



Name: Xinhang Xu SSN / ITIN: 113-69-2977 Email Address: xihxu@ucdavis.edu Country of Tax Residence: China Country of Citizenship: China Current Immigration Status: J1 Research Scholar Original Immigration Status: Immigration Status Expiration: March 9, 2026 Employee / Student ID Number: 10716894 UCPath EMPLID: 10716894 PIDM / Vendor I.D.:	Changed Immigration Status? No Immigration Status Change Date: Date of Entry to U.S.: March 2, 2024 Estimated Date of Departure: March 11, 2026
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Tax Residency Status:	Nonresident Alien for U.S. Tax Purposes
Residency Status Change Date:	July 3, 2026 to Resident Alien
Residency Status Start Date:	January 1, 2026 to Resident Alien
Residency Status Change Date 2 (if applicable):	
Residency Status Start Date 2 (if applicable):	

Applicable Tax Withholding Rate: <i>(If Tax Treaty Does Not Apply or Form Is Not Submitted)</i>	Single (Monthly)	EX
Tax Treaty Exemption Status:	Exempt	
Tax Treaty Time Limit:	Three Years From Date of Arrival	
Tax Treaty Exemption Period:	March 2, 2024 - March 1, 2027	
Tax Treaty Dollar Limit:	Unlimited Dollar Amount	

EX

Required Forms and Document Copies Attach the following Forms and Documents to the Tax Summary Report

Form I-94/I-94W Card
Form DS-2019
Visa Sticker (in Passport)

I hereby declare that the information provided by me to University of California, Davis and/or entered into the GLACIER Online Tax Compliance System for purposes of making the tax determinations above is true and correct. If any of the information provided changes or if other relevant information becomes available, I will notify University of California, Davis as soon as possible so that this information and/or my U.S. tax status may be updated.

Date:



Tax Summary Report Instructions

Congratulations – You Have Completed Your Individual Record in GLACIER!

You are almost finished . . .

- Review, sign and date each of the Required Forms (see list on previous page);
- Submit the Required Forms and a copy of each of the Required Documents (see list on previous page) following the instructions below.

Please submit all Required Forms and Document Copies to:

DO NOT SUBMIT YOUR DOCUMENTS THROUGH EMAIL.

Please submit your documents to <https://securesend.ucdavis.edu/filedrop/TaxDrop>

GLACIER Administrator: Nang Xiong
Tax Compliance Analyst
naxiong@ucdavis.edu
530-754-1829

All Required Forms and Document Copies must be submitted within 10 days; failure to submit all Required Forms and Document Copies on time may result in tax withheld from payments made to you.

If any information in your Individual Record changes, you must access GLACIER and update your Individual Record as soon as possible.

If you have any questions, please contact the GLACIER Administrator listed above.

Thank you for your prompt attention to this matter.

Additional Information, if any

Employee's Withholding Certificate

OMB No. 1545-0074

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**Give Form W-4 to your employer.****Your withholding is subject to review by the IRS.****2025****Step 1:
Enter
Personal
Information**

(a) First name and middle initial Xinhang	Last name Xu	(b) Social security number 113 69 2977
Address 1514 Pole Line Rd		Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
City or town, state, and ZIP code Davis, CA 95616		
(c) <input checked="" type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying surviving spouse <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

TIP: Consider using the estimator at www.irs.gov/W4App to determine the most accurate withholding for the rest of the year if: you are completing this form after the beginning of the year; expect to work only part of the year; or have changes during the year in your marital status, number of jobs for you (and/or your spouse if married filing jointly), dependents, other income (not from jobs), deductions, or credits. Have your most recent pay stub(s) from this year available when using the estimator. At the beginning of next year, use the estimator again to recheck your withholding.

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, and when to use the estimator at www.irs.gov/W4App.

**Step 2:
Multiple Jobs
or Spouse
Works**

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at www.irs.gov/W4App for the most accurate withholding for this step (and Steps 3–4). If you or your spouse have self-employment income, use this option; **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; **or**

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate ☐

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

**Step 3:
Claim
Dependent
and Other
Credits**

If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000 \$

Multiply the number of other dependents by \$500 \$

Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here

3 \$0.00**Step 4
(optional):
Other
Adjustments**

(a) **Other income (not from jobs).** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income

4(a) \$

(b) **Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here

4(b) \$

(c) **Extra withholding.** Enter any additional tax you want withheld each **pay period**

4(c) \$**NONRESIDENT ALIEN****Step 5:
Sign
Here**

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.)**Date****Employers
Only**

Employer's name and address

First date of
employmentEmployer identification
number (EIN)

**Exemption From Withholding on Compensation
for Independent (and Certain Dependent) Personal
Services of a Nonresident Alien Individual**

OMB No. 1545-0795

► Go to www.irs.gov/Form8233 for instructions and the latest information. ► See separate instructions.**Who Should
Use This Form?****Note:** For definitions of terms used in this section and detailed instructions on required withholding forms for each type of income, see **Definitions** in the instructions.**IF** you are a nonresident alien individual who is receiving. . .**THEN**, if you are the beneficial owner of that income, use this form to claim. . .

Compensation for independent personal services performed in the United States

A tax treaty withholding exemption (Independent personal services, Business profits) for part or all of that compensation.

Compensation for dependent personal services performed in the United States

A tax treaty withholding exemption for part or all of that compensation.

Noncompensatory scholarship or fellowship income **and** personal services income **from the same withholding agent**A tax treaty withholding exemption for part or all of **both** types of income.**DO NOT Use
This Form. . .****IF** you are a beneficial owner who is. . .**INSTEAD**, use. . .Receiving compensation for dependent personal services performed in the United States **and** you are **not** claiming a tax treaty withholding exemption for that compensation

Form W-4 (See the Instructions for Form 8233 for how to complete Form W-4.)

Receiving noncompensatory scholarship or fellowship income **and** you are **not** receiving any personal services income **from the same withholding agent**

Form W-8BEN or, if elected by the withholding agent, Form W-4 for the noncompensatory scholarship or fellowship income

Claiming only foreign status or treaty benefits with respect to income that is **not** compensation for personal services

Form W-8BEN

This exemption is applicable for compensation for calendar year 2025, or other tax year beginning _____ and ending _____.**Part I Identification of Beneficial Owner** (See instructions.)**1** Name of individual who is the beneficial ownerXinhang Xu**2** U.S. taxpayer identification number113692977**3** Foreign tax identification number, if any**4** Permanent residence address (street, apt. or suite no., or rural route). **Do not use a P.O. box.**USTC ,96 Jinzhai road , Baohe district

City or town, state or province. Include postal code where appropriate.

Hefei, 230026

Country (do not abbreviate)

China**5** Address in the United States (street, apt. or suite no., or rural route). **Do not use a P.O. box.**1514 Pole Line Rd

City or town, state, and ZIP code

Davis, CA 95616**Note:** Citizens of Canada or Mexico are not required to complete lines 7a and 7b.**6** U.S. visa typeJ1**7a** Country issuing passportChina**7b** Passport numberEB3862544**8** Date of entry into the United States3/2/2024**9a** Current nonimmigrant statusJ1 Research Scholar**9b** Date your current nonimmigrant status expires3/9/2026**10** If you are a foreign student, trainee, professor/teacher, or researcher, check this box ☒
Caution: See the **line 10 instructions** for the required additional statement you must attach.

Part II Claim for Tax Treaty Withholding Exemption**11** Compensation for independent (and certain dependent) personal services:**a** Description of personal services you are providingresearch scholar of postdoctor at UCDavis**b** Total compensation you expect to be paid for these services in this calendar or tax year \$ 64480**12** If compensation is exempt from withholding based on a tax treaty benefit, provide:**a** Tax treaty on which you are basing exemption from withholding U.S. - China Income Tax Treaty**b** Treaty article on which you are basing exemption from withholding Article 19**c** Total compensation listed on line 11b above that is exempt from tax under this treaty \$ 64480**d** Country of residence China**Note:** Do not complete lines 13a through 13d unless you also received compensation for personal services **from the same withholding agent.****13** Noncompensatory scholarship or fellowship income:**a** Amount \$ _____**b** Tax treaty on which you are basing exemption from withholding _____**c** Treaty article on which you are basing exemption from withholding _____**d** Total income listed on line 13a above that is exempt from tax under this treaty \$ _____**14** Sufficient facts to justify the exemption from withholding claimed on line 12 and/or line 13 (see instructions) _____As set forth on this form, I qualify for an exemption from tax withholding under theU.S. - China Income Tax Treaty, Article 19I have met all of the requirements set forth in the article as verified by the withholding agent (signature below).The required additional statement that details the criteria is attached.**Part III Certification**

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the beneficial owner (or am authorized to sign for the beneficial owner) of all the income to which this form relates.
- The beneficial owner is not a U.S. person.
- The beneficial owner is a resident of the treaty country listed on line 12a and/or 13b above within the meaning of the income tax treaty between the United States and that country, or was a resident of the treaty country listed on line 12a and/or 13b above at the time of, or immediately prior to, entry into the United States, as required by the treaty.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner.

Sign Here

Signature of beneficial owner (or individual authorized to sign for beneficial owner)

Date

Part IV Withholding Agent Acceptance and Certification

Name <u>Regents of the University of Ca</u>	Employer identification number <u>946036494</u>
Address (number and street) (Include apt. or suite no. or P.O. box, if applicable.) <u>One Shields Avenue</u>	
City, state, and ZIP code <u>Davis, CA 95616</u>	Telephone number <u>530-754-1829</u>

Under penalties of perjury, I certify that I have examined this form and any accompanying statements, that I am satisfied that an exemption from withholding is warranted, and that I do not know or have reason to know that the nonresident alien individual is not entitled to the exemption or that the nonresident alien's eligibility for the exemption cannot be readily determined.

Signature of withholding agent

Date

University of California, Davis

*Official Attachment to IRS Form 8233
Additional Statement for Teachers and Researchers*

Name (Last, First)	Country of Tax Residence	Social Security Number/ITIN
Xu, Xinhang	China	113692977

I was a resident of the People's Republic of China on the date of my arrival in the United States. I am not a U.S. citizen. I have not been lawfully accorded the privilege of residing permanently in the United States as an immigrant.

I am visiting the United States for the purpose of teaching, giving lectures, or conducting scientific research at University of California, Davis. I will receive compensation for my teaching, lecturing, or research activities.

The teaching, lecturing, or research compensation received during the entire tax year qualifies for exemption from withholding of federal tax under the tax treaty between the United States and the People's Republic of China. I have not previously claimed an income tax exemption under that treaty for income received as a teacher, lecturer, researcher, or student before the date of my arrival in the United States.

Any research I perform will be undertaken in the public interest and not primarily for the private benefit of a specific person or persons.

I arrived in the United States on 03/02/2024. The treaty exemption is available only for compensation received during a maximum aggregate period of three years.

I hereby certify that the information provided above is true and correct to the best of my knowledge. If any of the information changes or if I have reason to believe that I no longer qualify for the exemption claimed above, I will notify the Institution Administrator .

Signature

Date



U.S. Tax Information For Non-United States Citizens/Non-U.S. Permanent Resident Aliens

Why Am I Required to Provide Information in GLACIER? The Internal Revenue Service ("IRS"), the U.S. government tax authority, has issued strict regulations regarding the taxation and reporting of payments made to non-United States citizens. As a result, payments made to you may be subject to U.S. income tax and reporting.

Why Is My Tax Status Important? To comply with the U.S. tax laws, your *U.S. Tax Residency Status* must be determined. The Substantial Presence Test determines whether an individual is a *Nonresident Alien* or *Resident Alien* for U.S. tax withholding and reporting. **GLACIER** will calculate your *U.S. Residency Status for Tax Purposes* based on the information provided by you.

What is the Difference between a Nonresident Alien and Resident Alien? If you are a *Nonresident Alien for Tax Purposes*, you are subject to special tax withholding and reporting regulations; if you are a *Resident Alien for Tax Purposes*, you are taxed in the same manner as a U.S. Citizen.

How Long Will I Be a Nonresident Alien? Your *Residency Status Change Date* is the day on which your *U.S. Residency Status for Tax Purposes* will change, generally from *Nonresident Alien for Tax Purposes* to *Resident Alien for Tax Purposes*. The U.S. tax system is based on a calendar year period (January 1 – December 31). In most cases, when your *U.S. Residency Status for Tax Purposes* changes, you will become a *Resident Alien for Tax Purposes* retroactive to the first day of the calendar year during which your status changed; this day is called the *Residency Status Start Date*.

How Will I Be Taxed on Payments From U.S. Sources? As a *Nonresident Alien for Tax Purposes*, U.S. tax law requires that you be taxed in the following manner:

- If you are an employee and receive Dependent Compensation (salary or wages), you are required to complete Form W-4 as "Single or Married Filing Separately", regardless of your actual marital status.
- If you receive a Scholarship or Fellowship (for which NO services are required), your scholarship or fellowship may consist of *Nontaxable items* (Tuition, Book Allowance, and Required Registration Fees) or *Taxable items* (including, but not limited to, Room and Board, Stipend, Living Allowance, Travel Payment/Reimbursement). If you are present in the U.S. under an F, J, M, or Q immigration status, the applicable rate of tax withholding is 14 percent; if you are present in the U.S. under any other immigration status, the applicable rate of tax withholding is 30 percent.
- If you receive an Honorarium, Guest Speaker Fee, Consultant Fees, Royalty, or any other type of income, the applicable rate of tax withholding is 30 percent.

Can I Be Exempt From Tax Withholding? The U.S. maintains income tax treaties with more than 60 countries. Certain taxable payments made to you may be exempt from U.S. tax based on an income tax treaty entered into between the U.S. and your country of tax residence. The existence of a tax treaty does not automatically ensure an exemption from tax withholding; rather, you must satisfy the requirements for the exemption set forth in the tax treaty and provide all applicable forms and documents to your Institution's **GLACIER** Administrator. If you qualify for a tax treaty exemption, you must complete and submit Form W-8BEN (for all non-service scholarships and fellowships, or royalty payments) and/or Form 8233 (for all compensation or payments for services).

What If I Do Not Submit My Forms and Documents? If you do not complete the information in **GLACIER** and/or submit the required forms and documents in a timely fashion, the maximum amount of tax will be withheld from all payments made to you. For instructions of how to submit your forms and documents, please refer to the instruction page generated with your forms; DO NOT send your forms to the **GLACIER** Support Center.

Where Can I Get More Information? If you have additional questions about **why** you were asked to complete **GLACIER**, please contact your Institution's **GLACIER** Administrator or the person at your institution who asked you to complete **GLACIER**. If you have questions about **GLACIER** or the U.S. tax system, please contact the **GLACIER** Support Center at support@online-tax.net.