

Tax Forms Check List 2018—Scholars

(for 2017 Tax Year)

(Tax returns are due April 17, 2018. *Make & keep a copy of all tax forms for 3 years.)

Federal/U.S. Tax Forms

<input type="checkbox"/> Form 8843	<input type="checkbox"/> Form 1040	<input type="checkbox"/> Check to "United States Treasury"
<input type="checkbox"/> Federal copy of W-2(s)	<input type="checkbox"/> Form 8833	<input type="checkbox"/> Form W-7
<input type="checkbox"/> Federal copy of 1042-S	<input type="checkbox"/> Form 1040X	<input type="checkbox"/> Form _____
<input type="checkbox"/> Form 1040NR	<input type="checkbox"/> Reconciliation W-2	<input type="checkbox"/> Form _____
<input type="checkbox"/> Form 1040NR-EZ	<input type="checkbox"/> Child Tax Credit	<input type="checkbox"/> Form _____

SIGN FEDERAL TAX RETURN & MAIL TO

If you **ARE NOT** enclosing a payment:
Department of the Treasury
Internal Revenue Service
Austin, TX 73301-0215

If you **ARE** enclosing a payment:
Internal Revenue Service
P.O. Box 1303
Charlotte, NC 28201-1303

If **W-7**, mail with tax forms to:
Internal Revenue Service
ITIN Operation
P.O. Box 149342
Austin, TX 78714-9342

State/Pennsylvania (PA) Forms (use black ink and leave cents column blank)

<input type="checkbox"/> Form PA-40	<input type="checkbox"/> Check to "PA Department of Revenue"
<input type="checkbox"/> State copy of W-2(s)	

SIGN STATE TAX RETURN & MAIL TO

Owe tax: Payment Enclosed, 1 Revenue Place, Harrisburg, PA 17129-0001
 Don't owe & no refund: No Payment or No Refund, 2 Revenue Place, Harrisburg, PA 17129-0002
 Refund: Refund or Credit Requested, 3 Revenue Place, Harrisburg, PA 17129-0003

Local Forms (*F-1 and J-1 visa holders who had 1% local tax deducted need **not file** a local tax return, if a tax other than 1% was withheld, the student must file*)

<input type="checkbox"/> Local Earned Income Return Form (Tax Office address on form)
<input type="checkbox"/> Local copy of W-2(s)
<input type="checkbox"/> Copy of current visa <i>plus</i> Form I-20 <i>or</i> DS 2019 <i>or</i> tuition receipt
<input type="checkbox"/> Local Services Tax: Refund Application (as needed)

*(Excluding Halfmoon & Benner Twps which are .5%)

SIGN LOCAL TAX RETURN & MAIL TO

Centre Tax Agency
P.O. Box 437
State College, PA 16804-0437

*or deliver in person to the
State College Borough Building,
Centre Tax Agency office