Form **13614-NR** (October 2026)

Department of the Treasury - Internal Revenue Service

Nonresident Alien Intake and Interview Sheet

OMB Number 1545-1964

Last or family name	First	Middle initial
Visa #	Passport #	

Date of birth: *(mm/dd/yyyy)* ____ / ____ / _____	Telephone #	E-mail address

Were you a U.S. citizen or resident alien the entire year? ☐ **Yes** ☐ **No** **Were you ever a U.S. citizen?** ☐ **Yes** ☐ **No**

U.S. local street address

City	State	Zip code

Foreign residence address

Address line 2

Foreign country	Province/County	Postal code

Country of citizenship	Country that issued passport

Are you married? ☐ Yes ☐ No If "YES", is your spouse in the U.S.? ☐ Yes ☐ No

If "YES", is it recognized by the state where you will be filing? ☐ Yes ☐ No

Are you a

U.S. National	Resident of Canada	Resident of Mexico	Resident of South Korea	Resident of India
☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

Dependent Information ***(Only if "Yes" is checked in one of the categories above)***

First name	Last or family name	Date of birth (mm/dd/yyyy)	Relationship to you (son, daughter, none, etc.)	Number of months lived with you in the U.S. in 2026	U.S. citizen, U.S. resident alien, U.S. national, or a resident of Canada, Mexico, or South Korea	Did person file joint return?	Did person provide more than 50% of their own support?	Did you provide more than 50% of their support?	Did the person have Gross Income of $5,300 or more?

What is the date you FIRST entered the United States on a non-visitor Visa? ____ / ____ / _____

Entry Immigration Status - Check one

☐ U.S. Immigrant/Permanent resident ☐ F-1 Student ☐ F-2 Spouse or child of student

☐ H-1 Temporary employee ☐ *J-1 Exchange visitor ☐ J-2 Spouse or child of exchange visitor

Other *(list)*

Current Immigration Status - Check one

☐ U.S. Immigrant/Permanent resident ☐ F-1 Student ☐ F-2 Spouse or child of student

☐ H-1 Temporary employee ☐ *J-1 Exchange visitor ☐ J-2 Spouse or child of exchange visitor

Other *(list)*

Have you ever changed your visa type or U.S. immigration status? ☐ Yes ☐ No

If "Yes", indicate the date and nature of the change. ____ / ____ / _____

Enter the type of U.S. visa you held during these years

2020 _____ 2021 _____ 2022 _____ 2023 _____ 2024 _____ 2025 _____

*** If Immigration status is J-1, what is the subtype? Check one**

☐ 01 Student ☐ 05 Professor ☐ 12 Research scholar

☐ 02 Short term scholar Other *(list)*

What is the actual primary activity of the visit? Check one

☐ 01 Studying in a degree program ☐ 04 Lecturing ☐ 07 Conducting research ☐ 10 Clinical activities

☐ 02 Studying in a non-degree program ☐ 05 Observing ☐ 08 Training ☐ 11 Temporary employment

☐ 03 Teaching ☐ 06 Consulting ☐ 09 Demonstrating special skills ☐ 12 Here with spouse

Check the years you were present in the United States as a teacher, trainee, student or as an accompanying spouse or dependent of a person in such status for any part of the year. ☐ 2020 ☐ 2021 ☐ 2022 ☐ 2023 ☐ 2024 ☐ 2025

Have you ever been present in the U.S. PRIOR to 2020 on a teacher, trainee, student visa, or as their accompanying spouse or dependent? ☐ Yes ☐ No **If so, what years and visa type** _____

How many days (including vacations, nonworkdays and partial days) were you present in the U.S. during

2024 _____ 2025 _____ 2026 _____

List the dates you entered and left the United States during 2026

Date entered United States mm/dd/yyyy	Date departed United States mm/dd/yyyy	Date entered United States mm/dd/yyyy	Date departed United States mm/dd/yyyy

Did you file a U.S. income tax return for any year before 2026? ☐ Yes ☐ No

If "Yes", give latest year ____ / ____ / _____ Form number filed _____

During 2026, did you apply to be a green card holder (lawful permanent resident) of the United States? ☐ Yes ☐ No

Do you have an application pending to change your status to lawful permanent resident? ☐ Yes ☐ No

1. Are you claiming the benefits of a U.S. income tax treaty with a foreign country? ☐ Yes ☐ No

If "Yes", enter the appropriate information in the columns below

(a) Country	**(b)** Tax treaty article	**(c)** Number of months claimed in prior tax years	**(d)** Amount of exempt income in current tax year

2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above? ☐ Yes ☐ No

Information about academic institution you attended in 2026

Name	Telephone number
Address	
Name of your academic/specialized program director	Telephone number
Address	

If you are due a refund, would you like Direct Deposit ☐ Yes ☐ No

If you have a balance due, would you like to make a payment directly from your bank account ☐ Yes ☐ No

During 2026 did you receive		**Did you have**	
Scholarships or fellowship grants	☐ Yes ☐ No	Casualty losses in a declared disaster area	☐ Yes ☐ No
Wages, salaries or tips	☐ Yes ☐ No		
Interest	☐ Yes ☐ No	Student loan interest paid	☐ Yes ☐ No
Distributions from IRA, pension or annuity	☐ Yes ☐ No	State or local income taxes	☐ Yes ☐ No
State or local tax refunds	☐ Yes ☐ No	U.S. Charitable contributions	☐ Yes ☐ No
Unemployment compensation	☐ Yes ☐ No	Child/Dependent care expenses	☐ Yes ☐ No
Dividend income or capital gains or losses	☐ Yes ☐ No	IRA contributions	☐ Yes ☐ No

Any other income *(gambling, lottery, prizes, awards, self-employment, rents, royalties, virtual currency, etc.)* ☐ Yes ☐ No

Did you or any dependent have health insurance coverage through **HealthCare.gov** (The Marketplace)? ☐ Yes ☐ No

If yes, was any Advanced Premium Tax Credit received? *(Provide Form 1095-A)* ☐ Yes ☐ No

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We are asking for this information so you may participate in the IRS Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) program which provides IRS-certified volunteer income tax preparers to assist with basic income tax return preparation for qualified individuals. The IRS authority to collect this information is 5 U.S.C. section 301 and 26 U.S.C. section 7801. The information you provide may be disclosed to others who coordinate VITA/TCE staffing, outreach, and other VITA/TCE related activities. The IRS may only disclose your return and return information as provided by 26 U.S.C. section 6103. All other records may be disclosed only for purposes the IRS deems are compatible with the purpose for which IRS collected the records, and consistent with any routine use disclosures described in the System of Record Notice (SORN) Treasury/IRS 24.030, Customer Account Data Engine (CADE) Individual Master File (IMF). You may view Treasury/IRS SORNs on the Treasury SORN website at Treasury.gov/System of Records Notices (SORNs). Providing this information is voluntary however, if you do not provide the requested information the IRS volunteers may not be able to assist you with preparing and filing your tax return.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

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