

COMMON DOCUMENTS TO COLLECT FOR PREPARING YOUR TAXES

Keep in mind you might also receive other important forms not listed below.

Wage and Tax Statement

**Form
W-2**

Available online through
HRMS Self Service
by January 31

Issued by employers to show a summary of the total amount of wages earned during the year and the amount of money withheld for any taxes. You will only receive this form if you have been employed, and you will receive one W-2 from each employer separately.

U.S. Source Income

**Form
1042-S**

Mailed by Minot State
Payroll Office
by January 31

The 1042-S form will only be given to students who have received scholarship or fellowship money that exceeds tuition and related fee charges or who have worked at MSU and used a tax treaty exemption for part or all of their salary. Not all students will receive this form.

Interest Income

**Form
1099**

Mailed by your bank

The 1099 is issued by your bank and shows the interest you received on deposits in your bank account. Not all students will receive these forms. Contact your personal bank for more information.

Tuition Statement

**Form
1098-T**

Available online through
Campus Connection
by January 31

The 1098-T tuition statement reports qualified educational expenses to you and the IRS. Box 2, amount billed, will reflect the total tuition and fees charged, minus any applicable waivers that were applied.

Scholarships are reported in Box 5 of the 1098-T. Some of your related costs (such as books, housing, board, etc.) are not reportable to the IRS. **Canadians will also need to get a TL11A tuition statement from the International Office for their Canadian taxes, but TL11As are not used for U.S. tax returns.*

Also gather the following when preparing to file your returns:

- Passport, I-20, and I-94
- Social Security number or Individual Tax Identification Number (generally not required if you will file only Form 8843)
- Address information (current U.S. address and foreign address)
- U.S. entry and exit dates for all visits to the U.S. during the last 3 calendar years
- Scholarship/fellowship grant letter (if any)
- A copy of last year's federal income tax return (if filed)

