

# Instruction Manual



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# Introduction

Sprintax Calculus has been designed to help US payors, who make taxable payments to foreign nationals to correctly determine the correct amount of tax subject to withholding from such payments. The determination is made based on the information provided by the payee in their Sprintax Calculus profile.

Sprintax Calculus will help you:

- Determine residency for tax purposes
- Tax treaty eligibility, and
- Produce the tax forms applicable to your case, based on the information you enter

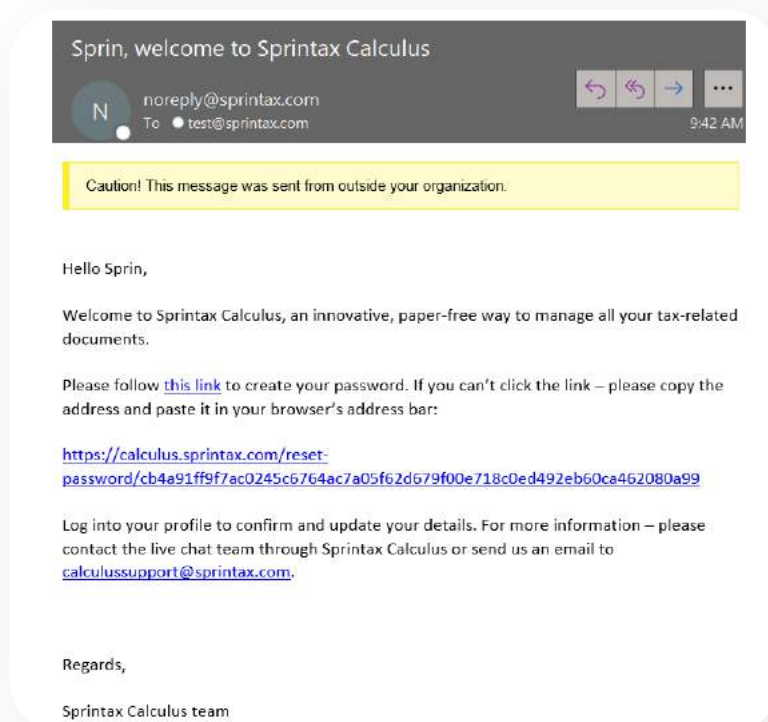
Most of the documents produced such as Form W8-Ben, Form 8233, Form W-4, and Form W-9 are to be signed and provided to your payor prior to them arranging your first payment.

## HOW SPRINTAX CALCULUS WORK – ACCESSING THE SOFTWARE

Note that your profile is created by your paying institution and it is essential that you do NOT use the “Sign-Up” option on the Sprintax Calculus login page. A profile is created with an email, a first, and a last name.

Once your profile is created, you will receive an activation email from [noreply@sprintax.com](mailto:noreply@sprintax.com).

The email will contain a **unique link** which you will need to create your password.



## Set password

You have requested to set the password for  
kj\*\*\*\*g@my\*\*\*\*\*m

A strong password is paramount for the security of  
your data.

Please enter a password that is least 8 symbols long,  
and includes a capital and a small letter, a number,  
and a special symbol (e.g. %, \$, \*, etc.)

New password \*

Retype new password \*

I agree to the [Sprintax Calculus terms and conditions](#)

I agree to [Information disclosure under IRC Section 7216](#)

Set My Password

Your password has been changed successfully! Click [here](#) to login.

## Select an account to log in

Available entities:

TDS Demo 20

Sign In

To sign into Sprintax Calculus after creating your password, go to:  
<https://calculus.sprintax.com/>, or follow the link on the **“You have successfully set up your password”** screen.

On the middle screen, choose the profile you want to access. There will be a single possible option in most of the cases unless you were registered with Sprintax Calculus by other US payors you anticipate to or received payments from.

# 1. Completing your Calculus profile

Your Calculus profile consists of:

1. An **online questionnaire (4 steps)**
2. A **“Tax Treaties”** screen where you refer to your tax treaty eligibility details if applicable
3. A **“Residency summary”** screen where you can refer to your residency for tax purposes as determined in the software
4. **Final Summary** representing your overall tax summary, based on the info provided
5. **Tax Forms screen** – the screen where you can download your tax forms
6. **Documents Exchange** – a tool where you upload signed documents back onto your profile so that your payor can access the signed documents quickly

**Note**, that 2 to 5 will not be accessible until you complete the online questionnaire first.

# 1.1. Residency

The first step of the online questionnaire is Residency.

## > Consent for electronic Form 1042-S

Note that you will be asked to answer the electronic consent pop-up question before you start completing the Residency step. This question requires confirmation whether you agree to receive your form 1042-S electronically (as a download in Sprintax Calculus) after the tax year ends, or you prefer a paper form to be mailed to your mailing address on file.

Make sure you confirm your preference before starting.

Note: you will have the option to change your preference later, on the Tax Forms screen of your profile.


### Electronic 1042-S Consent Form

I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Sprintax Calculus account. I confirm that I have read and agree to the [Consent form](#)

No  Yes

## Tax Forms

2022 2023



### You are almost there...

Please follow the directions below to complete this process.

---

I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Calculus account. [Consent form](#)

## > Completing Residency

This step aims to collect all information relating to your residency for tax purposes. Based on the information provided Sprintax Calculus will determine whether you should be treated as a non-resident or a resident alien for US tax purposes. The determination is based on two main tests implemented in the software:

- The US citizenship and the US green card tests
- The Substantial Presence Test

**Your Details** | Final Summary | Tax Forms | Document Exchange

### Residency Information

Are you (or will you be) a citizen of the United States, Guam, Puerto Rico, The US Virgin Islands, American Samoa, or the CNMI by birth or by naturalization, on the last day of 2023? \*

Yes  No

Are you currently or will you be a Green Card holder on the last day of 2023? \*

Yes  No

Have you ever applied for US citizenship/ lawful residence? \*

Yes  No

Have you been present, or do you expect to be present in the US during 2023? \*

Yes  No

Did you or do you plan to stay in the US for less than 31 days in total in 2023? \*

Yes  No

When did you first enter the US? * <a href="#">i</a>	What is your current immigration status? * <a href="#">i</a>
<input type="text" value="08-30-2016"/> <a href="#">📅</a>	<input type="text" value="F1 - Student"/> <a href="#">v</a>
What date did you first enter the US on this immigration status? *	What is the expiry date of your current immigration status? * <a href="#">i</a>
<input type="text" value="08-30-2016"/> <a href="#">📅</a>	<input type="text" value="05-30-2026"/> <a href="#">📅</a>
Final departure date you left or intend to leave the US <a href="#">i</a>	Country of Citizenship *
<input type="text" value="06-25-2025"/> <a href="#">📅</a>	<input type="text" value="Canada"/> <a href="#">v</a>
Country of residence * <a href="#">i</a>	Passport number (from your current valid passport) *
<input type="text" value="Canada"/> <a href="#">v</a>	<input type="text" value="6165235"/>

## Visits to the US ⓘ

**Note:** If you were present in the United States prior to coming on your current immigration status listed above, list your previous immigration statuses in this section. Note, that your residency for tax purposes is determined by the complete history of all statuses/visits to the US from 1986 onwards, as a student, a trainee, a scholar or a teacher holding an F, J, M, or Q visa, and by the complete history of your US statuses/visits for the last 3 calendar years for all other immigration statuses different to F, J, M, and Q. To add a previous status, use the "Add status" option in this section.

### How to fill "Visits to the US"?

[Learn More](#)

Visa type/Visitor status

F1 - Student

Subcategory

Student

Date of entry in the US on your current status

08-30-2016

Date when the status expires

05-30-2026

+ Add Status

## Please select all years listed below you were out of the US for a full calendar year (01 Jan to 31 Dec)

**Important:** If you were present in US for 24 hours or more in the years listed, do not select the year(s).

2017

2018

2019

2020

2021

2022

## Residency presence days ⓘ

**Note:** Enter the number of the days you were or expect to be present during the listed tax year under the listed immigration status.

Visa type/Visitor status

F1 - Student

Year

2021

Days

355

Visa type/Visitor status

F1 - Student

Year

2022

Days

355

Visa type/Visitor status

F1 - Student

Year

2023

Days

341

Save & Continue →

If you are not a US citizen or a green card holder, you will be asked to confirm if you had physical presence in the US in the year you are completing the software for. If you did or you expect to be physically present in the US, you will be asked to enter your visa information, immigration status and a few dates that are mandatory for residency determination:

## > The date of first US entry (1989 onwards)

If you were present in the US prior to coming on your current visa, you must indicate the very first entry you made in the US for the first required date. For this purpose, consider all visits from 1989 onwards.

When did you first enter the US? ⓘ

08-30-2016 📅

If you do not remember your exact entry date, you can check your I-94, Arrival/Departure record in case you traveled with your current passport here: <https://i94.cbp.dhs.gov/i94/#/history-search>

If you traveled with a different document than the current one, enter an approximate date to the best of your knowledge.

Info box, attached to the Date field will help you identify what date you need to specify in the respective field.

## > Entry date under your current immigration status and expiry of your current status

What date did you first enter the US on this immigration status? \*

08-30-2016 📅

What is the expiry date of your current immigration status? \* ⓘ

05-30-2026 📅

Enter the date you entered on your current visa/status. Then, enter the expiration date of your current visa/status respectively.

For F and J visa holders, the expiry date of your current status is listed on Form I-20 and Form DS-2019 respectively.

## I-20, Certificate of Eligibility for Nonimmigrant (F-1) Student Status

<b>PROGRAM OF STUDY</b>		
<b>EDUCATION LEVEL</b> BACHELOR'S	<b>MAJOR 1</b> History and Philosophy of Science and Technology 54.0104	<b>MAJOR 2</b> None 00.0000
<b>PROGRAM ENGLISH PROFICIENCY</b> Required	<b>ENGLISH PROFICIENCY NOTES</b> Student is proficient	<b>EARLIEST ADMISSION DATE</b> 04 APRIL 2016
<b>START OF CLASSES</b> 01 JUNE 2016	<b>PROGRAM START/END DATE</b> 04 MAY 2016 - 30 MAY 2020	



## DS-2019, Certificate of Eligibility for Exchange Visitor (J-1) Status

3. Form Covers Period: From (mm-dd-yyyy): 12-31-2016 To (mm-dd-yyyy): 12-30-2017	4. Exchange Visitor Category: RESEARCH SCHOLAR Subject/Field Code: 52.1099 Subject/Field Code Remarks: The scholar will establish research-based collaborations with our faculty in LER with the
--	---

For all other statuses, refer to the expected end date of your job assignment if you are employed in the US for a specified period, or enter your actual expected departure date for all other statuses.

Documents you may need to refer to:

- Employment Authorization Card - I-766
- Notice of Action - I-797

### ➤ What is your current immigration status?

What is your current immigration status? \* ⓘ

FI - Student

This is a combination of your visa type and the primary purpose of your current visit to the US. Choose from the drop-down menu the option that applies to you. If you are a student on F visa, or an international scholar, teacher, professor, holding a J visa and you are not sure about the primary purpose of your visit, refer to I-20 (F visa holders) or your DS-2019, box 4 (J visa).

### ➤ Country of residence explained

If your country of residency is different than the country issuing your passport, indicate your country of residence as it is in:

Country of residence \* ⓘ

Canada

Your country of residence is generally the place where you permanently resided before entering the US on your current status and to which you had tighter connections than to any other place or country.

*Note that you will not find an option to choose "USA". Whether you are a resident for US tax purposes will be determined within the software and is not readily collectible information.*

## Visits to the US

If **The date of first US entry** above is different from **Entry date under your current immigration status** above, you must enter prior visits or statuses in the US before entering on your current status.

In **Visits to the US section**, you will see a greyed table showing your current US status. Note that this table is locked for editing and it cannot be changed manually unless you change the dates you indicated earlier.

**To add additional statuses** or visits to the current one, click on 'Add status'

[+ Add Status](#)

This will load an additional blank table for you to complete:

### Visits to the US ?

**Note:** If you were present in the United States prior to coming on your current immigration status listed above, list your previous immigration statuses in this section. Note, that your residency for tax purposes is determined by the complete history of all statuses/visits to the US from 1986 onwards, as a student, a trainee, a scholar or a teacher holding an F, J, M, or Q visa, and by the complete history of your US statuses/visits for the last 3 calendar years for all other immigration statuses different to F, J, M, and Q. To add a previous status, use the "Add status" option in this section.

? How to fill "Visits to the US"?
[Learn More](#)

Visa type/visitor status <input type="text" value="F1 - Student"/>	Subcategory <input type="text" value="Student"/>
Date of entry in the US on your current status <input type="text" value="08-30-2016"/>	Date when the status expires <input type="text" value="05-30-2026"/>

---

Delete

Visa type/visitor status <input type="text" value="VWP visa - Travel Authorization under VWP"/>	Subcategory <input type="text" value="Travel Authorization under Visa Waiver Program"/>
Date of entry in the US on your prior status <input type="text" value="07-30-2013"/>	Date when the status expires <input type="text" value="06-28-2013"/>

+ Add Status

Repeat the action if you need to enter more than one additional status.

Notes:

You need to make sure that the very first status you indicate in this section starts with the date indicated in **'The date of first US entry'** above.

Sprintax Calculus will **not** collect your days of actual presence in the current calendar year unless this information is **required** (you are not an exempt individual for the purposes of the substantial presence test).

## 1.2. Personal data

Enter your personal information such as your date of birth, US tax identification number (TIN) (your SSN or your ITIN (individual taxpayer identification number) whichever is applicable, if any.

Your place of birth and city of birth are not mandatory to complete if you have a US TIN.

The screenshot shows the 'Personal Information' and 'Tax Identification' sections of the Sprintax Calculus interface. The 'Personal Information' section includes fields for First name (Bingwen), Middle name, Surname/Last name (Bo), Date of birth (02-05-1998), Place of birth (China), and City of birth (Shanghai). The 'Tax Identification' section includes a question 'Do you have US TIN (SSN or ITIN)?' with 'Yes' selected, and fields for Your US TIN (SSN or ITIN) (004-21-8596), TDS Demo 20 ID (TSD2020286), SEVIS ID (N52654964521), Payroll system ID, Program Type (Research scholar), Campus (Seattle), and What is your foreign (home country) tax identification number? (963-456-321). A progress bar on the left highlights 'Personal data' as the current step.

**sprintax**  
calculus

Progress:

- Residency
- 2  Personal data**
- Contact details
- Tax Forms Info
- Payments
- Residency Summary
- Tax Treaties

Need help?

- 
- 
- 

**Your Details** | Final Summary | Tax Forms | Document Exchange

### Personal Information

First name \*  Middle name

Surname/Last name \*  Date of birth \*

Place of birth  City of birth

### Tax Identification:

Do you have US TIN (SSN or ITIN) \*  Yes  No

Your US TIN (SSN or ITIN) \*

TDS Demo 20 ID  SEVIS ID

Payroll system ID  Program Type

Campus  What is your foreign (home country) tax identification number?

The screenshot shows a web form with a left-hand navigation menu and a main content area. The navigation menu includes a 'Progress' section with several items checked: Residency, Personal data (highlighted in blue), Contact details, Tax Forms Info, Payments, Residency Summary, and Tax Treaties. Below this is a 'Need help?' section with buttons for 'Live Chat', 'Contact Sprintax', and 'Contact your institution'. The main content area contains several input fields and questions:

- Student number:** An empty text input field.
- Payroll system ID:** An empty text input field.
- Campus:** A dropdown menu currently showing 'Philadelphia North'.
- SEVIS ID:** An empty text input field.
- Program Type:** A dropdown menu with the text 'Please choose an option'.
- What is your foreign (home country) tax identification number?:** An empty text input field.
- Are you a full-time student or scholar in a US educational institution in 2023? \*** Radio buttons for 'Yes' (selected) and 'No'.
- Are you a degree candidate in a US educational institution during 2023? \*** Radio buttons for 'Yes' (selected) and 'No'.
- Are you an OPT/CPT program participant during 2023? \*** Radio buttons for 'Yes' and 'No' (selected).
- Are you married? \*** Radio buttons for 'Yes' and 'No' (selected).
- Can you be claimed as a dependent on someone else's tax return? \*** Radio buttons for 'Yes' and 'No' (selected).

Below the 'What is your foreign (home country) tax identification number?' field, there is a small note: 'If you don't have a foreign tax identification number you can enter your national identification number which appears on your national ID card, or any unique number in your home country you are identified by.'

## ➤ Student number (Optional)

This field may:

- be labeled differently depending on your payor's specific identification number of foreign nationals. Example: Western University ID (WUID), College of Birmingham ID (CBID), University of TX ID, etc.
- can be pre-populated in your account by your payor, and locked for further editing

## ➤ SEVIS ID (Optional)

This is a non-mandatory field and is applicable to J and F visa holders only. This N- number is generally found on your form I-20 or DS-2019, and it has the format of NXXXXXXXXXX(XX) ('N' followed by 9 to 11 numerics).

This field may:

- not be visible on your screen at all
- can be pre-populated in your account by your payor, and locked for editing

If that's the case, you do not need to take further action. If, however, you see this field and you are an international student on an F, J or M visa, and you do not have a US tax identification number as a sole recipient of scholarship grants, it is recommended that you enter your SEVIS ID.

SEVIS ID: **N0004705844**

<b>SURNAME/PRIMARY NAME</b> Ngo	<b>GIVEN NAME</b> Hang Thu	<b>Class of Admission</b>  <b>F-1</b>  <b>ACADEMIC AND LANGUAGE</b>
<b>PREFERRED NAME</b> Hang Thu Ngo	<b>PASSPORT NAME</b> Ngo Thu Hang	
<b>COUNTRY OF BIRTH</b> VIETNAM	<b>COUNTRY OF CITIZENSHIP</b> VIETNAM	
<b>DATE OF BIRTH</b> 10 AUGUST 1989	<b>ADMISSION NUMBER</b>	
<b>FORM ISSUE REASON</b> CHANGE OF EDUCATION LEVEL	<b>LEGACY NAME</b> Hang Thu Ngo	
<b>CATEGORY OF REGISTRATION</b>		

### ➤ Payroll system ID (Optional)

This field is generally pre-uploaded by US payors on behalf of employees, and

- might be not visible on your screen, or
- your payor may have pre-populated this field

In either case, you should skip this field.

### ➤ Program type (Optional)

This is generally a further description of your occupation or cohort within the institution that pays you. This field may:

- not be visible on your screen
- be pre-populated by your payor and locked for further editing
- available for selection of multiple choices
- 

If you can see and can edit the field and there are options available, you can choose the option applicable to you. Otherwise, skip the field.

### ➤ Campus (Optional)

This field may:

- be pre-populated by your payor and locked for editing
- there might be no options to choose (not applicable)

If that is the case, skip the field.

## > Foreign tax identification number (Optional)

Generally, this is the number assigned by your country of residency and which you use to identify yourself for tax purposes in your country, file your tax returns, etc.

Note:

*Not all countries issue tax numbers to their residents. In case you do have a foreign TIN and you do not yet have a US TIN but expect to receive taxable scholarship grant, it is recommended to add your foreign tax ID.*

## 1.3. Contact details

Enter your US address, if any, and your Foreign residential address where you lived prior to you coming to the US. You have the option to choose which one you want to appear as a mailing address on your tax forms such as form 1042-S, form 8233, form W-4, etc.

The screenshot shows the 'Your Details' form in the SPRINTAX CALCULUS system. The form is divided into two main sections: 'Your US Address' and 'Your Home Address (Outside the US)'. A red warning message at the top states: 'PLEASE NOTE: The SPRINTAX system only accepts English/Latin alphabet letters.' The 'Your US Address' section includes fields for 'Address (Number, Street)', 'Address (Apartment number)', 'Address (City)', 'State' (a dropdown menu currently showing 'Florida'), and 'ZIP code' (currently showing '33001'). The 'Your Home Address (Outside the US)' section includes fields for 'Address (Number, Street, Apartment number) \*', 'Address (Country, Province)', 'Address (City)', 'Country \*' (a dropdown menu currently showing 'Germany'), and 'Postal code / Zip code' (currently showing '69126'). Below these sections, there are two sets of radio buttons. The first set is labeled 'Please choose your mailing address \*' and has 'US address' selected. The second set is labeled 'Please choose your current residential address \*' and has 'Your Home Address (Outside the US)' selected. At the bottom, there are fields for 'US phone number' and 'Home country phone number'. The left sidebar of the form contains navigation links: 'Progress:', 'Residency', 'Personal data', 'Contact details', 'Tax Forms Info', 'Payments', 'Need help?', 'Live chat', 'Contact SPRINTAX', and 'Contact your institution'.

## 1.4. Tax Forms info

'Tax Forms Info' step aims to collect **annual** information from you. This page must be completed on an annual basis if you aim to produce Form 8233, Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, requested by your payor or as soon as any of the circumstances that would affect your residency status, treaty eligibility changes, or your employment conditions change (example: enrolled with a new job, changes in wage amount, marital status, etc.).

Note that the look of Tax Forms Info step will depend on payor's account settings. The list of income types might be different depending on your immigration status or your payor's account settings.

### > **Unlocked for Editing**

If your Tax Forms Info screen looks like this

**sprintax**  
calculus

**Progress:**

- Residency
- Personal data
- Contact details
- 4 Tax Forms Info**
- Payments
- Residency Summary

Need help?

- Live Chat
- Contact Sprintax
- Contact your institution

**Your Details** Final Summary Tax Forms Document Exchange

### Tax Forms Info

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from TDS Demo 20 in 2023? \*

Yes  No

Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)

Tick "Other Royalties" if you received income for copyrights of literary, artistic, scientific works or for the use of software different to listed in "TI Motion picture or television copyright royalties"

Does not include patents and know-how.

Scholarship or fellowship grants (Income Code 16) ⓘ

Do not tick this box if you are a recipient of a grant funded by your home country institution/organization. Select only if you receive grants from TDS Demo 20.

Compensation for independent personal services (Income Code 17) ⓘ

Compensation during studying and training (Income Code 20) ⓘ

Other income (awards, prizes) (Income Code 23) ⓘ

← Back Save And Continue →

OR this,

🕒 **Your Details** 🔒 Final Summary 🔒 Tax Forms Document Exchange

Qing Mu

## Tax Forms Info 2023

**📘 Tax Forms Info:**

Please, note that Form 8233, Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, may not be generated if there is no input for total compensation you expect to be paid during this calendar year.


### Tax Forms Info

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from St. Louis in 2023? \*

Yes  No

← Back Save And Continue →

OR this,



**Progress:**

- ⚠️ Residency
- Personal data
- Contact details
- 4 Tax Forms Info**
- Payments

Need help?

- 
- 
-

🕒 **Your Details** 🔒 Final Summary 🔒 Tax Forms Document Exchange

Hanna Fox

## Tax Forms Info 2022 2023

### Tax Forms Info

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from TDS Demo 20 in 2023? \*

Yes  No

---

- Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)
 

Tick "Other Royalties" if you received income for copyrights of literary, artistic, scientific works or for the use of software different to listed in "11 Motion picture or television copyright royalties"

Does not include patents and know-how.
- Scholarship or fellowship grants (Income Code 16) ⓘ
 

Do not tick this box if you are a recipient of a grant funded by your home country institution/organization. Select only if you receive grants from TDS Demo 20.
- Compensation for independent personal services (Income Code 17) ⓘ
- Compensation during studying and training (Income Code 20) ⓘ
- Other income (awards, prizes) (Income Code 23) ⓘ



AND you can select/deselect option(s), please select the income type you expect to be paid by this payor in the calendar year you are completing for (example: 2021). This will prompt the related questions to show for you to answer.

## ➤ **Locked for Editing:**

If your tax forms page shows a list of **pre-selected income types locked for editing**, you need to proceed with answering all questions. If any of the income types do not apply to you, you can skip the optional amount fields.

## ➤ **Available for editing:**

If your tax forms page shows a list of **pre-selected income types and you can edit the selections**, you can unselect the one(s) that do not apply by leaving the one(s) that you anticipate from the payor who asked you to complete a Sprintax Calculus profile.

### **Example 1: Sole recipients of scholarship grants**

If your only income in the calendar year is or will be scholarship grants only:

- confirm whether you were/will be physically enrolled on campus in the US, or were you enrolled online from your home country
- confirm if you were/will be required to perform personal services as a condition to receive all or part of your grant

**Tax Forms Info**

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from TDS Demo 17 in 2023? \*

Yes  No

10 Industrial royalties (Income code 10) ⓘ

Right to use patents, designs, models, plans, secret processes or formulas, trademarks

Motion picture or television copyright royalties (Income Code 11)

Tick "11 Motion picture or television copyright royalties" if you received income for the right to use any motion picture films, films or audio or video tapes or disks, or any other means of image or sound reproduction or transmission for use in connection with television

Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)

Tick "Other Royalties" if you received income for copyrights of literary, artistic, scientific works or for the use of software different to listed in "11 Motion picture or television copyright royalties"

Scholarship or fellowship grants (Income Code 15) ⓘ

Compensation for independent personal services (Income Code 17) ⓘ

Compensation during studying and training (Income Code 20) ⓘ

Other income (awards, prizes) (Income Code 23) ⓘ

Winning awards/gambling (Income Code 28)

Deposit interests (Income Code 29)

Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? \* ⓘ

Yes  No

Where is the activity covered by your scholarship grant performed? \*

US/US territories  Other Country

Note: Please, select whether the scholarship/grant you received or expect to receive is related to an activity you perform in or outside US.

## Example 2: Students working on campus and receiving scholarship grants and wages

[Your Details](#) [Final Summary](#) [Tax Forms](#) [Document Exchange](#)

### Tax Forms Info

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from TDS Demo 17 in 2023? \*

Yes  No

---

10 Industrial royalties (Income code 10) ⓘ  
Right to use patents, designs, models, plans, secret processes or formula, trademarks

Motion picture or television copyright royalties. (Income Code 11)  
Tick "11 Motion picture or television copyright royalties" if you received income for the right to use any motion picture films, films or audio or video tapes or disks, or any other means of image or sound reproduction or transmission for use in connection with television.

Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)  
Tick "Other Royalties" if you received income for copyrights of literary, artistic, scientific works or for the use of software different to listed in "11 Motion picture or television copyright royalties."

Scholarship or fellowship grants (Income Code 16) ⓘ

Compensation for independent personal services (Income Code 17) ⓘ

Compensation during studying and training (Income Code 20) ⓘ

Other income (awards, prizes) (Income Code 23) ⓘ

Winning awards/Gambling (Income Code 28)

Deposit interests (Income Code 29)

Are you legally allowed to work? \* ⓘ

Yes  No

Do you have or expect to have more than one job in the US in 2023? \* ⓘ

Yes  No

---

Please choose your Employer/Payer \* First date of employment with this employer ⓘ

TDS Demo 17 [Calendar Icon]

*Please, complete in the field below ONLY income received as an FI - Student, a JI - Student, an MI - Student, a JI - Intern/Trainee, a JI - Physician Intern/Trainee, or a Q1/Q2 - Intern/Trainee*

Total compensation you expect to be paid in wages and other similar payments from employment on- or off campus in the current tax year \* ⓘ

\$ 4,000.00

**Note:** Enter an estimated amount if you do not know the exact amount.

Please, provide a short description of the employment you perform(ed) during your study or training

Part-time Teaching Assistant

*Examples for acceptable descriptions*  
 A nonresident alien student can enter "part-time library assistant," "part-time restaurant worker," or "teaching one chemistry course per semester to undergraduate students."  
 A nonresident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."  
 A nonresident alien student working on-campus

Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? \* ⓘ

Yes  No

Have you or do you expect to receive compensation or a compensatory grant for study and training (wages, salaries, other employment income) from another U.S. employer (University/Company)? \*

Yes  No

Where is the activity covered by your scholarship grant performed? \*

US/US territories  Other Country

**Note:** Please, select whether the scholarship/grant you received or expect to receive is related to an activity you perform in or outside US.

Please, enter the expected amount of your scholarship paid during your study to cover living expenses (room and board) or other non-tuition-related expenses in the US \* ⓘ

\$ 28,100.00

An international student, resident of a tax treaty country, who is employed on campus, will be generally asked to provide approximate amounts of expected wages/compensation for the calendar year.

Total compensation you expect to be paid in wages and other similar payments from employment on- or off campus in the current tax year \* ⓘ

\$ 4,000.00

Please, provide a short description of the employment you perform(ed) during your study or training

Part-time Teaching Assistant

Examples for acceptable descriptions  
A non-resident alien student can enter "part-time library assistant," "part-time restaurant worker," or "teaching one chemistry course per semester to undergraduate students."  
A non-resident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."  
A non-resident alien student working on-campus

Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? \* ⓘ

Yes  No

Have you or do you expect to receive compensation or a compensatory grant for study and training (wages, salaries, other employment income) from another U.S. employer (University/Company)? \*

Yes  No

Where is the activity covered by your scholarship grant performed? \*

US/US territories  Other Country

Note: Please, select whether the scholarship/grant you received or expect to receive is related to an activity you perform in or outside US.

Please, enter the expected amount of your scholarship paid during your study to cover living expenses (room and board) or other non-tuition-related expenses in the US \* ⓘ

\$ 28,100.00

In case of an international student, recipient of a scholarship grant from the same payor, enter your scholarship amount for the calendar year as shown below:

Total compensation you expect to be paid in wages and other similar payments from employment on- or off campus in the current tax year \* ⓘ

\$ 4,000.00

Note: Enter an estimated amount if you do not know the exact amount.

Please, provide a short description of the employment you perform(ed) during your study or training

Part-time Teaching Assistant

Examples for acceptable descriptions  
A non-resident alien student can enter "part-time library assistant," "part-time restaurant worker," or "teaching one chemistry course per semester to undergraduate students."  
A non-resident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."  
A non-resident alien student working on-campus

Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? \* ⓘ

Yes  No

Have you or do you expect to receive compensation or a compensatory grant for study and training (wages, salaries, other employment income) from another U.S. employer (University/Company)? \*

Yes  No

Where is the activity covered by your scholarship grant performed? \*

US/US territories  Other Country

Note: Please, select whether the scholarship/grant you received or expect to receive is related to an activity you perform in or outside US.


Please, enter the expected amount of your scholarship paid during your study to cover living expenses (room and board) or other non-tuition-related expenses in the US \* ⓘ


\$ 28,100.00

### Example 3: International scholar receiving compensation for research


International scholars, teachers, professors from a tax treaty country, visiting the US on a J visa, will be asked to provide approximate annual amount of the income they expect to receive from this payor for the calendar year. Enter an approximate annual amount and a short description of your job.

Your income type is 'Income code 19.


Compensation for teaching or research (Income Code 19) 

Are you legally allowed to work? \* 


Yes  No

Do you have or expect to have more than one job in the US in 2023? \* 

Yes  No

Please choose your Employer/Payer \* First date of employment with this employer 


Please, complete in the field below income earned ONLY under JI-Teacher, JI-Reseracher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar

Total compensation you expect to be paid for teaching or reserach in the current tax year \* 

\$

**Note:** Enter an estimated amount if you do not know the exact amount.

Please, provide a short description of the dependent services related to teaching or research \*




Please, complete in the field below income earned ONLY under JI-Teacher, JI-Reseracher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar

Have you been paid for or do you expect to be paid for participation in a research activity? \*

Yes  No

Note: Consider only research activity under your current immigration status and while being enrolled with the institution you are completing this questionnaire for.

Is the research for the public interest (for a non-profit organization)? \* 

Yes  No

Have you been invited by a governmental institution, educational institution, or scientific research institution as a teacher, lecturer, or to participate in research? \*

Yes  No

### Example 4: Independent contractors

If you are a non-employee receiving honoraria or commission payments for performing a service or services independently, your income type 'Income code 17':

Compensation for independent personal services (Income Code 17) 

How many days have you stayed or intend to stay in the US during 2023? \* [i](#)

Do you have your own office, a place of business, maintained by you for performing these services? \* [i](#)

Yes  No

Total amount you expect to be paid for independent services in this tax year (commissions, fees, self-employment income) \* [i](#)

**Note:** Enter an estimated amount if you do not know the exact amount.

Please, provide a short description of the independent services you perform(ed)

 [C](#)

Examples for acceptable descriptions of Independent personal services

"Consulting contract to design software"

"Give three lectures at XYZ University."

[- Back](#)

[Save And Continue →](#)

Compensation for independent personal services (Income Code 17) [i](#)

Compensation for dependent personal services (Income Code 18) [i](#)

Other income (awards, prizes) (Income Code 23) [i](#)

Winning awards/Gambling (Income Code 28)

Deposit interests (Income Code 29)

How many days have you stayed or intend to stay in the US during 2023? \* [i](#)

Do you have your own office, a place of business, maintained by you for performing these services? \* [i](#)

Yes  No

Where are the independent services performed? \*

US/US territories  Other Country

## 2. Residency Summary

This step summarizes how your residency status for tax purposes has been determined in Sprintax Calculus.

**Note:** Days counted towards the SPT

Days countable for the Substantial Presence Test (SPT) may not be the same as your actual days of presence for the listed years. Individuals who are exempt from the SPT for the current or the previous two years do not count days for SPT purposes. In those cases, the days listed might be "0" or the year indicated as "Exempt".

**Note:** Residency starting date

Your residency starting date (RSD) is the date on which you are no longer an exempt individual for SPT purposes. It is not necessarily the date on which you will become or became a Resident for US tax purposes.

This is generally the first of January of the year in which you are expected to meet the substantial presence test or, in some cases it might be a midst-year date.

The screenshot shows the 'Residency Status' page in the Sprintax Calculus interface. The navigation menu on the left includes 'Residency Summary' (highlighted), 'Personal data', 'Contact details', 'Tax Forms Info', and 'Payments'. The main content area displays the following information:

- Status:** Non-resident
- Individual:** Sakis Katsoulis is F1 - Student visa holder, with primary purpose: Student.
- Exemption:** Exempt Individual for 2023 under 5-year lifetime rule.
- Date of entry into the United States on this status:** 11/11/2022
- Date of expiry of this status:** 11/11/2027
- Days count for Substantial Presence Test (SPT):**
  - 2023: Exempt from SPT for 2023
  - 2022: Exempt from SPT for 2022
  - 2021: Outside US in 2021
- Total number of non-exempt days in United States during 2023 for SPT:** Exempt from SPT in 2023
- Substantial Presence Test:** Sakis Katsoulis does not meet the substantial presence test
- Federal Tax Status:** Sakis Katsoulis is a non-resident for federal tax purposes for tax year 2023
- Residency Starting Date:** Sakis Katsoulis residency starting date under I.R.C. § 7701(b) is 01/01/2025
- Tax Years covered:**
  - 2019: Exempt
  - 2020: Exempt
  - 2021: Outside the US
  - 2022: Exempt
  - 2023: Exempt

## 3. Tax Treaties

This step summarizes if you are eligible for tax treaty or not. Generally, if you do not have a US TIN (an SSN or ITIN), you cannot claim treaty benefits unless you provide your TIN on Personal Data screen and produce the applicable tax forms to provide to your payor. Note that your payor cannot grant treaty benefits before you sign the required forms listing a valid US TIN.

### No TIN cases:

If you do not yet have a US TIN, you might see the following text:

🕒 Your Details Final Summary Tax Forms Document Exchange

Esra Kara

**Tax Treaties** 2019 2020 2021 2022 **2023**

You may be eligible to a tax treaty on your US source income, however you cannot claim reduced tax rate if you do not have US TIN (SSN/ITIN). Therefore you will be taxed at non-reduced tax rate. Normally, this is the tax rate you would be taxed if no tax treaty applies to your income.

← Back Save And Continue →

### No treaty country cases:

If you are a resident of a country that has no treaty convention with the US, you will see the following text:

Yuan Bai

**Tax Treaties** 2019 2020 2021 2022 **2023**

Your country does not have a tax treaty agreement with USA covering any of your income.

← Back Save And Continue →

## 'Income type not eligible' cases:

Even if your country has a signed treaty convention with the US, it is possible that the income type you receive is not covered in the Convention.

🕒 **Your Details** Final Summary Tax Forms Document Exchange

Yuan Bai

### Tax Treaties

2019 2020 2021 2022 **2023**

There is a tax treaty agreement between your country and the United States covering certain items of income. However, based on the information provided, none of your income is eligible for tax treaty benefits because you do not meet some or all of the treaty requirements.

← Back Save And Continue →

## 'Treaty eligible' cases:

If you are eligible to benefit a tax treaty exemption, your tax treaty eligibility will be displayed on this step. You can either agree to benefit the exemption or choose not to:

🕒 **Your Details** Final Summary Tax Forms Document Exchange

Hanz Hanz

### Tax Treaties

2019 2020 2021 2022 **2023**

#### Compensation for teaching or research

Hanz Hanz is a Non-resident, is not U.S. citizen or approved for a lawful permanent resident of the United States under the routine procedures of the USCIS.

During 2023, Hanz Hanz was J1 - Research scholar visa holder under subcategory: Research scholar. As a Research scholar at TDS Demo 17, Educational institution, Hanz Hanz receives Compensation for teaching or research, covered by tax treaty article 20(1) of U.S. - Germany.

#### PROTOCOL (2006) ARTICLE XI

Article 20 (Visiting Professors and Teachers; Students and Trainees) of the Convention is modified by: a) deleting paragraph 1 and substituting the following paragraph:

1. Remuneration that a professor or teacher who is a resident of a Contracting State and who is temporarily present in the other Contracting State for the primary purpose of carrying out advanced study or research or for teaching at an accredited university or other recognized educational institution, or an institution engaged in research for the public benefit, receives for such work shall be taxable only in the first-mentioned Contracting State for a period not exceeding two years from the date of his arrival. This Article shall not apply to income from research if such research is undertaken not in the public interest but primarily for the private benefit of a specific person or persons. The benefits provided in this paragraph shall not be granted to an individual who, during the immediately preceding period, enjoyed the benefits of paragraph 2, 3, or 4.;

Do you want to use this tax treaty exemption? \*

Yes  No

← Back Save And Continue →





**sprintax**  
calculus

Progress:

- Residency
- Personal data
- Contact details
- Tax Forms Info
- Payments
- Residency Summary
- 7 Tax Treaties**

🕒 **Your Details** Final Summary Tax Forms Document Exchange

Deyna Canan

**Tax Treaties** 2020 2019 2021 2022 **2023**

**Scholarship or fellowship grants**

Deyna Canan is a Non-resident, is not U.S. citizen or approved for a lawful permanent resident of the United States under the routine procedures of the USCIS.

During 2023, Deyna Canan was F1 - Student visa holder under subcategory: Student. As a Student at TDS Demo 17, Educational institution, Deyna Canan receives Scholarship or fellowship grants, covered by tax treaty article 21(i) of U.S. - Czech Republic.

**ARTICLE 21 a)**

An individual who is a resident of a Contracting State at the beginning of his visit to the other Contracting State and who is temporarily present in that other Contracting State for the primary purpose of: i) studying at a university or other accredited educational institution in that other Contracting State, or ii) securing training required to qualify him to practice a profession or professional specialty, or iii) studying or doing research as a recipient of a grant, allowance, or award from a governmental, religious, charitable, scientific, literary, or educational organization, shall be exempt from tax by that other Contracting State with respect to the amounts described in subparagraph (b) of this paragraph for a period not exceeding five years from the date of his arrival in that other Contracting State. b) The amounts referred to in subparagraph (a) of this paragraph are: i) payments from abroad, other than compensation for personal services, for the purpose of his maintenance, education, study, research, or training; ii) the grant, allowance, or award;


Do you want to use this tax treaty exemption? \*

Yes  No

## 4. Final Summary

This is your **Personal Tax Summary**. The summary has a downloadable PDF version allocable on the next screen named *"Tax Forms"*.

**Other Forms**

 [Sprintax Tax Summary](#) [Review and sign](#)

The PDF version has a spot to sign and date the document to confirm the information accuracy for your payor. The document is optional and whether it needs to be signed and uploaded is to be decided by the paying institution.

Your Details **Final Summary** Tax Forms Document Exchange

Deyna Canon

### Summary

2020 2019 2021 2022 **2023**

**General Info**

First Name	Deyna	Middle Name	
Last Name	Canon	Country of Passport/Citizenship	Australia
Current Immigrant Status	F1 - Student	Your SSN/ITIN	521-28-2827
Applied for SSN/ITIN	N/A	Entry / affiliate	TDS Demo 17

**Residency information**

US tax residency status	Non-resident	Date First in USA	05/01/2019
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**Progress:**

- Residency
- Personal data
- Contact details
- Tax Forms Info
- Payments
- Residency Summary
- Tax Treaties

**Need help?**

- 
- 
- 

Your Details **Final Summary** Tax Forms Document Exchange

Immigration status change date

08/14/2020

**Tax Treaty and Income tax Details**

Full-time Student	Yes	Degree candidate	Yes
OPT/CPT participant	No	Primary Purpose of Visit	Student
Occupation at University (Institution)	Student	Tax Residence	Canada

**Tax Treaty Income Code 16 - Scholarship or Fellowship (No Service)**

Income code	16 Scholarship or fellowship grants	Tax treaty article	N/A
Tax treaty limit	\$ 0.00	Tax treaty duration period	N/A
Federal Tax withholding rate	14.00% withholding rate	Tax treaty expiry date	N/A
Tax treaty start date	N/A		
Wish to claim treaty benefits	N/A		

**Tax Treaty Income Code 20 - Student or trainees compensation/compensatory grant**

Income code	20 - Compensation during studying and training/Compensatory grant.	Tax treaty article	XV(2)(a)
Tax treaty limit		Tax treaty duration period	

# 5. Tax Forms

The screenshot shows the 'Tax Forms' section of the Sprintax Calculus interface. The user is Deyna Canon. The interface includes a progress bar with 'Tax Forms' highlighted. Below the progress bar, there are instructions for completing the process, including a consent form and a list of documents to review and sign. The documents listed are 'Statement to Form 8233, income code 20' and 'Form 8233, income code 20'. The purpose of Form 8233 is explained, and the next steps are provided.

Depending on your income type selection on 'Tax Forms Info' step, the applicable tax forms will be produced in this step. You can download your tax forms by clicking on the name of the document.

Note: The instructions attached underneath the tax forms are general. If the paying institution instructed you otherwise, please proceed as instructed.

## E-SIGNING YOUR TAX FORMS

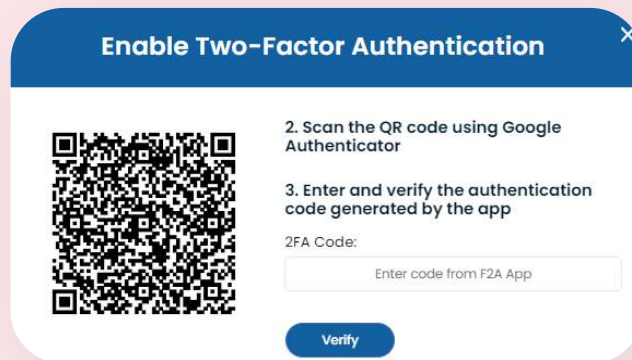
If you see "Review and Sign" as an option on the right, it means that your paying institution enabled Sprintax Calculus E-signatures. You can use Sprintax Calculus E-signatures to sign your tax forms directly in the software without having to download them and then upload sign versions. If you prefer to e-sign your documents, you will be prompted to enable multi-factor authentication (MFA) before doing so.

You will be asked to:

- Download either Google or Microsoft Authenticator upon clicking on "Review and Sign"



- Download either or click on 'Continue' if you already had any of the Apps on your mobile device.
- Scan the QR code and then enter the 6-digit security code generated in the App

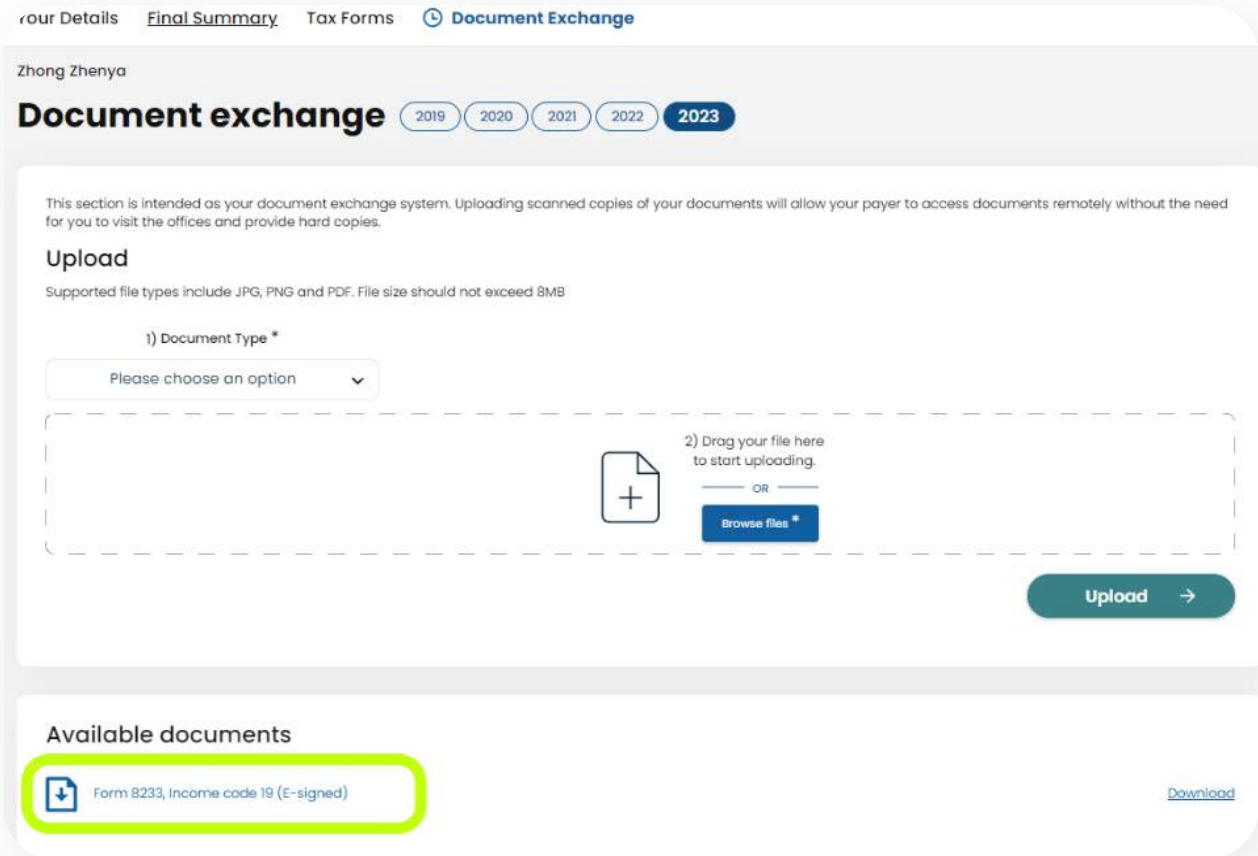


- Download the document and confirm that you have read it
- Proceed with drawing your signature on the pad

Make sure to keep the App on your device as you will need to authenticate with a 6-digit code for future account logins.

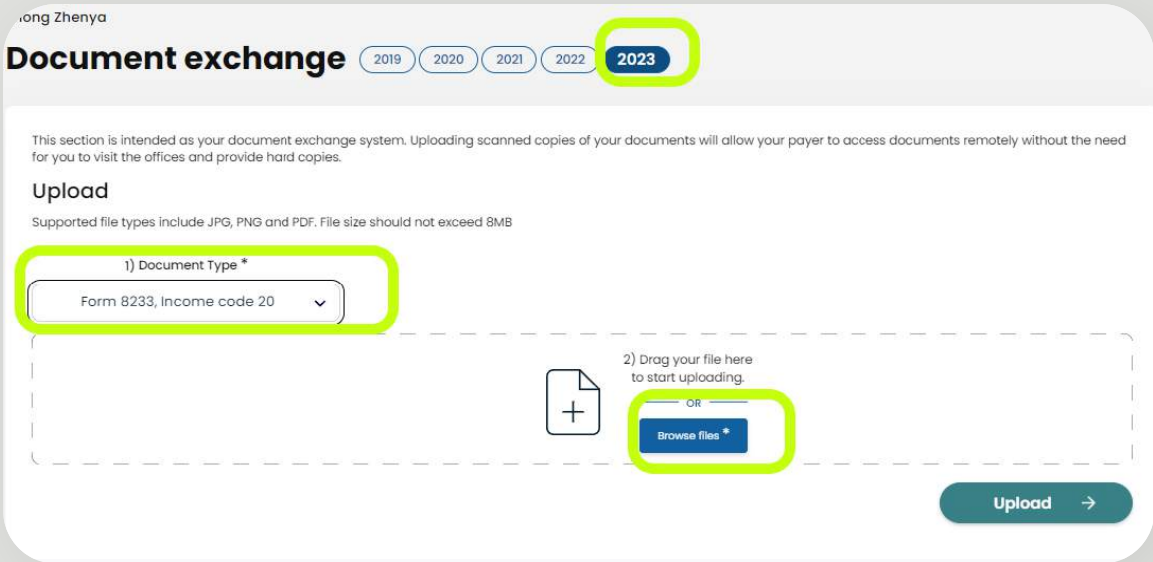
# 6. Documents Exchange

E-signed tax forms will appear also in Documents Exchange screen, 'Uploaded documents' with the extension '(E-signed)'.

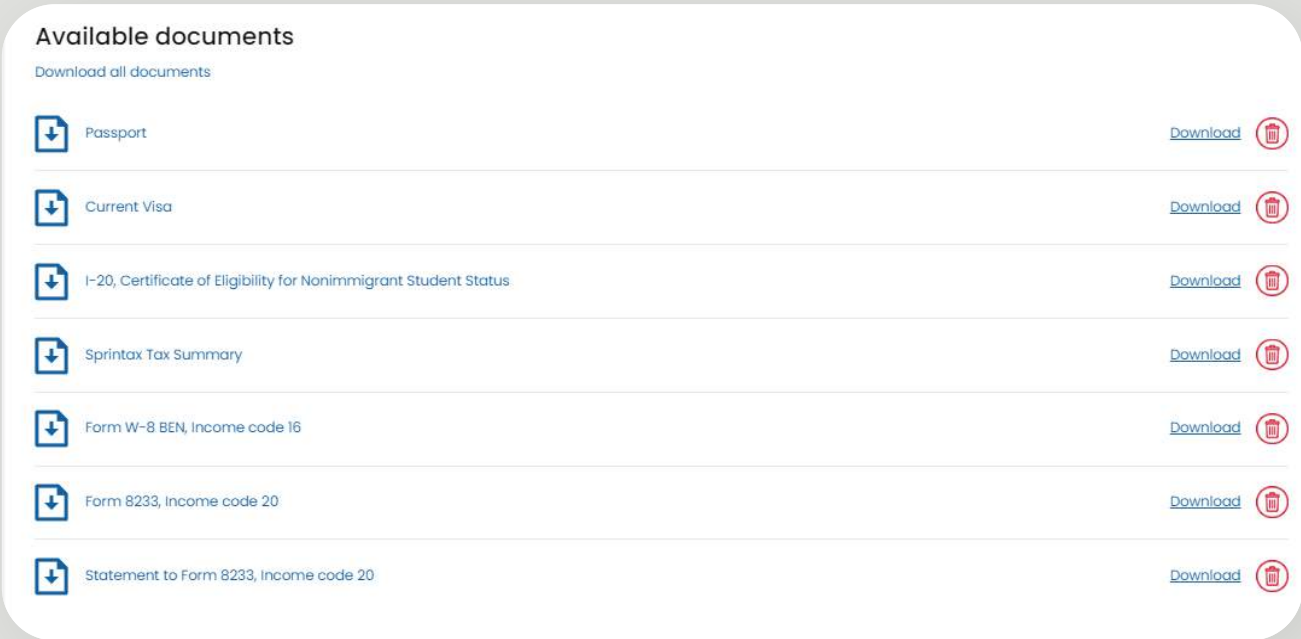


If you do not see the "Review and Sign" on the right, you must download the PDFs, sign manually and upload a clear scan of the signed forms back using the **"Documents Exchange"** feature:



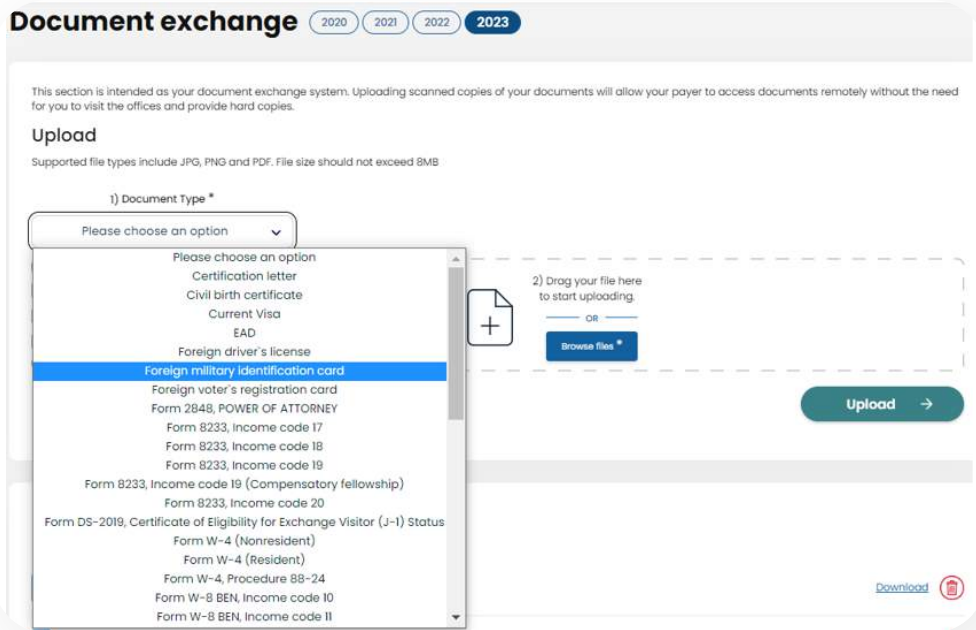


You can also upload additional documents via the Documents Exchange if your payor requested so. This is in addition to the generated tax forms in the previous step:



**Choosing the document type:**

To upload a signed form, simply browse your computer and then choose the correct document type from a drop-down menu:



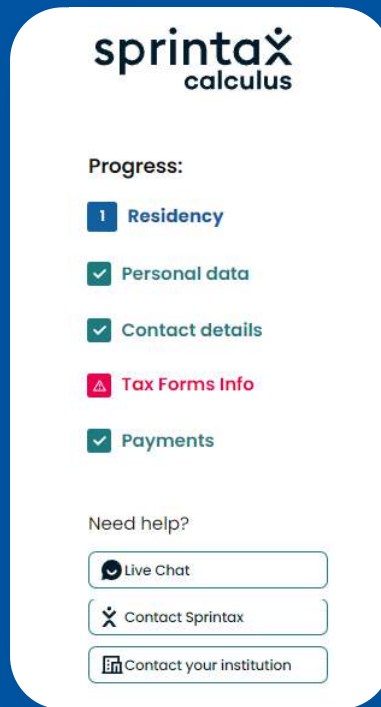
Make sure to verify you choose the correct document type as this is important for your payor to allocate the required documents quickly.

### Deleting an upload

If you want to upload a new signed copy of a document or you want to delete a document uploaded in error, you can do so using the small red bin sign on your right.

## Important

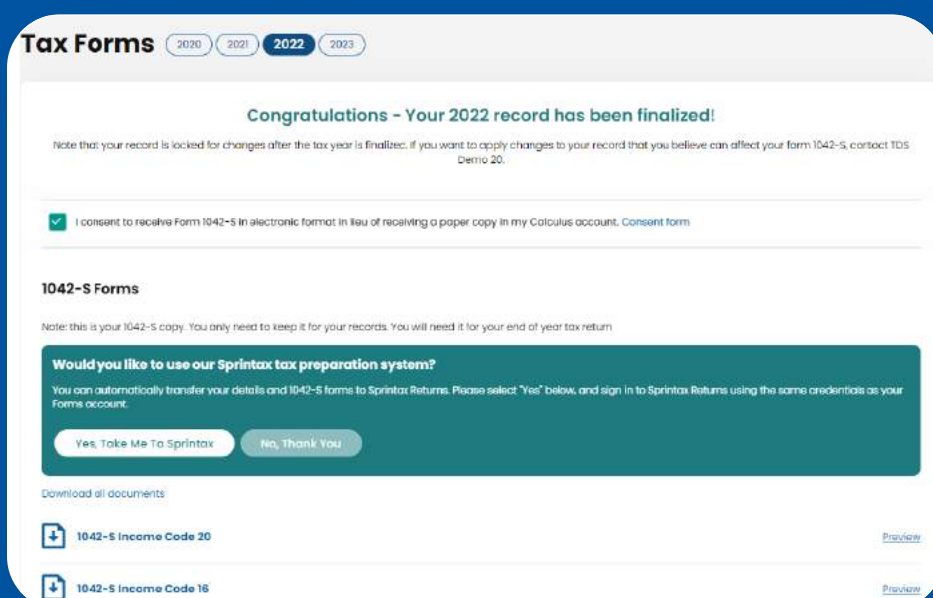
- Your profile might be half pre-populated by your payor on your behalf. If you believe that some of the details provided by your payor are outdated or not current, make sure to update the information in your profile.
- Update your Sprintax Calculus profile every time during the year there is a change in information. Example: change in address, change in position, receiving a US TIN, changing your visa type while in the US or extending your duration of stay Form DS-2019 or Form I-20.
- Sections with missing mandatory details will be colored in red.



## 7. Downloading your Form 1042-S

In the year completing for, if you expect to receive or received taxable payments from the institution asking you to maintain this Sprintax Calculus profile, and you are considered a nonresident alien for US tax purposes, you are supposed receive a **1042-S, Foreign Person's U.S. Source Income Subject to Withholding**. There is an exception from this rule where a Form 1042-S can be also issued to residents under the substantial presence test if the resident is eligible to claim certain tax treaty benefits under exception from the saving clause of the tax treaty convention in question.

If you did consent to receive Form 1042-S electronically and you need a copy of your Form 1042-S you can download it on 'Tax Forms' screen. If you did not, you can request a paper copy of your form from your payor.

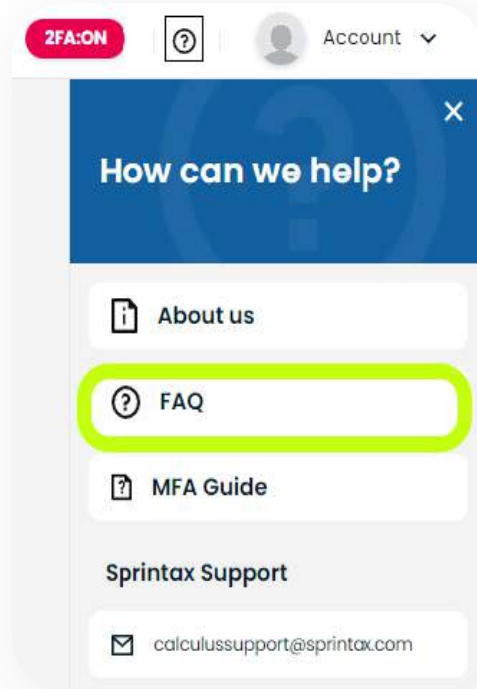


*This document may not be available before the end of the calendar year.*

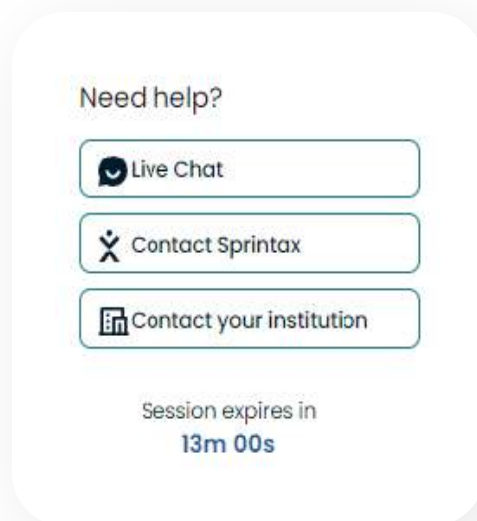


# What you may find helpful

Frequently asked questions section



Calculus Support email and Live chat:



For assistance with your Sprintax Calculus account please contact:

---

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