



UNIVERSITY OF OKLAHOMA

INTERNATIONAL INFORMATION FORM (IIF) INSTRUCTIONS

SECTION 1: PAYEE INFORMATION

- Enter your name.
 - Last name, first name, and middle initial.
- This information must be the same as shown on your Social Security Card, if applicable.
- If you do not have a Social Security Card, please use your name as it appears on your Visa.
- Enter your country of citizenship.
- Enter your mailing address, city/town, state/province, and postal/zip.
- Enter an email address that can be used to communicate with you.

SECTION 2: ADDITIONAL PAYEE INFORMATION

- Enter your U.S. social security number or ITIN if you have one.
 - If no SSN or ITIN, check No TIN.
- Select if you are Resident or Non-Resident for tax purposes. There are two main tests to answer this question. You are a Resident for tax purposes if:
 - If you are a lawful permanent resident of the U.S. (have an Alien Registration/Green Card) or are an immigrant or refugee seeking asylum in the U.S.; or
 - After completing the number of days, you are present in the U.S., not counting days you were “exempt” (If you are a student on a F or J visa, generally you are “exempt” for the first 5 calendar years you are in the U.S. If you are a teacher or researcher on a J visa, generally you are “exempt” for the first 2 calendar years you are in the U.S.), your count of days in the U.S. is for 183 or more days, AND, you do not pay taxes in your home country or have a closer connection with that country than the U.S.
- A W9 is required for all resident aliens. Information on the form W9 can be found at:
<https://www.irs.gov/forms-pubs/about-form-w-9>.
- A W8 is required for all non-resident aliens. Information on the types of W8 forms can be found at:
<https://www.irs.gov/forms-pubs/about-form-w-8-ben>.
- Select the purpose of your trip/payment type that you will be receiving.
 - Candidate/Recruit. Visiting the University for possible employment opportunity. The payment will be for travel expense reimbursement only.
 - Guest/Visitor. Trip only to visit the University. The payment will be for travel expense reimbursement only.
 - Honorarium/Speaker. Presenting for the University. The payment will be for services rendered.
 - Independent Contractor. Other non-honorarium services. The payment will be for services rendered.
 - Participant/Research Subject. Participating in a research project as a human subject. The payment is compensation for participation.
 - Student. The payment of a scholarship or fellowship.
 - Other. Any type of activity not already listed. Please include an explanation of the activity and payment.
- Are you related to an OU/OUHSC employee?
 - If yes, please provide their name and the relationship.
- Have you been employed by OU/OUHSC within the last 12 months or retired from the Oklahoma State System of Higher Education in the last 24 months?
 - If yes, please provide the date of termination or retirement.
- Can you accept payment in US Dollars?
 - Please indicate yes or no.

SECTION 3: PASSPORT AND VISA INFORMATION

- Select your current visa status.
- If F-1, J-1 or H-1B is checked, please enter the name of the institution sponsoring your visa.
- If Other is selected, please specify your visa type.



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SECTION 4: DOCUMENTATION REQUIREMENTS

- The Passport and Visa documentation should be provided with the form submission (if Visa has already been obtained).
- Form I-94 is the DHS arrival/departure record issued to aliens who are admitted to the U.S., who are adjusting status while in the U.S. or extending their stay, among other uses. Customs and Border Protection (CPB) Form I-94 Arrival/Departure Record or Form I-94W Nonimmigrant Visa Waiver Arrival/Departure Record will be issued electronically. You will need to access the record and provide a printout to your visiting department. Information on how to access the record can be found at: <https://www.cbp.gov/travel/international-visitors/i-94>.

SECTION 5: VISA ACTIVITY - SUBSTANTIAL PRESENCE TEST

- Provide your original entry date, activity date and end date for this trip you will be receiving compensation for.
- Provide the information on the number of days for current year, first preceding year, and second preceding year you have been in the U.S. to substantiate your residency status for tax purposes.
- Visa Type History. Have you ever been in the U.S. before? If you have and your current visa status is F or J, please provide all the travel information back to 1985. If additional room is necessary, please attach a list of this information.
 - Enter the date you entered the US.
 - Enter the date you left the US.
 - Enter your visa type for your visit to the US.
 - Enter your visa number for your visit to the US.
 - Enter your activity for your visit to the US.
 - Enter your country of residence during your visit.
 - Mark Yes or No if treaty exempt for each visit.

SECTION 6: HONORARIUM/SPEAKER FEE PAYMENT RECIPIENTS

- Please answer the questions regarding 9 days, 5 institutions, within 6 months with Yes or No for each question.
- Honorarium Speaker amount you will be expecting to receive for your visit.

SECTION 7: CERTIFICATION

- Sign certification that information provided is true and accurate.
- Submit all documentation to your department contact.



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IMPORTANT:

Additional documentation may be requested depending upon your residency status or type of service being provided. This form is required for all resident and non-resident alien visitors receiving a non-employment payment from the University.

SECTION 1: PAYEE INFORMATION

Name:

Country of Citizenship:

Mailing Address:

City/Town:

State/Province:

Postal/Zip Code:

Email Address:

SECTION 2: ADDITIONAL PAYEE INFORMATION

Identification Number:

No US TIN

Foreign Tax Identification Number (FTIN):

*U.S. Tax Identification Number (SSN or ITIN):

*Payment may be subject to U.S. withholding tax. Forms must include U.S. or foreign TIN for treaty claim (except treaty claim on U.S. source non-qualified scholarships or fellowships requires U.S. TIN). To claim a treaty exemption, please submit the applicable IRS W-8 form.

Residency Status:

Resident Alien for tax purposes of
the United States.

***MUST ATTACH - IRS W-9
form or OU Individual Supplier
Form.***

Non-Resident Alien for tax
purposes of the United States.

***MUST ATTACH - Applicable
IRS W-8 form.***

Purpose of Activity:

Candidate/Recruit

Independent Contractor

Other

Guest/Visitor

Participant/Research Subject

Honorarium/Speaker

Student

If Other, please explain your relationship with OU/OUHSC:

Are you related to a current OU/OUHSC employee?

Yes

No

*If Yes, please provide their name and relationship:

Have you served as an employee of OU/OUHSC within the last 12
months or retired from the Oklahoma State System of Higher
Education within the last 24 months?

Yes

No

*If Yes, please provide termination/retirement date (MM/DD/YY):

Can you accept a check in U.S. dollars?

Yes

No



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SECTION 3: PASSPORT AND VISA INFORMATION

Only required for those in or entering the U.S.

Visa Type:

B-1

B-2

WB

WT

J-1

(Non- student)

F-1/J-1

(Student)

H1-B

Canadian Visa
Exempt

Other

For F, J or H visa types, please list your sponsoring institution:

The American Competitiveness and Workforce Improvement Act (ACWIA) allows international visitors in Business or Tourist (B-1/B-2, WB/WT) travel status to be paid honoraria or be reimbursed for travel expenses only if all of the following conditions are met:

- You are a visitor performing services of academic activities (short-term instructions including guest lectures, seminars, presentations, workshops) associated with the University, and
- Your activity being compensated is any portion of nine days or less at the University, and
- You have not been paid or reimbursed by more than five U.S. institutions or organizations during the past six months, including the University.

SECTION 4: DOCUMENTATION REQUIREMENTS

Only required for those in or entering the U.S.

Please submit the following documents along with the IIF.

Passport

Visa

I-94

SECTION 5: VISA TYPE ACTIVITY - SUBSTANTIAL PRESENCE TEST

Only required for those in or entering the U.S.

Provide your original entry date into the U.S.:	Month	Day	Year
Start date of current purpose/activity:	Month	Day	Year
End date of current purpose/activity:	Month	Day	Year

Number of days in the United States during current calendar year:

Number of days in the United States during first preceding calendar year:

Number of days in the United States during second preceding calendar year:

Visa Type History

If your current visa status is F or J, enter your visits to the U.S. since January 1, 1985.

Entry to U.S.	Exit from U.S.	Visa Type	Visa #	Primary Purpose/Activity	Country of Tax Residence	Treaty Exemption		
							Yes	No
							Yes	No
							Yes	No

SECTION 6: HONORARIUM/SPEAKER FEE PAYMENT RECIPIENTS

Only required for Honorarium or Speaker payee types

Will your affiliation with OU exceed 9 days?	Yes	No
Have you accepted an honorarium for more than 5 visits to any institution(s) including previous visits to OU in the previous 6 month period?	Yes	No
Is the activity to be performed a usual academic activity?	Yes	No

Honorarium/Speaker fee amount: \$



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SECTION 7: CERTIFICATION

I hereby certify that the above information is true and correct. I understand that if my status changes, I must submit a new International Information Form.

Signature:

Date: