

Instruction Manual



Adapted for University of Northern
Colorado -- Not the official Sprintax
Calculus Guide!

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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 amount of tax subject to withhold from those payments (and pay to the U.S. government). The determination is made based on the information provided by the payee (you) in your Sprintax Calculus profile. **Please note, that the Calculus process is separate from filing your federal or state income taxes** (UNC offers access to Sprintax Tax Prep software for F and J status scholars who are nonresidents for tax purposes).

Sprintax Calculus will help you:

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

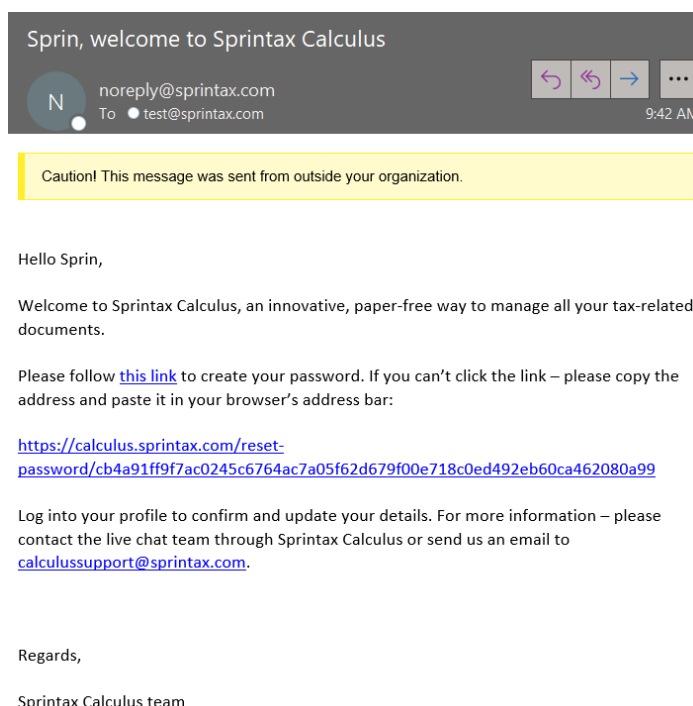
Most of the documents produced such as Form W8–Ben, Form 8233, Form W4–, and Form W9– are to be signed and provided to your payor (UNC) prior to them arranging your first payment.

HOW SPRINTAX CALCULUS WORK – ACCESSING THE SOFTWARE

Note that your profile is created by your paying institution (UNC) 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. – The signer of the email will usually be Amy Sands

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 TDS 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 nonresident or a resident alien for US tax purposes. The determination is based on two main tests implemented in the software:

- The US citizenship / US green card test
- The Substantial Presence test

Your correct travel history is critical to determining your tax status and correct withholding. Be sure that you put your VERY FIRST visit to the U.S. since 1986 in the “When did you first enter the US?” field, and the start of your current status (entry as a student or change of status) in “What date did you first enter the US on this immigration status?” field. Unless you have stayed in the U.S. continuously in the same visa status these should be different dates. If your first entry was for your current program with the same I-20/DS-2019, then the dates would be the same.

[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

“This immigration status” means the start of your CURRENT (F-1/J-1 or other status) program

When did you first enter the US? *

Very first visit to USA in any status

08-30-2016

What is your current immigration status? *

F1 - Student

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

Final departure date you left or intend to leave the US

06-25-2025

Country of Citizenship *

Canada

I-20/DS-2019 end date OR post completion OPT/AT end date

Country of residence *

Canada

Passport number (from your current valid passport) *

6165235

If your first entry ever and current status dates are not the same, you will need to complete a travel history. If your only travel to the U.S. has been for this academic program, and you have not had any significant breaks in your time here (not including summer/winter breaks and short trips home or abroad), you won't need to complete a detailed travel history. Include trips prior to your current student/scholar status, but not trips in and out since you arrived for this program.

This is your current F-1/J-1 period for students and scholars based on the information you entered

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

Please fill the visa type, entry and exit dates for all your visits

You have not entered all your visits to the US. Please, enter all your visits starting with your first ever entry.

Visa type/Visitor status

FI - Student

Subcategory

Student

Date of entry in the US on your current status

08-16-2019

Date when the status expires

05-15-2025

Select the visa/waiver status for that very first trip

Only important for some categories (J-1 student vs J-1 Scholar)

Delete

Visa type/Visitor status

Please choose an option

Occupation

Please choose an option

Date of entry in the US on your prior status

08-16-2005

Date when the status expires

This is based on the date that you entered the very first time. You may need extra rows if you have additional periods of stay in the U.S., including previous periods of F or J (in any category) status.

Enter the date you left or your status expired for that first trip to the U.S..

If you need to count days in the U.S. for some of your travel history (see page 7a), you can use your I-94 record (though it is not always complete) and an online days calculator to help you count days
<https://www.timeanddate.com/date/duration.html>
<https://www.calculator.net/day-counter.html>

Number of days in the U.S. can be important in determining your tax residency status for some cases.

7

Visits to the US ⓘ

This is your current F-1/J-1 period for students and scholars based on the information you entered

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

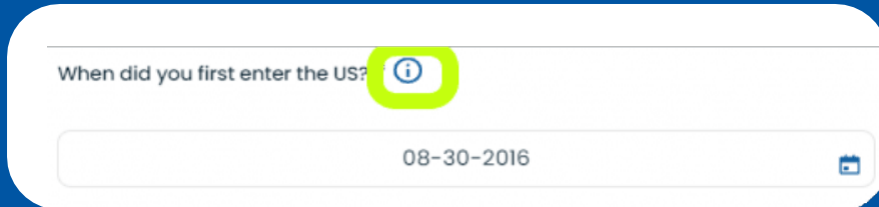
341

[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 (1986 onwards)

If you were present in the US prior to coming on your current visa/stay, you must indicate the very first entry you made to the US for the first required date. For this purpose, consider all visits from 1986 onwards.



When did you first enter the US? ⓘ

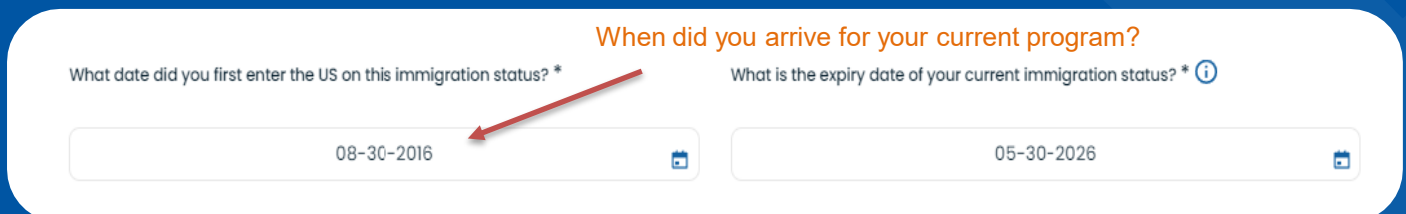
08-30-2016

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



When did you arrive for your current program?

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 for your your current program of studies or started on the current I-20/DS-2019 (this might be at your previous school for transfer students on the same SEVIS ID).

For F and J visa holders, the expiry date of your current status is listed on Form I-20 and Form DS-2019 respectively, though you can choose to calculate OPT or AT time, if eligible – that may change your residency calculation.

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

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

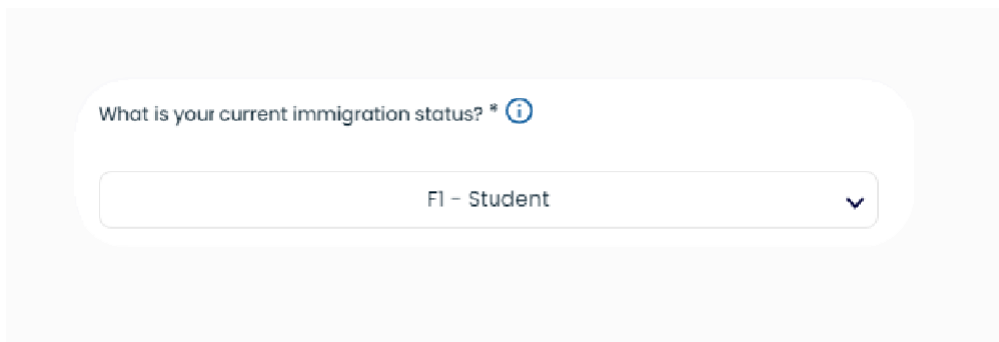
3. Form Covers Period:	4. Exchange Visitor Category:	
From (mm-dd-yyyy): 12-31-2016	RESEARCH SCHOLAR	
To (mm-dd-yyyy): 12-30-2017	Subject/Field Code:	Subject/Field Code Remarks:
	52.1099	The scholar will establish research-based collaborations with our faculty in LEP with the


For all other non-student or J scholar 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-797A (Approval notice)

What is your current immigration status?



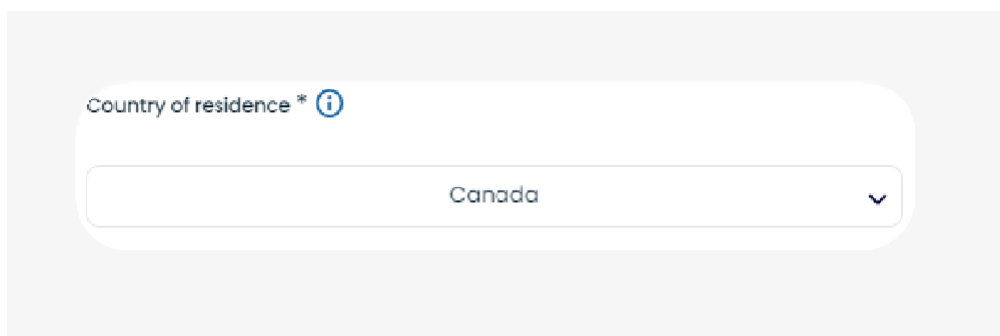
What is your current immigration status? * 


F1 - 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. This may or may not be your home 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.

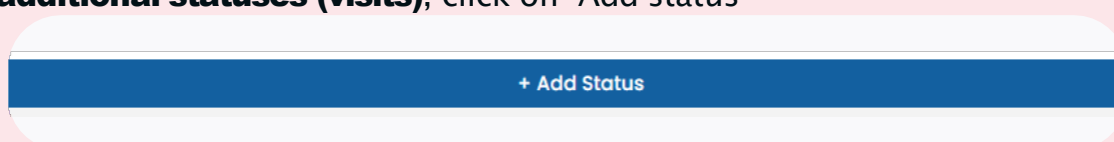
Visits to the US

If The date of first US entry above is different from **Entry date under your current immigration status (program)**, you must enter each prior visit (or status) to the US as well as the current one. *Each segment of travel* to the U.S. prior to your current program (for students and scholars) and your immigration status at the time is important.

Sprintax Calculus generally looks at your program dates on your I-20 or DS-2019 to be one period of status or stay, even if you travel several times during your program.

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 (visits), click on '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 FI - Student	Subcategory Student
Date of entry in the US on your current status 08-30-2016	Date when the status expires 05-30-2026

Delete

Visa type/Visitor status VWP visa - Travel Authorization under VWP	Subcategory Travel Authorization under Visa Waiver Program
Date of entry in the US on your prior status 07-30-2013	Date when the status expires 08-28-2013

+ Add Status

How to fill "Visits to the US"?

[Learn More](#)

Visa type/Visitor status

FI - Student

Subcategory

Student

Date of entry in the US on your current status

01-11-2021

Date when the status expires

12-31-2026

Delete

Visa type/Visitor status

B2 - Tourist visa

Subcategory

Tourist visa

Date of entry in the US on your prior status

06-21-2019

Date of departure from the US on your prior status

06-22-2019

Delete

Visa type/Visitor status

FI - Student

Subcategory

Student

Date of entry in the US on your prior status

01-06-2016

Date when the status expires

12-16-2018

Delete

You may need several rows of visits to the US if you have a lot of travel history prior to entering for this program or degree. Make sure you complete one row for EACH visit prior to your current stay (as defined by your I-20/DS-2019); each with the correct visa/status for that individual visit to the U.S. Your [I-94 history](#) can help, and so can passport stamps. **Keep adding rows until all visits are accounted for.** Most recent at the top and oldest at the bottom are easiest to keep track of. Unfortunately, the system will not let you save your progress, so you must complete this step in one sitting.

Repeat the action if you need to enter more than one additional status/period of stay.

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 or TIN (either 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 entered a US ITIN or SSN. If you need an ITIN, enter your birth information.

The screenshot shows the 'Your Details' form in the Sprintax Calculus interface. The progress bar on the left highlights '2 Personal data' in blue. The form is divided into two main sections: 'Personal Information' and 'Tax Identification'.

Personal Information:

- First name *: Bingwen
- Middle name: (empty)
- Surname/Last name *: Bo
- Date of birth *: 02-05-1998
- Place of birth: China (dropdown)
- City of birth: Shanghai

Tax Identification:

- Do you have US TIN (SSN or ITIN) *: ☒ Yes ☐ No
- Your US TIN (SSN or ITIN) *: 004-21-8596
- TDS Demo 20 ID: TDS02020286
- SEVIS ID: N52654964521
- Payroll system ID: (empty)
- Program Type: Research scholar (dropdown)
- Campus: Seattle (dropdown)
- What is your foreign (home country) tax identification number?: 963-456-321

On the left sidebar, under 'Progress:', the following items are listed with checkboxes: Residency, **2 Personal data** (highlighted), Contact details, Tax Forms Info, Payments, Residency Summary, and Tax Treaties. Below this, under 'Need help?', there are links for 'Live Chat', 'Contact Sprintax', and 'Contact your institution'.

Tax Identification section

Students who need an ITIN for tax reporting and filing purposes the Tax Identification information is important.

☒ Payments

☒ Residency Summary

 Need help?

Contact Sprintax

Contact your institution

Place of birth *

Iceland

City of birth *

Húsavík

Tax Identification:

Do you have US TIN (SSN or ITIN) *

☐ Yes
 ☒ No

Have you applied or do you expect to apply for an SSN? *

☐ Yes
 ☒ No
 ☐ I want to re-apply

Have you applied for an ITIN before? *

☐ Yes
 ☒ No
 ☐ I want to re-apply

Bear Number

123456789

SEVIS ID

N0000000000

FNR ID

Payroll system ID

Program Type

Student Athlete

Campus

Greeley

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

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 in 2024? *

☒ Yes
 ☐ No

Are you a degree candidate in a US educational institution during 2024? *

☒ Yes
 ☐ No

Are you an OPT/CPT program participant during 2024? *

☐ Yes
 ☒ No

Are you married? *

☐ Yes
 ☒ No

Can you be claimed as a dependent on someone else's tax return?

☐ Yes
 ☒ No

Back

Save And Continue

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Select your program (see page 16 for details)

Unless you have finished your degree or are an exchange student, mark yes

Will you be applying for OPT/CPT/Academic training? Even if you have not yet done so.

Progress:

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

Need help?

- Live Chat
- Contact Sprintax
- Contact your institution

Student number

Payroll system ID

Campus

Philadelphia North

SEVIS ID

Program type

Please choose an option

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

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 in 2023? *

☒ Yes ☐ No

Are you a degree candidate in a US educational institution during 2023? *

☒ Yes ☐ No

Are you an OPT/CPT program participant during 2023? *

☐ Yes ☒ No

Are you married? *

☐ Yes ☒ No

Can you be claimed as a dependent on someone else's tax return? *

☐ Yes ☒ No

Will you be applying for OPT/CPT/Academic training? Even if you have not yet done so.

➤ Student number (Optional)

This field may:

- be labeled differently depending on your payor's specific identification number of foreign nationals. Example: University of Northern Colorado (Bear Number) College of Birmingham ID (CBID), 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(X) ('N' followed by 9 to 11 numbers).

This field may:

- not be visible on your screen at all
- 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 or J visa, and you do *not* have a US tax identification number (ITIN or SSN) but have scholarships or grants, please enter your SEVIS ID.

Department of Homeland Security U.S. Immigration and Customs Enforcement		I-20, Certificate of Eligibility for Nonimmigrant Student Status OMB NO. 1653-0038	
SEVIS ID: N0004705844			
SURNAME/PRIMARY NAME Ngo	GIVEN NAME Hang Thu	Class of Admission F-1 ACADEMIC AND LANGUAGE	
PREFERRED NAME Hang Thu Ngo	PASSPORT NAME Ngo Thu Hang		
COUNTRY OF BIRTH VIETNAM	COUNTRY OF CITIZENSHIP VIETNAM		
DATE OF BIRTH 10 AUGUST 1989	ADMISSION NUMBER		
FORM ISSUE REASON CHANGE OF EDUCATION LEVEL	LEGACY NAME Hang Thu Ngo		

Payroll system ID (Optional)

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

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

In either case, you should skip this field.

Program type

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:

- Student Athlete – chose this program type if you have an athletic scholarship, even if you also have on campus employment
- Student Employee – students who have a GA or GTA appointment or on campus employment of any kind
- Employee – professional employees who are not primarily students at UNC
- Independent Contractor – providing services independently for UNC (guest lectures, art exhibitor, performer, etc.)

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.

Unless you will be departing the U.S. permanently, or for a long period of time, please use your U.S. mailing address as the mailing address. Don't forget to update your mailing address with the U.S. Post Office if you move!

Progress:
 Residency
 Personal data
Contact details
 Tax Forms Info
 Payments
 Need help?
 Live Chat
 Contact Sprintax
 Contact your institution

Navigation: Your Details | Final Summary | Tax Forms | Document Exchange

PLEASE NOTE:
 The Sprintax system only accepts English/Latin alphabet letters.

Your US Address

Address (Number, Street): Address (Apartment number):

Address (City): State:

ZIP code: ZIP+4:

Your Home Address (Outside the US)

Address (Number, Street, Apartment number) *: Address (County, Province):

Address (City): Country *:

Postal code: Internal code/Zip code:

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:

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 when requested by the Accounting office or OGE, or if you need Form 8233, *Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual*, requested by your payor (UNC) 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 the *Tax Forms Info* step will depend on UNC'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

The screenshot shows the 'Tax Forms Info' step in the Sprintax Calculus interface. The left sidebar contains a 'Progress' section with a list of steps: Residency, Personal data, Contact details, **4 Tax Forms Info** (highlighted with a green box), Payments, and Residency Summary. Below this is a 'Need help?' section with buttons for 'Live Chat', 'Contact Sprintax', and 'Contact your institution'. The main content area is titled 'Tax Forms Info' and contains the following questions and options:

- 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 "II 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) ⓘ

At the bottom of the main content area, there is a '← Back' button on the left and a 'Save And Continue →' button on the right.

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,

sprintax

calculus

Progress:

Residency

Personal data

Contact details

4

Tax Forms Info

Payments

Need help?

Live Chat

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Contact your institution

Your Details

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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) ⓘ

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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 it for (example: 2021). This will prompt the related questions to show for you to answer. If you are not sure what your sources are, ask Accounting or OGE (but OGE does not always have this information).

> **Locked for Editing:**

If your tax forms page shows a list of **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

The screenshot shows the 'Tax Forms Info' section of the Sprintax Calculus interface. At the top, there are tabs: 'Your Details' (active), 'Final Summary', 'Tax Forms', and 'Document Exchange'. Below the tabs, the question is: 'Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from TDS Demo 17 in 2023? *'. The 'Yes' radio button is selected.

Below this, there is a list of income types with checkboxes. Red arrows point from text labels to specific options:

- An arrow points from 'Rarely used' to the '10 Industrial royalties (Income code 10)' checkbox.
- An arrow points from 'Rarely used' to the 'Motion picture or television copyright royalties (Income Code 11)' checkbox.
- An arrow points from 'Rarely used' to the 'Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)' checkbox.
- An arrow points from 'Scholarships (athletes and scholarships without employment)' to the 'Scholarship or fellowship grants (Income Code 16)' checkbox, which is checked.
- An arrow points from 'Honoraria & independent contracting/1099 (rarely used)' to the 'Compensation for independent personal services (Income Code 17)' checkbox.
- An arrow points from 'Assistantships and similar campus employment, student wages' to the 'Compensation during studying and training (Income Code 20)' checkbox.

Other visible options include 'Other income (awards, prizes) (Income Code 23)', 'Winning awards/Gambling (Income Code 28)', and 'Deposit interests (Income Code 29)'. At the bottom, there are two more questions: 'Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? *' (with 'Yes' selected) and 'Where is the activity covered by your scholarship grant performed? *' (with 'US/US territories' selected).

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) ⓘ ← Scholarships (athletes and scholarships without employment)

☐ Compensation for independent personal services (Income Code 17) ⓘ

☒ Compensation during studying and training (Income Code 20) ⓘ ← Assistantships and similar campus employment, student wages

☐ 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 *

TDS Demo 17

First date of employment with this employer ⓘ

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 from a country with a tax treaty, and 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

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

In case of an international student, recipient of a scholarship grant from UNC, 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 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

Students with scholarships that cover more than tuition and fees, who need to apply for an Individual Taxpayer ID Number (ITIN), be sure to leave the “Foreign Source Income” box **UNCHECKED**.

Progress:

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

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- Contact your institution

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 University of Northern Colorado in 2024? *

☒ Yes ☐ No

☒ **Scholarship or fellowship grants (Income Code 16)** ⓘ

International students and scholars often receive scholarships, fellowships, grants, and assistantships from U.S. sources. These grants and waivers fall into one of three categories: Money received for (or a waiver of charges for) tuition, fees, books, and/or supplies Money received from a domestic ... [Read More](#)

☐ **Compensation during studying and training (Income Code 20)** ⓘ

Student income from employment including assistantships and on-campus employment. Students and trainees from many countries are allowed to earn some money tax free in the U.S. Immigration restrictions usually bar students from working off campus during their first year in the U.S., therefore, most ... [Read More](#)

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

Sex *

☐ Male ☒ Female

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

☐ Yes ☒ No

☐ **Foreign source income (Study related activities take place outside the US)**

← Back Save And Continue →

ITIN Questions...

Completing the Tax Forms Info pages with scholarship income checked and and the Foreign Source Income unchecked will add a new segment to Calculus: the ITIN Questions.

If you need an ITIN, it's critical to complete this step.

Progress:

- ✓ Residency
- ✓ Personal data
- ✓ Contact details
- ✓ Tax Forms Info
- 5 ITIN questions**
- ✓ Payments
- ✓ Residency Summary
- ✓ Tax Treaties

Need help?

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ITIN Questions

2024

Electronic 1042-S Consent

What is ITIN?

Learn More

Identification

Please, choose your supporting document *

☒ Passport
☐ Other document

Passport number *

t nyrty

Expiry date *

05-05-2025

Note: Your document must be good (non-expired) for at least 6 months from the date you expect to file your application for an ITIN

Issued by *

Iceland

Have you previously received an ITIN (Individual Taxpayer Identification Number) or an Internal Revenue Service Number (IRS#)? *

☐ Yes
☐ I don't know
☒ No

Length of stay *

5

Length of stay *

Years

← Back

Save And Continue →

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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 (UNC) 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 ⓘ

TDS Demo 17

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 * ⓘ

\$

65000

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 *

Research on Bio AI

Please, complete in the field below income earned ONLY under JI-Teacher, JI-Researcher, 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 (NOT for enrolled students)

If you are a non-employee of UNC receiving honoraria or commission payments for performing a service or services independently, your income type is 'Income code 17'. This category includes but is not limited to guest lectures or presentations, art or photography exhibits, and performances (including composers).

☒ Compensation for independent personal services (Income Code 17) ⓘ

Independent contractors (NOT for enrolled students), continued...

How many days have you stayed or intend to stay in the US during 2023? * ⓘ

90

Do you have your own office, a place of business, maintained by you for performing these services? * ⓘ

☐ Yes ☒ NoTotal amount you expect to be paid for independent services in this tax year
(commissions, fees, self-employment income) * ⓘ

\$ 8000

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)

Consulting contract to design software



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) ⓘ☐ Compensation for dependent personal services (Income Code 18) ⓘ☐ Other income (awards, prizes) (Income Code 23) ⓘ☐ 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? * ⓘ

15

Do you have your own office, a place of business, maintained by you for performing these services? * ⓘ

☐ 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.

Remember that your complete and correct travel and immigration status history is critical to determining your tax status in the U.S.

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 mid-year date.

Progress:

- ☒ Residency
- ☒ Personal data
- ☒ Contact details
- ☐ Tax Forms Info
- ☒ Payments
- 6 Residency Summary**

Need help?

-
-

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

Residency Status

Status: Non-resident

Sakis Katsoulis is F1 - Student visa holder, with primary purpose: Student.

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

Sakis Katsoulis does not meet the substantial presence test

Sakis Katsoulis is a non-resident for federal tax purposes for tax year 2023

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 a 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 (UNC).

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:

The screenshot shows a user interface for 'Esra Kara' with tabs for 'Your Details', 'Final Summary', 'Tax Forms', and 'Document Exchange'. The 'Tax Treaties' section is active, displaying a header with years 2019, 2020, 2021, 2022, and 2023 (highlighted). Below the header, a message states: '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.' At the bottom, there are 'Back' and 'Save And Continue' buttons.

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:

The screenshot shows a user interface for 'Yuan Bai' with the same tabs as the previous screen. The 'Tax Treaties' section is active, displaying a header with years 2019, 2020, 2021, 2022, and 2023 (highlighted). Below the header, a message states: 'Your country does not have a tax treaty agreement with USA covering any of your income.' At the bottom, there are 'Back' and 'Save And Continue' buttons.

‘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
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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 by a tax treaty exemption, your tax treaty eligibility will be displayed on this step. You can either agree to benefit from the exemption or choose not to:

🕒 Your Details
Final Summary
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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 →



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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 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 (that means you are affirming you checked everything and it's correct to the best of your knowledge).

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

Deyna Canan
Summary 2020 2019 2021 2022 **2023**

General Info

First Name	Deyna	Middle Name	
Last Name	Canan	Country of Passport/Citizenship	Australia
Current Immigrant Status	F1 - Student	Your SSN/ITIN	521-26-2627
Applied for SSN/ITIN	N/A	Entity / affiliate	TDS Demo 17

Residency information

US tax residency status	Non-resident	Date first in USA	05/01/2019
-------------------------	--------------	-------------------	------------

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

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calculus

Progress:

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

Need help?

- Live Chat
- Contact Sprintax
- Contact your institution

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

Deyna Canan

Tax Forms 2020 2019 2021 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](#)

1. Review, sign and date each of the required documents listed below.
2. Submit the required documents through Documents Exchange.
[Download all documents](#)

Non-Resident Tax forms

[Statement to Form 8233, Income code 20](#) [Review and sign](#)

[Form 8233, Income code 20](#) [Review and sign](#)

Purpose of form: Form 8233 "Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Non-resident 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.

What to do next: Providing Form 8233 to the Withholding Agent: TDS Demo 17

A completed Form 8233 must be presented to the withholding agent (TDS Demo 17) in order to claim a reduced rate of tax withholding. To provide a valid Form 8233 please:

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.

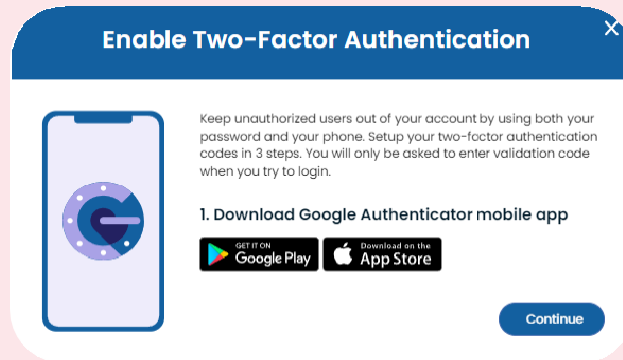
Note: The instructions attached underneath the tax forms are general. If the paying institution instructed you otherwise, please proceed as instructed.

E-SIGNING YOUR TAX FORMS

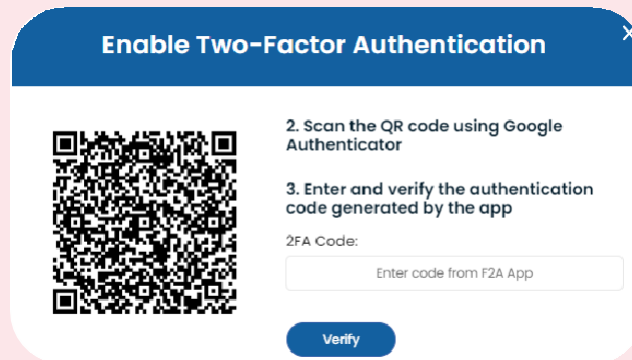
If you see "Review and Sign" as an option on the right, it means that your paying institution enabled Sprintax Calculus E-signatures. You can use Sprintax Calculus E-signatures to sign your tax forms directly in the software without having to download them and then upload signed versions. If you prefer 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 have 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 every future login to your account.

6. Documents Exchange

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

The screenshot shows the 'Document Exchange' tab selected in the top navigation bar. Below the navigation bar, the user's name 'Zhong Zhenya' is displayed. The main heading is 'Document exchange' with year filters for 2019, 2020, 2021, 2022, and 2023 (selected). A descriptive text states: 'This section is intended as your document exchange system. Uploading scanned copies of your documents will allow your payer to access documents remotely without the need for you to visit the offices and provide hard copies.'

The 'Upload' section includes instructions: 'Supported file types include JPG, PNG and PDF. File size should not exceed 8MB'. It features a dropdown menu for 'Document Type *' with the placeholder 'Please choose an option'. Below this is a dashed box for file upload with a plus icon and the text '2) Drag your file here to start uploading.' or 'Browse files *'. An 'Upload' button with a right arrow is at the bottom right of the upload section.

The 'Available documents' section shows a single document: 'Form 8233, Income code 19 (E-signed)'. This document entry is highlighted with a yellow border. A 'Download' link is visible to the right of the document name.

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 ask for help from OGE or the Accounting office):

This close-up shows the 'Available documents' section with two entries. The first entry, 'Statement to Form 8233, Income code 19', is highlighted with a yellow border and includes a 'Download' link and a trash icon. The second entry, 'Form 8233, Income code 19 (E-signed)', also has a 'Download' link.

ong Zhenya

Document exchange

2019 2020 2021 2022 **2023**

This section is intended as your document exchange system. Uploading scanned copies of your documents will allow your payer to access documents remotely without the need for you to visit the offices and provide hard copies.

Upload

Supported file types include JPG, PNG and PDF. File size should not exceed 8MB

1) Document Type *

Form 8233, Income code 20















2) Drag your file here to start uploading.

OR

Browse files *

Upload →

You can also download additional documents via the Documents Exchange if UNC requested it. This is in addition to the generated tax forms in the previous step:

Available documents		
Download all documents		
	Passport	Download 
	Current Visa	Download 
	I-20, Certificate of Eligibility for Nonimmigrant Student Status	Download 
	Sprintax Tax Summary	Download 
	Form W-8 BEN, Income code 16	Download 
	Form 8233, Income code 20	Download 
	Statement to Form 8233, Income code 20	Download 

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:

Document exchange 2020 2021 2022 **2023**

This section is intended as your document exchange system. Uploading scanned copies of your documents will allow your payor to access documents remotely without the need for you to visit the offices and provide hard copies.

Upload

Supported file types include JPG, PNG and PDF. File size should not exceed 5MB

1) Document Type *

Please choose an option

- Certification letter
- Civil birth certificate
- Current Visa
- EAD
- Foreign driver's license
- Foreign military identification card**
- Foreign voter's registration card
- Form 284B, POWER OF ATTORNEY
- Form 8233, Income code 17
- Form 8233, Income code 18
- Form 8233, Income code 19
- Form 8233, Income code 19 (Compensatory fellowship)
- Form 8233, Income code 20
- Form DS-2019, Certificate of Eligibility for Exchange Visitor (J-1) Status
- Form W-4 (Nonresident)
- Form W-4 (Resident)
- Form W-4, Procedure 88-24
- Form W-8 BEN, Income code 10
- Form W-8 BEN, Income code 11

2) Drag your file here to start uploading.

OR

Browse files *

Upload →

Download Delete

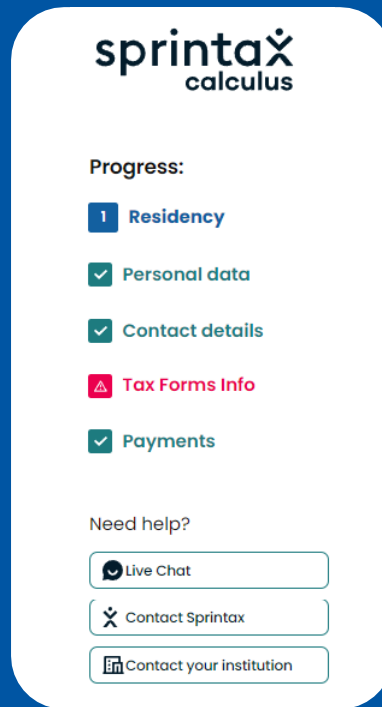
Make sure to verify you chose the correct document type (including the income code, if applicable) as this is important for your payor (UNC) to allocate the required documents quickly.

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 trash can (trash bin) button on the right.

Important

- Your profile might be half pre-populated by your payor (UNC) 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 Form DS-2019 or Form I-20, or a change in your travel history.
- Sections with missing mandatory details will be colored in red.
- Students who need an ITIN for tax filing (if you have a scholarship that covers more than tuition/fees/books) must make a TAX/ITIN appointment with OGE to complete paperwork with Kara LaSota. Please bring ALL of your original immigration documents and your proof of scholarship (signed athletic aid agreement for most students) to your appointment and make sure your Calculus profile is complete and correct first.



sprintax
calculus

Progress:

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

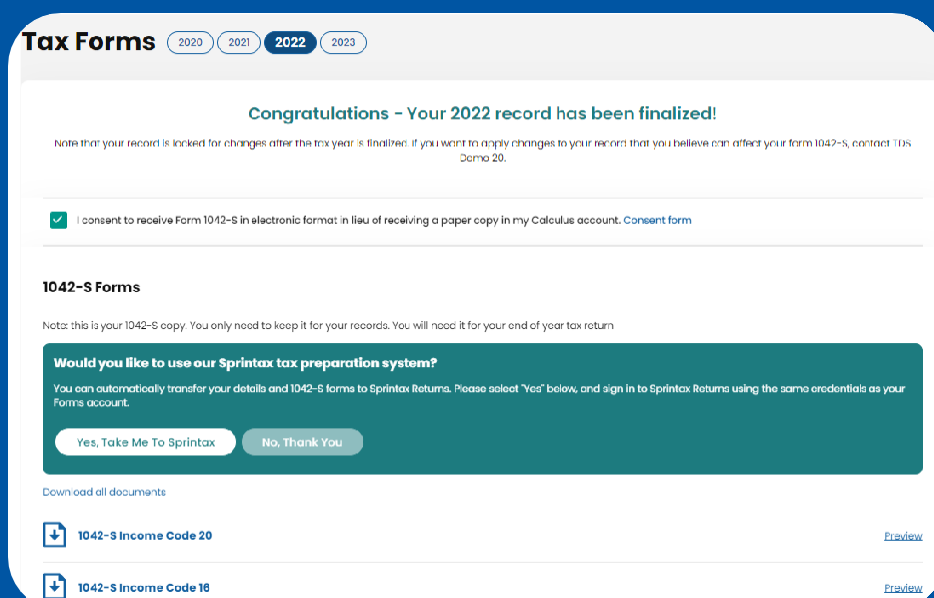
Need help?

- Live Chat
- Contact Sprintax
- Contact your institution

7. Downloading your Form 1042-S

If you expect to receive or received taxable payments from UNC, 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** by March 15th. 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 the Accounting Office. Remember if you transferred and had a scholarship at your previous institution, you may need to ask them for a 1042-S as well to properly complete your taxes for your transfer year.



Tax Forms 2020 2021 **2022** 2023

Congratulations - Your 2022 record has been finalized!

Note that your record is locked for changes after the tax year is finalized. If you want to apply changes to your record that you believe can affect your form 1042-S, contact TOS Demo 20.

☒ I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Calculus account. Consent form

1042-S Forms

Note: this is your 1042-S copy. You only need to keep it for your records. You will need it for your end of year tax return.

Would you like to use our Sprintax tax preparation system?

You can automatically transfer your details and 1042-S forms to Sprintax Returns. Please select "Yes" below, and sign in to Sprintax Returns using the same credentials as your Forms account.

Yes, Take Me To Sprintax No, Thank You

Download all documents

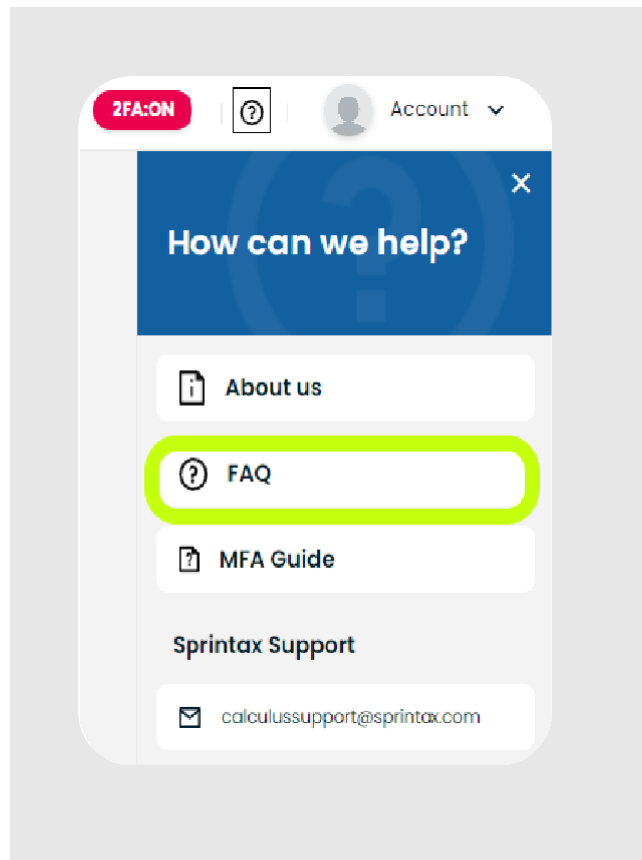
1042-S Income Code 20 [Preview](#)

1042-S Income Code 16 [Preview](#)

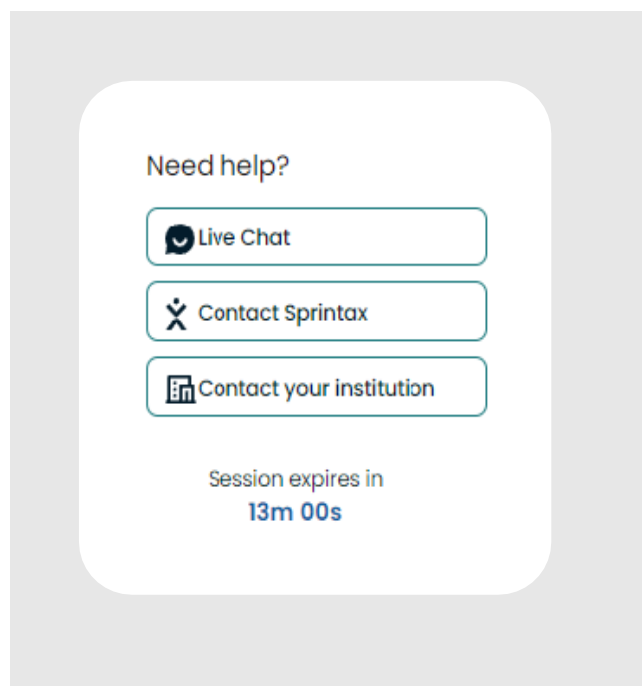
This document may not be available before the end of the calendar year.

What you may find helpful

Frequently asked questions section



Calculus Support email and Live chat:



Tax Filing – Sprintax TAX PREP software

As noted earlier, Sprintax **Calculus** helps UNC *determine the correct amount of tax to withhold from payments* to nonresidents for tax purposes (and pay to the U.S. government), and the **Calculus process is separate from filing your federal or state income taxes.**

In the spring, eligible students and scholars (F and J status) will receive access codes for **Sprintax Tax Prep** software to assist with:

- US Federal income tax form preparation and filing (UNC covers the preparation and filing costs, but not taxes you owe) for the most recent tax year
- Colorado (and other state) income tax form preparation and filing (UNC does not cover preparation or filing costs or the taxes you may owe)
- Sprintax Tax Prep may also be used to prepare income tax forms and filing for years you may have missed, but these are at your own expense

The Office of Global Engagement sends out tax codes and instructions, and links to webinars offered by Sprintax starting in January or February, often times before 1042-S forms are issued. *Please be sure to wait for your 1042-S if you are a nonresident alien for tax purposes and received scholarship funding in the previous year.*

Calculus data can be migrated into the Tax Prep product if you are using the same email to login to both, however, UNC staff cannot assist with the process – please contact Sprintax Tax Prep for assistance.

Note that you may need to update travel history in Tax Prep, as you may have traveled since completing our Calculus profile (which you should also update) for that tax year.

For assistance with your Sprintax Calculus account please contact:

AT SPRINTAX CALCULUS

Mr. Ryan Ludden,

AVP of Sprintax

rludden@sprintax.com

Mr. Enda Kelleher,

VP of Sprintax

ekelleher@sprintax.com

Mr. Peter Ganchev,

Sprintax and Taxback Web
Development Manager

peganchev@taxback.com

Mr. Stefan Stefanov,

Sprintax CIO

sistefanov@taxback.com

**Sprintax Inc.
757 3rd Ave
20th Floor
New York, NY
10017
USA**

At University of Northern Colorado

Amy Sands

Accountant

General Accounting Office
(Carter Hall)

Amy.Sands@unco.edu

Kara LaSota

Director, ISSS

Office of Global

Engagement (Wilson Hall)

Kara.LaSota@unco.edu