2026 Tax Season Organizer for International Students | 留学生/OPT 报税季整理表

Tax year 2026 (filed in 2027). Fill the yellow cells. 2026 税年（2027 年申报）。只填黄色单元格。

Name 姓名	Alex Chen 陈同学	Optional 可选
Visa status in 2026 2026 年签证身份	F-1	Pick from the list. 从下拉菜单选择。
Tax residence before you came to the U.S. 来美前的税务居民地	China (PRC) 中国大陆	Used for the treaty note below. 用于下方税收协定提示。
First calendar year in the U.S. on F/J/M/Q 首次以 F/J/M/Q 身份在美的年份	2023	e.g. 2023 if you arrived in Aug 2023. Any part of a year counts as a year. 如 2023 年 8 月入境填 2023；一年中任何一天都算一年。
Earlier years exempt as J/Q teacher or trainee (count) 此前作为 J/Q 访问学者/培训生的年数	0	Usually 0. 通常为 0。
Had 2026 U.S. wages subject to withholding? 2026 年有被预扣税的美国工资吗?	Yes 是	W-2 from an on-campus job, CPT or OPT = Yes. 有校内工作、CPT 或 OPT 的 W-2 即选“是”。
SSN or ITIN? 有 SSN 或 ITIN 吗?	SSN	Needed for Form 1040-NR. 报 1040-NR 需要。
State(s) you lived/worked in during 2026 2026 年居住/工作的州	California	State returns are separate. 州税需另行申报。
'Today' override (optional) 指定今天（可选）	2027-02-20	Leave blank to use the real date. 留空使用今天日期。

YOUR 2026 SNAPSHOT 你的 2026 概览

Today used 当前日期	2027-02-20
Calendar years as an exempt student/trainee, incl. 2026 含 [illegible]	4
Likely tax status for 2026 2026 年可能的税务身份	Likely NONRESIDENT alien (exempt individual) — see Pub. 519 很可能为非居民外国人
Forms to expect 可能需要的表格	Form 1040-NR + Form 8843 (attached) 1040-NR + 8843
Federal due date 联邦截止日	2027-04-15 (Thursday)
Days left 剩余天数	54
Treaty note 税收协定提示	U.S.–China treaty Art. 20(c): up to $5,000 per tax year of income from personal services may be exempt for a PRC resident present solely for education/training (Pub. 901). 中美税收协定第20(c)条：每税年最多 $5,000 劳务收入可免税。

Start 开始 — SAMPLE inputs (Alex Chen 陈同学, F-1, first year in the U.S. 2023).

IMPORTANT 重要声明

This is an organizing tool, not tax or legal advice, and it does not prepare or file a return. Facts are summarized from IRS publications (Pub. 519, Pub. 901, Pub. 4011 Rev. 10-2026, Form 8843 for 2026, Instructions for Form 1040-NR and Form 4868), checked November 2026 — see the Sources tab. Rules can change; IRS.gov, your school's international office, a VITA site or a tax professional are the authority for your situation.

本表格仅用于整理资料，不构成税务或法律建议，也不会替你报税。内容摘自 IRS 官方出版物（2026 年 11 月核对，见“来源”页）。规则可能变化，具体情况请以 IRS 官网、学校国际学生办公室、VITA 志愿报税点或专业报税人员为准。

The 5-year count above is a rough check for students only. Teachers/researchers, F-2/J-2 dependents and anyone near the limit should read Pub. 519. 上方 5 年计算仅为学生的粗略判断；访问学者、家属或接近 5 年者请阅读 Pub. 519。

Which forms do I need? 我要交哪些表?

Answer Yes/No. The right column tells you what it means and where the IRS says so. 逐条回答“是/否”，右侧显示对应表格和 IRS 出处。

#	Question 问题	Answer 回答	If yes → 如果是 →	IRS source 出处
1	I was in the U.S. during 2026 on an F, J, M or Q visa as a student (exempt individual). 2026 年我以 F/J/M/Q 学生身份在美国。	Yes 是	Form 8843 — required even with no income. Each F-2/J-2 family member files their own. 即使没有收入也要交 8843；F-2/J-2 家属每人一份。	Form 8843 (2026); Pub. 4011
2	I had 2026 wages subject to U.S. income tax withholding (W-2: on-campus job, CPT, OPT). 我有被预扣税的工资（W-2）。	Yes 是	Form 1040-NR with Form 8843 attached — due Thu Apr 15, 2027. 1040-NR（附 8843），2027 年 4 月 15 日截止。	Instructions for Form 1040-NR; Pub. 4011
3	I had other taxable U.S. income but no wages (e.g. a taxable scholarship on Form 1042-S). 没有工资但有其他应税收入（如应税奖学金）。	No 否		IRS: Taxation of nonresident aliens; Pub. 4011
4	I want to claim a tax-treaty benefit (e.g. U.S.–China Art. 20). 我要申请税收协定优惠。	Yes 是	File Form 1040-NR and complete item L of Schedule OI. Pub. 4011: nonresident aliens claiming treaty benefits must also file a return. 需报 1040-NR 并填写 Schedule OI 第 L 项。	Instructions for Form 1040-NR; Pub. 4011; Pub. 901
5	Social Security / Medicare tax (W-2 box 4 / box 6) was withheld while I was a nonresident F-1/J-1 student. 我作为非居民学生被扣了社安税/医保税。	Yes 是	Generally exempt for nonresident F/J/M students (incl. OPT). Ask your employer for a refund first; if that fails, Form 843 + Form 8316. 通常可豁免；先找雇主退，退不了再交 843 + 8316。	IRS: Foreign student liability for Social Security and Medicare taxes
6	I must file Form 1040-NR but have no SSN and am not eligible for one. 要报 1040-NR 但没有也不能申请 SSN。	No 否		Instructions for Form W-7; Pub. 4011 (ITIN expiry)
7	I lived or worked in a state with an income tax. 我住/工作的州有州所得税。	Yes 是	A state return may also be required — check your state tax agency. 可能还需报州税，请查州税务局。	State rules vary 各州不同

8	I received a Form 1099-NEC or Form 1095-A. 我收到了 1099-NEC 或 1095-A。	No 否		Pub. 4011 (Source Documents)
9	My bank sent me a Form 1099-INT (bank interest). 银行寄来了 1099-INT。	Yes 是	Pub. 4011: most nonresident students don't need to report bank deposit interest; give your bank Form W-8BEN. 多数非居民学生无需申报存款利息；可向银行提交 W-8BEN。	Pub. 4011 (Source Documents)
10	I can't file by the due date. 无法按时申报。	No 否		Form 4868 instructions
11	I've been exempt as an F/J/M/Q student for any part of more than 5 calendar years. 我已有超过 5 个日历年为豁免学生。	No 否		IRS: Exempt individual – Who is a student; Substantial presence test
12	I'm from China (PRC) and had wages or a scholarship. 我来自中国大陆，有工资或奖学金。	Yes 是	U.S.–China treaty Art. 20: up to $5,000/yr of personal-services income, plus certain grants and payments from abroad, may be exempt; Pub. 519 says the Art. 20 benefit can continue after you become a resident alien. Not for Hong Kong. 第20条：每年最多 $5,000 劳务收入免税，某些奖学金/境外汇款亦可免；成为税务居民后仍可适用；不适用于香港。	Pub. 901 (China); Pub. 519 ch. 9; U.S.–China treaty

Days present in the U.S. 在美天数

For Form 8843 line 4a (days in 2026, 2025, 2024). Any part of a day in the U.S. counts as a day present. 用于 8843 第 4a 行

First arrival date for your current stay 2023-08-15

Check against your I-94 travel history. 请与 I-94 出入境记录核对。

Result 结果	2026	2025	2024
Days present 在美天	**348**	**330**	**309**

Assumes you were in the U.S. from the arrival date on, except the trips listed. Days you leave and return both count as days present. 假设入境后除所列行程外都在美；出境日和返美日都算在美。

Left U.S. 离境日	Returned 返美日	Trip / note 行程	Days out 2026	Days out 2025	Days out 2024
2023-12-18	2024-01-10	Winter break home 寒假回国	0	0	9
2024-06-01	2024-07-20	Summer 暑假	0	0	48
2025-01-15	2025-02-09	Lunar New Year 春节	0	24	0
2025-12-20	2026-01-05	Winter break 寒假	4	11	0
2026-08-02	2026-08-16	Trip home 回国	13	0	0
			0	0	0
			0	0	0
			0	0	0

PREVIEW / 预览 • end of preview 预览结束

2026 Tax Organizer for F-1/OPT Students

This preview is from the filled SAMPLE file, not the blank organizer.
预览来自已填写的 SAMPLE 示例文件，不是空白表。
SAMPLE uses a fictional student (Alex Chen 陈同学, F-1, from China, first U.S. year 2023).
The full download also includes the blank .xlsx and a 6-page bilingual Quick-Start PDF.
This is an organizing tool. It does not prepare or file a tax return.

Full product page 完整产品页

https://qazmaster10.gumroad.com/l/vftppe

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