



UMass Sprintax Calculus Instruction Manual

Contents

- Introduction2**
- Accessing the software2**
- 1. Completing your Calculus profile4**
 - 1.1. Residency4
 - Consent for electronic Form 1042-S4
 - Completing Residency5
 - 1.2. Personal data10
 - 1.3. Contact details13
 - 1.4. Tax Forms info14
 - Example 1: International student working on campus receiving compensation for studying and training only16
 - Example 2: Sole recipients of scholarship grants16
 - Example 3: Students working on campus and receiving scholarship grants and wages17
 - Example 4: International teacher/researcher/scholar receiving compensation for teaching or research only19
- 2. Residency Summary20**
- 3. Tax Treaties21**
- 4. Final Summary22**
- 5. Tax Forms23**
 - E-signing your tax forms23
- 6. Documents Exchange24**

Introduction

Sprintax Calculus has been designed to help UMass, who make taxable payments to you to correctly determine the correct amount of tax 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

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 we arranging your first payment.

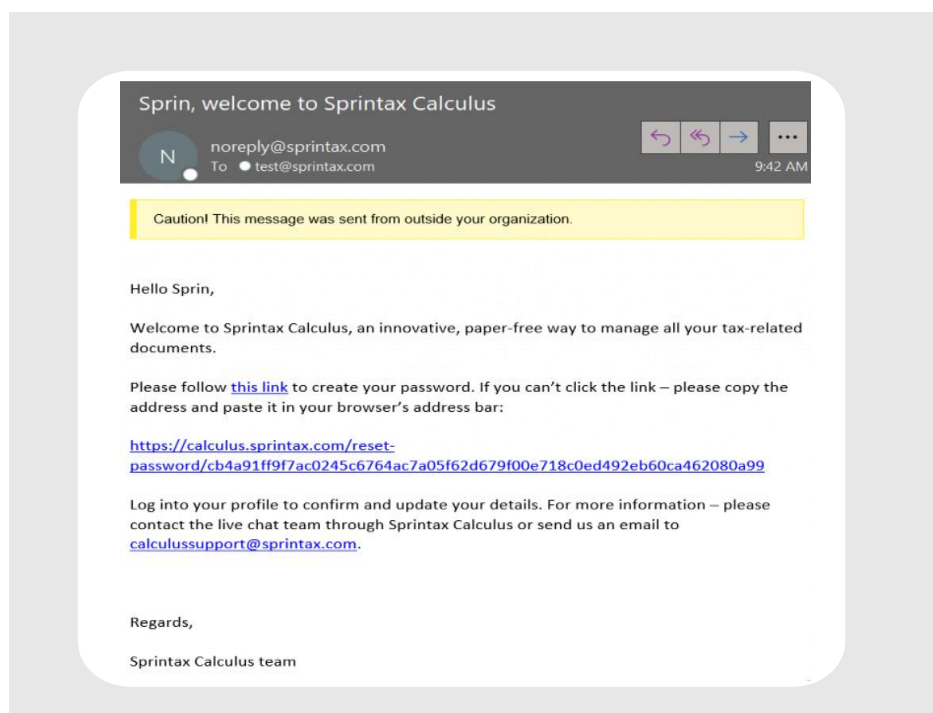
Accessing the software

Note that your profile is created by UMass 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 email will contain a **unique link** which you will need to create your password.

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.

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 “University of Massachusetts”.



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:

 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>

sprintax
calculus

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.

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 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.

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

The image shows two screenshots from the Sprintax Calculus software. The top screenshot is a pop-up window titled "Electronic 1042-S Consent Form". It contains the text: "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](#)". Below the text are two buttons: "No" and "Yes". The bottom screenshot shows the "Tax Forms" screen for the year 2023. It features a trophy icon and the text "You are almost there... Please follow the directions below to complete this process." At the bottom, there is a checked checkbox next to the text: "I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Calculus account. [Consent form](#)".

> Completing Residency

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

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

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

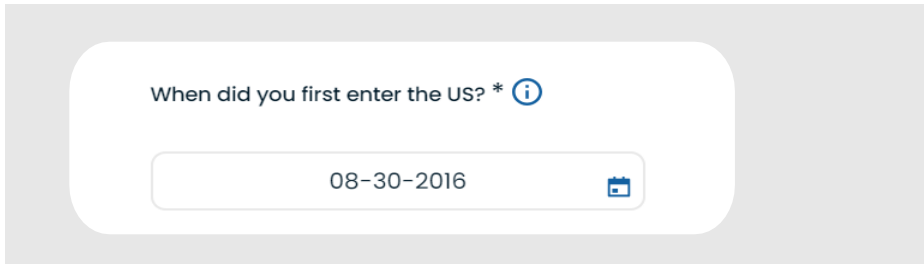
Did you or do you plan to stay in the US for less than 31 days in total in 2023? *

Yes **No**

When did you first enter the US? * i	What is your current immigration status? * i
<input type="text" value="08-30-2016"/> 📅	<input type="text" value="F1 - Student"/> ▼
What date did you first enter the US on this immigration status? * i	What is the expiry date of your current immigration status? * i
<input type="text" value="08-30-2016"/> 📅	<input type="text" value="05-30-2026"/> 📅
Final departure date you left or intend to leave the US i	Country of Citizenship *
<input type="text" value="06-25-2026"/> 📅	<input type="text" value="Canada"/> ▼
Country of residence * i	Passport number (from your current valid passport) *
<input type="text" value="Canada"/> ▼	<input type="text" value="Number123"/>

➤ 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? * ⓘ

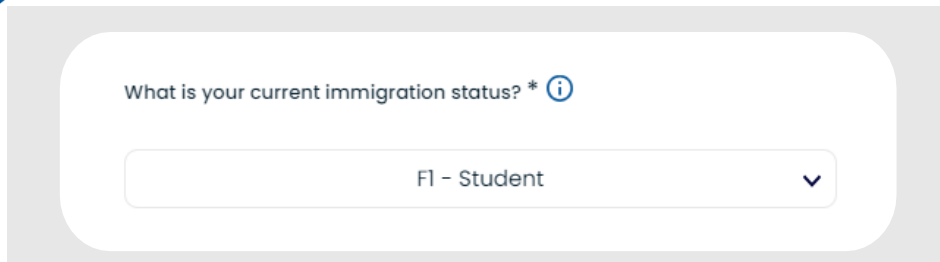
08-30-2016 📅

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? * ⓘ

08-30-2016

05-30-2026

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!

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 LER 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
- Notice of Action – I-797

➤ 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.

➤ Country of citizenship

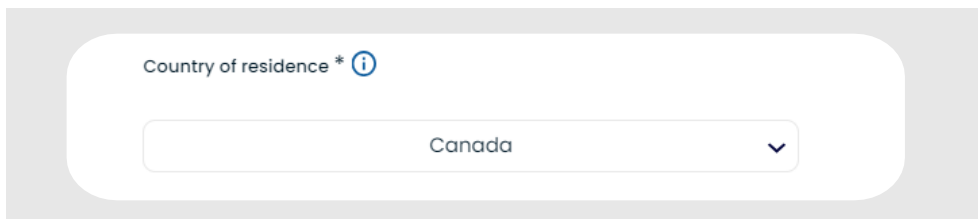
If you are a citizen of two countries, please select the country under whose documents you entered the US.

> 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.



Country of residence * ⓘ

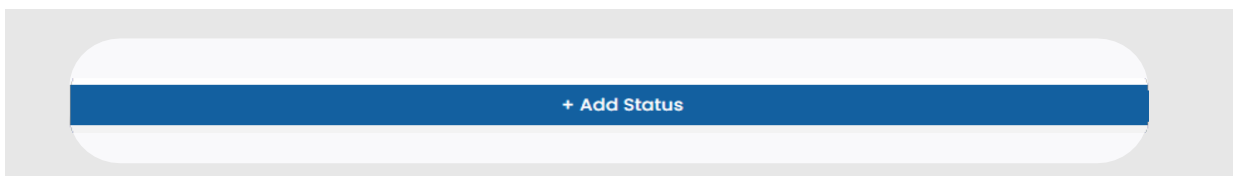
Canada ▼

> Visits to the US

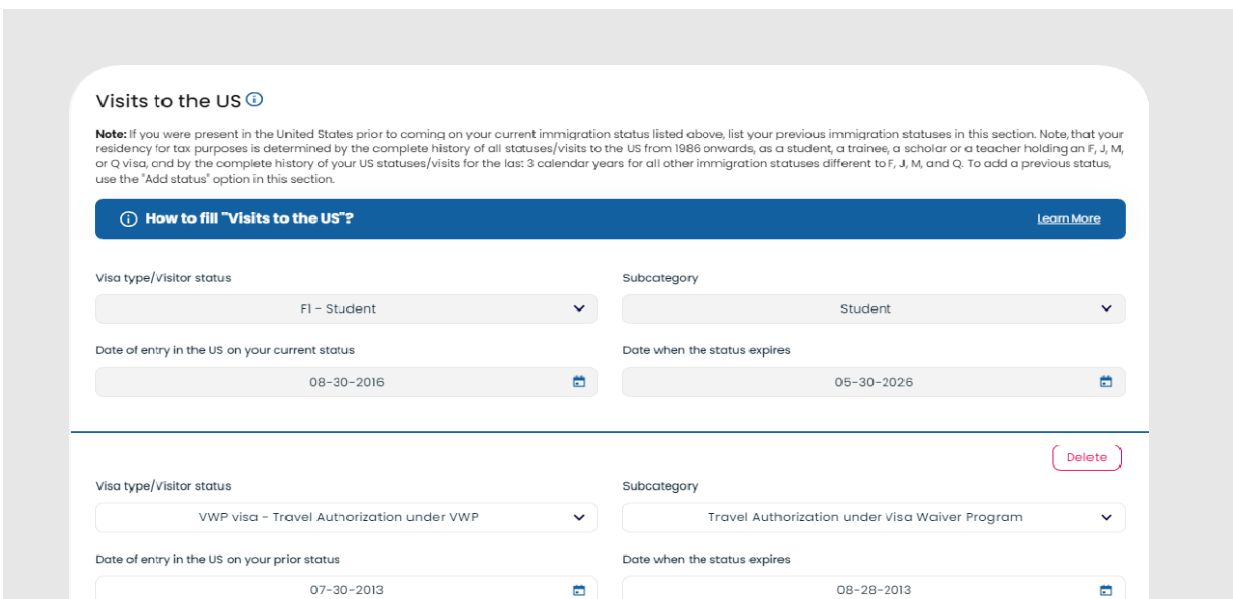
If **The date of first US entry** above is different from **Entry date under your current immigration status** above, you must enter prior visits or statuses in the US before entering on your current status.

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’.



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	Subcategory
F1 - Student ▼	Student ▼
Date of entry in the US on your current status	Date when the status expires
08-30-2016 📅	05-30-2026 📅
Delete	
Visa type/visitor status	Subcategory
VWP visa - Travel Authorization under VWP ▼	Travel Authorization under Visa Waiver Program ▼
Date of entry in the US on your prior status	Date when the status expires
07-30-2013 📅	08-28-2013 📅

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).

<input type="checkbox"/> 2017	<input type="checkbox"/> 2018	<input type="checkbox"/> 2019	<input type="checkbox"/> 2020
<input type="checkbox"/> 2021	<input type="checkbox"/> 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.

The screenshot shows the 'Personal Information' form in the Sprintax Calculus interface. On the left is a sidebar with the 'sprintax calculus' logo and a 'Progress' section. The progress items are: 'Residency' (checked), '2 Personal data' (highlighted), 'Contact details' (checked), 'Tax Forms Info' (checked), and 'Payments' (checked). The main form area is titled 'Your Details' and 'Personal Information' for the year 2023. The form fields are: 'First name *' (containing 'UMass'), 'Middle name' (empty), 'Surname/Last name *' (containing 'Test'), 'Date of birth *' (containing '01-01-1995' with a calendar icon), 'Place of birth' (containing 'China' with a dropdown arrow), and 'City of birth' (containing 'Shanghai').

> 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.

Tax Identification:

Do you have US TIN (SSN or ITIN) * [i](#)

Yes No

Your US TIN (SSN or ITIN) *

880-77-0666

Employee ID

10001234

SEVIS ID [i](#)

N0004500123

Program Type

Please choose an option [v](#)

Campus

Amherst [v](#)

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

Taxnumber123

Student ID

3100

> 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 “1”.

> 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(X) (‘N’ followed by 9 to 11 numerics). It is recommended that you 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	

> 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 2023? (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', 'Payments', and 'Need help?'. The main content area is titled 'Your Details' and contains a 'PLEASE NOTE' warning: 'The Sprintax system only accepts English/Latin alphabet letters.' Below this, there are two main sections: 'Your US Address' and 'Your Home Address (Outside the US)'. Each section has input fields for address components (Number, Street, Apartment number, City, State, ZIP code) and radio buttons to select the address as the mailing or current residential address. At the bottom, there are fields for 'US phone number' and 'Home country phone number'.

Your US Address

Address (Number, Street) Address (Apartment number)

Address (City) State

ZIP code

Your Home Address (Outside the US)

Address (Number, Street, Apartment number) * Address (Country, Province)

Address (City) Country *

Postal 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

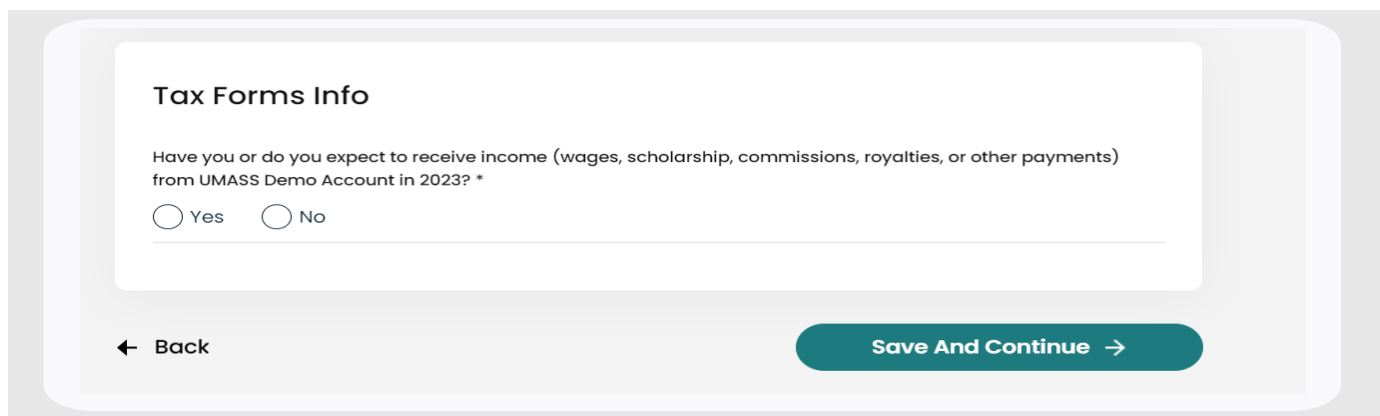
1.4. Tax Forms info

'**Tax Forms Info**' step aims to collect **annual** information from you. This page must be completed on an **annual** basis 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.).

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 (example: 2023). This will prompt the related questions to show for you to answer.

> 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

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

Yes No

← Back Save And Continue →

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)

F-1 student or J-1 student: you generally will choose from Income Code 20 and/or Income Code 16 (see example 1, 2 and 3).

Non-students/non-trainees (including J-1 professor/teacher/research scholar/short-term scholar, H-1B teacher/researcher/scholar): you generally will choose Income Code 19 (see example 4) or choose Income Code 18 if you are from Canada.

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 example, copyright, 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) ⓘ

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 →

Example 1: International student working on campus receiving compensation for studying and training only

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 * First date of employment with this employer ⓘ

Please, complete in the field below ONLY income received as an FI - 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 * ⓘ

\$

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

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

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

Example 2: 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.

Your income type is 'Income code 16'.

The screenshot shows a web interface for tax forms. At the top, there are navigation tabs: 'Your Details' (active), 'Final Summary', 'Tax Forms', and 'Document Exchange'. Below the tabs is the 'Tax Forms Info' section. A question asks: '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 codes with checkboxes: '10 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)', 'Scholarship or fellowship grants (Income Code 16)' (checked), '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)', and 'Deposit interests (Income Code 29)'. Below the list, another question asks: 'Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant? *'. The 'No' radio button is selected. A final question asks: 'Where is the activity covered by your scholarship grant performed? *'. The 'US/US territories' radio button is selected. A note at the bottom states: '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: Students working on campus and receiving scholarship grants and wages

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

This screenshot is similar to the one above, showing the 'Tax Forms Info' section. The 'Yes' radio button is selected for the first question. In the list of income codes, 'Scholarship or fellowship grants (Income Code 16)' and 'Compensation during studying and training (Income Code 20)' are both checked. The 'No' radio button is selected for the second question. The 'US/US territories' radio button is selected for the third question. The note at the bottom is the same as in the previous screenshot.

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 * First date of employment with this employer [?](#)

TDS Demo 17 [Calendar Icon]

Please, complete in the field below ONLY income received as an FI - Student, a 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

Annotations: A red box highlights the \$4,000.00 field with a callout: "Estimate the amount to the best of your ability. If you enter 0.00, then Calculus may not generate necessary tax treaty forms." A green box highlights the description field containing "Part-time Teaching Assistant".

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

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

US/US territories Other Country

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

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

\$ 28,100.00

Example 4: International teacher/researcher/scholar receiving compensation for teaching or research only

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 * First date of employment with this employer ⓘ
TDS Demo 17 [Calendar Icon]

Please, complete in the field below income earned ONLY under JI-Teacher, JI-Researcher, 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 [Green G Icon]

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

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

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.

sprintax
calculus

Progress:

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

Need help?

Live Chat

Contact Sprintax

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

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).

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 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 is 2023. The screen is titled 'Tax Treaties' and includes a progress bar on the left with steps: Residency, Personal data, Contact details, Tax Forms Info, Payments, Residency Summary, and Tax Treaties (highlighted). The main content area shows 'Scholarship or fellowship grants' for Deyna Canan, a Non-resident. It states that during 2023, she was an F1 - Student visa holder under subcategory: Student. As a Student at TDS Demo 17, Educational institution, she receives Scholarship or fellowship grants, covered by tax treaty article 21(i) of U.S. - Czech Republic. Below this, 'ARTICLE 21 a)' is displayed, detailing the exemption for individuals who are residents of a Contracting State at the beginning of their visit to another Contracting State for purposes of study, research, or training. At the bottom, there is a question: 'Do you want to use this tax treaty exemption?' with radio buttons for 'Yes' (selected) and 'No'.

4. Final Summary

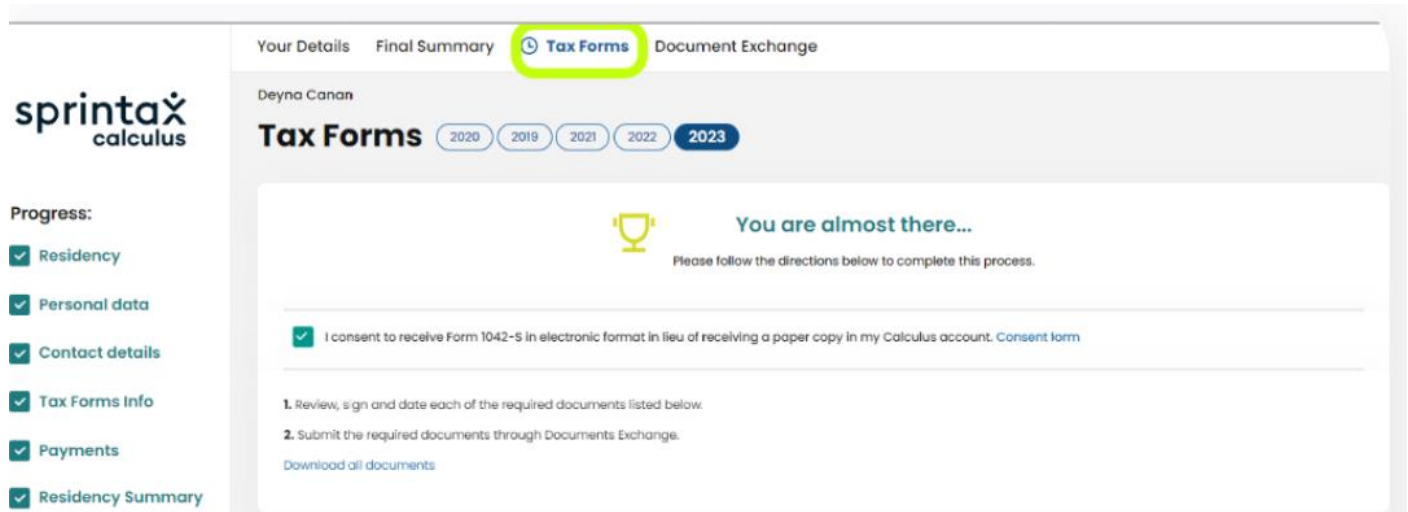
This is your **Personal Tax Summary**. The summary has a downloadable PDF version allocable on the next screen named “Tax Forms”. The PDF version has a spot to sign and date the document to confirm the information accuracy for UMass. You need to sign and upload the tax summary.

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.



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.**



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

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.

State withholding Forms

 Massachusetts - Form M-4	Preview
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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](#)

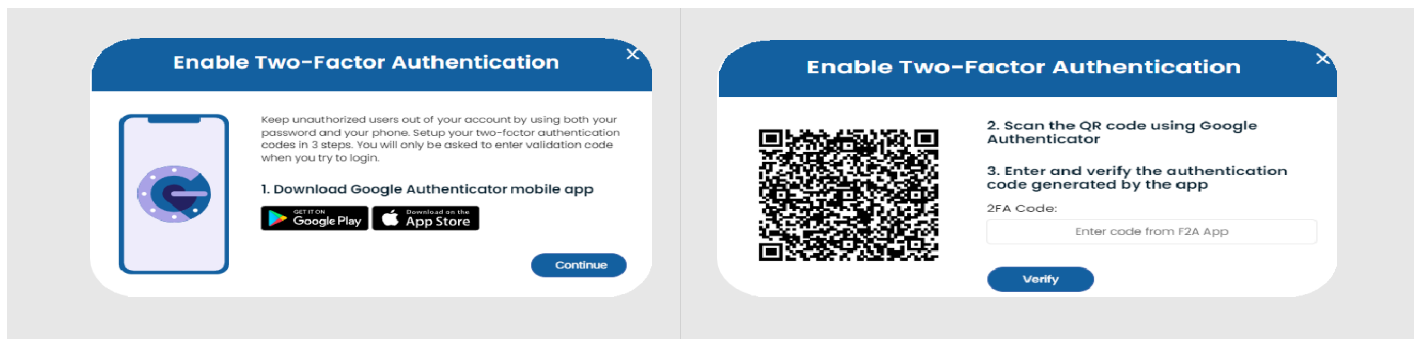
E-signing your tax forms

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

You will be asked to:

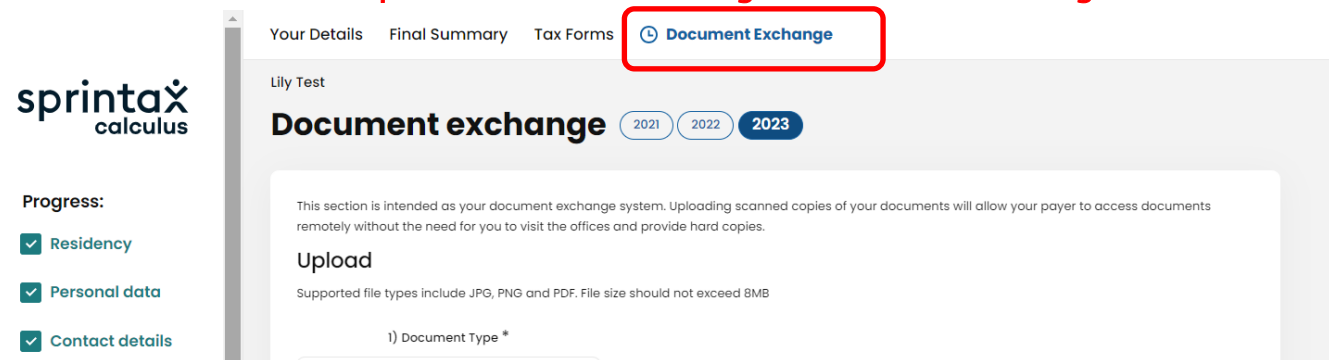
- Download either Google or Microsoft Authenticator upon clicking on “Review and Sign”.
- Download either or click on ‘Continue’ if you already had any of the Apps on your mobile device.
- Scan the QR code and then enter the 6-digit security code generated in the App.
- Download the document and confirm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

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



6. Documents Exchange

You must submit the required documents 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, you must download the PDFs, sign manually and upload a clear scan of the signed forms back using the “Documents Exchange” feature.

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 5MB

1) Document Type *

Please choose an option



2) Drag your file here to start uploading.

OR

Browse files

Upload →

Available documents



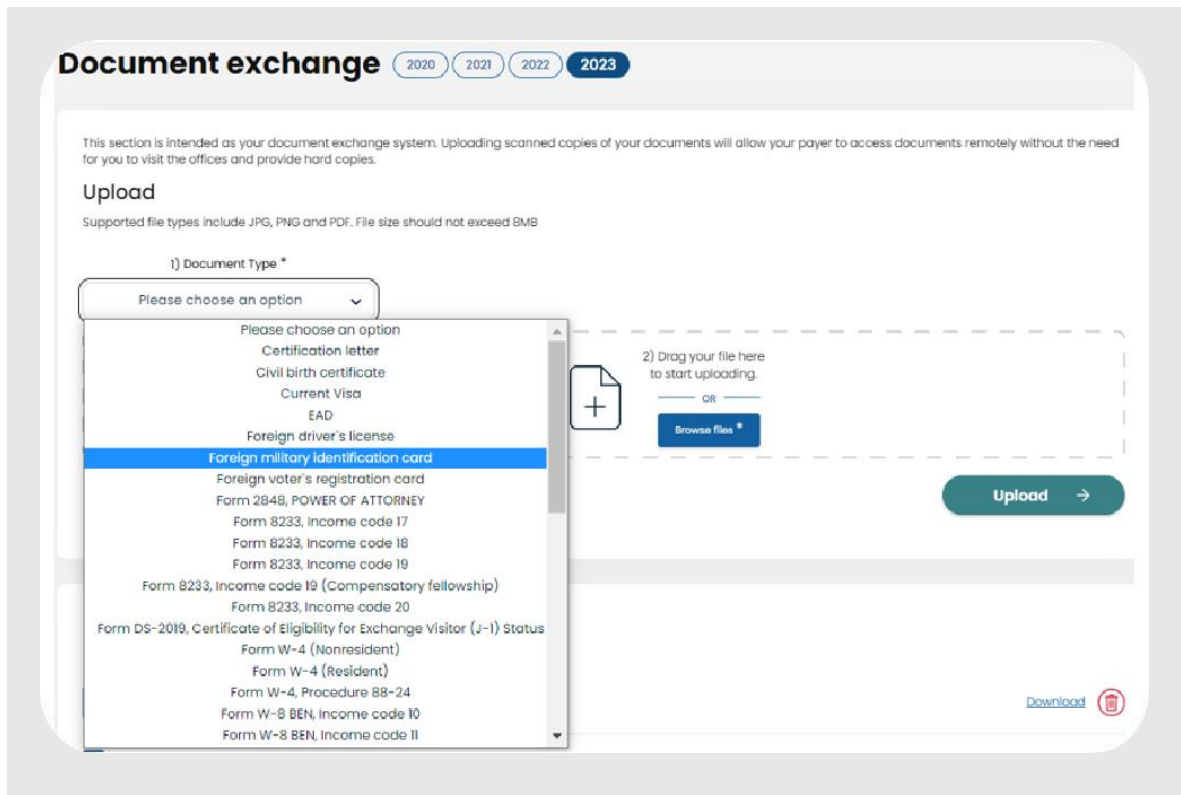
Form 8233, Income code 19 (E-signed)

[Download](#)

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.

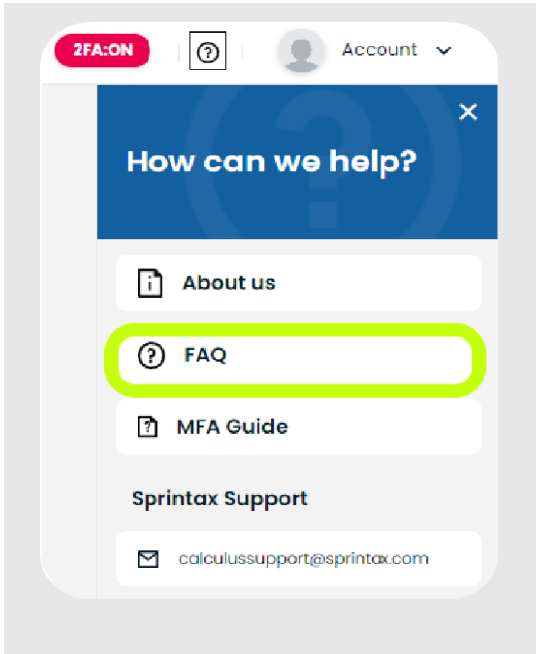


Deleting an upload

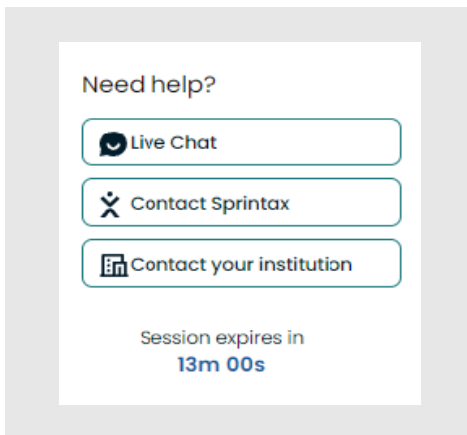
If you want to upload a new signed copy of a document or you want to delete a document uploaded in error, you can do so using the small red bin sign on your right.

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!