



SPRINTAX TAX DETERMINATION SYSTEM

AN OVERVIEW FOR TDS USERS

Contents

Common Questions about Sprintax Tax Determination System	3
What is Sprintax Tax Determination System (TDS)?	3
How does Sprintax TDS work?	3
The Steps Involved for TDS Users:	3
Why is it important to have a Sprintax TDS record?	4
What documents/information might I need to complete my TDS account?	4
Where and when can I access Sprintax TDS?	4
Is this the same system as Sprintax Tax Preparation?	4
What should I do if I forget my user name and password?	4
If I make an error what can I do?	3
How can I get help?	3
Sprintax TDS Process Walk-Through Guide of the system for Usersv	5
1. Account setup	5
2. Residency Page	5
3. Personal Data	7
Your Contact Details	10
5. Finance Information	10
6. Tax Questions Page	10
7. Tax Treaty Page	14
8. Summary Page	15
9. Tax Forms Page:	15
10. Documents Exchange Facility:	17
11. Support:	18

Common Questions about Sprintax Tax Determination System

What is Sprintax Tax Determination System (TDS)?

Sprintax TDS is an innovative, paper-free way to understand your tax position and manage all your tax-related documents. It's a secure, web-based, hassle-free tool which will help your institution to carry out tax residency determination, treaty eligibility and helps ensure they are withholding correctly on payments made to you and other non-resident aliens.

How does Sprintax TDS work?

To simplify the process of determining the appropriate tax withholdings from college/university payments, your school uses the Sprintax Tax Determination System. The system uses information you enter to determine your residency status, eligibility for tax treaty benefits and generate tax reporting documents.

The Steps Involved for TDS Users:

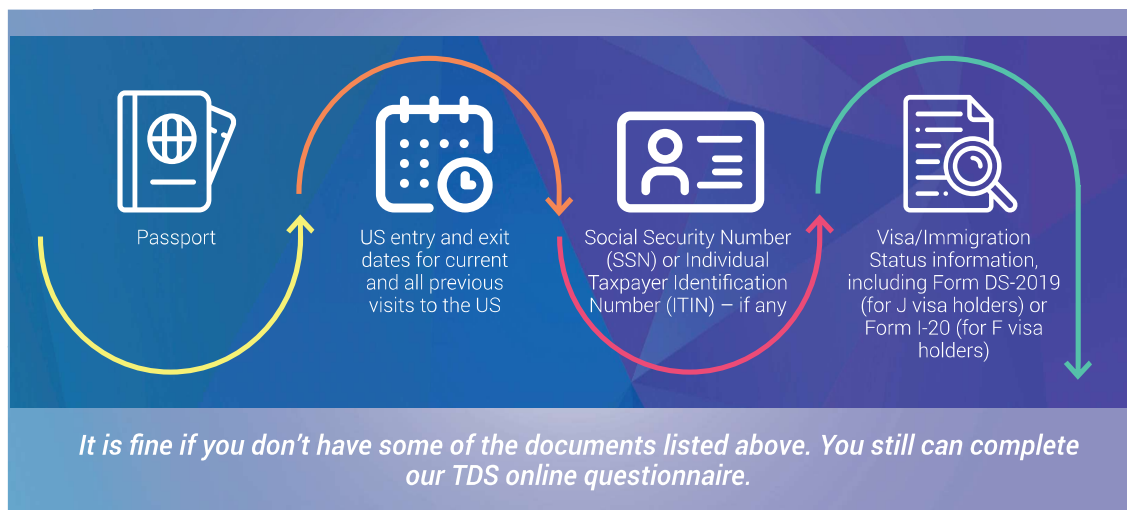


Why is it important to have a Sprintax TDS record?

Completing a record in the Sprintax Tax Determination System is mandatory for many foreign visitors receiving payments from their school. It is important because it ensures that non-resident students, scholars and professionals have the correct amount of tax withheld from income paid out by their institution and reported to the IRS.

Sprintax TDS will assist you in determining your residency status for tax purposes and whether you can claim a tax treaty. Additionally, Sprintax TDS will generate your tax forms and help you use Sprintax tax prep tool for preparing your tax return.

What documents/information might I need to complete my TDS account?



Where and when can I access Sprintax TDS?

You don't need to install anything on your computer. You can access your Sprintax TDS online account anywhere at any time. The portal is accessible via <https://tds.sprintax.com/>

Is this the same system as Sprintax Tax Preparation?

No. This is a system from the same company but it is separate to the tax preparation system. Sprintax Tax preparation assists with the preparation of your tax returns whereas Sprintax Tax Determination System is used to understand your tax position so that your school/institution can tax you correctly on payments made to you and other non-residents. You will likely have an obligation to complete your account on both systems separately.

What should I do if I forget my user name and password?

Reset your password by clicking "Forgot your password" and follow the instructions. A reset password email will be sent to the email address you gave us, so if you can't access it, confirm what address you used to register on Sprintax.

If I make an error what can I do?

You can log back into your personal TDS account and correct your details. You must click “save and continue” all the way through to the end and then reprint all of your affected documents and follow the instructions provided with each document on TDS.

How can I get help?

The Sprintax TDS team is ready to help! Ask us anything via our online chat system or email TDS@sprintax.com if you have any questions.

Sprintax TDS Process Walk-Through Guide of the system for Users

1. Account setup

1.1 Activation Email:

Once your school has set you up on TDS, you will receive an email directing you to the Sprintax Tax Determination System with a link to activate your account. It is important that you activate the account and set up your password by following the activation link provided.

An example of this email is outlined below.

From: noreply@sprintax.com <noreply@sprintax.com>
Sent: Wednesday 22 November 2017 09:56
To: ryanludden@hotmail.com
Subject: Ryan, welcome to Sprintax Tax Determination System

Hello ryan,
 Welcome to TDS, an innovative, paper-free way to manage all your tax-related documents.

Please follow [this link](#) to create your password. If you can't click the link – please copy the address and paste it in your browser's address bar:
<https://tdsdemo.taxback.com/reset-password/6ad949e887e23869dd45c5cab2fed3934d9b08196a522e6c38c19514c22c3358>

Log into your profile to confirm and update your details. For more information – please contact Customer service.
 Regards,
 Sprintax TDS

2. Residency Page

2.1 Residency Page Overview:

After logging in, you will arrive at the “Residency” page. Here TDS will ask questions related to the current and previous immigration statuses that you have/had whilst in the US. The system will require you to enter the first date of entry into the US, your visa type, as well as asking you to outline your visits in and out of the USA.

The expiry date of your current immigration status will generally be outlined on your I-20 or DS 2019 or will be the expiration status set by customs and border protection at the port of entry.

Notice that there is an asterisk or * beside some questions. This means that the question is mandatory and must be answered. Anything that does not have this is only optional. If you do not have information at hand you can save and continue through the pages and come back to answer an unanswered mandatory question at a later date.

Kim Nei
2019

RESIDENCY

Please answer the following questions around your US residency information

Residency Information

Are you (or will you be) a US citizen, by birth or naturalization, on the last day of 2019? *

Yes
 No

Are you currently or will you be, a Green Card holder on the last day of 2019? *

Yes
 No

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

Yes
 No

When did you first enter the US? *

01-01-2019

What is your current immigration status? *

F1 - Student

Please see your I-20 or DS-2019 for F or J Status

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

01-01-2019

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

12-31-2019

Please see your I-20 or DS-2019 for F or J Status

Expiry date of your current US visa (if any)

12-31-2019

Country of Citizenship *

China

The expiry date of your visa: This is optional but you will get this information from the visa stamp on your passport.

Country of Citizenship: This will generally be the country where you were born and/or to which that person owes allegiance. It is the country by which you are entitled to be protected.

Country of Residence: This is the country in which you resided before entering the USA.

Expiry date of your current US visa (if any)

12-31-2019

Country of Citizenship *

China

Country of residence *

China

Passport number (from your current valid passport) *

C1281932

Visa number (Your current valid visa, if any)

1029322

All fields marked as mandatory are required for successful residency and tax determination. Skipping answers could lead to incomplete estimation and tax forms.

SAVE AND CONTINUE

2.2 Residency Summary:

TDS will outline whether you are a resident or non resident for tax purposes based on the information provided on the Residency page. Please click next here to continue through the questionnaire.

The screenshot shows the Sprintax TDS interface. The top navigation bar includes the logo and links for Home and About Us. A sidebar on the left lists various sections, with 'Residency Summary' highlighted. The main content area displays the user's name 'Kim Nei' and the year '2019'. Below this, the 'RESIDENCY STATUS' section indicates that Kim Nei is an F1 - Student visa holder with a primary purpose of being a student. It further states that Kim Nei is non-resident because they do not pass the substantial presence test, and concludes that Kim Nei is a nonresident for federal tax purposes for the 2019 tax year. At the bottom of the main content area, there are 'BACK' and 'NEXT' buttons.

3. Personal Data

3.1 Personal Data Page:

The Personal data section will require you to fill out your personal details such as: name, date of birth, birthplace, student ID, etc. You may have some of this information pre populated on your behalf by the school.

Your US TIN: (Tax identification Number) Relates to whether or not you have either a Social Security number or an Individual Taxpayer Identification Number. If you have one, please enter that information on the TDS system.

Residency ✓
 Residency Summary ✓
 Personal data ✓
 Contact details ✓
 Finance info ✓
 ITIN questions ✓
 Tax questions ✓
 Tax treaties ✓

CONTACT PERSONS

Live Chat

Kim Nei
2019

PERSONAL INFORMATION

Personal Information

First name *
Kim

Middle name
Jong

Surname/Last name *
Nei

Date of birth *
01-01-1990

Place of birth *
China

City of birth *
Beijing

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

Your US TIN (SSN or ITIN) *
353-32-2111

Student number
PI145236

SEVIS ID

FNR ID

Payroll system ID

If there is no options for a program type you will not need to answer this question as it's optional for schools to set up.

TDS will ask you for your foreign tax Identification Number as it may be needed to help generate some of your tax forms. Generally students will have tax number from their home country, however if not, please enter your national identification number which appears in your national ID card, or any unique number in your home country you are identified by.

Full time student: You are a full-time student if you are enrolled at a school for the number of hours or classes that the school considers full time. You must be full-time for some part of each of 5 calendar months during the year. (The months need not be consecutive)

Degree Candidate: You are a candidate for a degree if you attend a primary or secondary school or are pursuing a degree at a college or university, or attend an educational institution that offers a program of training to prepare students for gainful employment in a recognized occupation and is authorized under federal or state law to provide such a program and is accredited by a nationally recognized accreditation agency

Program Type Please choose an option	What is your foreign (home country) tax identification number? * c27483293
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.	
Are you a full time student or scholar in a US educational institution? *	
<input checked="" type="radio"/> Yes <input type="radio"/> No	
Are you a degree candidate in a US educational institution? *	
<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are you OPT/CPT program participant? *	
<input type="radio"/> Yes <input checked="" type="radio"/> No	
Was the length of your program 12 consecutive months or less? *	
<input type="radio"/> Yes <input checked="" type="radio"/> No	
Have you been listed on someone else's US tax return past year as a dependent and will they claim you next year again? (your parents, relatives, spouse filing US tax return) *	
<input type="radio"/> Yes <input checked="" type="radio"/> No	
<input type="button" value="BACK"/>	<input type="button" value="SAVE AND CONTINUE"/>

OPT/CPT program participant: Optional Practical Training (OPT) is a program that temporarily allows international students with an F-1 visa in the United States to work up to 12 months in relation to their major of study. F-1 visa students are eligible for OPT after completing their first academic year. OPT can be completed both before and after completing graduation.

Curricular Practical Training (CPT) is a program that temporarily allows international students with an F-1 visa to gain practical experience directly related to their major through employment, paid or unpaid internships, or cooperative (co-op) education. CPT must be completed before graduating. In addition, CPT can be part-time (20 hours or less a week) or full time (20 hours or more a week). Although, if you work full-time for 12 months in CPT, you will lose your eligibility for OPT.

Listed as a Dependant on Someone's Previous US Tax Return: This questions asks if have you been listed as a dependent on someone's previous US tax return in the past or expect to be this year. This could be from your parents, relatives or spouse.

4. Your Contact Details

At this stage TDS will ask you for your contact details from your US address as well as your home address as these will be needed on your tax forms. Please choose your mailing address for which you would like to receive correspondence via mail from tax authorities in the future. TDS will also ask for a phone number.

Tax questions

Tax treaties

CONTACT PERSONS

Live Chat

YOUR CONTACT DETAILS

Your US Address

Note: Please note that the Sprintax system only accepts English/Latin alphabet letters.

Address (Number, Street) *	Address (Apartment number)
Baker Street	2f
Address (City) *	State *
Baltimore	Maryland
ZIP code *	
11105	

Your Home Address (Outside the US)

Address (Number, Street, Apartment number) *	Address (County, Province)
2 Xingxi St	
Address (City)	Country *
Beijing	China
Postal code/Zip code	
1231hj	

Please choose your mailing address *

US address

Your Home Address (Outside the US)

Please choose your current residential address *

US address

Your Home Address (Outside the US)

US phone number *	Home country phone number
(914) 309-8316	

5. Finance Information

The finance information section is used to help populate the tax documents for you, such as the 8233, W-4 or W-8BEN which you may need for receipt of US income. The question of if you have US income is locked on your behalf by the school. Your type of income will also be preselected by the school.

The length of your stay during 2019: Please provide an estimate of how many days you will spend within the US. E.g. Ryan is an F1 student and will be in the US for the entire year except for 1 week where he returns home. In this case Ryan will enter 365-7 which will be 358 days here. The estimate does not need to be precise but to your best knowledge.

Do you have your own office, place of business that is maintained by you personally for performing these services: This question will only affect your application if you had income from independent personal services.

Do you have more than one job? TDS will need confirmation as to whether you worked at only one place or more. In case you had more than one job you will be required to enter your wages from both your lowest paying job and your highest paying job, and whether the income from your second job plus your spouse's income (if any) is expected to be less than \$1,500. This will help TDS to correctly populate your W-4.

The screenshot shows the 'FINANCE INFORMATION' section for user Kim Jong Nei in 2019. The sidebar on the left includes navigation links for Residency Summary, Personal data, Contact details, Finance Info, ITIN questions, Tax questions, and Tax treaties. Below the sidebar is a 'CONTACT PERSONS' section with a 'Live Chat' button. The main content area contains the following questions and options:

- Finance Information**
 - Do you have US income (wages, scholarships, or other payments) in 2019? *
 - Yes
 - No
 - Scholarship or fellowship grants (Income Code 16)
 - Compensation for independent personal services (Income Code 17)
 - Compensation for teaching or research (Income Code 19)
 - What is the length of your stay during 2019 (days)? *
 -
 - Please fill out this field.
 - Do you have your own office, place of business, that is maintained by you personally for performing these services? *
 - Yes
 - No
 - Please fill out this field.
 - Do you have more than one job? *
 - Yes

Your expected gross income: Sprintax TDS will require an estimate of your expected gross income from your school as well. If you do not have a precise figure, a rough estimate will suffice. This question affects only the 8233 tax document if performing independent personal services.

Please choose your employer/payer: The only option here will be the option for your school, please select this option.

Do you have more than one job? *

Yes

No

What is your expected gross income? *

\$ 5,000.00

Please choose your Employer/Payer *

Demotest1

Please, provide short description of your position (not more than 300 symbols):

Part-Time Library assistant at University

Examples for acceptable descriptions of Independent personal services
 "Consulting contract to design software"
 "Give three lectures at XYZ University."

Examples for acceptable descriptions of Dependent personal services
 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 professor or teacher can enter "teaching at ABC University."
 A nonresident alien researcher can enter "research at ABC University's school for liquid crystal research."
 A nonresident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."

Total compensation you expect to be paid for these services in this calendar or tax year \$ *

\$ 5,000.00

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

\$ 0.00

[BACK](#) [SAVE AND CONTINUE](#)

Provide a short description of your position: If performing independent/dependent personal services you can enter information regarding the nature of your position. For example a part time library assistant at the school.

Total compensation you expect to be paid for these services in this calendar year: This compensation is in relation to the description of the services you performed and outlined in the "Provide a short description of your position" box.


Whilst you may not know exactly the amount, please try to provide TDS an estimate. E.g. Kim works at the library for \$11 an hour and works 5 hours a week. Kim will be working there for 16 weeks. $\$11 \times 5 \text{ hours} \times 16$ (The number of weeks) = \$880

Please enter the amount of your scholarship paid to cover living expenses (room and board) or other non-tuition related expenses: If you are not in receipt of scholarship income then please leave this at \$0. If you are receiving scholarship and it covers areas that are not directly related to your tuition then please provide an outline of this on TDS.

6. Tax Questions Page

The school will be reporting payment information made to you on this page so you can click next through this page without requiring to fill in this information. You do not need to enter information on the Tax Questions Page, please click save and continue on this section.

TAX QUESTIONS

 **Scholarship & Grant (Income code 16) questions**

Payer's name

Demotest1

Purpose of your scholarship/grant
Please, enter below the part of your scholarship payment granted towards:


University tuition and fees

Books or Equipment, required for your course of study


Living expenses - room and board

Individual expenses, other type of maintenance not included in living expenses

For doing research as a recipient of a grant allowance or award

 **Compensation for teaching or research (Income code 19) questions**

<p>Payer's name</p> <p>Demotest1</p>	<p>Amount *</p> <p>\$ 0.00</p>
---	---------------------------------------

 **Compensation for dependent personal services (Income code 17) questions:**

<p>Payer's name</p> <p>Demotest1</p>	<p>Amount *</p> <p>\$ 0.00</p>
---	---------------------------------------








BACK

SAVE AND CONTINUE


7. Tax Treaty Page

This page will outline any particular tax treaties that are available to you if you are in receipt of this income code/type. You will need to confirm whether or not to use your treaty benefits on this page. Please note – these are treaties that are applicable only if you receive this type of income. It does not mean that you have received this income.

Details

-  Residency
-  Residency Summary
-  Personal data
-  Contact details
-  Finance info
-  Tax questions
-  Tax treaties

CONTACT PERSONS


Live Chat

Your Details
TDS Summary
Tax Forms
Document Exchange

Kim Jong Nei

2019

TAX TREATY

Tax treaty income code 16

Tax treaty available: Yes	Tax Residence: China
Income type: Scholarship or fellowship grants	Max amount: no limit
Tax treaty article: 20(b)	

Tax treaty income code 19

Tax treaty available: Yes	Tax Residence: China
Income type: Compensation for teaching and research	Max amount: no limit
Tax treaty article: 19	

BACK

SAVE AND CONTINUE

Do you want to use this tax treaty exemption? *

Yes

No

8. Summary Page

The summary page will give you a summary of the information you provided on TDS. You will need to click “save and continue” at the very bottom of this page to access your tax forms.

Details

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

Kim Jong Nei
2019

Residency
Residency Summary
Personal data
Contact details
Finance info
Tax questions
Tax treaties

CONTACT PERSONS

Live Chat

GENERAL INFO

First Name: Kim	Middle Name: Jong
Last Name: Nei	Country of Passport/Citizenship: China
Current visa: F1 - Student	Current Immigrant Status: F1 - Student
Subcategory: Student	Your SSN/ITIN: 353-32-2111
Applied for SSN / ITIN: No	University (Institution)/Affiliate: Demotest1
Foreign Taxpayer ID: c27483293	

RESIDENCY INFORMATION

US tax residency status: Non-resident	Date First in USA: 02/22/2019
First day in USA under F1 - Student: 01/01/2019	Last day in USA under F1 - Student: 12/31/2019
Prior visits: N/A	2019 exempt status: F1 - Student
SPT results: Substantial Presence Test not met	Residency starting date: 12/31/2019
Immigration status change date: 01/01/2019	

TAX TREATY AND INCOME TAX DETAILS

9. Tax Forms Page:

This page will outline the tax forms that are applicable to you. You will need to print these, sign these and provide them to your withholder. You can also upload signed copies back to TDS via the document exchange facility which is explained further in this document.

The tax documents you may receive are:

Form W-4 “Employee’s Withholding Allowance Certificate” determines how much tax is withheld from an employee’s paycheck each pay period. A non-resident alien subject to wage withholding must give the withholding agent (employer) a completed Form W-4 so that the employer knows how much tax withhold from the employee’s paycheck. A nonresident alien for tax purposes must have selected a filing status of “single” regardless of actual marital status.

Form W-8BEN “Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding” is a form filed by non-resident aliens from foreign countries with which the United States has an income tax treaty. To receive the benefits of the tax treaty between the US and the foreign country, every international student must complete Form W-8BEN. The form provides an exemption from, or reduction of, withholding for certain types of income (for example scholarships, fellowships, grants and stipends that do not require the performance of a service; dividends; royalties and other).

Purpose of form: Form 8233 “Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual” must be filed by all non-resident aliens who receive non-compensatory scholarship or fellowship income and personal services income (including compensatory scholarship or fellowship income) from the same withholding agent. Form 8233 is used to claim a tax treaty withholding exemption for part or all of both types of income.

TDS Summary: The TDS summary will simply provide an overview of the information that has been provided by you. This document does not need to be printed out and signed unless otherwise requested by your educational institution.

The screenshot shows a user interface for Kim Jong Nei in 2019. The sidebar on the left contains navigation links: Residency Summary, Personal data, Contact details, Finance info, Tax questions, and Tax treaties. Below these is a 'CONTACT PERSONS' section with a 'Live Chat' button. The main content area is titled '1042-S FORMS' and 'TAX FORMS'. It lists two forms: 'W4 form' and 'W8BEN form - Income code 16'. The 'W4 form' entry includes a 'Purpose of form' section with the following text: "Purpose of form: Form W-4 “Employee’s Withholding Allowance Certificate” determines how much tax is withheld from an employee’s paycheck each pay period. A non-resident alien subject to wage withholding must give the withholding agent (employer) a completed Form W-4 so that the employer knows how much tax withhold from the employee’s paycheck. A nonresident alien for tax purposes must have selected a filing status of “single” regardless of actual marital status." Below this is a 'What to do next' section: "Providing Form W-4 to the Withholding Agent: Demotest1". A 'Read More' link is also present. The 'W8BEN form' entry also has a 'Purpose of form' section, with the beginning of the text visible: "Purpose of form: Form W-8BEN “Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding” is a form filed by non-resident aliens from foreign countries with which the United States has an income tax treaty. To receive the benefits of the".

10. Documents Exchange Facility:

This facility allows you to upload information to your account which will also be provided to your withholder at the school. Examples of documents you can upload include a signed W-4, 8233, W9, W-8BEN as well as other identification documents you may wish to upload.

The screenshot displays the Sprintax TDS Document Exchange interface for user Kim Jong Nei in 2019. The interface includes a navigation menu with options like 'Your Details', 'TDS Summary', 'Tax Forms', and 'Document Exchange'. A sidebar on the left provides navigation for 'Details' (Residency, Residency Summary, Personal data, Contact details, Finance info, Tax questions, Tax treaties) and 'CONTACT PERSONS' (Live Chat). The main content area is titled 'DOCUMENT EXCHANGE' and contains a list of supported document types for upload. A dropdown menu is open, showing a list of document types, with 'Signed W4 form' highlighted. Below the list is a dropdown menu currently set to 'Passport' and a green 'UPLOAD' button. The interface also includes an 'AVAILABLE DOCUMENTS' section with a 'BACK' button.

11. Support:

In terms of support, you can always contact the TDS live chat team if you have any questions on your TDS profile or any question on the account. You can also contact tds@sprintax.com for additional email support. Do not hesitate to contact these resources before contacting the school.

