



UMass Sprintax Calculus Instruction Manual

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Introduction

Sprintax Calculus has been designed to help UMass, make payments to you accurately and to determine the correct amount of tax that may be subject to withholding from such payments. The determination is made based on the information provided by you in your Sprintax Calculus profile.

Sprintax Calculus will help you

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



Please see page 30 [Document Checklist](#) to make sure your profile is complete.

Most of the documents produced such as Form W-8BEN, Form 8233, Form W-4, and Form W-9 are to be signed and provided to UMass prior to us arranging your first payment.

Accessing the software

Your profile is created by UMass administrators. Do **NOT** use the “Sign-Up” option on the Sprintax Calculus login page. **Once your profile is created by a UMass administrator, you will receive an activation email from noreply@sprintax.com.** The email will contain a **unique link** which you will need to create your password. Please check in “all mail” if you use a focused inbox or spam/junk folder.

If you do not activate your account within **24 hours** of receipt of this email, you can request a new activation link here <https://calculus.sprintax.com/forgotten-password/> and enter your email. This forgotten password activation link is also only valid for 24 hours, afterwards you will need to request another forgotten password activation link.

After creating your password, follow the link on the “You have successfully set up your password” screen. On the middle screen, choose “Commonwealth of Massachusetts – University of Massachusetts”.

The image shows two side-by-side screenshots. The left screenshot is an email from noreply@sprintax.com to test@sprintax.com. It contains a warning about an external message and a red-bordered box with the text: "Click the unique link in your email to activate your account. Do NOT use the 'Sign-up' option." The email body includes a link to reset the password: <https://calculus.sprintax.com/reset-password/cb4a91ff9f7ac0245c6764ac7a05f62d679f00e718c0ed492eb60ca462080a99>. The right screenshot is the Sprintax Calculus login page. It has a "Log In" header and a "Sign-up" link that is crossed out with a red X. There are input fields for "Username *" and "Password *". A "Forgotten password?" link is highlighted in yellow. A "Login" button is at the bottom, with a "Login with your institution account" link below it that is also crossed out with a red X. A red-bordered box at the bottom right of the login page contains the text: "You can request a new activation link here."

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:



Commonwealth of Massachusetts - University
of Massachusetts

Sign In

Important

- Click  next to a question to get more information.
- Your profile might be half pre-populated by UMass on your behalf. If you believe that some of the details are outdated or not current, make sure to update the information in your profile.
- Update your Sprintax Calculus profile every time during the year there is a change in information.** Example: change in address, change in position, receiving a US TIN, changing your visa type while in the US or extending your duration of stay Form DS2019 or Form I-20.
- Sections with missing mandatory details will be colored in red.
- Training videos: <https://hs.sprintax.com/sprintax-calculus-questionnaire-knowledge-base>
- YouTube: <https://www.youtube.com/@SprintaxUSA>

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Progress:

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

Need help?

-  Live Chat
-  Contact Sprintax
-  Contact your institution

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 Calculus profile so that UMass can access the signed documents quickly

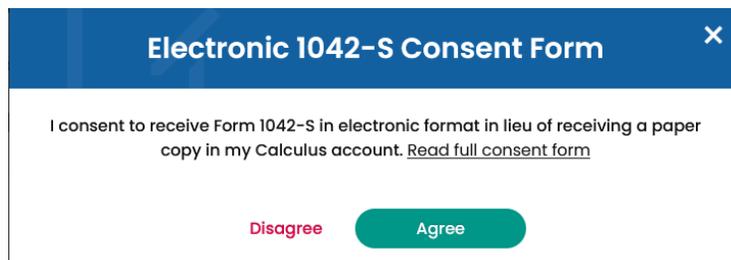
Note, that 2 to 5 will not be accessible until you complete the online questionnaire first.

 Please see page 30 [Document Checklist](#) to make sure your profile is complete.

1.1. 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 for to be mailed to your mailing address on file. If you prefer a paper form, your 1042-S will not be available for view/download through Sprintax Calculus system. If you consent to receive electronically posted form 1042-S, then UMass will not mail a paper copy to you. Make sure you confirm your preference before starting. You will have the option to change your preference later, on the top of any screen of your profile.

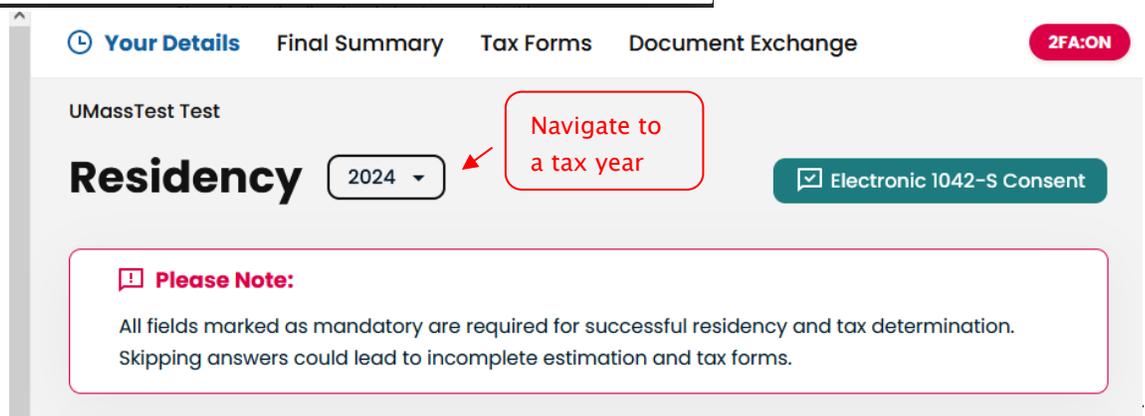


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Progress:

1 Residency

✓ Personal data



Completing Residency

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

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

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.

Residency Information

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

Yes No

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

Yes No

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

Yes No

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

Yes No

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

Yes No

When did you first enter the US? * ⓘ

09-01-2021 ⓘ

What is your current immigration status? * ⓘ

F1 - Student

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

09-01-2021 ⓘ

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

06-30-2028 ⓘ

End date on I-20/DS-2019/ I-797/EAD

Final departure date you left or intend to leave the US ⓘ

05-20-2028 ⓘ

Expiry date of your current US visa (if any) *

05-31-2026 ⓘ

End date on Visa sticker

Country of Citizenship *

China

Country of residence * ⓘ

China

Passport number (from your current valid passport) *

Passportnumber123

Visa number (Your current valid visa, if any) *

Visanumber123

You entered on **current** immigration status

You first entered the US on **ANY** immigration status

If you have applied for lawful residence (green card), select "Pending" in the next question unless your I-485 has been approved.

Refer to your immigration documents I-20/DS-2019/I-797

You will not find an option to choose "USA". Your U.S. tax residency will be determined within the software and is not readily collectible information.

> The date of first US entry (1986 onwards)

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

When did you first enter the US? * 

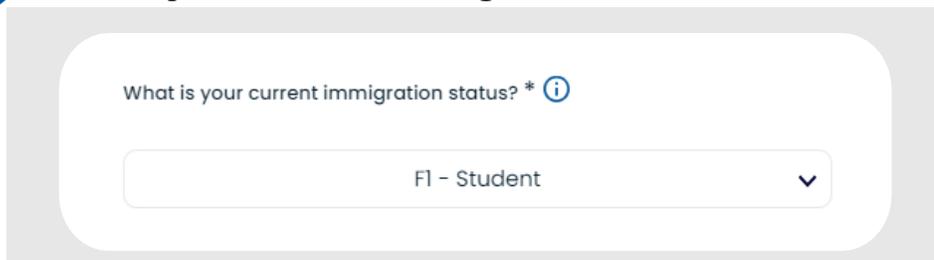
08-30-2016 

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.

> 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 unsure of your current immigration status, refer to your immigration documentation (e.g. Forms I-20, DS-2019, I-797) for this information.

J-1 visa holders must select the appropriate sub-category indicated in box 4 of Form DS-2019. If you select the wrong immigration status, Calculus will not be able to correctly determine your eligibility of tax treaty benefits.

Chan Medical School J-1 Alien Physician should select the option "J1-Physician Trainee". Do not select "J1-Physician Teacher/Researcher".

> Entry date under your current immigration status and expiration date

Enter the date you entered on your current visa/status. **If you have changed your status while in the US and have not left to re-enter the US on your new status, fill in the date you switched to your new status.** If you have been granted extension to your existing status while in the US and have not left to re-enter the US, fill in the date you entered on your current status, not the date extension was granted.

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

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

07-21-2021

09-06-2028

Then, enter the expiration date of your current immigration status.

VERY IMPORTANT: For F and J visa holders, the expiry date of your current status is listed on Form I-20 and Form DS2019 respectively. Do not use visa or passport expiration date! **F-1 OPT or STEM OPT** should enter the end date on your Employment Authorization Card (EAD card).

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

PROGRAM OF STUDY

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

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

3. Form Covers Period: From (mm-dd-yyyy): 12-31-2016 To (mm-dd-yyyy): 12-30-2017	4. Exchange Visitor Category: RESEARCH SCHOLAR Subject/Field Code: 52.1099 Subject/Field Code Remarks: The scholar will establish research-based collaborations with our faculty in IEP with the
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For all other statuses, refer to the expected end date of your job assignment if you are employed in the US for a specified period, or enter your actual expected departure date for all other statuses. Documents you may need to refer to:

- Employment Authorization Card – I-766 (e.g. **F-1 OPT or STEM OPT**)
- Notice of Action – I-797 (e.g. **H-1B**)

➤ Final departure date

Final exit date is the date on which you permanently left the US and returned to your home country for good (not for a vacation). If you haven't still left the US, enter your expected final exit date. If you are unsure, make an approximation. This date will be used for purposes of limitations in the income tax treaty review.

Final departure date you left or intend to leave the US ⓘ

Expiry date of your current US visa (if any) *

09-30-2028

05-31-2026

> Expiry date of current US visa (if any)

If you entered the US on a visa, enter the end date of your visa sticker in the passport.

> Country of citizenship

If you are a citizen of two countries, please select the country under whose documents you entered the US.

> Country of residence explained

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 (Generally the country to which you owe tax on your “worldwide” income).

For most individuals, your countries of citizenship and tax residency will be the same. If you have lived in a country other than your country of permanent residence immediately before coming to the US to study/work, you may have established tax residency in that 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.



A screenshot of a web form field labeled "Country of residence *". To the right of the label is an information icon (i). Below the label is a dropdown menu with "Canada" selected and a downward arrow on the right side.

> Visits to the US

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

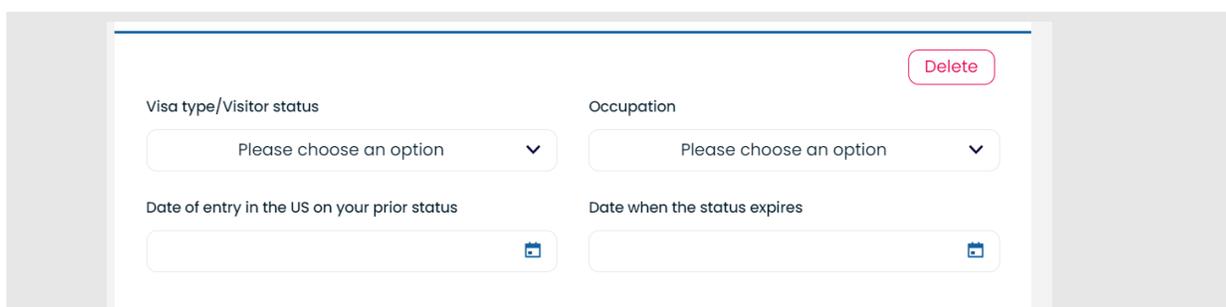
In **Visits to the US section**, you will see a greyed table showing your current US status. Note that this table is locked for editing and it cannot be changed manually unless you change the dates you indicated earlier.

To add additional statuses or visits to the current one, click on ‘Add status’.



A screenshot of a blue button with white text that says "+ Add Status".

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



A screenshot of a form for adding a new status. It features a "Delete" button in the top right corner. Below it are four input fields arranged in a 2x2 grid:

- Top-left: "Visa type/Visitor status" with a dropdown menu showing "Please choose an option".
- Top-right: "Occupation" with a dropdown menu showing "Please choose an option".
- Bottom-left: "Date of entry in the US on your prior status" with a date picker icon.
- Bottom-right: "Date when the status expires" with a date picker icon.

Visits to the US ⓘ

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

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

Visa type/visitor status: F1 - Student
 Subcategory: Student
 Date of entry in the US on your current status: 08-30-2016
 Date when the status expires: 05-30-2026

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

[Delete](#)

[+ Add Status](#)

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

If you were out of the US for a full calendar year, then please select the applicable year.

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

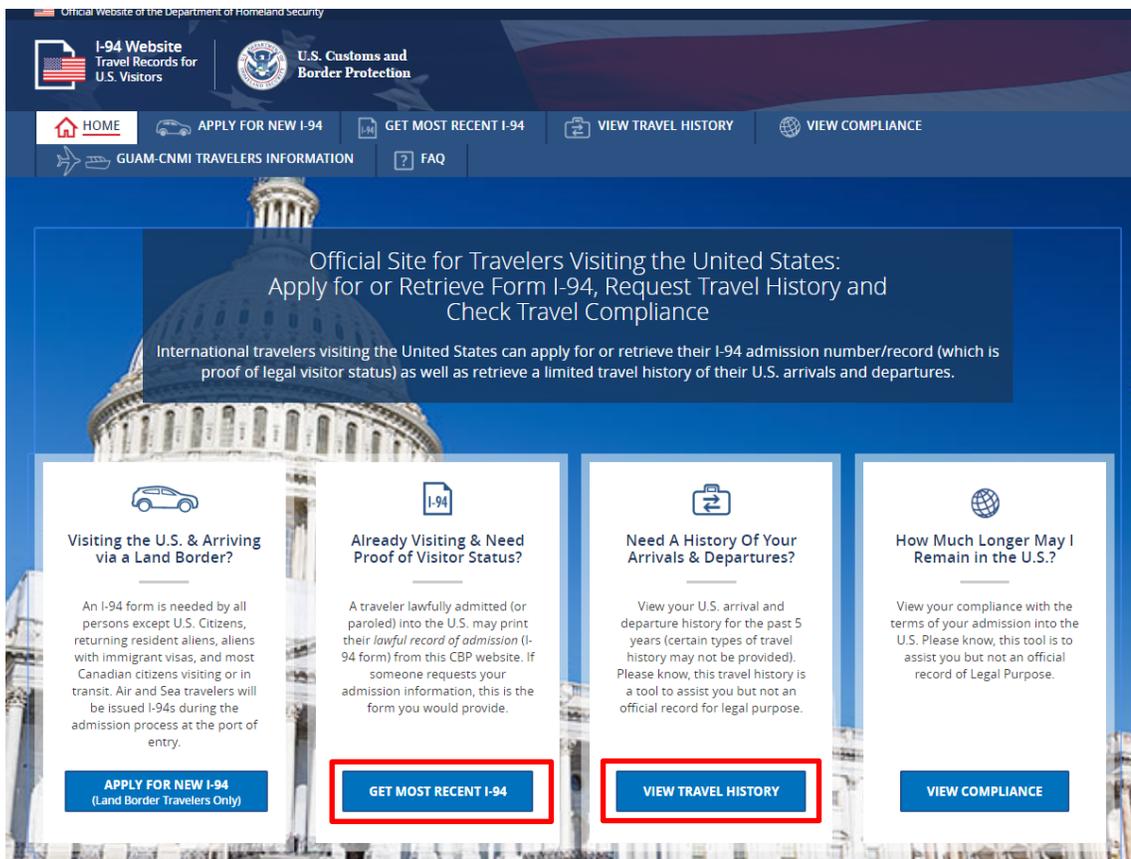
Notes:

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).

Information from the I-94 departure record and stamps in the passport will assist in determining the dates. I-94 Travel History can be obtained from U.S.

Customs and Board Protection website: <https://i94.cbp.dhs.gov/I94/#/home>



1.2. Personal data

➤ Enter your name

Your name should consistent with your immigration documents (I-20, DS-2019, I-94 etc.) If you have a Social Security Card, your name should match what is printed on that card. If

your name does not appear correctly on Social Security Card, be sure to contact Social Security Administration for a corrected card, and update Calculus again once the new card has been received. Your place of birth and city of birth are not mandatory to complete if you have a US TIN.

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Progress:

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

Your Details ▾

Personal Information (2021) (2022) **(2023)**

Personal Information

First name * Middle name

Surname/Last name * Date of birth *

Place of birth City of birth

➤ US tax identification number

Enter your US tax identification number (TIN) (your SSN (social security number) or your ITIN (individual taxpayer identification number) whichever is applicable, if any.

VERY IMPORTANT: You must enter an SSN or an ITIN in order to be eligible for income tax treaty benefits. If you don't have a US TIN (SSN or ITIN), you will need to apply for one. Once you receive your SSN or ITIN, you must update your Calculus record and submit new tax summary and forms. Tax treaty benefits are not available until the SSN/ITIN is issued and reported in Calculus, but you may claim a refund on your annual tax return if excess tax is withheld while the SSN/ITIN application is pending.

The screenshot shows a 'Tax Identification' form with the following fields and values:

- Do you have US TIN (SSN or ITIN) * Yes No
- Your US TIN (SSN or ITIN) *: 880-77-0666
- Employee ID: 10001234
- SEVIS ID: N0004500123
- Program Type: Please choose an option
- Campus: Amherst
- What is your foreign (home country) tax identification number?: Taxnumber123
- Student ID: 3100

Red callouts with arrows point to the Employee ID and Student ID fields, with the text: "Enter your Employee ID. It should start with '10'." and "Enter your Student ID." respectively.

➤ Employee ID

This field may be pre-populated in your account by UMass. You will find your Employee ID in the payroll system (HR Direct) or on your paystubs. It is an 8-digit number starting with "10".

➤ 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 DS2019, and it has the format of NXXXXXXXXXX (XX) ('N' followed by 9 to 11 numerics). It is recommended that you enter 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	

> Program type (Optional)

Please choose the option applicable to you.

> Campus

This field is pre-populated by UMass and locked for editing. If this is not the UMass campus that you are currently associated with, then please contact your campus administrator.

> 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.

Second Email

Are you a full-time student or scholar in a US educational institution in 2023? * [i](#)

Yes No

Are you a degree candidate in a US educational institution during 2023? * [i](#)

Yes No

Are you an OPT/CPT program participant during 2023? * [i](#)

Yes No

Are you married? *

Yes No

Can you be claimed as a dependent on someone else's tax return? [i](#)

Yes No

> Student ID

Enter your UMass Student ID.

- Amherst campus: It is an 8-digit number starting with “3”.
- Boston/Lowell/Dartmouth campus: It is an 8-digit number starting with “0”.
- Chan Medical School: It is a 9-digit number starting with “100”.

> Second Email (Optional)

You may provide a different email address (not the one you used to login to Calculus).

➤ Are you an OPT/CPT program participant during 2024? (F-1 student)

If you are a F-1 student, then you may be asked to answer this question. Click info box next to this question to get more information. Optional Practical Training (OPT) and Curricular Practical Training (CPT) allow international students with an F-1 visa to gain practical experience directly related to their major of study through employment, paid, or unpaid internships.

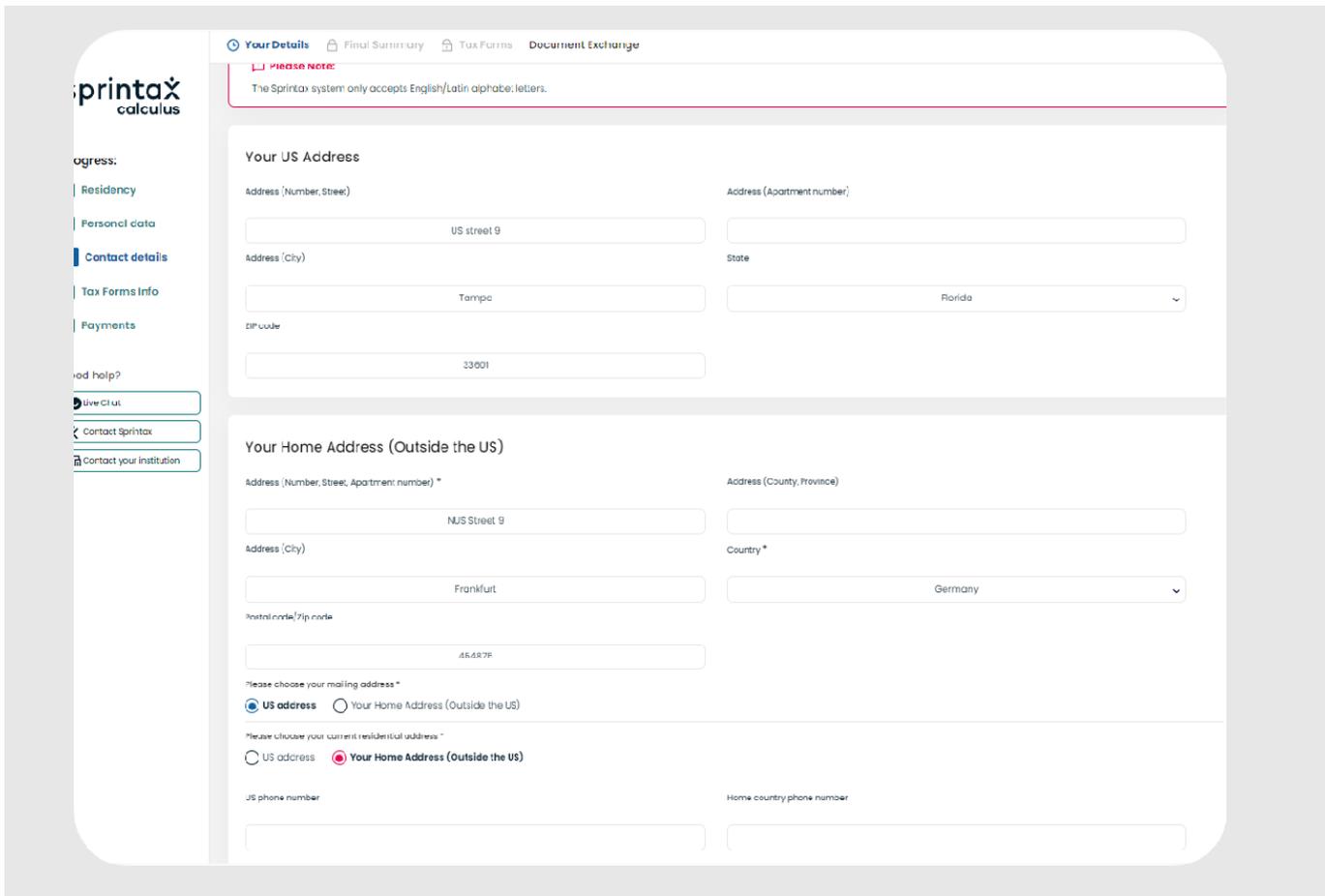
➤ Can you be claimed as a dependent on someone else's tax return? (optional)

A dependent is a qualifying person who entitles a taxpayer (generally your parents or relatives) to claim dependent-related tax benefits on a US tax return.

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.

Enter your US phone number and/or home country phone number.



The screenshot shows the 'Your Details' section of the Sprintax Calculus interface. It includes a navigation menu on the left with options like 'Residency', 'Personal data', 'Contact details', 'Tax Forms Info', and 'Payments'. The main content area is divided into two sections: 'Your US Address' and 'Your Home Address (Outside the US)'. Each section has input fields for address, city, state/province, and ZIP/postal code. There are also radio buttons to select the mailing and current residential address. The 'Your Home Address' section is pre-filled with 'MUS Street 9', 'Frankfurt', and 'Germany'.

Your US Address

Address (Number, Street): US street 9
Address (Apartment number):
Address (City): Tampa
State: Florida
ZIP code: 33601

Your Home Address (Outside the US)

Address (Number, Street, Apartment number): MUS Street 9
Address (Country, Province): Germany
Address (City): Frankfurt
Country: Germany
Postal code/Zip code: 65457F

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

The list of income types might be different depending on your immigration status. Please select the income type(s) you expect to be paid by UMass in the calendar year you are completing for.

Tax Forms Info

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

Yes No

10 Industrial royalties (Income code 10) ⓘ **Do not select.**

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

Motion picture or television copyright royalties. (Income Code 11) **Do not select.**

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 publishing, software, broadcasting, endorsement payments) (Income Code 12) **Do not select.**

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) ⓘ

Amherst graduate non-working scholarship, Chan Medical School GSBS transition assistance, Dartmouth health insurance subsidy, athletic scholarship, travel scholarship/award, summer undergraduate research, research experience undergraduate, housing allowance

Compensation for independent personal services (Income Code 17) ⓘ **Do not select.**

guest speaker honorarium, consulting fee

Compensation during studying and training (Income Code 20) ⓘ

J-1 professor/teacher/research scholar/short-term scholar, H-1B visa holder will see Income Code 19.

Wages/salary for services performed by F-1 student, OPT, CPT, J-1 student, Chan Medical School J-1 alien physician

Other income (awards, prizes) (Income Code 23) ⓘ **Do not select.**

graduation award, contest prize, human subject payment

Winning awards/Gambling (Income Code 28) **Do not select.**

Deposit interests (Income Code 29) **Do not select.**

← Back

Save And Continue →

 See Example 1–5 below for more specific information.

- [Example 1: International student \(F–1 student/J–1 student/OPT/CPT\) working on campus receiving compensation/salary/wages \(Income Code 20\)](#)
- [Example 2: Sole recipients of scholarship grants \(Income Code 16\)](#)
- [Example 3: International student working on campus and receiving scholarship grants and wages \(Income Code 20 and 16\)](#)
- [Example 4: International teacher/researcher/scholar receiving compensation for teaching or research only \(Income Code 19\)](#)
- [Example 5: Apply for SSN \(Social Security Number\)](#)

Generally, the following income types do not apply to you. Do not select these options.

- Industrial royalties (Income Code 10)
- Motion picture or television copyright royalties (Income Code 11)
- Other royalties (for example, copyright, publishing, software, broadcasting, endorsement payments) (Income Code 12)
- Compensation for independent personal services (Income Code 17)
- Other income (awards, prizes) (Income Code 23)
- Winning awards/Gambling (Income Code 28)
- Deposit interests (Income Code 29)

‘**Tax Forms Info**’ step aims to collect **annual** information from you. This page must be completed on an **annual** basis if you aim to produce Form 8233, Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, requested by UMass 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.).

> Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from UMASS?

If you do not receive any payment at the moment, but expect to receive payments later from UMass during the calendar year, please select “Yes”. Otherwise, Calculus will not generate the necessary tax forms. If you will not receive any payments or income from UMass for the entire year, please select "No".

Tax Forms Info 2024 Electronic 1042-S Consent

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 UMASS Demo Account in 2024? *

Yes No

> Are you legally allowed to work?

Make your answer only in regards to your relationship with UMass. In general, you are legally allowed to work for UMass if you are on a visa sponsored by UMass (including F, J, H-1B, O-1, TN), and/or you have obtained permission from International Students and Scholars Office (IPO/ISSO). Or you are legally allowed to work for UMass if you have an Employment Authorization Document (EAD/work permit) (including OPT, STEM OPT, H-4, J-2).

> Do you have or expect to have more than one job in the US in 20XX?

Please indicate if you have two or more jobs **at the same time**. Take into consideration all your jobs in the U.S. If you have two positions at UMass, you may select No as it falls under the same payroll system.

> First date of employment with this employer?

This field is optional. Leave as blank if you are not sure about the first date of employment at UMass.

If you are allowed to work for UMass, then you must select Yes.

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

This field is optional.

Please choose your Employer/Payer *

First date of employment with this employer 

University of Massachusetts 



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

Example 1: International student (F-1 Student/J-1 Student/OPT/CPT) working on campus receiving compensation/salary/wages (Income Code 20)

International students from a tax treaty country, visiting the US on a F-1 student, OPT, CPT, J-1 student visa: If your only income in the calendar year is or will be wages/salary for services only, you will be asked to provide approximate annual amount of the income they expect to receive from UMass for the calendar year. Enter an approximate annual amount and a short description of your job.

Your income type is 'Income code 20'.

Compensation during studying and training (Income Code 20) ⓘ

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 *
UMASS Demo Account ▼

First date of employment with this employer ⓘ
This field is optional.

Please, complete in the field below ONLY income received as an FI - Student, a J1 - Student, an MI - Student, a J1 - Intern/Trainee, a J1 - 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
Estimate the amount to the best of your ability. If you enter 0.00, then Calculus may not generate necessary tax treaty forms. This should be your wages/salary from UMass employment.

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

Example 2: Sole recipients of scholarship grants (Income Code 16)

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.

Your income type is 'Income code 16'.

Your Details | Final Summary | Tax Forms | Document Exchange

Tax Forms Info

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

Yes No

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

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

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

Scholarship or fellowship grants (Income Code 16) ⓘ

Compensation for independent personal services (Income Code 17) ⓘ

Compensation during studying and training (Income Code 20) ⓘ

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

Winning awards/Gambling (Income Code 28)

Deposit interests (Income Code 29)

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

Yes No

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

US/US territories Other Country

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

Example 3: International student working on campus and receiving scholarship grants and wages (Income Code 20 and 16)

International students from a tax treaty country, visiting the US on a F-1 student, OPT,

Your Details | Final Summary | Tax Forms | Document Exchange

Tax Forms Info

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

Yes No

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

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

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

Scholarship or fellowship grants (Income Code 16) ⓘ

Compensation for independent personal services (Income Code 17) ⓘ

Compensation during studying and training (Income Code 20) ⓘ

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

Winning awards/Gambling (Income Code 28)

Deposit interests (Income Code 29)

Are you legally allowed to work? * ⓘ

Yes No

If you are allowed to work for UMass, then you must select Yes.

CPT, J-1 student visa: If your income in the calendar year is or will be both wages/salary for services and scholarship grants, **select both Income Code 16 and Income Code 20.**

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

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 F1 - Student, a J1 - Student, an M1 - Student, a J1 - Intern/Trainee, a J1 - 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

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

In case of an international student, recipient of a scholarship grant from the same payor, indicate where the activity covered by scholarships is performed – in the U.S. or outside the U.S.

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.

← Back Save And Continue →

Example 4: International teacher/researcher/scholar receiving compensation for teaching or research only (Income Code 19)

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 UMass for the calendar year. Enter an approximate annual amount and a short description of your job.

Your income type is 'Income code 19' (or Income Code 18 if you are from Canada).

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 *
TDS Demo 17

First date of employment with this employer ⓘ
Please, complete in the field below income earned ONLY under JI-Teacher, JI-Reseracher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar

Total compensation you expect to be paid for teaching or reserach in the current tax year * ⓘ
\$ 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-Reseracher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar

Have you been paid for or do you expect to be paid for participation in a research activity? *
 Yes No
Note: Consider only research activity under your current immigration status and while being enrolled with the institution you are completing this questionnaire for.

Is the research for the public interest (for a non-profit organization)? * ⓘ
 Yes No

Have you been invited by a governmental institution, educational institution, or scientific research institution as a teacher, lecturer, or to participate in research? *
 Yes No

If you are allowed to work for UMass, then you must select Yes.

This field is optional.

Estimate the amount to the best of your ability. If you enter 0.00, then Calculus may not generate necessary tax treaty forms.

Example 5: Apply for SSN (Social Security Number)

If you indicated on the “Personal data” page that you do not have a US SSN, then you may be asked to provide additional information on the “Tax Forms Info” page to assist you in completing the Form SS-5, Application for Social Security Card.

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 *
UMASS Demo Account ▼

First date of employment with this employer ⓘ
[Calendar icon]

First name
[Text input]
at birth, if different than provided in the Personal Details screen

Full middle name
[Text input]
at birth, if different than provided in the Personal Details screen

Last name
[Text input]
at birth, if different than provided in the Personal Details screen

Other names you have used or are known by (if applicable) ⓘ
[Text input]

Did you apply for or have another US Social Security Number (SSN) issued in the past? *
 Yes No

Sex *
 Male Female

Mother's first name (at birth) *
[Text input]

Mother's full middle name (at birth)
[Text input]

Mother's last name (at birth) *
[Text input]

Does your mother have a US Social Security Number (SSN)? *
 Yes No I don't know

Father's first name (at birth) *
[Text input]

Father's full middle name (at birth)
[Text input]

Father's last name (at birth) *
[Text input]

Does your father have a US Social Security Number (SSN)? *
 Yes No I don't know

← Back Save And Continue →

Only the highlighted fields are required. The system collects other information to complete the Form SS-5 for you.

You may proceed **without** completing other fields if you do not want to provide this information in Sprintax. You will then have to manually complete Form SS-5 outside Sprintax if you need to apply for SSN.

2. Residency Summary

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

An alien is any individual who is not a U.S. citizen or U.S. national. The taxation of aliens by the United States is significantly affected by the residency status of such aliens. Although the immigration laws of the United States refer to aliens as immigrants, nonimmigrants, and undocumented (illegal) aliens, the tax laws of the United States refer only to **Nonresident Alien (NRA)** and **Resident Alien (RA)**.

A **Resident Alien for tax purposes** is treated in the same manner as a U.S. citizen when filing a tax return and paying taxes. A **Nonresident Alien for tax purposes** has a completely different method of having tax withheld, completing tax forms and tax documents, and is eligible for very few and limited deductions when paying taxes. A **Resident Alien for tax purposes** must report worldwide income, whereas, a **Nonresident Alien for tax purposes** must only report and pay tax on money that he or she receives from U.S. sources.

The time period for which you are a **Nonresident Alien for tax purposes** depends on the results of what is called the **“Substantial Presence Test (SPT)”**. In general, individuals present in the U.S. under an F, J, M, or Q STUDENT immigration status will be a Nonresident Alien for the first FIVE calendar years they are present in the U.S.; individuals present in the U.S. under a J or Q NON-STUDENT immigration status will be a Nonresident Alien for the first TWO calendar years they are present in the U.S. There are many exceptions to the general rule so further questions must consider the facts and circumstances of the particular individual’s current and past visits to the U.S.

The system will skip “Payments” section as this is for admins.

The screenshot shows the 'Residency Status' page in the Sprintax Calculus interface. The page title is 'Residency Status' and the status is 'Non-resident'. The user is identified as Sakis Katsoulis, an F1 - Student visa holder. The page details the user's exemption from the Substantial Presence Test (SPT) for 2023, 2022, and 2021. It also shows the total number of non-exempt days in the United States during 2023 for SPT, which is zero. The page indicates that Sakis Katsoulis does not meet the substantial presence test and is a non-resident for federal tax purposes for tax year 2023. The residency starting date under I.R.C. § 7701(b) is 01/01/2025. The page also shows the tax years covered: 2019: Exempt, 2020: Exempt, 2021: Outside the US, 2022: Exempt, and 2023: Exempt.

Annotations:

- A red box on the left side of the page highlights the 'Residency Summary' section in the navigation menu, with a note: "The system will skip 'Payments' section as this is for admins." (Note: The screenshot shows 'Payments' is checked and 'Residency Summary' is highlighted, which contradicts the annotation text).
- A red box on the right side of the page contains the text: "If you are an alien (not a U.S. citizen), you are considered a nonresident alien, unless you meet one of two tests for the calendar year (January 1 - December 31)."
 - the Green Card Test
 - the [Substantial Presence Test](#) (which is a numerical formula which measures days of presence in the United States).
- A red box at the bottom of the page contains the text: "“Exempt” or “Non-exempt” here is not related to your income tax treaty exemption but rather referring to exempt individual or non-exempt individual status for [Substantial Presence Test](#) calculations."

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”. “Exempt” or “Non-exempt” here is not related to your income tax treaty exemption.

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 become 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.

3. Tax Treaties

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

You may not be eligible for tax treaty if you do not yet have a US TIN, or if you are a resident of a country that has no treaty convention with the US. 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.

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

The screenshot shows the 'Tax Treaties' section of the Sprintax Calculus interface. The user is Deyna Canan, and the year selected is 2023. The interface includes a progress sidebar on the left with 'Tax Treaties' highlighted. The main content area displays information about 'Scholarship or fellowship grants' and 'ARTICLE 21 a)', along with a question about using the tax treaty exemption.

sprintax
calculus

Progress:

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

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

Deyna Canan

Tax Treaties

2020 2019 2021 2022 **2023**

Scholarship or fellowship grants

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

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

ARTICLE 21 a)

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

Do you want to use this tax treaty exemption? *

Yes No

4. Final Summary

This is your **Personal Tax Summary**. The summary has a downloadable PDF version allocable on the next screen named “Tax Forms”. The PDF version has a spot to sign and date the document to confirm the information accuracy for UMass. You need to sign and upload the tax summary.

IMPORTANT: It is not enough to complete your Sprintax Calculus profile online, you must sign tax forms and submit documents through Documents Exchange portal in order for payment to be issued at the proper withholding rate from UMass.

Click “Download Your Forms” at the bottom of the page to review and download your tax forms.

Please review this summary page carefully as it contains information regarding your U.S. tax residency status and income tax treaty eligibility.

If you are not eligible to benefit a tax treaty exemption, then the summary will show “N/A” for Tax treaty article, tax treaty limit and tax treaty duration period.

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

Income Code and Income Type

Income code

20 – Compensation during studying and training/Compensatory grant

Tax treaty article

N/A

No treaty exemption

Tax treaty limit

\$ 0.00

Tax treaty duration period

N/A

Tax treaty start date

N/A

Tax treaty expiry date

N/A

Tax withholding rate on wages/salary

Federal Tax withholding rate

Graduated rate

Wish to claim treaty benefits

N/A

Income Code and Income Type

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

Income code

16 Scholarship or fellowship grants

Tax treaty article

N/A

No treaty exemption

Tax treaty limit

\$ 0.00

Tax treaty duration period

N/A

Federal Tax withholding rate

14.00% withholding rate

Tax withholding rate on scholarship/fellowship

Tax treaty start date

N/A

Tax treaty expiry date

N/A

Wish to claim treaty benefits

N/A

If you are eligible to benefit a tax treaty exemption, then the summary will show tax treaty details, including article, dollar limit, duration period, start date and expiry date.

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

Income Code and Income Type

Income code	Tax treaty article
20 – Compensation during studying and training/Compensatory grant	21(1)
Tax treaty limit	Tax treaty duration period
\$ 2,000.00	5 years
Tax treaty start date	Tax treaty expiry date
08/04/2021	12/31/2025
Federal Tax withholding rate	Wish to claim treaty benefits
0.00% withholding rate	Yes

Treaty dollar limit

Tax withholding rate on wages/salary

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

Income Code and Income Type

Income code	Tax treaty article
16 Scholarship or fellowship grants	21(1)
Tax treaty limit	Tax treaty duration period
No limit	5 years
Federal Tax withholding rate	
0.00% withholding rate	
Tax treaty start date	Tax treaty expiry date
08/04/2021	12/31/2025
Wish to claim treaty benefits	
Yes	

Treaty dollar limit

Tax withholding rate on scholarship/fellowship

5. Tax Forms

Depending on your income type selection on 'Tax Forms Info' step, the applicable tax forms will be produced in this step. **You must review, sign and date each of the required documents listed below, and submit the required documents through Documents Exchange.** Make sure you read and follow step 1, 2, and 3 listed on the screen. **Sprintax will generate tax forms based on your personal situation.**

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

Case One Test

Tax Forms 2023

 **You are almost there...**
Please follow the directions below to complete this process.

1. Review, sign and date each of the required documents listed below.
2. Submit the required documents through Documents Exchange.
3. Make clear scan of your Passport, I-94, I-20, Certificate of Eligibility for Nonimmigrant Student Status, Current Visa, Sprintax Tax Summary, and upload them through Documents Exchange.

[Download all documents](#)

"You are almost there" message will stay the same even if you have submitted all forms. Please follow step 1, 2, and 3 to complete your profile.

If you see "Review and Sign" as an option, then you can use Sprintax Calculus E-signatures to sign your tax forms directly in the software without having to download them and then upload sign versions.

Non-Resident Tax forms

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

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

Click the name of each form to download the PDF version if you'd like to sign manually.

Click "Review and sign" to sign electronically. See the next page for more details.

Massachusetts – Form M-4: you must **download** the PDFs, **sign manually** and **upload** a clear scan of the signed forms back using the "Documents Exchange" feature. Massachusetts – Form M-4 cannot be e-signed in Sprintax Calculus.

State withholding Forms

 **Massachusetts – Form M-4** [Preview](#)

Sprintax will not generate M-4 if you selected only income code 16 as M-4 is not applicable to non-service scholarship/fellowship payments.

Please, note that only your personal information has been completed on the State withholding form. A completed State withholding form must be presented to the withholding agent (UMASS Demo Account) so that correct state income tax can be withheld from your pay.

To provide a valid State withholding form please:

- ✓ Review and confirm the personal information on the form that Sprintax Forms has generated is correct
- ✓ Make sure that you complete the remaining missing information on the form, where applicable

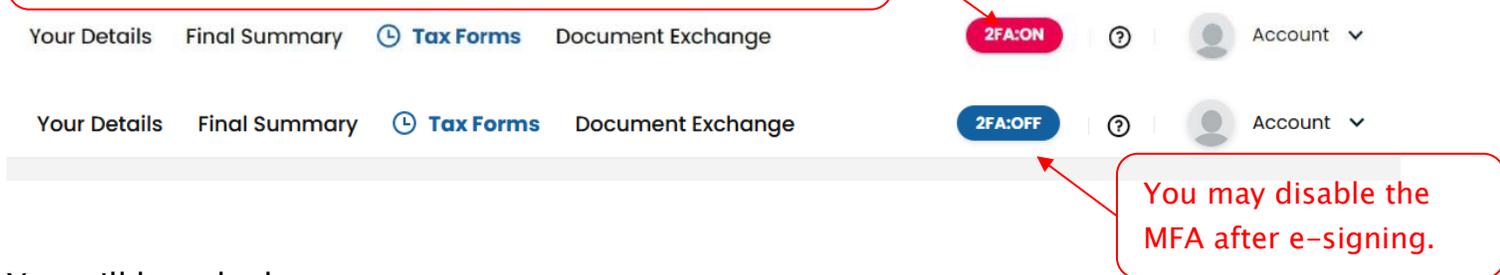
[Read More](#)

E-signing your tax forms

⚠️ Keep the authenticator app on your device for future account logins!

You can use Sprintax Calculus E-signatures to sign your tax forms directly in the software without having to download them and then upload sign versions.

If the MFA is on, you will need to enter a 6-digit security code generated in the app the next time you login.

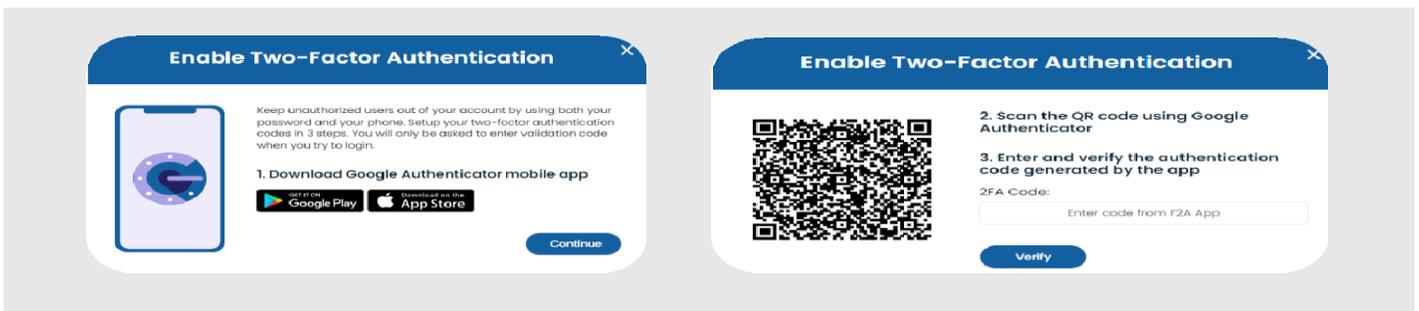


You will be asked to:

- Download either Google or Microsoft Authenticator upon clicking on “Review and Sign”.
- Download either or click on ‘Continue’ if you already had any of the Apps on your mobile device.
- Scan the QR code and then enter the 6-digit security code generated in the App.
- Download the document and confirm that you have read it.
- Proceed with drawing your signature on the pad.

Please follow the step-by-step [MFA Guide](#):

<https://www.dropbox.com/scl/fi/vdh0g4arlkbp4dn5d6v2a/MFA-Guide-Sprintax-Calculus.pdf?rlkey=xjuanw3bw6k4uh1yvvpj9lb5a&dl=0>



6. Documents Exchange

You must submit the required documents through Documents Exchange.

Make clear scan of your passport, current Visa, I-94, I-20 or DS-2019, and upload them through Documents Exchange.

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

If you do not see the “Review and Sign” on the right (e.g. **Massachusetts – Form M-4**), you must download the PDFs, sign manually and upload a clear scan of the signed forms back using the “Documents Exchange” feature.

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

Zhong 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 *

Please choose an option

2) Drag your file here to start uploading.

OR

Browse files *

Upload →

Available documents

Form 8233, Income code 19 (E-signed) [Download](#)

Select the appropriate document type from the list and upload scanned copies of your documents. Forms generated by Sprintax Calculus must be e-signed or manually upload a signed form.

Did you sign and upload the Massachusetts Form M-4 if it is generated by the system?

Choosing the document type:

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

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

Document exchange

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 *

Please choose an option

- 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](#)

Document Checklist

If you will **work on campus** (Income Code 20/19/18), then you must submit the following documents. Please update [Step 4 Tax Forms Info](#) page to select the correct income code.

Forms	Generated by Sprintax Calculus	E-signing available in Sprintax Calculus
Sprintax Tax Summary	Yes	Yes
Form W-4	Yes	Yes
Massachusetts Form M-4	Yes	No, must download, sign, and upload through Document Exchange
Form 8233 Statement to Form 8233 (OR Form W-9, Statement to Form W-9 if you are a resident alien)	Yes, if treaty exemption is available (except Indian students)	Yes
Passport	Scan and upload through Document Exchange	
Current Visa	Scan and upload through Document Exchange	
I-94	Scan and upload through Document Exchange	
I-20 or DS-2019 or I-797	Scan and upload through Document Exchange	
If you will receive scholarship grants (Income Code 16), then you must submit Form W-8BEN.		

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

Available documents
Download all documents

- Current Visa
- I-20, Certificate of Eligibility for Nonimmigrant Student Status
- I-94
- Passport
- Massachusetts - Form M-4
- Form W-9 (E-signed)
- Form W-4 (Resident) (E-signed)
- Statement to Form W-9, Income code 16 (E-signed)
- Statement to Form W-9, Income code 20 (E-signed)
- Sprintax Tax Summary (E-signed)

Annotations:

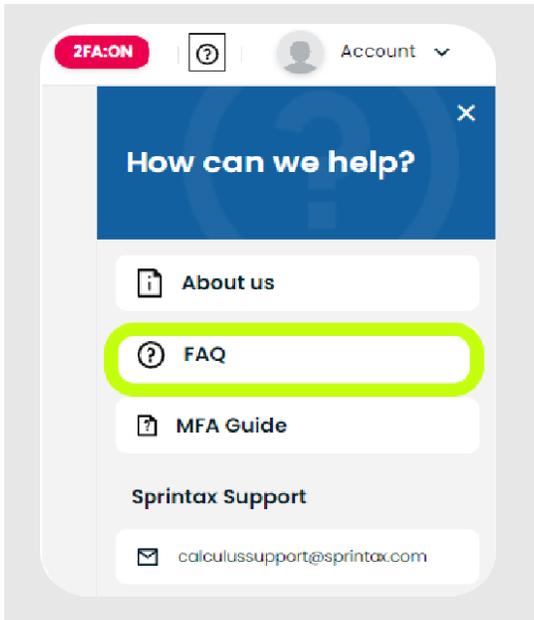
- Make clear scan of your **Passport, Current Visa, I-94, I-20 or DS-2019**, and upload them through Documents Exchange.
- Download **Form M-4** if it is generated by the system, sign manually and upload a clear scanned Form M-4. You don't need to upload M-4 if it's not generated by the system.
- E-signed tax forms will appear automatically. Sprintax will generate tax forms based on your personal situation. This is an example.

Deleting an upload

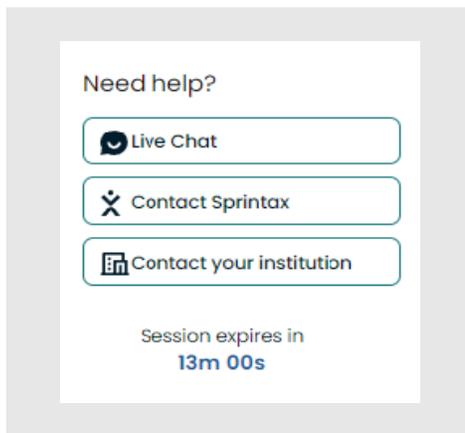
If you want to upload a new signed copy of a document or you want to delete a document uploaded in error, you can do so using the small red bin sign on your right.

What you may find helpful

Click the  icon on the upper right of any screen for frequently asked questions.



Click Calculus Support email and Live chat on the left of any screen if you need help. Click Contact your institution to email UMass administrators.



Thank you for completing your Sprintax Calculus profile!