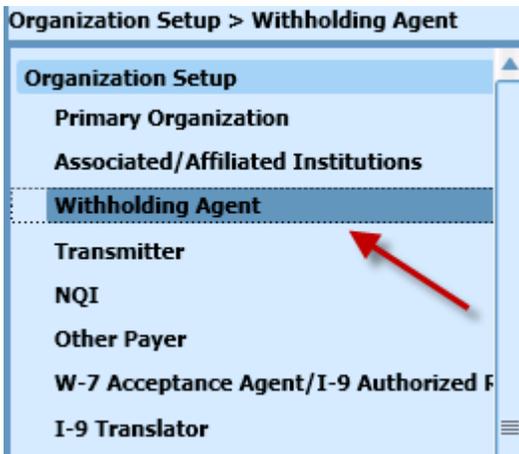


How to Process Your Annual 1042 - S

1. Open your Windstar Database
2. First you will add the Withholding Agent
 - a. Go to Organization Setup
 - i. Ensure you have the correct Tax Year Selected.
 - ii. Click "Add"
 - iii. Withholding Agent – Information from the prior year should populate and then selection "Ok". If it does not or if the information is incorrect, please complete with the appropriate information. This should be the person who is responsible for reviewing and signed the annual 1042 Report. After you have completed and reviewed the information, you will lock the record by selecting the "Lock" tab in the bottom right corner. If you have an error after locking the withholding agent, you will need to contact Thomson Reuters to unlock the record.



International Tax Navigator®

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Organization Setup > Withholding Agent

Organization Setup

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- Associated/Affiliated Institutions
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- Transmitter
- NQI
- Other Payer
- W-7 Acceptance Agent/I-9 Authorized F
- I-9 Translator
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- Recipient
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Tax year

Name of withholding agent(organization)

Name of contact at withholding agent

Contact's department

Contact's title

Address line 1

Address line 2

Address line 3

City

State Zip

Contact's telephone number

Withholding agent's employer ID number (EIN)

View address Add Change Cancel OK Lock

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Tax year 2011

Name of withholding agent(organization) ABC Agency

Name of contact at withholding agent John Smith

Contact's department ABC Agency Finance Department

Contact's title Controller

Address line 1 100 West Street

Address line 2

Address line 3

City Raleigh

State NC Zip 27603-5925

Contact's telephone number 919-707-0795 Ext

Withholding agent's employer ID number (EIN) 56-6011111

View address Add Change Cancel OK Lock

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- Create Forms Outside Analyses
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Organization Processing

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Tax year 2011

Name of withholding agent(organization) ABC Agency

Name of contact at withholding agent John Smith

Contact's department ABC Agency Finance Department

Contact's title Controller

Address line 1 100 West Street

Address line 2

Address line 3

City Raleigh

State NC Zip 27603-5925

Contact's telephone number 919-707-0795 Ext

Withholding agent's employer ID number (EIN) 56-601111

View address Add Change Cancel OK Lock

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New Hire Forms

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- FNIS Upload

Organization Processing

- Export to Excel
- Export for Paying Systems
- FNIS Upload
- Reports

Tax year 2011

Name of withholding agent (organization) ABC Agency

Name of contact at withholding agent John Smith

Contact's department ABC Agency Finance Department

Contact's title Controller

Address line 1 100 West Street

Address line 2

Address line 3

City Raleigh

State NC Zip 27603-592

Contact's telephone number 919-707-0795 Ext

Withholding agent's employer ID number (EIN) 56-601111 Record Locked

View address Add Change Cancel OK Lock

3. Recipient Setup and processing
 - a. For each individual recipient, you must ensure your recipients addresses are entered for where you want the 1042 to go. If you wish for them to go to the U.S address, you will click on the recipient's name and then click on U.S. Address tab. You will see, after you

complete the U.S. address, you can check the box “Use U.S. address on 1042-S mailer slip.”

International Tax Navigator®
Tax Year 2011

Recipient Setup and Processing > Recipient

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Associated/Affiliated Institutions
Withholding Agent
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NQI
Other Payer
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Reports

Basic Info | Personal Info | **U.S. Address** | Foreign Address | Country Info | Default Income 1 | Default Income 2 | Comments | Pers. Exempt Info

Recipient name: JEN TRIV

ID numbers: [] [] 100027

Address line 1: 3512 Bush Street

Address line 2: []

Address line 3: []

City: Raleigh

State: NC Zip: 27604

Use U.S. address on 1042-S mailer slip

Buttons: Add, Delete, Change, Cancel, OK, Refresh, View mailing label, Find city using zip code, Show city list, Show city list for all states

OR

- b. Instead of the U.S. Address, you can have the 1042-S sent to the foreign address on file. If you wish for them to go to the foreign address check the box on the “Foreign Address” tab on the bottom left corner, once you have completed the entire address:

Organization Setup
Primary Organization
Associated/Affiliated Institutions
Withholding Agent
Transmitter
NQI
Other Payer
W-7 Acceptance Agent/I-9 Authorized F
I-9 Translator
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Recipients
Immigration Details
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Substantial Presence Test Recap
Treaty Analysis Recap
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Reports

Basic Info | Personal Info | U.S. Address | **Foreign Address** | Country Info | Default Income 1 | Default Income 2 | Comments | Pers. Exempt Info

Recipient name: JEN TRIV

ID numbers: [] [] 100027

Address line 1: 100 Paris Aven

Address line 2: []

Address line 3: []

City postal code: []

City: Paris

Province/Region: []

Region postal code: []

Country: FRANCE FR

Use foreign address on 1042-S mailer slip

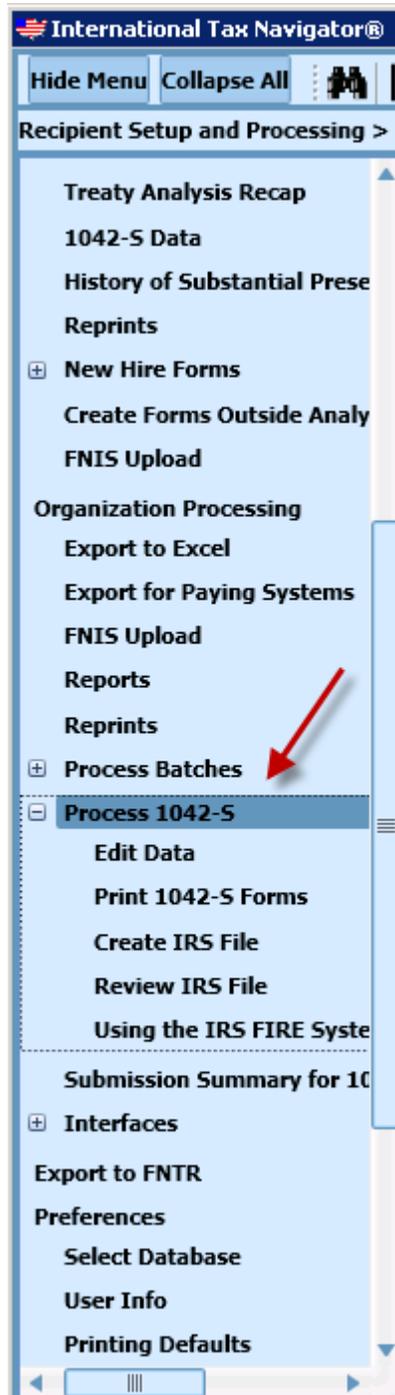
Buttons: Add, Delete, Change, Cancel, OK, Refresh, View mailing label

4. 1042-S Data should be entered next:

- a. Gross Income paid
 - i. Calculate income paid should be entered.
 - ii. If the Withholding allowance has not been calculated, select the appropriate amount of tax (a percentage) and click “Calculate federal tax”
 - iii. State taxes has been calculated (if applicable) – this is a manual entry.
 - iv. Click “ok” once complete.

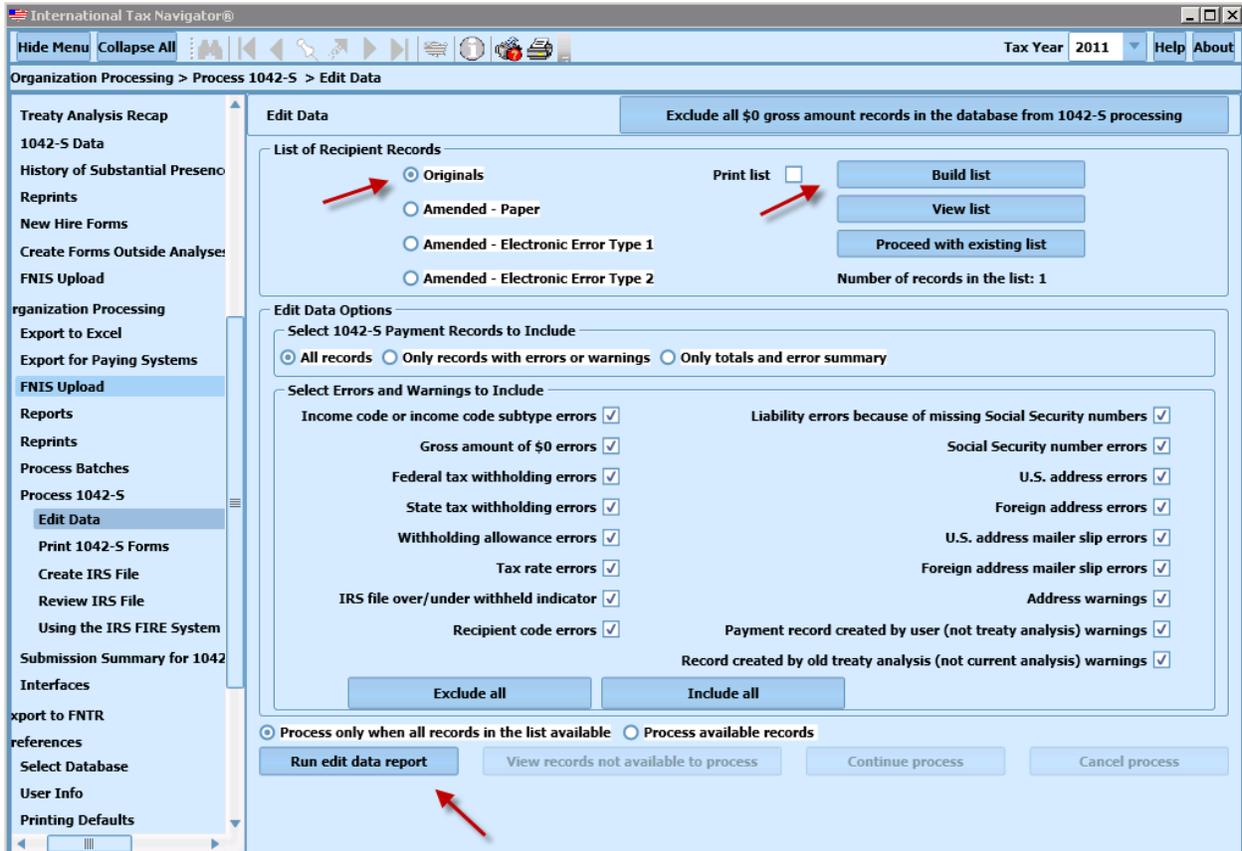
- b. Multiple 1042-S data may be entered for the same individual. Click “add” and start at “step 4.” again.
 - i. To move between the 1042 records, you can use the arrows on the bottom right corner.

5. Processing the 1042-S
 - a. Process 1042-S – Click “Process 1042-S”.



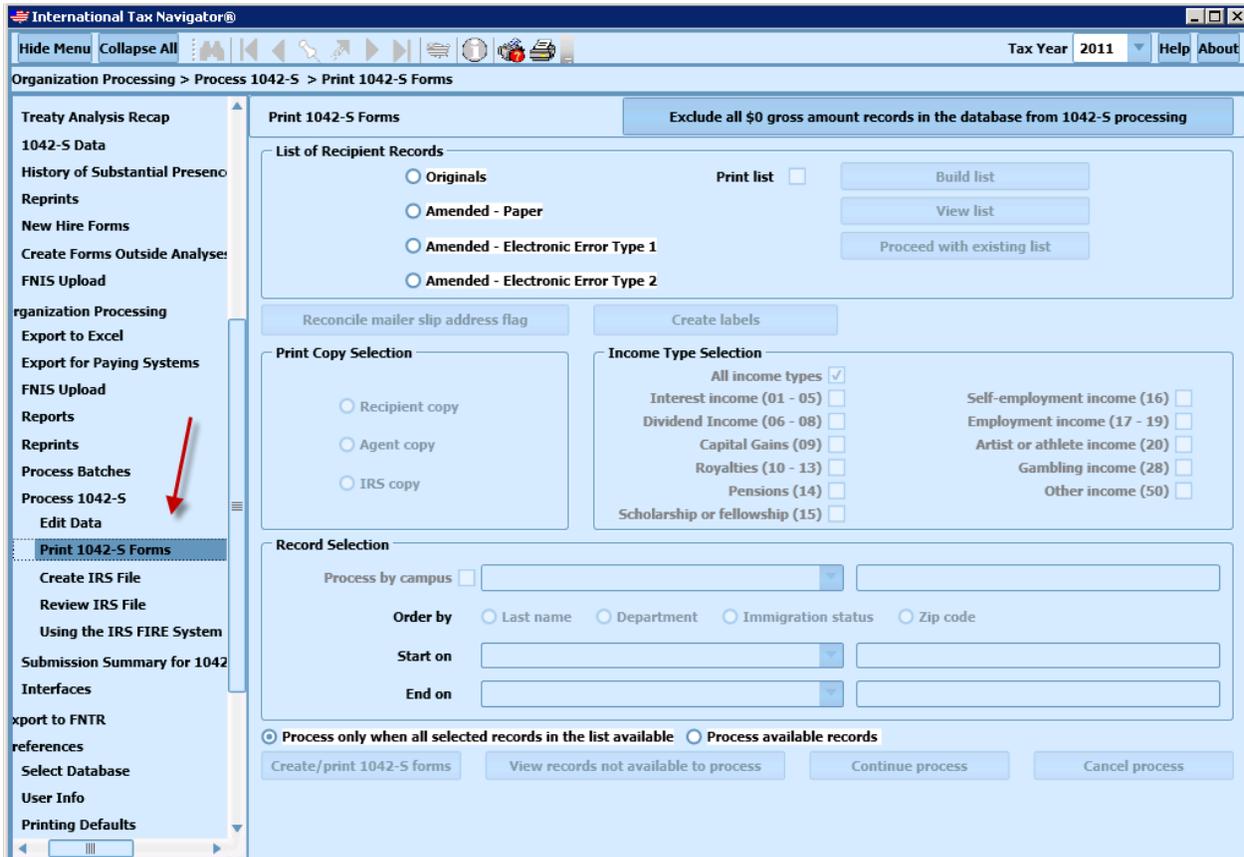
- b. Click “Edit Data”
 - i. Click “Originals”

- ii. Click “Build List”
 1. Click “yes” for “you have opted to build but not print the list for tax year you are working on;” “Do you want to proceed”
- iii. Click “Run Edit Data Report”

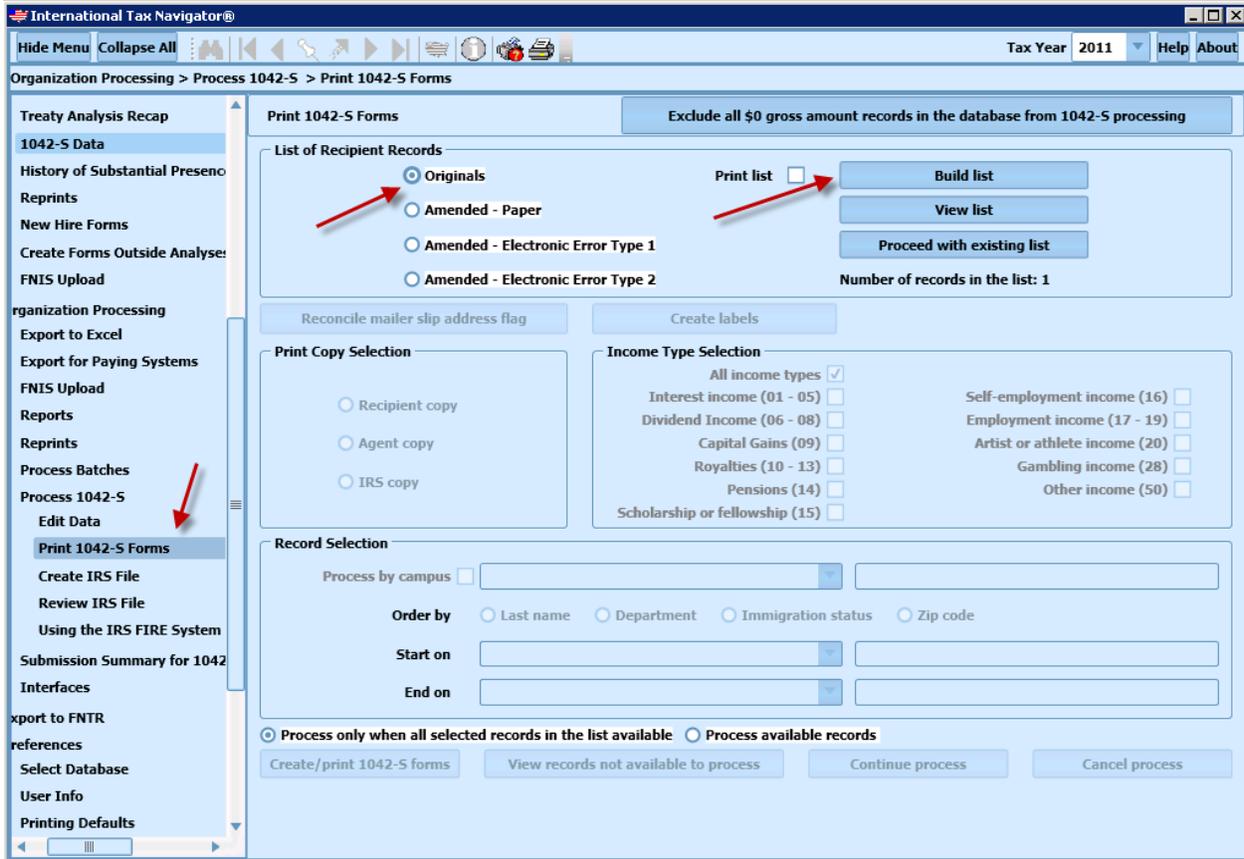


- iv. Pop-up menu - Click “yes” to “run edit data report. Do you want to proceed with current selections for edit data options and availability of records?”
- v. Either print and review the reports for any necessary changes or view them on the screen and edit the information, if necessary. After the review is complete, click “Close”.

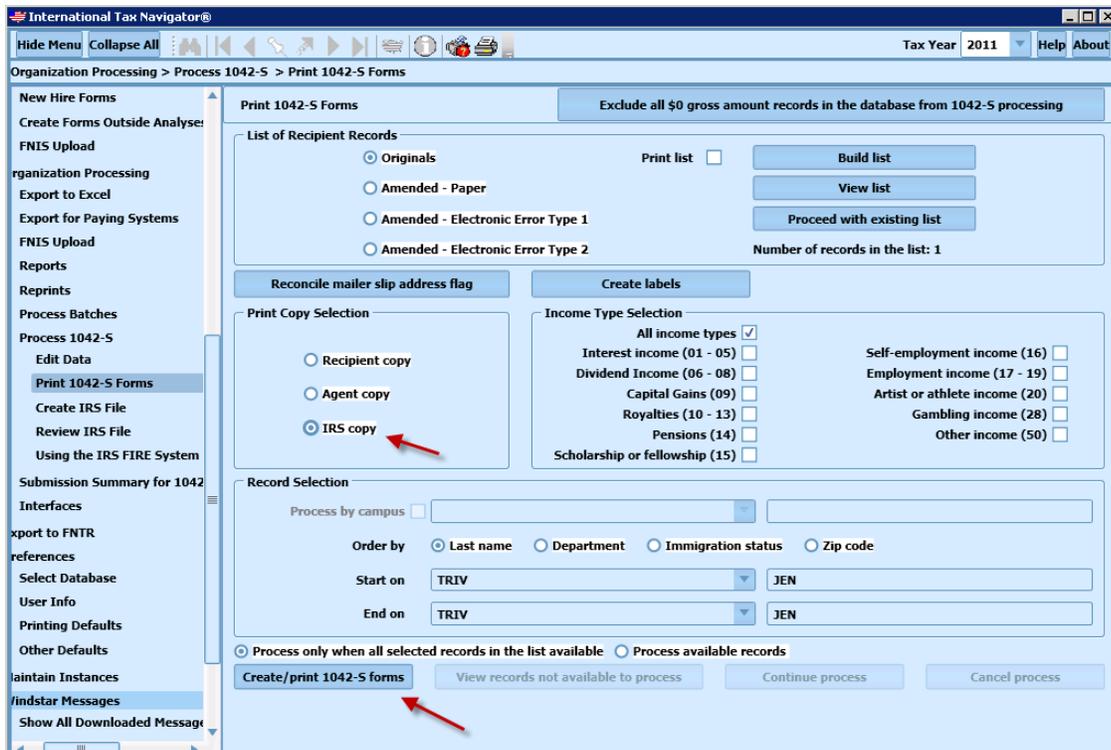
6. Print 1042-S Forms
 - a. Click "Print 1042-S forms"



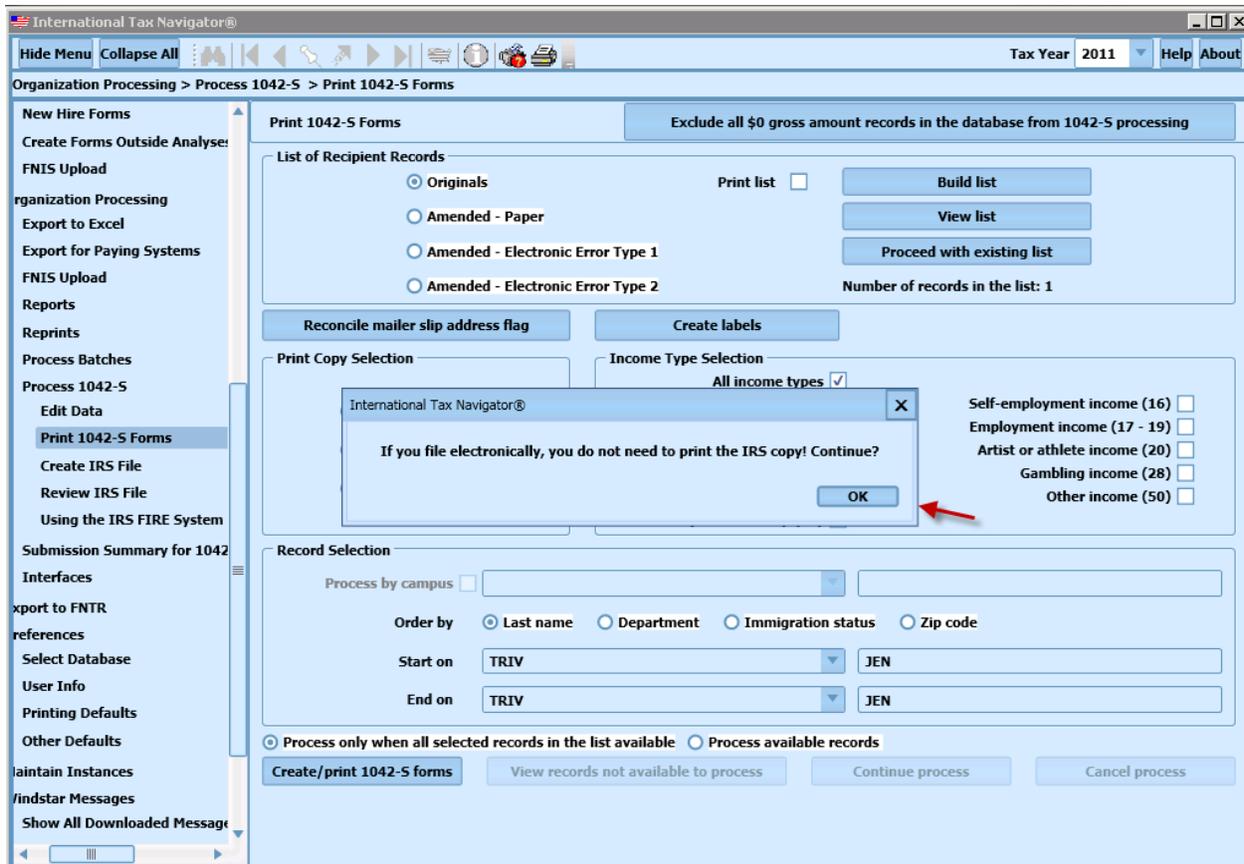
- b. Click "Original"
- c. Click "Build List"



- d. Pop-up menu - Click "Yes" "You have opted to build but not to print the list for tax year. Do you want to proceed?"
- e. Click select "IRS Copy" (please skip this step if you have more than 250 - 1042-S records to print.
 - i. Click "Create/Print 1042-S forms"



- ii. Pop-up menu - Click "yes" you have opted to create/print 1042-S forms. Do you want to proceed with current selections for print copy, income type, record selection and availability of records? Click "No" if you have more than 250 – 1042-S records to print.



iii. Pop-up menu - Click “Yes” to continue with printing the IRS Copy, UNLESS you have more than 250 and need to file electronically. Depending on your print preferences, 1042-S Copy A should have printed to your default printer.

f. Next, print the “agent copy.”

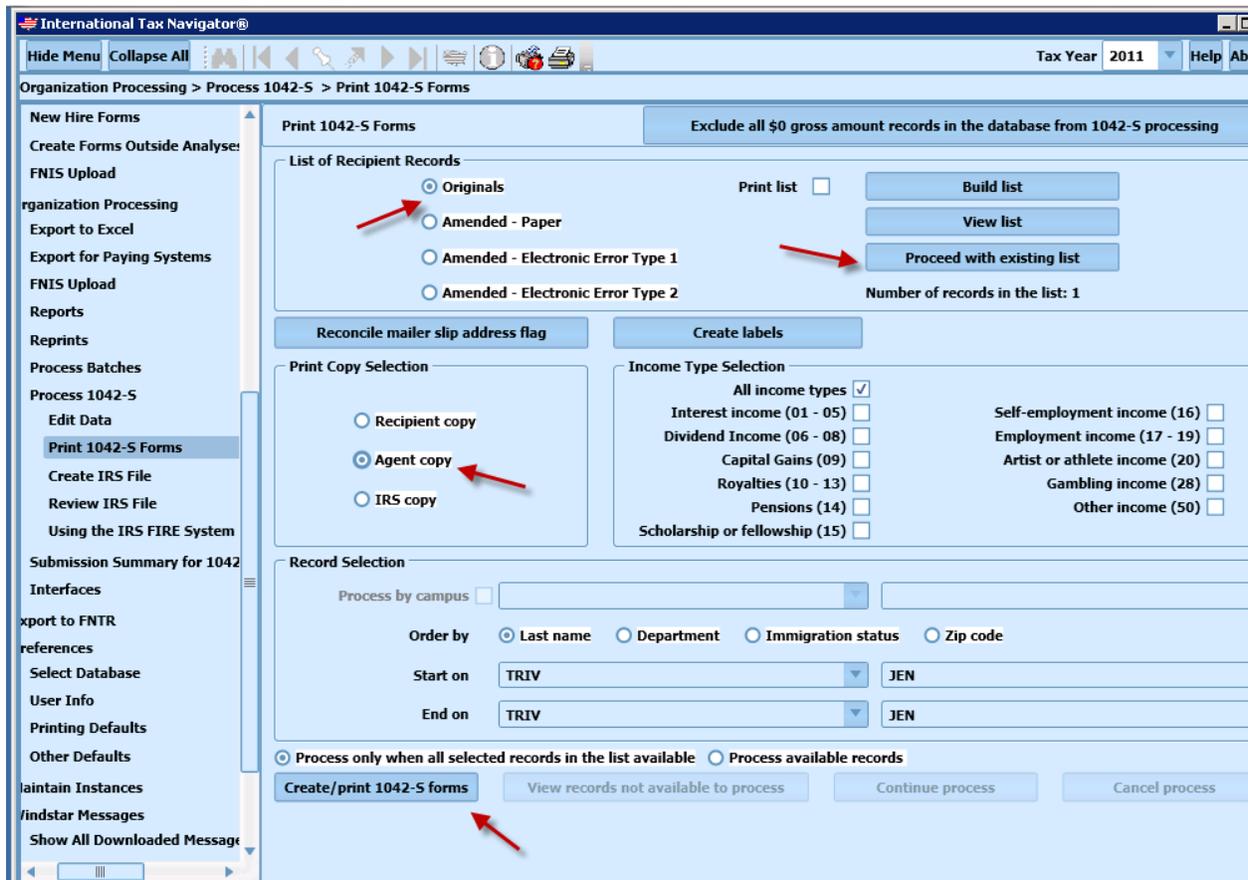
i. Click “originals”

ii. Click “proceed with existing list” since you have already created the list.

iii. Select “Agent Copy”

iv. Click “Create/Print 1042-S forms”

v. Pop-up menu - Click “yes” to opt to create/print 1042-S forms. Do you want to proceed with current selections for print copy, income type, record selection and availability of records”.



- vi. 1042-S, Copy E for Withholding Agent should have printed on your default printer.
 - vii. Click “close” to close the summary report.
- g. Next, print the Recipient Copy
- i. Click “originals”
 - ii. Click “proceed with existing list” since you have already created the list.
 - iii. Select “Agent Copy”
 - iv. Click “Create/Print 1042-S forms”
 - v. Pop-up menu - Click “yes” to opt to create/print 1042-S forms. Do you want to proceed with current selections for print copy, income type, record selection and availability of records”

Organization Processing > Process 1042-S > Print 1042-S Forms

Print 1042-S Forms Exclude all \$0 gross amount records in the database from 1042-S processing

List of Recipient Records

Originals Print list Build list
 Amended - Paper View list
 Amended - Electronic Error Type 1 Proceed with existing list
 Amended - Electronic Error Type 2 Number of records in the list: 1

Reconcile mailer slip address flag
Create labels

Print Copy Selection

Recipient copy
 Agent copy
 IRS copy

Income Type Selection

All income types
 Interest income (01 - 05) Self-employment income (16)
 Dividend Income (06 - 08) Employment income (17 - 19)
 Capital Gains (09) Artist or athlete income (20)
 Royalties (10 - 13) Gambling income (28)
 Pensions (14) Other income (50)
 Scholarship or fellowship (15)

Record Selection

Process by campus

Order by Last name Department Immigration status Zip code

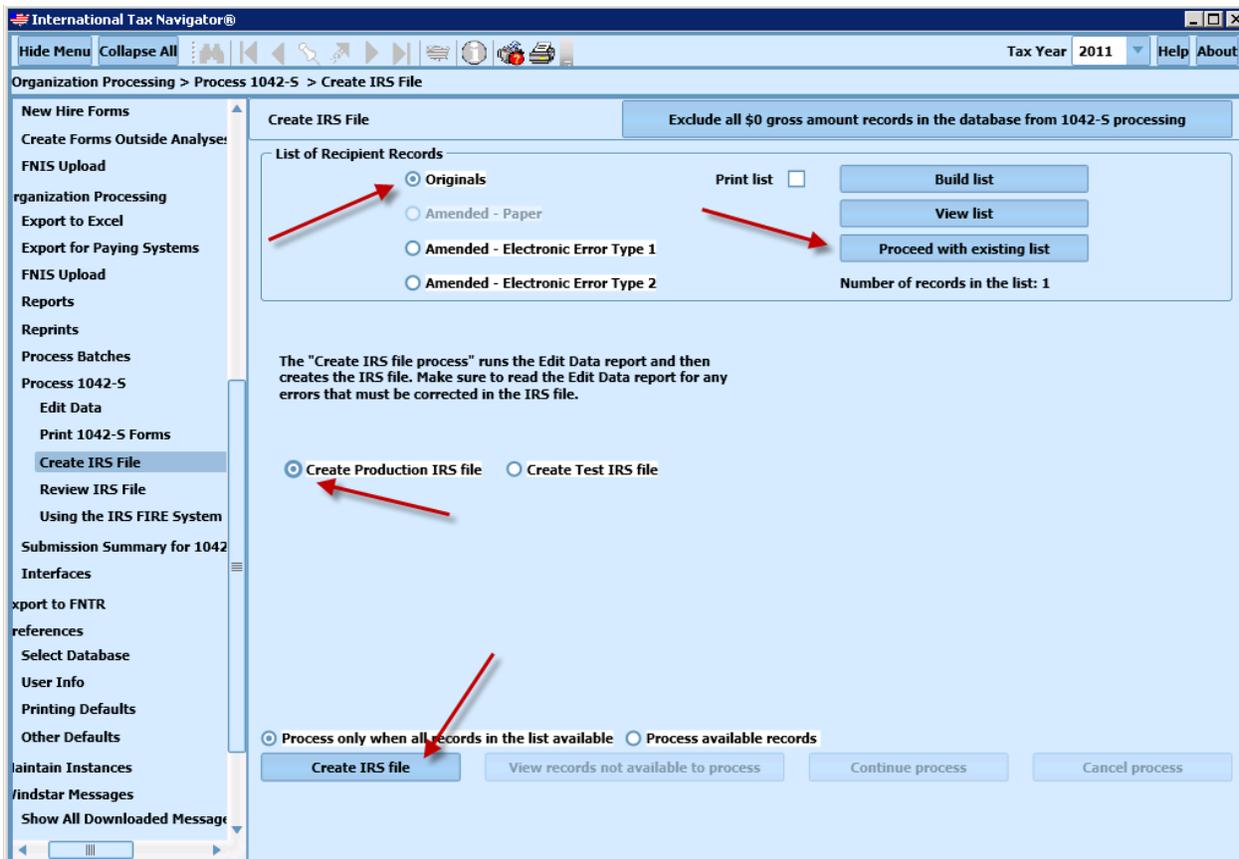
Start on TRIV JEN
 End on TRIV JEN

Process only when all selected records in the list available Process available records

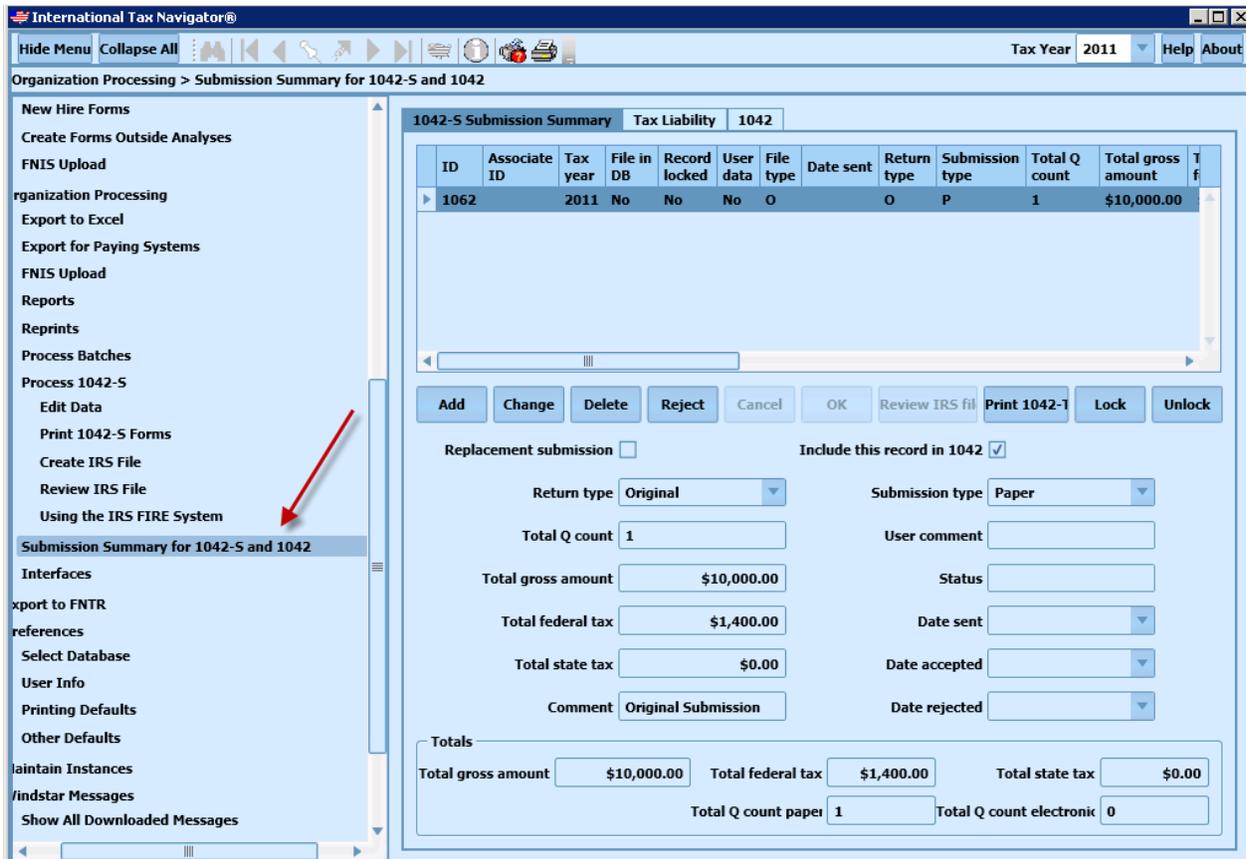
Create/print 1042-S forms
View records not available to process
Continue process
Cancel process

- vi. Pop-up menu - Click “Yes” you have opted to create/print 1042-S forms. Do you want to proceed with current selections for print copy, income type, record selection and availability of records”
- vii. 1042-S Copies B, C and D should have printed on your default printer for the Recipient.
- viii. Click “close,” to close the summary reports.

- j. If you have more than 250 - 1042-S records, then you will need to create the IRS file for electronic filing. If you have printed the IRS 1042-S Copy A, you can skip this step.



- i. Pop-up menu - Click "Yes" you have opted to create IRS file. Do you want to proceed with current selections for type of file and availability of records"
 - ii. Please call the Foreign National team if you need assistance with this process.
- k. Next, complete the 1042 and 1042T. Select "submission summary for 1042-S and 1042". Here, you will need to know when you paid your liabilities through the EFTPS system, which is required for all tax payments to the IRS.



- i. At the top of the 1042-S Submission Summary, you will see a tab for “Tax Liability.” This is where you will enter the taxes paid. Click on the tab “Tax Liability”.
 1. Select the approximate time that each tax liability was sent to the IRS and click “change”. Please note that you must select one of the dates. You can’t select “April Total”, instead you will select “Apr 30”

Organization Processing > Submission Summary for 1042-S and 1042

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- Export to FNTR
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- Select Database
- User Info
- Printing Defaults
- Other Defaults
- Maintain Instances
- Findstar Messages
- Show All Downloaded Messages

1042-S Submission Summary		Tax Liability		1042	
Line #	Period ending	Tax liability	Tax deposit	Date modified	User modified
7	Feb 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
8	Feb 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
9	Feb 28	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
10	Feb Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
11	Mar 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
12	Mar 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
13	Mar 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
14	Mar 31	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
15	Mar Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
16	Apr 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
17	Apr 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
18	Apr 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
19	Apr 30	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
20	Apr Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
21	May 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
22	May 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
23	May 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
24	May 31	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette

Change
Cancel
OK

Tax year

Line #

Period ending

Tax liability

Tax deposit

YTD

Tax liability YTD

Tax deposit YTD

1042 federal tax

- ii. You will enter the “tax liability” amount, in this case \$1,400 and if the amount was sent to the IRS, you will enter the “tax deposit.” If the taxes were not sent to the IRS, please leave this blank and your summary report will note that you own a tax amount. You can also enter multiple tax deposits. Please note that the \$1,400 is for example purposes. Click “OK” when you have entered all tax liabilities and tax deposits that have been made for the various periods.

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Printing Defaults

Other Defaults

Maintain Instances

Windstar Messages

Show All Downloaded Messages

1042-S Submission Summary Tax Liability 1042

Line #	Period ending	Tax liability	Tax deposit	Date modified	User modified
7	Feb 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
8	Feb 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
9	Feb 28	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
10	Feb Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
11	Mar 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
12	Mar 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
13	Mar 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
14	Mar 31	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
15	Mar Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
16	Apr 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
17	Apr 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
18	Apr 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
19	Apr 30	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
20	Apr Total	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
21	May 7	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
22	May 15	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
23	May 22	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette
24	May 31	\$0.00	\$0.00	10/5/2012 7:57:28 AM	jtrivette

Change Cancel OK

Tax year 2011 Line # 19 Period ending Apr 30

Tax liability \$1,400.00 Tax deposit \$1,400.00

YTD Tax liability YTD \$0.00 Tax deposit YTD \$0.00 1042 federal tax \$1,400.00

iii. Next, click "1042" tab. Click "Create/Print 1042"

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 Other Defaults
 Maintain Instances
 Findstar Messages
 Show All Downloaded Messages

1042-S Submission Summary Tax Liability 1042

1042 ID	Tax year	Record locked	Quarterly monthly deposits	QI	NQI	Forms number magnetic	Forms number paper	Forms number electronic	Total gross income paid on 1042-S	Tax
7	2011	No	No	No	No	0	1	0	\$10,000.00	

Add Change Delete Cancel OK Lock Unlock Create/Print 1042

Amended return QI NQI/Flow-through entity

61a. Total Q Count Paper	1	61b. Total Q Count Electronic	0
62a. Total gross amount on 1042-S forms	\$10,000.00	62b. Total federal tax on 1042-S forms	\$1,400.00
63a. Total tax liability			\$1,400.00
63b. Adjustment			\$0.00
63c. Total net tax liability			\$1,400.00
64. Total tax paid			\$1,400.00
65. Overpayment applied as credit from previous year			\$0.00
66. Credit for amounts withheld by other withholding agents			\$0.00
67. Total tax payments			\$1,400.00
68. Balance due			\$0.00
69. Overpayment			\$0.00
70. Apply overpayment to		<input type="radio"/> Credit on next year's Form 1042-S	<input checked="" type="radio"/> Refund
71. Total payment made	\$0.00	X 2%	\$0.00

Organization Processing > Submission Summary for 1042-S and 1042

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- Substantial Presence Test Recap
- Treaty Analysis Recap
- 1042-S Data
- History of Substantial Presence Test and Treaty
- Reprints
- [-] New Hire Forms
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- FNIS Upload
- Organization Processing
- Export to Excel
- Export for Paying Systems
- FNIS Upload
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- [-] Process Batches
- [-] Process 1042-S
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- Submission Summary for 1042-S and 1042
- [-] Interfaces
- Export to FNTR
- Preferences
- Select Database

1 of 1

Form **1042** OMB No. 1545-0096

Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
2011

Department of the Treasury Internal Revenue Service

If this is an amended return, check here:

Name of withholding agent: **ABC Agency** Employer identification no. **56-6011111**

Number, street, and room or suite no. (if a P.O. box, see instructions): **100 West Street** For IRS Use Only

City or town, province or state, and country (including postal code): **Raleigh, NC 27603-5925** CC RD CAF CR EDC SIC

If you will not be liable for returns in the future, check here: Enter date final income paid:

Check if you are a: GI/Withholding foreign partnership or trust NOI/Flow-through entity (See instructions)

Record of Federal Tax Liability (Do not show federal tax deposits here.)								
Line No.	Period ending	Tax liability for period (including any taxes assumed on Form(s) 1000)	Line No.	Period ending	Tax liability for period (including any taxes assumed on Form(s) 1000)	Line No.	Period ending	Tax liability for period (including any taxes assumed on Form(s) 1000)
1	7	0	21	7	0	41	7	0
2	15	0	22	15	0	42	15	0
3	22	0	23	22	0	43	22	0
4	31	0	24	31	0	44	30	0
5	Jan. total	0	25	May total	0	45	Sept. total	0
6	7	0	26	7	0	46	7	0
7	15	0	27	15	0	47	15	0
8	22	0	28	22	0	48	22	0
9	29	0	29	30	0	49	31	0
10	Feb. total	0	30	June total	0	50	Oct. total	0
11	7	0	31	7	0	51	7	0
12	15	0	32	15	0	52	15	0
13	22	0	33	22	0	53	22	0
14	31	0	34	31	0	54	30	0
15	Mar. total	0	35	July total	0	55	Nov. total	0
16	7	0	36	7	0	56	7	0
17	15	0	37	15	0	57	15	0
18	22	0	38	22	0	58	22	0
19	30	1400	39	31	0	59	31	0
20	Apr. total	1400	40	Aug. total	0	60	Dec. total	0

61 No. of Forms 1042-S filed: **0** On paper **1** b Electronically **10000**

62 For all Form(s) 1042-S and 1000: **a** Gross income paid **10000** **b** Taxes withheld or assumed **1400**

63a Total tax liability (add monthly total lines from above) **63a** **1400**

63b Adjustments (see instructions) **63b** **0**

64 Total net tax liability (combine lines 63a and 63b) **64** **1400**

65 Enter overpayment applied as a credit from 2010 Form 1042 **65** **0**

66 Credit for amounts withheld by other withholding agents (see instructions) **66** **0**

67 Total payments. Add lines 64 through 66 **67** **1400**

68 If line 63c is larger than line 67, enter balance due here **68** **0**

69 If line 67 is larger than line 63c, enter overpayment here **69** **0**

70 Apply overpayment on line 66 to (check one): Credit on 2012 Form 1042 or Refund

71 Excise tax on specified federal procurement payments included on line 63a. (Total payments made **0** x 2% = **0**) **71** **0**

Third Party Designee: Do you want to allow another person to discuss this return with the IRS (see instructions)? Yes, Complete the following: No

Tax Navigator Print
Close

- iv. If your 1042 record doesn't print, click "Tax Navigator Print" or use the icon above the document to print. Then click "close"
- v. If the information that you printed appears to be correct, you can print the "1042-T"

International Tax Navigator®

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1042-S Submission Summary Tax Liability 1042

ID	Associate ID	Tax year	File in DB	Record locked	User data	File type	Date sent	Return type	Submission type	Total Q count	Total gross amount	T f
▶ 1062		2011	No	No	No	O		O	P	1	\$10,000.00	

Replacement submission
 Include this record in 1042

Return type
 Submission type

Total Q count
 User comment

Total gross amount
 Status

Total federal tax
 Date sent

Total state tax
 Date accepted

Comment
 Date rejected

Totals

Total gross amount
 Total federal tax
 Total state tax

Total Q count paper
 Total Q count electronic

- vi. If the 1042-T doesn't automatically print, click "Tax Navigator Print" or use the icon above the document to print. Then click "close"

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DO NOT STAPLE

Form **1042-T** **Annual Summary and Transmittal of Forms 1042-S** OMB No. 1545-0086

Department of the Treasury Internal Revenue Service

Name of withholding agent **ABC Agency** Employer identification number **2011**
John Smith **56-6011111**

Number, street, and room or suite no.
100 West Street

City or town, province or state, and country (including postal code)
Raleigh, NC 27603-5925

If you are an intermediary (see Form 1042 instructions), check if you are a:
 OI/Withholding foreign partnership or trust
 NOI/Flow-through entity

1a Type of paper Forms 1042-S attached (check only one box): Original Amended
 Also check here if pro-rata (see instructions)

b Number of paper Forms 1042-S attached

2a Total gross income on all paper Forms 1042-S (box 2) attached \$ **10000**
b Total federal tax withheld on all paper Forms 1042-S (box 9) attached \$ **1400**

Caution: If you have already filed a Form 1042 and an attached Form 1042-S causes the gross income or tax withheld information shown on your previously filed Form 1042 to change, you must file an amended Form 1042. See the instructions below.

If this is your FINAL return, enter an "X" here (see instructions)

Please return this entire page to the Internal Revenue Service.

Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete.

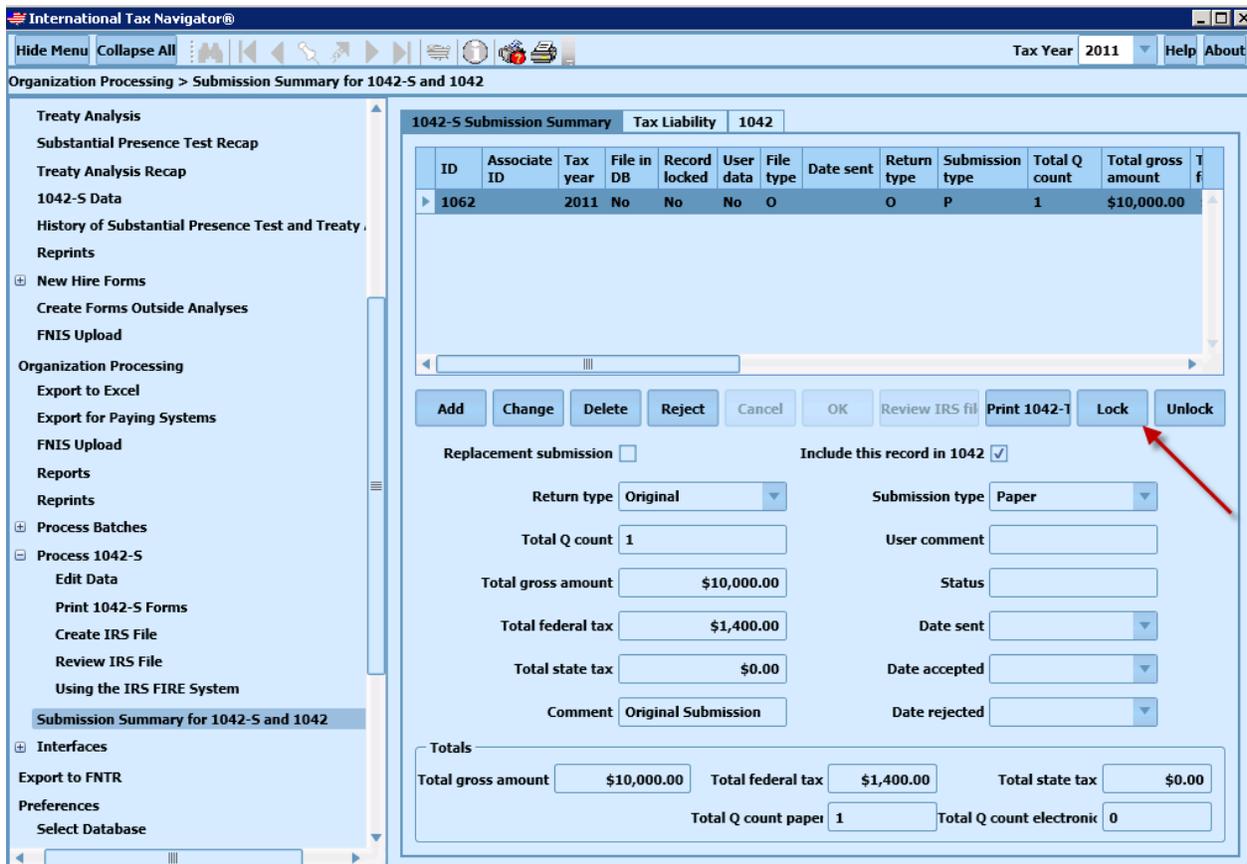
Sign Here Title Date Daytime phone number

Instructions
Purpose of form. Use this form to transmit paper Forms 1042-S, Foreign Person's U.S. Source Income Subject to Withholding, to the Internal Revenue Service. Use a separate Form 1042-T to transmit each type of Form 1042-S (see the instructions for line 1a).
CAUTION If you file 250 or more Forms 1042-S, you are required to submit them electronically. You also can use this method to submit less than 250 Forms 1042-S. If you submit Forms 1042-S electronically, do not use Form 1042-T. See Pub. 1187, Specifications for Filing Form 1042-S, Foreign Person's U.S. Source Income Subject to Withholding, Electronically, for information on filing electronically.
 Use of this form to transmit paper Forms 1042-S does not affect your obligation to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons.
 If you have not yet filed a Form 1042 for 2011, you may send in more than one Form 1042-S to submit paper Forms 1042-S prior to filing your Form 1042. You may submit amended Forms 1042-S even though changes affect differences in gross income and tax withheld information of Forms 1042-S previously submitted with a Form 1042-T.

Identifying information at top of form. The name, address, and EIN of the withholding agent or intermediary on this form must be the same as those you enter on Forms 1042 and 1042-S. See the instructions for Form 1042 for definitions of withholding agent and intermediary.
Line 1a. You must file a separate Form 1042-T for each type of paper Form 1042-S you are transmitting. Check only the Original or Amended box. If you are filing pro-rata Forms 1042-S (see Form 1042-S instructions), also check the pro-rata box. As a result, there are four possible types of Form 1042-S that may be transmitted:
 • Original • Original pro-rata
 • Amended • Amended pro-rata
 Each type would be transmitted with a separate Form 1042-T. For example, you would transmit only original Forms 1042-S with one Form 1042-T and only amended Forms 1042-S with another Form 1042-T.
Line 2a. Enter the total of the gross income amounts shown on the Forms 1042-S (box 2) being transmitted with this Form 1042-T.
Line 2b. Enter the total of the federal tax withheld amounts shown on the Forms 1042-S (box 9) being transmitted with this Form 1042-T.

Tax Navigator Print Close

- vii. If you feel that all your records are complete. You can “Lock,” by clicking “Lock,” the records to ensure they are kept as you sent them to the IRS, and Recipient.



- I. You have now completed the 1042 Process. Please prepare and send the 1042 documents to the proper location by March 15. If you have a deposit that is owed, you must send this with the EFTPS system rather than by check. IF you send it by check you will receive a penalty.
 - i. Please note the address and filing requirements is on the 1042-T.

Please contact OSC Foreign Nationals Team, at OSC.Foreign.National.Team@osc.nc.gov , if you need additional assistance. Please note that this step-by-step guide is for informational purposes and not intended to be used out outside of this scope.