

Timeline of Tax Filing

Arrival in the U.S. thru the end of December

- After arrival in the U.S., apply for a U.S. tax ID (i.e. either a Social Security Number (SSN) from the Social Security Administration **or** an Individual Taxpayer Identification Number (ITIN) from the Internal Revenue Service).
- If you are eligible to apply for a Social Security Number (SSN), please apply. If you are not eligible for a Social Security Number (SSN), you will need to apply for an Individual Taxpayer Identification Number (ITIN).
- If you request IIE tax team's assistance to apply for an Individual Taxpayer Identification Number, IIE tax team will keep you updated on the progress via emails from the IIE portal or itin@iie.org.
 - *If the ITIN application that IIE tax team filed on your behalf was rejected, you will need to re-submit the ITIN application when you file your tax returns in Spring.*

End of January thru mid-February

- At the end of January, **participants who received taxable funding from IIE** in the prior calendar year will receive emails from Sprintax (noreply@sprintax.com) and tax@iie.org with instructions to complete Sprintax Calculus profiles by mid-February. Sprintax Calculus enables IIE to determine your tax withholding rate and issue your Form 1042-S.
- **For eligible participants who did not receive any taxable grants from IIE** and would not receive a Form 1042-S from IIE, they will receive an email from tax@iie.org about tax return filing using Sprintax Returns.

Mid-March thru April 15th

- By mid-March, **the participants who received taxable grants from IIE** will receive a "Form 1042-S is available" email from Sprintax (noreply@sprintax.com) and tax@iie.org to proceed to prepare federal and applicable state tax returns via Sprintax Returns and to file the tax returns by April 15th.

Mid-March thru June

Participants will submit state tax reimbursement requests by providing a copy of the state tax return and proof of the state tax payment. For Fulbright program participants, the documents should be uploaded to the IIE Self-Service Portal. For non-Fulbright programs, please email tax@iie.org.

After April 15th

After filing tax returns, participants should receive the federal tax refund, if any. Note that they will need to return the federal tax refunds that were from the taxes withheld on IIE grants when they receive the refunds from IRS.

August-October

Applicable participants will receive emails from tax@iie.org regarding returning refunds to IIE.

December

Applicable participants who have not sent the refunds to IIE will receive reminder emails from tax@iie.org.