence Country	Employee ID
<input checked="" type="checkbox"/>	KURPAD	KRISHNA		8/31/2010	H1B-Employee	India	00429608
<input checked="" type="checkbox"/>	THEWARAPPERUMA	PATHMA		10/17/2010	J1-Professor	Sri Lanka	00230651
<input checked="" type="checkbox"/>	ZAMAR	MARIA SHEILA		5/27/2012	J1-Research Scholar	Philippines	00407212

Total Number of Search Results: 246  
\* Denotes TEST Individual Records

Please review the Email Text PRIOR to selecting ?Send Email Notifications? to ensure that it contains up-to-date information.

Admin Activities Menu | Reports Menu | Send Email Notifications | Save To File | [View Email Text](#)

# International Tax – Manual data entry into HRS

<http://www.hrs.wiscorsin.edu/login>

**Passport & Visa information entry:** Workforce Admin>Personal Info>Citizenship>Identification Data

**Step 1 Passport & Visa information entry:** Workforce Admin>Personal Info>Citizenship>Identification Data

Citizenship/Passport Visa/Permit Data

XIN FENG Person ID: 00609281

Citizenship/Passport Find First 1 of 1 Last

\*Country: [ ] Go To Row + -

Passport Info Find | View All First 1 of 1 Last

\*Passport Number: [ ] + -

Issue Date: [ ] Expiration Date: [ ]

Country: [USA] United States

State: [ ]

City: [ ]

1. Click on Citizenship/Passport tab
  - a. Enter their country in Citizenship/Passport sections. (country must be entered in two fields on the passport page and should be changed from USA default, unless you're entering USA permanent resident/naturalized citizen information – see below)
    - Note: “issuing post” on visa is not necessarily the individual’s country of citizenship.
    - Hong Kong/Taiwan should not be listed as PR China on either the passport page or within Glacier) These individuals are not eligible for PR China treaty.
    - If citizen of one country & PR of another, contact Deb Holm (dholm@ohr.wisc.edu). List citizen country code only on passport page & PR country code into corresponding fields on tax page)
  - b. Can leave “citizenship status” empty unless you’re entering permanent US residency or naturalized US citizen information (see below)
  - c. passport number: On passport and visa. Enter “99” if you don’t have the passport number (Glacier will eventually submit)
  - d. issue date/exp date – as listed on the document they submitted

2. Click on Visa permit data tab

Citizenship/Passport Visa/Permit Data

XIN FENG Person ID: 00609281

Visa/Permit Data Find First 1 of 1 Last

\*Country: [USA] USA Go To Row + -

\*Type: [ ] Get Supporting Documents

\*Effective Date: [04/18/2011] \*Purpose: [ ]

Number: [ ]

\*Status: [Applied For] \*Status Date: [04/18/2011]

Duration: [ ] Months

Issue Date: [ ]

Date of Entry into Country: [ ] Expiration Date: [ ]

Issuing Authority: [ ]

Issue Place: [ ]

Supporting Documents Needed Customize | Find | View All | First 1 of 1 Last

*Sup Doc ID	Description	Request Date	Date Received
1	[ ]	[ ]	[ ]

If we need to add another row, be on #1, (identified to the right of the top blue line.) Click on + sign to add a row. HRS files rows by visa type (alpha order). Contact the Service Center to delete row if entered in error.

- a. Country should always be USA, since the USA has issued the visa
- b. Type: select as appropriate – note there are many types of J1 visas in HRS – choose the one that matches the exact wording in #4 of the DS-2019
- c. Effective date – Enter the day you’re entering this information into HRS. Note, HRS will only read the visa information on the most recent effective dated row.
- d. Purpose – F-1 purpose always equals ‘student’. J1 purpose corresponds to wording in #4 of DS-2019. If the word ‘student’ is used, select purpose of student. Other wording relates to researcher or teacher. If DS-2019 says “Research Scholar” this is not a student – list “research scholar”.
- e. Number – not required
- f. Status – for most, we’ll select “granted” (when we have the I20/DS-2019. Select “applied for” only if we know they’ve applied for permanent residence or only applied for a new visa status change
- g. Status date – the begin date in the immigration document’s eligibility date range. When coming from Glacier, may be the date EE listed as their Entry to US date. Should be last entry following a U.S. absence of 1+ year
- h. Duration – not required
- i. Issue date – Should be the last time they entered the U.S. following an absence of one year or more (regardless of the status they were on during that initial entry). This should match what the employee is listing in Glacier as their entry to U.S. date
- j. Date of entry into country – can leave this blank
- k. Expiration date – status expiration date from current I-20, DS-2019 or I-797, or EAD card if on Student OPT
- l. Issuing Authority & Issue place – If this has been populated by Glacier, it will say “temporary value.” If you’re adding visa information to bring over the data listed in Glacier, be sure to add the word “Glacier” to the temporary value field.
- m. Supporting Documents needed – not required
- n. No other fields required

**Permanent U.S. Resident or Naturalized U.S. Citizen** passport/visa page settings –

- a. passport tab:
  - If now a naturalized US citizen or Permanent US Resident, add a row to passport page
  - indicate USA in both country fields
  - Citizenship Status Field should be selected (i.e., naturalized or permanent resident).
  - Enter the ID number listed on the PR/US passport in passport number field. Enter issue and expiration dates from docs.
- b. Visa tab: add a row on the visa page, selecting “PR” as the visa type and entering the dates from the permanent resident card. If you don’t have PR card for individual who is now a naturalized citizen, can enter PR row with expiration date to be one day less than the naturalization date. Leave the status field blank for PR status.
- c. Inform Service Center that employee is now a permanent U.S. resident.



Citizenship/Passport **Vjsa/Permit Data**

MAHP: \_\_\_\_\_ Person ID: 00569800

---

Citizenship/Passport Find First 2 of 2 Last

'Country: USA United States Citizenship Status: Permanent Resident Go To Row + -

Passport Information Find View All First 1 of 1 Last

'Passport Number: \_\_\_\_\_

Issue Date: 07/26/2010 Expiration Date: 07/26/2012

Country: USA United States

State: \_\_\_\_\_

City: \_\_\_\_\_

Authority: \_\_\_\_\_

Comment: \_\_\_\_\_

SAVE data

**Step 2: Job Data – Income Code Review in HRS:** Income code can be view at: Workforce Administration>Job Information>Reports>Job Data>UW Custom tab.

Job Data - Windows Internet Explorer provided by UW-Madison AIMS

https://www.hrs.wisc.edu/psp/hrs-fd\_1EMPLOYEE/HRMS/c/ADMINISTER\_WORKFORCE\_(GBL)

ORACLE

Home Add to Favorites Sign out

Menu Search: \_\_\_\_\_

- My Favorites
- CLEAN\_Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
  - Personal Information
  - Job Information
    - Review Job Information
    - Reports
      - Job Data
        - Job Data - Student Help Only
        - Add Emplmnt Instance - Student
        - Current Job
        - Template-Based Hire
        - Workforce Reports
        - UW External HR Systems
  - Benefits
  - Time and Labor
  - Payroll for North America
  - Global Payroll & Absence Mgmt
  - Payroll Interface
  - Workforce Development
  - Organizational Development
  - Set Up HRMS
  - Set Up SACR
  - UW Absence Management Reports
  - UW HR Reports
  - UW Payroll Reports
  - Reporting Tools
  - PeopleTools
  - My Personalizations
  - My Dictionary
  - ERM

Work Location Job Information Job Labor Payroll Payroll\* Salary Plan Compensation UW Custom

KAI CAI EMP ID: 00594485 Empl Red #: 0

UW Custom Data Find 1 of 1 Last

Effective Date: 08/01/2012 Effective Sequence: 0 Job Indicator: Primary Job

Action: Data Chg Reason: Change to Working Title

Continuity Status Information

\*Continuity: 03 Job Security: \_\_\_\_\_ Guaranteed Length: \_\_\_\_\_

Probation

\*Probation Type: Not Required Probation End Date: \_\_\_\_\_

Rate Exceptions

Under Min:  Over Max:

External Systems

Source System: Other Number: \_\_\_\_\_

Additional

Working Title: MARKLEY-RESEARCH ASST Reset

Encumbrances

Business Unit: UWMSN Year: 2013 Begin Date: 07/01/2012

Session: FY End Date: 08/30/2013

Non-Resident Alien Info

Income Code (for 1042-S): \_\_\_\_\_ Study/Tm

Job Data Empl Study/Tm Earnings Distribution Benefits Program Participation

1. Contact the service center if you are processing the Glacier file of an individual who completed their Glacier entry after the start of the last interface and they will be paid before the interface runs again. The service center will need to manually add their income code and substantial presence settings into HRS before the payroll confirms.

2. Review the income code settings from the beginning of the employee's current pay period if they are either receiving tax treaty or they hold one of the scholar, fellow or trainee titles listed on page 3 of this document.

- Employees on a student visa should have their job income code set at Study/Trn
- Employees on a non-student visa should have their job income code set at Teach/Res
- Those holding Fellow, Scholar, Trainee positions (see on page 3) should have that position's income code set at Schol/Fell

Notify the Service Center if any of the following situations occur (for those who are treaty-eligible or scholar/fellow/trainees).

- a. the income code was not set correctly from the first day of the pay period.
- b. The income code listed does not match the individual's current visa status.
- c. The income code typically associated with the position does not match the foreign national's current visa status, i.e.:
  - i. F1 on OPT holding Research Associate/Lecturer/other non-student position, or
  - ii. J1-Research Scholar, H-1B, J-1 Short-Term Scholar holding Research Intern or other position typically held by students).

Following receipt of your email, the Service Center will perform a manual HRS adjustment prior to the payroll confirm.

**Step 3. Federal Tax Data Page:** Payroll for North America>Employee pay data USA>Tax Info>Update Employee tax data

\*\*Note: If both NRA and Resident Alien in same tax year, set up initially as NRA and insert row to change to Resident Alien when appropriate.

Federal tab

The screenshot shows the 'Federal Tax Data' page for employee HAOYU TONG (Person ID: 00608840) at UWS University of Wisconsin System. The page includes the following sections:

- Effective Date:** 03/29/2011. This data was last updated by Online Usr on 04/17/2011.
- Exempt from FUT:**  Exempt from FUT,  Use Total Wage for Multi-State,  Always create W2 for NQDC Rptg.
- Special Withholding Tax Status:**
  - None
  - Do Not Maintain Taxable Gross and Do Not Withhold Tax
  - Maintain Taxable Gross
  - Non-Resident Alien; Tax Treaty/NR Data
- W-4 Processing Status:**  None,  Notification Sent,  New W-4 Received
- Federal Withholding Status:**
  - Tax Marital Status:**  Single,  Married
  - Withholding Allowances:** 1
  - Check here and select Single status if married but withholding at single rate.
- Flagged for IRS:**  W4 Flagged for Transmission
- FWT Additional Amount:**
  - Amount:** [ ]
  - Percentage:** [ ]

- a. Select include history
- b. Go to record 1 before clicking on the + to add a row – for any changes

- c. Effective date: enter the date we received whatever form/information is prompting the change on the new record. Effective date cannot be less than previous record's effective date. Add one day, if necessary.
- d. Next 3 checkboxes should not be changed. Exempt from FUT should remain checked and the other two should not be checked.
- e. Special Withholding Tax Status - select the appropriate button:
  - -None (US citizen or Resident Alien not getting tax treaty)
  - -Do not maintain taxable gross & do not withhold tax (Foreign national who is living and working outside USA) (see additional information below\*)
  - -Maintain taxable gross (prev. tax exempt (T1) or 99 allowances) (NRAs cannot claim exempt)
  - -NRA; Tax Treaty/NR Data (NRAs with or without tax treaty benefits & Resident Aliens receiving tax treaty)

\* For foreign nationals living and working outside USA, must also indicate this on the person page Workforce Administration > Personal Information > Modify a Person. **Also inform the service center, as manual overrides may be necessary following each interface.**

The screenshot shows a web interface for 'UW Personal' information. At the top, it identifies 'LUIS CASTILLO' with 'EmpID 00452277'. Below this, there are several sections:
 

- 'UW Additional' with a field for 'Adj Cont Svc Dt'.
- 'UW Additional Fields' with a search bar and navigation buttons. It contains:
  - '\*Effective Date' set to '02/11/2011'.
  - 'Foreign Nat Working Outside US' with a checked checkbox.
  - 'Foreign Nat Working Inside US' with an unchecked checkbox.
  - 'Applied for SSN or ITIN' with an unchecked checkbox.
  - 'Selective Service' with 'Registered' set to 'N/A', 'Reason' set to 'Not Indicated', and a 'Signature Date' field.

- f. W-4 Processing status – ignore for now (year-end process)
- g. Federal withholding status – W-4 status & allowances – mark as requested on W-4:
  - a. if blank on form, set at Single with 0 allowances.
  - b. NRAs and individuals claiming tax treaty must:
    - i. have Tax Marital Status set at ‘single’ or ‘married’ with checkbox below selected to indicate ‘married but withholding at single rate’.
    - ii. cannot list more than 1 allowance unless from Mexico, Canada or S. Korea (per rules)
- h. Flagged for IRS section should not be applicable
- i. FWT Additional Amount – complete only if individual requests additional withholding. This amount will be withheld from every paycheck, in addition to any regular withholding, and if check isn't large enough, the HRS will take the net down to zero.
- j. Ignore this section

Lock-In Details

Letter Received      Limit On Allowances:

Earned Income Credit

Not applicable  
 Single, or Head of Household  
 Married without spouse filing  
 Married, both spouses filing

W-5 Processing Status

None  
 Notification Sent  
 New W-5 Received

Special Tax Form Renewal

Tax Form Renewal

Tax Treaty/NR Data section. Note: If Glacier entry, immigration documents, or previously submitted UW1123 indicates treaty may have been given through another employer during this tax year, do not give treaty (unless unlimited dollar amount). Treaty limits are per year and not per employer.

Tax Treaty/NR Data

Date of Entry:

Country:        Treaty ID:        Treaty Exp Date:

Form 8233 Rec'd:        8233 In Effect Date:        8233 Exp Date:

Form W8 Rec'd:        W8 In Effect Date:        W8 Exp Date:

Form W9 Rec'd:        W9 In Effect Date:

Taxpayer ID Number:       NRA Withholding Rule:

Allowable Earnings Codes		Find   View All	First	1-3 of 6	Last
Income Code (for 1042-S):	Max Earnings Eligible Per Year:	Tax Rate (after form):	Tax Rate (before form):		
	9999999.99	0.100000	0.300000		
Scholarship/Fellowship Grants	9999999.99		0.140000		
	9999999.99		0.300000		

- k. **Date of entry: Last time employee entered the U.S. following an absence of one year or more. Should also be listed this way in Glacier account in 'Entry to U.S.' field.**
- l. Country & treaty ID – select from drop down box. Don't enter for Resident Aliens unless they are receiving treaty benefits. Will get message: "treaty expiry date reset," This is a soft message. Click OK.
- m. Treaty Exp. Date - if didn't populate as expected, but treaty eligible, may need to finesse from what gets populated by HRS, as follows:
  - a. If treaty eligible: enter the end of the treaty period as listed on the Glacier Tax Summary Report or the date the employee becomes a resident alien, if from country where treaty ends when EE becomes resident alien. Do not use 2099 for P.R. China unless the employee is currently a resident alien and you have received their W-9.
  - b. If not getting treaty, should be date EE becomes a resident alien.
- n. Form 8233 and Form W8 Rec'd Rows:
  - a. Indicate "yes" on 8233 and/or W8 line if treaty forms have been received & checked into Glacier. Must be signed & dated. (Glacier will only generate treaty forms if EE enters SSN/ITIN into their account and indicates that they wish to claim the treaty).
  - b. 8233/W8 in Effect Date : enter the date we received the necessary (signed) forms, with SSN/ITINs (following any break due to in non-compliance, if applicable).
  - c. Form 8233 end date:
    - i. 12/31/current year if EE is an NRA and eligible through year end
    - ii. 12/31/2099 if EE is an RA with treaty that never ends (provided they've submitted a W-9)

- iii. xx/xx/20xx to reflect the actual date the treaty ends if Glacier is listing a specific treaty end date and treaty forms good through then.
- d. Form W8 End Date:
  - i. If EE is an NRA, EE submits the W8-BEN which is only valid until end of 3<sup>rd</sup> year (i.e. if received 9/1/11, W8 Ben form End Date is 12/31/13).
  - ii. If EE is an RA, you would still use the W-8BEN row and enter the expiration date as in c.ii example above).
- o. Form W9 row in HRS – Don't enter anything if EE is still getting treaty. A 'yes' indicator means the employee will be treated like a US citizen for tax purposes and HRS will remove all treaty settings/awards. Equates to the 1078 date in 3270. Note: If EE delivers W-9 form, this is not the place to enter it. That indicator would go on either the 8233 or W-8BEN row, whichever is applicable, as 12/31/2099.

**\*Note: Some countries allow individuals who are PRs of US to claim tax treaty. But the University of Wisconsin will not provide treaty in these instances. In this scenario, even if Glacier issues the treaty forms, you should not check them as received in Glacier. Inform the individuals that they must claim the treaty when they file their annual income tax return.**

- p. Taxpayer ID (ITIN) Leave blank. This field will only be used if we use HRS for printing 1042-S forms, but at this time, we are using Glacier. Note: ITIN 4<sup>th</sup> digit is 7/8/9, and 980 numbers don't have 7/8 as 4<sup>th</sup> digit.
- q. NRA withholding rule. Set as follows:
  - Exempt from rule – India Student only
  - Not applicable – Barbados, Hungary & Jamaica
  - Subject to rule – all others (gross up) (NRAs populate here)
  - Canada & Mexico – still subject to rule, but can enter more exemptions/allowances. See rules on University's long version of Form W-4.

**Green Card** – Remove treaty settings from HRS, and change taxation settings, if necessary. Email service center to remove income code from job page. (also need to update visa page as previously instructed)

DO NOT SAVE YET – Switch to State tax tab

**4. Step 4. State Tax Data Page** (unless living and working in CA – see section 4a for more info)  
Payroll for North America>Employee pay data USA>Tax Info>Update Employee tax data

Effective Date: 04/02/2011 + -

**State Information** Find | View All | First 1 of 1 Last

\*State: WI + - Graduated Tax Tbls-Allowances

Resident  UI Jurisdiction  
 Non-Residency Statement Filed  Exempt From SUT \*SDI Status: Not Applicable

**Special Tax Status**

None  
 Do Not Maintain Taxable Gross and Do Not Withhold Tax  
 Maintain Taxable Gross; SWT zero unless specified in 'Additional Withholding' below  
 Non-Resident Alien; Fed Rules

1. Special Tax Status and State Information:

- None (U.S. citizens and resident aliens not getting tax treaty). EXCEPTION: Fellows who are NRAs must have this set to None unless they are also getting tax treaty on income code 18 or 19 earning, which would then require the non-resident alien button
- Do not maintain taxable gross & do not withhold tax – select for foreign nationals living **and** working outside USA) (See additional information below\*)
- Maintain Taxable Gross: SWT zero unless specified in “Additional Withholding” below (fed info: Maintain taxable gross (prev. tax exempt (T1) or 99 allowances NRAs never eligible for this)
- Non-Resident Alien with or without treaty and resident aliens getting treaty.
  - Must also uncheck ‘resident’ box in State information section.

\*Foreign nationals living and working outside USA). Must also indicate this on the person page Workforce Administration > Personal Information > Modify a Person

2. Marital status & WH allowances: enter state withholding as form shows. Leave as S 00 if W4 not completely filled out. NRA’s cannot exceed 1 allowance, unless from Canada, Mexico or S. Korea (see previous instruction in federal tax page)

3. Tax form renewal – ignore – not using

Save

**\*\* Step 4.a. State Tax Data Page--Exception ONLY for people living & working in California**

Note: We can't indicate CA folks as NRAs on their state tab, since CA does not allow the federal tax treaty benefits. We have to put them at "None" status, so CA taxes take.

If we set them as NRAs, HRS indicates they would receive a 1042S form, which is not correct.

California – If foreign national is living and working in California, have to change the tax distribution and add a 2<sup>nd</sup> tax record at the federal page & update on the state page.

Changing tax distribution:

Payroll for North America>EE Pay Data USA>Tax information>Update tax distribution

Add a row and make effective date +1 of effective date of current situation.

**Employee Tax Distribution**

IOANNIS ZEGKINOLOU EMP ID: 00602764 Empl Rcd #: 0

**Tax Distribution** Find | View 1 First 1-2 of 2 Last

Effective Date: 02/11/2011 Country: USA  Insert Pre-filled Tax Location

State	Locality	Distribution %
CA		100.000

Effective Date: 02/10/2011 Country: USA  Insert Pre-filled Tax Location

State	Locality	Distribution %
WI		100.000

Change state on new record to CA.

Add a 2nd tax record at the federal page & update on the state page.

Federal update:

Update EE Fed tax data

Payroll for North America>EE Pay Data USA>Tax information>Update EE tax data

Add row on federal page to add a new date (eff date +1 of current situation)

**ORACLE** Home Add to Favorites Sign out

**Menu**

Search: [ ]

- My Favorites
  - Check Year-to-Date
  - Review Paycheck
  - Taxes
  - 182Citizenship-passport & visa
  - 3-Employee Presence Test USA
  - 4-Job Data-Income code
  - 5&6-Update Employee Tax Data
  - 7-W-4 Modify a Person
  - Add to Favorites
  - Edit Favorites
- CLEAR Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits
- Time and Labor
- Payroll for North America
- Global Payroll & Absence Mgmt
- Payroll Interface
- Workforce Development
- Organizational Development
- Workforce Monitoring
- Set Up HRMS
- Set Up SACR
- UW Absence Management Reports
- UW HR Reports
- UW Payroll Reports
- Reporting Tools
- PeopleTools
- My Personalizations
- My Dictionary
- EPM

**Federal Tax Data** State Tax Data

IOANNIS ZEGKINOLOU Person ID: 00602764

Company: UWS University of Wisconsin System

**Effective Date** 05/02/2011 This data was last updated by Online User on 04/21/2011

Exempt from FUT  Use Total Wage for Multi-State  Always create W2 for NQDC Rptg

**Special Withholding Tax Status**

None  
 Do Not Maintain Taxable Gross and Do Not Withhold Tax  
 Maintain Taxable Gross  
 Non-Resident Alien; Tax Treaty/NR Data

W-4 Processing Status:  None  Notification Sent  New W-4 Received

**Federal Withholding Status**

Tax Marital Status:  Single  Married Withholding Allowances: 1  
 Check here and select Single status if married but withholding at single rate.

**Flagged for IRS**

W-4 Flagged for Transmission

**FWT Additional Amount**

Amount: [ ] Percentage: [ ]

**Lock-In Details**

Letter Received Limit On Allowances: 0

**Earned Income Credit**

Not applicable  
 Single, or Head of Household  
 Married without spouse filing  
 Married, both spouses filing

**W-5 Processing Status**

None  
 Notification Sent  
 New W-5 Received

**Special Tax Form Renewal**

Tax Form Renewal [ ]

**Tax Treaty/NR Data**

Date of Entry: 01/06/2011  
 Country: DEU Treaty ID: TIAS Treaty Exp Date: 12/31/2011

\*Form 8233 Recd: Yes 8233 In Effect Date: 04/07/2011 8233 Exp Date: 12/31/ [ ]  
 \*Form W8 Recd: No W8 In Effect Date: [ ] W8 Exp Date: [ ]  
 \*Form W9 Recd: No W9 In Effect Date: [ ]  
 Taxpayer ID Number: [ ] NRA Withholding Rule: Subject to Rule



Go to STATE TAX DATA PAGE:

For individual living and working in California: must submit UW's long version of Form W-4 (<https://uwservice.wisc.edu/docs/forms/pay-employee-withholding.pdf>)

You must have two State pages, one for WI and one for CA

Insert new row at the + under the State Information (most recent record is #1, previous record is #2)

On new record (#1) enter CA for the State

Check "Resident" box, unless the individual is an NRA, then uncheck "Resident".

SDI Status should be "Not Applicable" under State Information

-Change Disability/Unemployment plan to "none/none" under the California Wage Plan Code

Uncheck the UI box. The UI box should remain checked on the WI page, since all unemployment is reported to WI.

Enter marital status and number of allowances on CA page.

Individuals living and working in CA are not eligible for any tax treaty benefits, since CA does not honor the treaties. You must choose the Special Tax Status of "None". If get a soft warning regarding federal rules, click OK

Uncheck the CA UI box, since it is all reported to WI.

The WI page should not have the "Resident" box checked.

The WI page should have UI checked.

The WI page should have "Do Not Maintain Taxable Gross and Do Not Withhold Tax" selected in the Special Tax Status section.

The screenshot displays the Oracle HR system interface. On the left is a navigation menu with options like 'My Favorites', 'Check Year-to-Date', 'Review Paycheck', 'Taxes', '3-Citizenship-passport & visa', '3-Employee Presence Test USA', '4-Job Data-Income code', '566-Update Employee Tax Data', '7-Not Modify a Person', 'Add to Favorites', 'Edit Favorites', 'CLEAN\_Address', 'Inbound File Upload', 'Self Service', 'Manager Self Service', 'Workforce Administration', 'Benefits', 'Time and Labor', 'Payroll for North America', 'Global Payroll & Absence Mgmt', 'Payroll Interface', 'Workforce Development', 'Organizational Development', 'Workforce Monitoring', 'Set Up HRMS', 'Set Up SACR', 'UW Absence Management Reports', 'UW HR Reports', 'UW Payroll Reports', 'Reporting Tools', 'PeopleTools', 'My Personalizations', 'My Dictionary', and 'EPM'. The main content area shows the 'State Information' page for '05/02/2011'. The top section is for California (CA), with 'Graduated Tax Tbls-Allowances' selected. It includes checkboxes for 'Resident', 'Non-Residency Statement Filed', 'UI Jurisdiction', and 'Exempt From SUT'. The 'SDI Status' is set to 'Subject'. Below this is the 'Special Tax Status' section with radio buttons for 'None', 'Do Not Maintain Taxable Gross and Do Not Withhold Tax', 'Maintain Taxable Gross; SWT zero unless specified in "Additional Withholding" below', and 'Non-Resident Alien; Fed Rules'. The 'State Withholding Elements' section shows 'SWT Marital/Tax Status' as 'Single, or Married with two or more incomes', 'Withholding Allowances' as '1', and 'Additional Amount' and 'Additional Percentage' as empty fields. There is also a 'PR Retirement Plan' checkbox. The 'California Wage Plan Code' section has a dropdown for 'Disability/Unemployment Plan' set to 'None/None'. The 'Tax Form Renewal Processing Status' section has radio buttons for 'None', 'Tax Form Renewal Received', and 'Notification Sent'. The bottom section is for Wisconsin (WI), with 'Graduated Tax Tbls-Allowances' selected. It includes checkboxes for 'Resident', 'Non-Residency Statement Filed', 'UI Jurisdiction', and 'Exempt From SUT'. The 'SDI Status' is set to 'Not Applicable'. The 'Special Tax Status' section has radio buttons for 'None', 'Do Not Maintain Taxable Gross and Do Not Withhold Tax', and 'Maintain Taxable Gross; SWT zero unless specified in "Additional Withholding" below'.

SAVE

Last Step: Email Service Center, name of new foreign national and Empl Record #. If the foreign national is a student, please indicate if they are enrolled half-time or greater.



**Step 5. Complete HRS entry of additional data if reported on the long version of the W-4 form –**

See KB document

Update the person info at:

Workforce Administration>Personal Information>Modify Person>-Biographical Info (Birthday, gender)

-SSN – EE should enter into Glacier so it pulls into HRS. If in Glacier but not in HRS, advise Kate Ingram at Service Center (kingram@ohr.wisc.edu).

-Contact Info (Address & Phone)

-Add permanent address in home country:

a. Add a row

b. enter permanent as address type and click on “add address detail”

c. Enter country code and click on “add address”

Effective Date	Country	Status	Address
07/11/2011	MY	A	

d. Enter address in that country’s format using lookup fields as offered. Click on OK

**Edit Address**

Country: Malaysia

Address 1: 8 Medan Pantal Jerjak

Address 2: Sg. Nibong

Address 3:

Address 4:

City: Bayan Lepas State: PG Postal: 11900

County:

Override Address Verification

e. Review and if correct, click OK, and then Save

**Address History**

Address Type: Permanent

Effective Date	Country	Status	Address
07/11/2011	MY	A	8 Medan Pantal Jerjak Sg. Nibong Bayan Lepas, Pulau Pinang 11900

## Step 6. Determine whether FICA needs adjusting

Review paychecks to determine whether FICA was taken in error or missed, and contact the Service Center to request an adjustment, if needed.

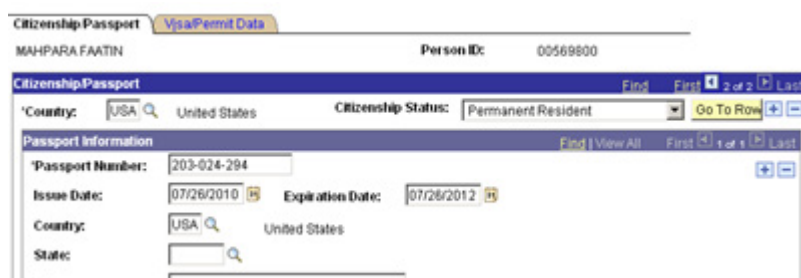
- Individuals on an F1 or J1 visa are not subject/eligible for FICA unless they are or will be substantially present in the current calendar year.
- Individuals on all other immigration status types ARE subject to FICA regardless of substantial presence in current calendar year (e.g. H-1B, TN, Permanent U.S. Resident, Refugee, Asylee).\*

\*Exceptions:

- FICA is not charged on income from Research Asst or fellow/scholar/trainee job titles.
- Student FICA exemption: see rules <http://www.wisconsin.edu/fadmin/gapp/gapp18a.htm>

## Step 7. Green Card HRS Revision Summary (as covered in above sections)

a. Update passport tab –

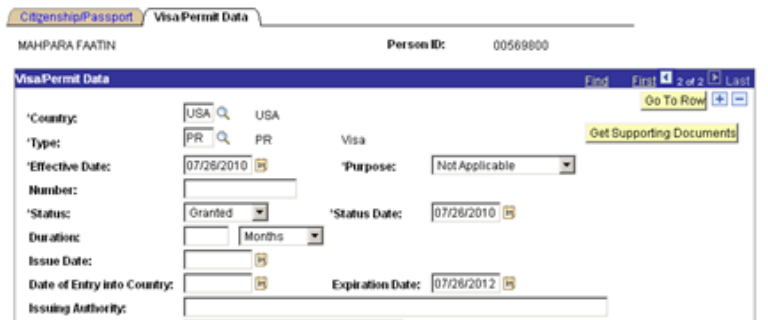


The screenshot shows a web-based form for updating passport information. At the top, there are tabs for 'Citizenship/Passport' and 'Visa/Permit Data'. The 'Citizenship/Passport' tab is active. The form displays the following information:

- Person ID: 00569800
- Country: USA (United States)
- Citizenship Status: Permanent Resident
- Passport Information:
  - Passport Number: 203-024-294
  - Issue Date: 07/26/2010
  - Expiration Date: 07/26/2012
  - Country: USA (United States)
  - State: (empty)

The new row would list USA as the country and permanent resident for the citizenship status. Enter the numbers on the card in lieu of passport number, and the issue and expiration dates from the card.

b. Update visa tab - In addition to the entry to the passport page, make this entry on the visa page



The screenshot shows a web-based form for updating visa information. At the top, there are tabs for 'Citizenship/Passport' and 'Visa/Permit Data'. The 'Visa/Permit Data' tab is active. The form displays the following information:

- Person ID: 00569800
- Country: USA
- Type: PR (PR Visa)
- Effective Date: 07/26/2010
- Purpose: Not Applicable
- Status: Granted
- Status Date: 07/26/2010
- Duration: (empty) Months
- Issue Date: (empty)
- Date of Entry into Country: (empty)
- Expiration Date: 07/26/2012
- Issuing Authority: (empty)

c. SPT & Income Code: Email Deb Holm at [dhholm@ohr.wisc.edu](mailto:dhholm@ohr.wisc.edu). Include EmplID, name and enrollment information, if applicable.

d. Tx/Trty - Remove treaty and change tax settings.