Form W-7 - Application for IRS Individual Taxpayer Identification Number Instructions

Under ‘Reason you are submitting Form W-7’: Check both f (Nonresident Alien Student) and h (Other)

Write on line h one of the following phrases, whichever is applicable to you:

- “Exception 2b – Scholarships/fellowships/grants claiming tax treaty benefits”
  (Below box h after “Additional Information”, enter the name of the treaty country and treaty article number – see Tax Treaty Tables)

  OR

- “Exception 2c – Scholarships/fellowships/grants not claiming tax treaty benefits”
  Note: F-2 or J-2 dependents should write on line h that you are to be claimed as a dependent on your spouse’s (or parent’s) tax return.

  Question 6c: Visa number is located on your visa stamp. Include both visa number and expiration date. Canadian citizens can put N/A in this field.

  Question 6d: Check passport and enter your passport information. For ‘Issued by’ put the passport country/country of citizenship. For ‘Date of entry’ put the date of initial entry to the U.S. in your current status.

  Question 6g: Put “University of California, Santa Cruz” and indicate the number of years of your program as indicated on Form I-20 or Form DS-2019.

  Sign and date the form.

If claiming tax treaty, write: “Exception 2b: Scholarship Income & Claiming Tax Treaty Benefits”

If no tax treaty, write: “Exception 2c: Scholarship Income”

Enter information by referring to your passport and visa. If a field doesn’t apply, write “N/A.”

Don’t forget to write in UCSC information!