

Monday, July 13th

Packing Up Pre-Arrival Session

Social Security, Taxes, and Other Job Tasks



Session Logistics



Please introduce yourself in the chat! This has helped past groups make connections with other new students.



You can submit your questions through the Q&A (Question and Answer) feature and we will answer as many as we can during the Q&A portion of today's session.



You can use the thumbs up feature to upvote questions your peers have asked. This will make it easier for panelists to see and more likely that you will hear a response.



A recording of this session will be posted on our Packing Up webpage.

Our Panelists

University Human Resources

Bernadette Clarke, HR Service Center Manager

International Compensation and Taxation

Eveleen Sng, Manager

Office of International Services

Lauren Ball, Associate Director

Process Overview



Required Employment Steps at NC State

1. Get an on-campus job
2. Complete the I-9 process with the I-9 Center
3. Initiate process with International Compensation and Taxation
4. Apply for a Social Security Number
5. Securely provide SSN to International Compensation and Taxation

I-9 Process



I-9 Process for the Employee

HR Service Center
2711 Sullivan Dr
Administrative Services II Building, Second floor

Bernadette Clarke, Manager
brclarke@ncsu.edu, 919-515-8386

Section 1, starting the I-9

- You will receive an email from DONOTREPLY@perfectcompliance.com
- Click the direct link and it will open to Section 1 of the I-9
- Enter information in any field that pertains to you
 - Your name should be entered as it appears in your PASSPORT
 - If you have multiple first or last names they should all go in the last name box and the first name field should be “FNU” for First Name Unknown
 - If you are new, and have not applied for a SSN yet, please check the “awaiting SSN” box under that field

Citizenship Status

You will need to check one of the following options:

Check one of the following boxes to attest to your citizenship or immigration status (See page 2 and 3 of the instructions.):		
☐	1. A citizen of the United States	
☐	2. A noncitizen national of the United States (See Instructions.)	
☐	3. A lawful permanent resident (Enter USCIS or A-Number.)	
☐	4. An alien authorized to work until (exp. date, if any) _____	
If you check Item Number 4., enter one of these:		
USCIS A-Number	OR	Form I-94 Admission Number
	OR	Foreign Passport Number and Country of Issuance

Options for Citizenship

1. Citizen of the United States
2. Noncitizen of the United States
 - a. This is for territories, etc.(Guam, Puerto Rico)
3. Lawful Permanent Resident
 - a. “Green Card”
4. An alien authorized to work until: _____
 - a. This applies to J-1, F-1, H-1B, etc.
 - b. Please enter the expiration date from the DS-2019 or H-1B document OR the PROGRAM END DATE from I-20. For an EAD card this is the expiration date. This is NOT your VISA expiration date. If you do not enter the correct date in this field, you will need to edit it when you arrive to complete Section 2. This could affect your compliance.

Electronically sign Section 1 by clicking “Continue” button at the bottom and checking the boxes, entering a PIN.

Completing Section 2

This is the when the I-9 agent will confirm the information entered on Section 1 based on the documents you provide for Section 2. This process must be completed in person at the Service Center located at 2711 Sullivan Dr, Administrative Services II building, second floor (first floor, Room 110 in August).

What documents do you need?

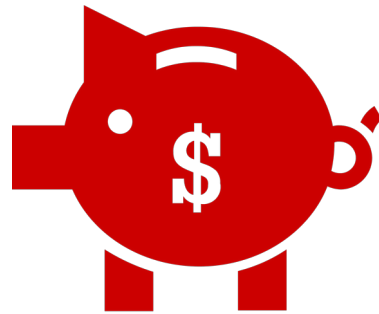
- Typically, if someone is F-1, they present a passport, I-94 and I-20. If they are H-1B, they present a passport and H-1B document. If they are J-1, they present their passport, I-94 and DS 2019. Otherwise, some people have an EAD or permanent resident card.
- Once you receive a permanent resident card, you can apply for an unrestricted SS Card, and should do so, if you want to use it on Section 2 of your I-9.

Updating your SSN at NC State

Employees should contact [International Compensation & Taxation \(ICT\) \(ictquestions@ncsu.edu\)](mailto:ictquestions@ncsu.edu) to update their SSN in the HR system

- ◆ ICT will guide the employee through their process to upload their SS Card for accurate information update. **DO NOT INCLUDE YOUR SSN IN YOUR EMAIL.**
- ◆ ICT will inform the employee that the I-9 team will be notified of this update and will be amending their I-9 Section 1 and the employee will receive an email with the subject “Need Your Confirmation of Amended I-9 Form with NC State University” from perfectcompliance.com with a link to the amendment.
- ◆ <https://internationalservices.ncsu.edu/social-security/> is the website to apply for your SSN

International Compensation and Taxation



Contact Information for International Compensation & Taxation (ICT)

CONTACT US

ICTquestions@ncsu.edu

919-513-3338

All International employees who are receiving any form of compensation need to complete a tax assessment with ICT once you are physically present in the U.S., before your first payment is processed.

Eveleen Sng, ICT Manager

Quick Overview of The Tax System

- U.S. Citizen
- Lawful Permanent Resident
- Resident Alien (RA) for Tax Purposes
- Nonresident Alien (NRA) for Tax Purposes

Taxable Compensation Per IRS and NCDOR

The IRS considers these items to be taxable income to an International employee:

- Tax liability for the following types of payments is determined by ICT:
 - Wages
 - Graduate Assistantships
 - Scholarships
 - Fellowships



Why is it so important for you to complete a tax assessment?

- Update tax panels - International employees in Nonresident Alien (NRA) tax status have a special set of tax guidelines that they must follow

Table 2

Payroll period	Add additional
Weekly	\$309.60
Biweekly	619.20
Semimonthly	670.80
Monthly	1,341.70
Quarterly	4,025.00
Semiannually	8,050.00
Annually	16,100.00
Daily or Miscellaneous (each day of the payroll period)	61.90

Pay Period	Weekly	Biweekly	Semimonthly	Monthly
Additional Withholding	\$11	\$21	\$22	\$44

- Exempt International employees in NRA tax status from FICA
- Update **SSN** to the HR system
 - Set up direct deposit
 - Amend I-9 form
- Extend treaty benefits

Graduate Fellowships/Scholarships

- International students must complete a tax assessment for graduate fellowship funds to be disbursed
- F-1 and J-1 students are subject to 14% withholding for Nonresident Aliens for tax purposes
- If a treaty is in place, may be exempt from 14% withholding for Nonresident Aliens for tax purposes
- F-1 and J-1 students are exempt from withholding for Resident Aliens for tax purposes

How is a tax assessment (TA) performed?

- Email ICT to request for a TA or receive an email from ICT to complete a TA
- Receive an email to set up Sprintax account and an email from ICT requesting for documentation (I-20/DS-2019, I-94, U.S. visa, Passport, FNIF, SSN)
- The TA is done online and documents are uploaded on Document Exchange
- Sign tax forms (W-8BEN or W-9, W-4, NC-4 or NC-4NRA)
- Sign tax treaty forms (W-8BEN with treaty or 8233) if applicable
- SSN will be updated to your MyPack Portal if provided
- FICA panels will be updated if determined to be NRA
- Federal and State Tax panels will be updated per tax residency status
- Fellowships will be released at appropriate tax rate

Sprintax Calculus

Payroll and Employment Tax for Foreign Nationals | University Controller's Office

Income types

☐ 10 Industrial royalties (Income code 10) [i](#)

Right to use patents, designs, models, plans, secret processes or formula, trademarks

☐ Motion picture or television copyright royalties. (Income Code 11)

Tick "11 Motion picture or television copyright royalties" if you received income for the right to use any motion picture films, films or audio or video tapes or disks, or any other means of image or sound reproduction or transmission for use in connection with television

☐ Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)

Tick "Other Royalties" if you received income for copyrights of literary, artistic, scientific works or for the use of software different to listed in "11 Motion picture or television copyright royalties"

☒ Scholarship or fellowship grants (Income Code 16) [i](#)

☐ Compensation for independent personal services (Income Code 17) [i](#)

☒ Compensation during studying and training (Income Code 20) [i](#)

☐ Other income (awards, prizes) (Income Code 23) [i](#)

☐ Winning awards/Gambling (Income Code 28)

☐ Deposit interests (Income Code 29)

Sprintax Calculus

Additional income information

Are you legally allowed to work? * [i](#)

☒ Yes ☐ No

W-4 questions

Do you have or expect to have more than one job in the US in 2025? * [i](#)

☐ Yes ☒ No

Please choose your Employer/Payer *

North Carolina State University 

First date of employment with this employer [i](#)



8233/W-8BEN/W-9 questions

Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? * [i](#)

☐ Yes ☒ No

Sprintax Calculus



Form W-8 BEN, Income code 16



Form W-4 (Nonresident)



North Carolina - Form NC-4 NRA



Sprintax Tax Summary

Sprintax Calculus

sprintax
calculus

Progress:

- ☒ Residency
- ☒ Personal data
- ☒ Contact details
- ☒ Tax Forms Info
- ☒ Payments
- ☒ Residency Summary
- ☒ Tax Treaties
- ☒ Final Summary
- ☒ Tax Forms
- 10 Document Exchange**

Your Details Final Summary Tax Forms **Document Exchange**

Eveleen Test

Document exchange 2025 ▾

☒ Electronic 1042-S Consent

This section is intended as your document exchange system. Uploading scanned copies of your documents will allow your payer to access documents remotely without the need for you to visit the offices and provide hard copies.

Upload

Supported file types include JPG, PNG and PDF. File size should not exceed 8MB

1) Document Type *

Current Visa ▾



2) Drag your file here
to start uploading.

OR

[Browse files *](#)

Upload →

Required Documents

[Download all documents](#)

Receiving Paychecks

- ICT will send an email the day before payday if you have a paycheck available
- If it is your first paycheck, there will be instructions on how to complete your tax assessment on Sprintax Calculus
- You do not need to have a SSN to start your tax assessment
- You can only enroll in direct deposit when you have your SSN

International Compensation and Taxation

Contact Information

For all questions please e-mail:

ictquestions@ncsu.edu

If you are employed by NCSU and/or receiving a Graduate Fellowship/Scholarship, please contact ICT for a tax assessment as soon as you arrive in the U.S. before your first payment is processed!

❑ The ICT team cannot offer tax advice or provide direction in completing a year end tax return or how to reply to IRS correspondence.

Applying for a Social Security Number

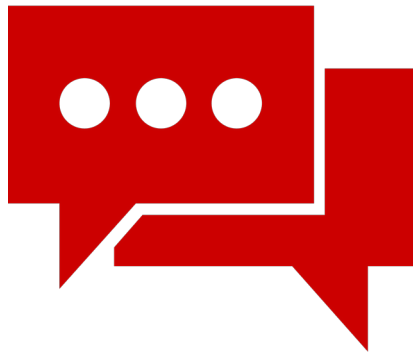


- **F-1 and J-1 students must have employment to be eligible for a SSN.**
For new students, that obviously comes in the form of on-campus employment.
- **Your SEVIS record needs to be active before you apply.** Applying before your record is active will create significant delays in the creation of your SSN. This means you must complete the immigration check-in process first AND receive the email confirming that your record is active BEFORE applying.
- **You can begin working before you have your Social Security Number** but you should apply as soon as possible once you are eligible.

1. Complete online application for SSN and schedule your appointment at the Raleigh Social Security office.
2. Gather required documents. Including:
 - Job offer letter from hiring department (printed if provided electronically)
 - Printed copy of your I-20 (F-1) or DS-2019 (J-1)
 - Printed copy of your I-94 record
 - Printed DSO letter (obtained from OIS)**
 - Original passport with U.S. student visa stamp
3. Visit the Social Security Administration office to present your required documents.
 - International students cannot use the document drop off service. You must meet with a staff member during your appointment because SSA policy requires they see you in-person.
4. Your Social Security card will be physically mailed to your address in 2-4 weeks following your appointment.

- Remember that once you have your SSN, International Compensation and Taxation will provide you with a secure way to provide your SSN to them. This is needed for taxation purposes.
- Your Social Security number, when issued, is highly sensitive information.
 - Do not carry it in your wallet unless you know you are going to need to show it for official reasons.
 - Do not laminate the card because it could damage the printing.
 - Do not email it to OIS (or anyone).

Question and Answer



OIS Instagram



OIS
@ncsu.ois

Upcoming Important Dates



On-Campus Housing Move-in for Fall 2026

August 11, 2026

Fall 2026 International Student Orientation

August 12, 2026

First Day of Classes Fall 2026

August 17, 2026

Tuition and Fee Payment Deadline

August 21, 2026

Student Blue Waive/Enrollment Deadline

September 10, 2026

Get Connected



Packing Up Pre-Arrival Series

Our next session will be Tuesday, July 21st from 8:30am to 9:30am Eastern Time. We will learn about resources and support for NC State students with disabilities. Our session will be led by staff from the Disability Resource Office.

*Registration will be live in 1 hour.
go.ncsu.edu/packing-up-registration*

NC STATE