Caltech

International Tax Navigator (aka Windstar) System Responsibilities Access Request

ADD ☐   CHANGE ☐   DELETE ☐

Employee☐   Temporary☐   Student☐   Consultant☐ _____ Other_____
                                                        (company name)

TO BE EFFECTIVE: Beginning date: ____/____/____
                                 Ending date: ____/____/____   OR   check if regular staff ☐

User Information:

Name: Last_____ First _____ Middle_____

Mail Code:_____ E-Mail:_____ CALTECH ID#_____

Phone Ext. _____   FAX_____

Department_____

Department Supervisor _____ Phone Ext._____

SELECT FROM THE FOLLOWING:

- ❑ Update User Information (IMSS Only)
- ❑ Perform Substantial Presence Tests
- ❑ Perform Treaty Analyses
- ❑ Set Interfaces Options & File Defaults (IMSS Only)
- ❑ Archive and Restore Records (IMSS Only)
- ❑ Update Payroll Information
- ❑ View Payroll Information
- ❑ Update Scholarship Information
- ❑ View Scholarship Information
- ❑ Update Account Payables Information
- ❑ View Account Payables Information
- ❑ Update Gambling and Prizes Information
- ❑ View Gambling and Prizes Information
- ❑ Update Royalties Information
- ❑ View Royalties Information
- ❑ Create/print 1042-S forms and maintain 1042 and 1042-S submissions
- ❑ Export recipient, immigration, 1042-S, and FICA information to Excel
- ❑ Run Crystal Reports in Tax Navigator
- ❑ Export recipient and immigration information including results of substantial presence tests and treaty analyses for paying
- ❑ Export/print encrypted fields in batch lists (IMSS Only)
- ❑ Include encrypted fields in export to Excel (IMSS Only)

REQUESTED BY: _____ Phone ext._____
                                  (please print name)
_____
APPROVED BY:
signed:_____dated:_____

                        Margaret Ory

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