



Personal Data Worksheet

Instructions for Completing the Graduate School Personal Data Worksheet

Even though you are not considered an Ohio State employee and do not perform a service for the stipend you receive as a Graduate Fellow or Postdoctoral Fellow, you must complete an Graduate School Personal Data Worksheet and Tax Card in order to be placed on the payroll. The information requested is fairly self-explanatory, however, the following are some guidelines for completing the worksheet.

- Social Security #: for international students, this is your 999-... application number.
- Employee ID: is the employee ID number that will be assigned by the automated payroll system when we post your appointment. If you have ever received any type of payment from Ohio State in previous year(s), please provide your OSU Employee ID number.
- Home/W2 Address: please provide the address where the Office of Human Resources can send your annual income tax information (January mailing)
- Local Address: please provide the address where you will be living while attending Ohio State.

Instructions for Completing the Tax Card

Under the Federal Tax Reform Act of 1986, the monthly stipend you receive as a graduate fellow or postdoctoral fellow is subject to federal and state income tax. Domestic students are required to file a Quarterly Estimated Tax form (#1040ES) and Declaration of Estimated Income (#IT1040ES). International students are required to obtain a permanent social security number and complete additional federal worksheets upon arrival in Columbus. The tax liability for international students will be based on a review of the federal worksheets and Tax Treaty (if applicable). Please note that international students will be taxed at 14% for federal and 3.5% for state until this process is completed. All individuals (domestic and international) regardless of their tax status are required to complete a Tax Card. Please pay special attention to the following items when completing the Tax Card:

Side One - Employee's Withholding Allowance Certificate

- #2 Social Security #: international students should provide the 999-... application number unless you already have a permanent social security number.
- #5 Allowance: refers to the number of deductions and/or individuals you claim on your annual income tax filing form. (Nonresident aliens should check specific country regulations for permitted allowances.)
- #6 Not applicable for Graduate Fellows or Postdoctoral Fellows. **Be sure to sign your name at "Employee's signature."

Side Two - Citizenship

- ** Be sure to check appropriate box.
- ** Nonresident aliens (international students) must provide visa type, country of residence (and arrival date in the United States, if known).
- ** If you check the box "Resident Alien or Permanent Resident" you must complete Form 1078 upon arrival.

State Tax

- ** Exemption: refers to the number of individuals you claim on your annual income tax filing form. (Nonresident aliens should check specific country regulations for permitted exemptions.)

City Tax

- ** City of Employment is Columbus.
- ** City of Permanent Residence must be provided.

Permanent Residents

- ** For Ohio residents, Public School District and County must be provided.