

## TAX WITHHOLDING REFUND REQUEST

### Overview:

This form is to be used to request a refund of Federal, State, or FICA taxes that were incorrectly withheld.

Federal and State refunds can only be requested for the current year. Any prior year Federal/State withholding can only be recouped by filing a tax return.

Employees who may have reached the Social Security maximum at another employer within the calendar year will continue to have full FICA withheld at UMD. Employees in this situation can request a Social Security tax refund while filling annual taxes.

### Process:

#### 1.) FEDERAL/STATE Refunds

- Current employees requesting a Federal/State refund must have an executed W4 and/or State withholding form claiming Exempt on file with Central Payroll. The employee can verify this by looking at their most current payslip to make sure the withholding has stopped. A refund request cannot be submitted until the employee can confirm this action.
- Former employees will need to attach a clear copy of their government issued ID. They will also be contacted by Payroll Services through the UM Secure Share portal to submit a W4 and/or State withholding form showing Exempt. Withholding forms should NOT be submitted via Service Now. The forms have Personally Identifiable Information on them and Service Now data is not encrypted for storage of this high-risk data.

#### 2.) FICA Refunds

- Students requesting refunds must submit a copy of their transcript showing they were enrolled at least half-time in classes when the payment was made. An unofficial transcript downloaded from Testudo is sufficient.
- Foreign Nationals requesting a refund due to their Non-Resident Alien status must have a current Glacier packet on file with Payroll Services.

3.) The Tax Refund Request form must be completed in its entirety based on the type of refund being requested.

4.) Requests can be submitted either by the department or by the employee. If the department is submitting the request, please make sure to verify all information with the employee and attach any necessary documentation.

5.) Print Name, Date, and Email Address.

6.) A case in Service Now must be created to submit the form. Go to [Open a Case with Finance](#).



TAX REFUND REQUEST FORM

An asterisk (\*) denotes a required field

Part I: Employee Information

\*Campus UMCP UMES UMCES UMSO
\*Affiliation Student Faculty Staff
\*Current Employee/Student \*Former Employee/Student
\*UID (Must attach a clear copy of government issued picture ID)
\*Employee Name Last Name First Name M.I.
\*Current Street Address
\*City \*State \*Zip Code
\*If State is "OC," Please Specify

Part II: Refund Information

\*Tax Refund Type FEDERAL STATE FICA
FEDERAL/STATE REFUND (Current Year Only)
\*Paycheck Date Withholding Stopped:
FICA REFUND (Current or Prior Three Tax Years)
\*Year(s) To Be Refunded
\*Reason For Refund
Student Exemption Copy of Transcript Required
Other Add'l Documentation MAY Be Required
Non-Resident Alien VISA Type
Student Glacier Paperwork is Required to be on File
Non-Resident Alien Faculty/Staff VISA Type Glacier Paperwork is Required to be on File
If "Other," Please Specify

Part III: Authorization

\*Printed Name \*Date
\*Department \*Email Address