B-1 or WB visitors

Departmental processing steps for fee payments or honorarium payments

1. Have the visitor complete the PIF form
2. Obtain completed B/WB Qualification statement from the visitor
3. Complete the AIS/PBS or APS and Independent Contractor Classification Checklist
4. Contact the Office of Accounting to see if visitor is eligible for tax treaty benefit
5. If the visitor is eligible for tax treaty benefit:
   • Obtain SSN and passport copies and schedule treaty benefit application appointment with the Office of Accounting staff
   • If no SSN, obtain ITIN and passport copies and schedule treaty benefit application appointment with the Office of Accounting staff
   • If no SSN nor ITIN, obtain passport copies and schedule the treaty benefit and ITIN application appointment with the Office of Accounting staff (ITIN application appointment takes approximately 45 minutes)

Note: Contact the Office of Accounting immediately if the visitor is from Canada, as these visitors require special wording in their invitation letters from The University of Texas at Austin.

Items needed by Office of Accounting prior to treaty benefit (or ITIN application) appointment

1. B/WB Qualification statement (completed and signed by visitor)
2. Passport Copy
3. B Visa page or if traveling under the Visa Waiver Program, a copy of the ESTA Authorization Form. The ESTA Application can be retrieved at: https://esta.cbp.dhs.gov/esta/application.html?execution=e1s1.
4. Copy of page in the passport booklet with the Arrival/Departure date stamp for this visit to the U.S.
5. A copy of the I-94 electronic admission authorization form. Once the electronic application has been approved and an admission number has been issued by U.S. Customs and Border Protection, the form will be available for retrieval at the following link: https://i94.cbp.dhs.gov/I94/request.html
6. PIF
7. Electronic AIS/PBS authorization document or APS (26-accounts only) Form
8. Employee Independent Contractor Classification Checklist (EICCC)
9. SSN or ITIN number (if the visitor has one)
10. Invitation letter from department
11. Form completed by the visitor regarding previous visits to the U.S.

Note regarding taxpayer numbers: The visitor should have an SSN if he or she has ever taught or studied in the U.S. prior to 2005. This is a permanent number and must be located prior to completing the paperwork. If the visitor has ever been issued an ITIN, this is also a permanent number and also must be located prior to completing the paperwork.

Note regarding ITIN applications: An ITIN application is only to be submitted if the visitor confirms that he or she has never applied for nor received an SSN or an ITIN previously and is currently eligible for treaty benefits. There must be a deduction of 30 percent for taxes taken from the initial fee payment. The Office of Accounting will refund this tax and forward the ITIN to the visitor upon receipt of the ITIN from the IRS.

If an ITIN application is processed in the Office of Accounting following the visitor’s appointment with the Office of Accounting staff, the Office of Accounting will issue a number to use in creating the VID (*DEFINE GGV).

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