



sprintax

calculus

Manual for Students and other International Visitors

Version 2021 1.1

Sprintax Forms was designed to help US payors, who make taxable payments to foreign nationals to correctly determine the tax subject to withholding from such payments. The determination is made based on the information provided by the foreign persons in their profiles.

Sprintax Forms will 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 statement have to be signed provided to your payor prior to them making your payment. Receiving your tax forms will help your payor to withhold the correct amount of tax from your payment.

How Sprintax Forms works – first steps

1. CREATING PROFILE FOR FOREIGN NATIONALS

Your profile will be created by your payor. A profile is created based on an email, a first and a last name. Once your profile is created, you should receive an email from noreply@sprintax.com containing a link where you can set up a password for your account. Your email address and the password you set up will be the credentials you use to sign in your account in the future.



noreply@sprintax.com

Date:

30-07-2021 06:14:49

Subject: Xu, welcome to Sprintax Tax Determination System

Hello Xu,

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

Please follow [this link](#) to create your password. If you can't click the link - please copy the address and paste it in your browser's address bar:

<https://tds.sprintax.com/reset-password/a38aea431ad64f34e8a1fa51124de170bdfb67b9a348d61608d36dc7ad360f55>

Log into your profile to confirm and update your details. For more information - please contact Customer service.

Regards,

Ashley

Sprintax TDS team

Setting a password:



SET PASSWORD

You have requested to set the password for ke*****8@al*****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 *

SET MY PASSWORD



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

[EULA](#) | [Privacy policy](#) | [Cookie policy](#) | [Information disclosure](#)

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Signing in:

sprintax

SIGN IN

Username *

kadeta2611@*****.com

Password *

.....

SIGN IN

OR

[Sign in with your institution account](#)

[Create account](#)

Forgot password? Click [here](#)



SELECT ENTITY TO LOGIN TO

Available entities:

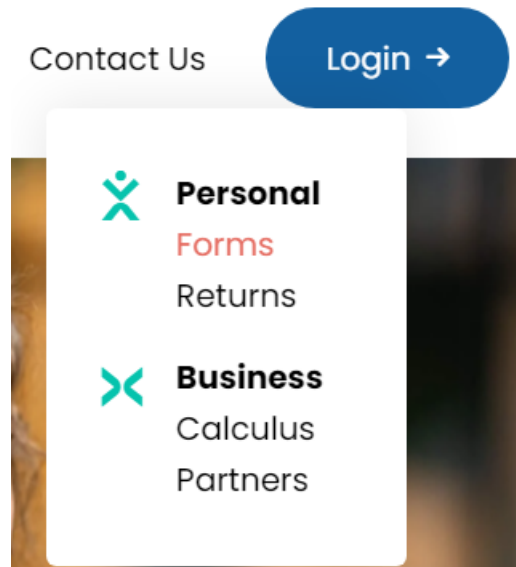
TDS Demo 2

SIGN IN

To sign in after setting your password, go to: <https://tds.sprintax.com/> or follow the link on the “you have successfully set up your password” screen. On the next screen, choose the profile you want to sign

in. There will be a single possible option in most of the cases unless you are paid by more than payors and were registered by other payors in Sprintax Forms under the same email address.

You are able to sign in into your account directly from www.sprintax.com. You need to select 'Forms' below the 'Personal' section from the Login drop-down menu.



2. COMPLETING THE ONLINE QUESTIONNAIRE

Your Sprintax Forms profile consists of:

1. an **online questionnaire**
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 by the system
4. **Summary** representing your overall tax summary, based on the info provided
5. **Tax Forms** screen – the screen where you can download your tax forms
6. **Documents Exchange** – a tool where you upload signed documents back onto your profile so that your payor can access the signed documents quickly

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

2.1. RESIDENCY

The first step of the Sprintax Forms online questionnaire is *Residency*.

2.1.1. Consent to electronic receipt of 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 from the system) after the tax year ends or you prefer a paper for to be mailed to your mailing address on file.

Make sure you confirm your preference before starting to complete the questionnaire. Note: you will have the option to change your preference later, on the Tax Forms screen of your profile.

The screenshot displays the Sprintax Calculus user interface. At the top left is the logo. A navigation menu on the left lists various profile sections: Residency, Personal data, Contact details, Tax Forms Info, TIN questions, Payments, Residency Summary, and Tax Treaties. A 'CONTACT TDS SUPPORT' section with the email 'TDS@sprintax.com' and a 'Live Chat' button is also visible. The main content area shows a user profile for 'Xu Jung' for the year '2021'. A modal window titled 'Electronic 1042-S Consent Form' is overlaid, containing the text: 'I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my TDS account. I confirm that I have read and agree to the [Consent form](#)'. Below this text are 'NO' and 'YES' buttons. The background page shows the 'RESIDENCY' section with the heading 'Please answer the following questions around your US residency information'. A sub-section 'Residency Information' asks: '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 2021? *'. There are radio buttons for 'Yes' and 'No'. A note at the bottom states: 'All fields marked as mandatory are required for successful residency and tax determination. Skipping answers could lead to incomplete estimation and tax forms.' A 'SAVE AND CONTINUE' button is located at the bottom of the questionnaire.

Xu Kai

2021

Congratulations - You completed your record!

Please follow the directions below to complete this process.



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

2.1.2. Completing Residency

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

- US citizenship and US green card test
- Substantial presence test

Details

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

CONTACT TDS SUPPORT
TDS@sprintax.com

Live Chat

Your Details | TDS Summary | Tax Forms | Document Exchange

Xu Kai
2021

RESIDENCY

Please answer the following questions around your US residency information

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 2021? *

Yes
 No

Are you currently or will you be, a Green Card holder on the last day of 2021? *

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 2021? *


Yes
 No

Did you or do you plan to stay in the U.S. for less than 31 days in total in 2021? *

Yes
 No

When did you first enter the US? * 08-23-2019

What is your current immigration status? * J1 - Student

08-23-2019 

J1 - Student 

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


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


What is the expiry date of your current immigration status? 

08-21-2020 

06-30-2025 

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

Final exit date you left or intend to leave US 

06-30-2025 

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

12-12-2025 

Country of Citizenship *

China 

Country of residence 

China 

Passport number (from your current valid passport) *

154465466

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

K165684J





 **Visits to the US** 





Please provide details below of all your visits to the US from your first ever visit to your current/last visit.

Note: Your residency status is determined by the complete history of all your visits to the US including any visits as a student, trainee, tourist and all other entries to the US from 1986 onwards.

[Add Status](#)

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

Visa type/Visitor status J1 - Student 	Subcategory Student 
Date status started 08-21-2020 	Date when the status expires 06-30-2025 

Visa type/Visitor status J1 - Scholar/Short-Term Scholar 	Subcategory Scholar/Short-Term Scholar 
Date status started 08-23-2019 	Date when the status expires 12-20-2019 
delete	


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


SAVE AND CONTINUE

If you are not considered 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 Sprintax Forms 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:

- a. The date of first US entry (1986 onwards).

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

When did you first enter the US? * 


08-23-2019 

If you do not remember your exact entry dates, 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 to the current one, enter an approximate date to the best of your knowledge.

- b. Entry date under your current immigration status and expiry of your current status

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

08-21-2020 

What is the expiry date of your current immigration status?

06-30-2025 

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

Enter the date you entered on your current status. Enter the expiry date of your current status.

For F and J visa holders, the expiry date of the current status is listed on I-20 or form DS2019.

I-20

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

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

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

Documents you may need to refer to:


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

What is your current immigration status?

This is a combination of your visa type and the primary purpose of your current visit to the US. Choose from the drop-down menu the option that applies to you. If you are a student on F visa, or an international scholar, teacher, professor, holding a J visa and you are not sure about the primary purpose of your visit, refer to I-20 (F visa holders) or your DS2019, box 4 (J visa).

Country of residence explained

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

Country of residence * 
China

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 and country.

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

Visits to the US [Visits to the US](#)





If **Date a.** above is different to **Date b.** above, you must enter any prior visits or statuses in the US before entering on your current status.

In [Visits to the US](#) section, you will see a table containing 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.

[Add Status](#)

To add additional statuses or visits to the current one, click on [Add status](#) option.

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

Visa type/Visitor status	Occupation
Please choose an option 	Please choose an option 
Date status started 	Date when the status expires 
delete	

If you need to enter more than one additional status, repeat the same action.

Notes:

You need to make sure that the very first status you indicate in this section starts with the date indicated in (a) above.

*Sprintax Forms 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).*

Add Status

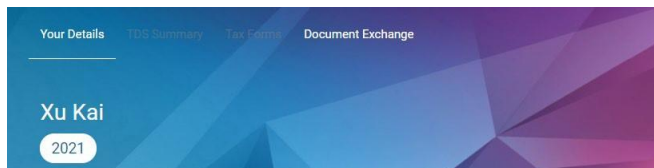
Visa type/Visitor status	Subcategory
J1 - Student	Student
Date status started	Date when the status expires
08-21-2020	06-30-2025

Visa type/Visitor status	Subcategory
J1 - Scholar/Short-Term Scholar	Scholar/Short-Term Scholar
Date status started	Date when the status expires
08-23-2019	12-20-2019
delete	

2.2. PERSONAL DATA

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





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



PERSONAL INFORMATION

Personal Information

First name *	Middle name
Xu	
Surname/Last name *	Date of birth *
Kai	01-20-1999
Place of birth	
China	
City of birth	
Shenzhen	
Do you have US TIN (SSN or ITIN) *	
<input checked="" type="radio"/> Yes	
<input type="radio"/> No	
Your US TIN (SSN or ITIN) *	
124-65-7676	

Student number DM 17526301I	SEVIS ID  N35165165464
Payroll system ID	Program Type Student degree ▼
Campus Philadelphia West ▼	
What is your foreign (home country) tax identification number? If you don't have a foreign tax identification number you can enter your national identification number which appears on your national ID card, or any unique number in your home country you are identified by.	
Are you a full time student or scholar in a US educational institution? * 	
<input checked="" type="radio"/> Yes <input type="radio"/> No	
Are you a degree candidate in a US educational institution? * 	
<input checked="" type="radio"/> Yes <input type="radio"/> No	
Are you OPT/CPT program participant? * 	
<input type="radio"/> Yes <input checked="" type="radio"/> No	

Student number

This is a not a mandatory field. Note that this field:

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

If that is the case or you are not sure what is your student ID, skip this field.

SEVIS ID

This is a non-mandatory field and is applicable **to J and F visa holders only**. This number is generally found on your form I-20 or DS2019. It has the format of N12345678910_

This field:

- might not be visible on your screen at all
 - can be pre-populated in your account by your payor
-

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

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	
PREFERRED NAME Hang Thu Ngo	PASSPORT NAME Ngo Thu Hang	F-1	
COUNTRY OF BIRTH VIETNAM	COUNTRY OF CITIZENSHIP VIETNAM		
DATE OF BIRTH 10 AUGUST 1989	ADMISSION NUMBER	ACADEMIC AND LANGUAGE	
FORM ISSUE REASON CHANGE OF EDUCATION LEVEL	LEGACY NAME Hang Thu Ngo		

Payroll system ID

This field is a non-mandatory field and is generally not applicable to payees who are not employed by their payor. This field is generally pre-uploaded by US payors

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

In either case, you should skip this field.

Program type

This field is a non-mandatory field. This is generally a further description of your occupation within the institution that pays you. This field:

- might not be visible on your screen
- might be pre-populated by your payor and locked for further editing
- available for editing on your end

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

Campus

This field is non-mandatory. If applicable, it:

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

If that is the case, skip the field.

Foreign tax identification number

This is a non-mandatory field. 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.


2.3. 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.

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

 **Your US Address**

Address (Number, Street) 123 Western Avenue	Address (Apartment number) 2082
Address (City) Palo Alto	State California
ZIP code 94303	

 **Your Home Address (Outside the US)**

Address (Number, Street, Apartment number) * Xi Cai Jin Dist Building 1055 Floor 38 Apt 3817	Address (County, Province) Guangdong
Address (City) Shenzhen	Country * China
Postal code/Zip code 13545676	

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 (916) 216-5464	Home country phone number + 865165465464
-----------------------------------	---

BACK **SAVE AND CONTINUE**

2.4. TAX FORMS INFO

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

The View of Tax Forms page may look differently depending on your payor's account settings.

Examples of Tax Forms step's possible looks:

TAX FORMS INFO

 **Tax Forms Info**

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

Do you have US income (wages, scholarships, or other payments) in 2021? * 

- Yes
- No

Industrial Royalties 

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)

If your tax forms page shows a list of unselected income types and you are able to select one, please select the income type you expect to be paid by this payor in the calendar year you are completing for (example: 2021). This will prompt additional relating questions for you to answer.

Xu Kai

2021

TAX FORMS INFO

Tax Forms Info


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

Do you have US income (wages, scholarships, or other payments) in 2021? * 

- Yes
 No


Scholarship or fellowship grants (Income Code 16) 

Compensation for independent personal services (Income Code 17) 

Compensation during studying and training (Income Code 20) 

How many days you stayed or intend to stay during 2021? *



Do you have your own office, place of business in the U.S., that is maintained by you personally for performing these services? * 

- Yes
 No

Are you legally allowed to work? * 

- Yes
 No

Locked for editing:

If your tax forms page shows a list of pre-selected income types **locked for editing**, this is probably coming from your payor's account settings. Proceed with answering all questions. If any of the income types do not apply to you, you can simply leave those **amount fields blank**.

Available for editing:

If your tax forms page shows a list of pre-selected income types and you are able to edit the selections, you can simply unselect whichever of them do not apply to you and leave the one or ones that you expect to receive in the calendar year selected.


Example 1: Student, recipient of scholarship grants only

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


- 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

2021


TAX FORMS INFO


 **Tax Forms Info**


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

Do you have US income (wages, scholarships, or other payments) in 2021? * 

Yes
 No


Scholarship or fellowship grants (Income Code 16) 

Compensation for independent personal services (Income Code 17) 

Compensation during studying and training (Income Code 20) 

Sex *

Male
 Female

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

Yes
 No

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

US/US territories
 Other Country


BACK **SAVE AND CONTINUE**

Example 2: Student working on campus and a recipient of scholarship grant in 2021

Details

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


CONTACT TDS SUPPORT
Support@tds.com

 Live Chat


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

Xu Kai
2021


TAX FORMS INFO


 **Tax Forms Info**


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


Do you have US income (wages, scholarships, or other payments) in 2021? * 

Yes
 No


Scholarship or fellowship grants (Income Code 16) 

Compensation for independent personal services (Income Code 17) 

Compensation during studying and training (Income Code 20) 

Are you legally allowed to work? * 


Yes
 No

Do you have more than one job? * 

Yes
 No

Please choose your Employer/Payer *

TDS Demo 19

First date of employment with this employer 



Sex *

- Male
 Female

Please, complete in the field below income earned ONLY under F1-Student, M1-Student, J1-Trainee, J1-Intern, Q1- or Q2-Trainee/Intern

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

\$ 12,540.00

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

Please, provide short description of the employment you performed during your studying and training *

An international student teaching part-time to undergraduates

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 compensatory grant or fellowship for performing services on-campus as part of the scholarship granted? * 

- Yes
 No

Have you or will you receive compensation or compensatory grant for study and training (wages, salaries, other employment income) from other U.S. employer (University/Company)? Yes/No *

- Yes
 No

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

- Yes
 No

Have you or will you receive compensation or compensatory grant for study and training (wages, salaries, other employment income) from other U.S. employer (University/Company)? Yes/No *

- Yes
 No

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

- US/US territories
 Other Country

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 * 

\$ 9880

BACK

SAVE AND CONTINUE

Please, complete in the field below income earned ONLY under F1-Student, M1-Student, J1-Trainee, J1-Intern, Q1- or Q2-Trainee/Intern

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

\$ 12,540.00

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

Please, provide short description of the employment you performed during your studying and training *

An international student teaching part-time to undergraduates

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

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/pay for the calendar year.

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:

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 * 


\$ 9880

Example 3: International scholar recipient of income for doing research


Divya Tambe

2020 2021

TAX FORMS INFO

 **Tax Forms Info**


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


Do you have US income (wages, scholarships, or other payments) in 2021? * 


Yes
 No


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


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

Scholarship or fellowship grants (Income Code 16) 

Compensation for independent personal services (Income Code 17) 

Compensation for dependent personal services (Income Code 18) 

Compensation for teaching or research (Income Code 19) 

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

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

Your income type is **generally 19.**

Are you legally allowed to work? * 


- Yes
 No

Do you have more than one job? * 

- Yes
 No

Please choose your Employer/Payer *

TDS Demo 20

First date of employment with this employer 



Sex *

- Male
 Female

Please, complete in the field below income earned ONLY under J1-Teacher, J1-Reseracher, J1-Lecturer, J1-Research Scholar OR J1-Short term scholar

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

\$ 41,520.00

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

Please, provide short description of the dependent services related to teaching or research you performed *

research at Demo 20 University's school for liquid crystal research

Examples for acceptable descriptions

A nonresident alien professor or teacher can enter "teaching at ABC University."

A nonresident alien researcher can enter "research at ABC University's school for liquid crystal research."

Were you paid for participation in any research? *

- Yes
 No

Was the research for public interest (for non-profit organization)? * 

- Yes
 No

Have you been invited by a governmental institution, educational institution or scientific research institution to teach, lecture or to participate in research? *

- Yes
 No





BACK

SAVE AND CONTINUE

Example 4: Independent contractor

If you are a non-employee receiving honoraria or commission payments for performing a service or services independently, your income type is generally 17.


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 for dependent personal services (Income Code 18) 
- Other income (awards, prizes) (Income Code 23) 

How many days you stayed or intend to stay during 2021? *



90

Do you have your own office, place of business in the U.S., that is maintained by you personally for performing these services? * 

- Yes
- No

Sex *

- Male
- Female

Where are the independent services being performed? *

- US/US territories
- Other Country

BACK

SAVE AND CONTINUE

2.5. RESIDENCY SUMMARY

The screenshot shows a web interface for 'sprintax calculus'. On the left is a 'Details' sidebar with a list of menu items: Residency, Personal data, Contact details, Tax Forms Info, Payments, Residency Summary (highlighted in yellow), and Tax Treaties. Below the list is a 'CONTACT TDS SUPPORT' section with the email 'TDS@sprintax.com' and a 'Live Chat' button. The main content area has a top navigation bar with 'Your Details', 'TDS Summary', 'Tax Forms', and 'Document Exchange'. Below this is a header for 'Xu Kai' with a '2021' badge. The main heading is 'RESIDENCY STATUS'. The content includes: 'Status: Non-resident', 'Xu Kai is J1 - Student visa holder, with primary purpose: Student.', 'Exempt Individual for 2021 under 5-year lifetime rule.', 'Date of entry into the United States on this status: 08/21/2020', 'Date of expiry of this status: 06/30/2025', 'Days count for Substantial Presence Test (SPT):' followed by a table: '2021: 0 days for 2021', '2020: 0 days for 2020', '2019: 0 days for 2019'. It also states: 'Total number of non-exempt days in United States during 2021 for SPT: 0 days', 'Xu Kai does not pass the substantial presence test', 'Xu Kai is a non-resident for federal tax purposes for tax year 2021', and 'Xu Kai residency starting date under I.R.C. § 7701(b) is 01/01/2024'. At the bottom are 'BACK' and 'NEXT' buttons.

This step summarizes how your residency status for tax purposes has been determined in the system.

Note: Days counted for SPT

Days countable for the Substantial Presence Test (SPT) are not 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”.

Note: Residency starting date

Your residency starting date (RSD) is the date on which you are no longer an exempt individual for SPT purposes. It is not necessarily the date on which you will become or became a resident for tax purposes. This is generally the first of January of the year in which you are expected to meet the substantial

sprintax
calculus

presence test or, in some cases it might be a midst-year date.



2.6. TAX TREATIES

The screenshot shows the Sprintax web application interface. At the top left is the Sprintax logo. A navigation menu includes Home, About Us, Contact Us, Policies, FAQ, and Sign Out. The user's name 'Xu Kai' and the year '2021' are displayed in a header banner. Below the banner are tabs for 'Your Details', 'TDS Summary', 'Tax Forms', and 'Document Exchange'. A left sidebar lists various account details, with 'Tax Treaties' highlighted in yellow. The main content area is titled 'TAX TREATY' and contains the following text: 'You cover the conditions to use tax treaty benefits if you are paid the following income types:'. It then lists 'Scholarship or fellowship grants' and asks 'Do you want to use this tax treaty exemption? *' with radio buttons for 'Yes' (selected) and 'No'. A second section for 'Compensation during studying and training' asks the same question, also with 'Yes' selected. At the bottom are 'BACK' and 'SAVE AND CONTINUE' buttons. A 'Live Chat' button is visible in the sidebar.

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.

2.7. SUMMARY

Based on the information by you or based on entries made by your payor, this is your Personal Tax Summary. This summary does have a downloadable PDF version allocable on the next screen named "Tax Forms".

Details

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

CONTACT TDS SUPPORT
TDS@sprintax.com



Live Chat

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

Xu Kai

2021

GENERAL INFO

First Name Xu	Middle Name
Last Name Kai	Country of Passport/Citizenship China
Current Immigrant Status J1 - Student	Your SSN/ITIN 124-65-7676
Applied for SSN/ITIN N/A	Entry / affiliate TDS Demo 17
Sevis ID N35165165464	

RESIDENCY INFORMATION

US tax residency status Non-resident	Date First in USA 08/23/2019
First day in USA under J1 - Student 08/23/2019	Last day in USA under J1 - Student 06/30/2025
SPT results Substantial Presence Test not met	Residency starting date 01/01/2024
Immigration status change date 08/21/2020	

TAX TREATY AND INCOME TAX DETAILS

Fulltime Student Yes	Degree candidate Yes
OPT/CPT participant No	Primary Purpose of Visit Student
Occupation at University (Institution) Student	Tax Residence China
FICA tax Exempt	FICA tax exemption finishes 06/30/2025
RUTA tax Exempt	RUTA tax exemption finishes 12/31/2023

PERSONAL AND CONTACT DETAILS

2.8. TAX FORMS

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

Xu Kai
2021



Congratulations You completed your record!

Please follow the directions below to complete this process.



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

1. Review, sign and date each of the required documents listed below.
2. Submit the required documents through TDS Documents Exchange.



Non-Resident Tax forms



 [W4 form \(non-resident\)](#) 

Purpose of form: Form W-4 "Employee's Withholding Allowance Certificate" determines how much tax is withheld from an employee's paycheck each pay period. A non-resident alien subject to wage withholding must give the withholding agent

 [W8BEN form - Income code 16](#) 

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



 [8233 form IC20](#) 

 [8233 statement - income code 20](#) 

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

What to do next: Providing Form 8233 to the Withholding Agent: TDS Demo 17
[Read More](#)

Other Forms

 [TDS Summary](#) 

[BACK](#)

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

Note: there are instructions attached to each document type. Please read them and follow the instructions or proceed as instructed by your payor, if differently.

The forms generated in the Other forms section are generally optional and non-mandatory unless your payor instructs you otherwise.

2.9. DOCUMENTS EXCHANGE

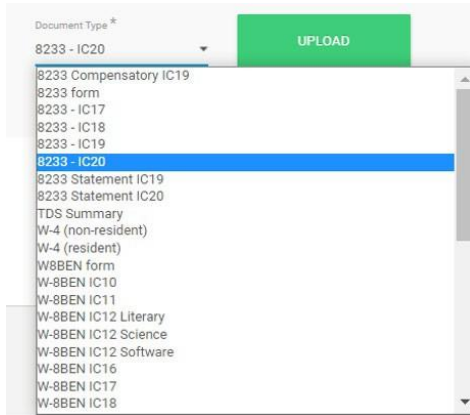
The screenshot shows the Sprintax Document Exchange interface. At the top, there is a navigation bar with links for Home, About Us, Contact Us, Policies, FAQ, Help, and Sign Out. The user's name, Xu Kai, and the year 2021 are displayed. The main content area is titled 'DOCUMENT EXCHANGE' and includes a description: 'This section is intended as your document exchange system. Uploading scanned copies of your documents will allow school officials to access documents remotely without the need for you to visit the offices and provide hard copies.' Below this, there is a file upload section with a 'Drag & Drop a file here to upload' area, supported file types (JPG, PNG, PDF, 8MB limit), and a form with a 'Browse files' button, a 'Document Type' dropdown menu (set to '8233 form IC20'), and an 'UPLOAD' button. At the bottom, there is an 'AVAILABLE DOCUMENTS' section with a 'BACK' button. A sidebar on the left contains a 'Details' menu with items like Residency, Personal data, Contact details, Tax Forms Info, Payments, Residency Summary, and Tax Treaties, along with a 'Live Chat' button.

Uploading signed Sprintax Forms generated or other documents in the Documents Exchange facility

This is an online tool which you can use to upload the signed tax forms requested by your payor unless your payor instructs you otherwise.

Choosing the document type:

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

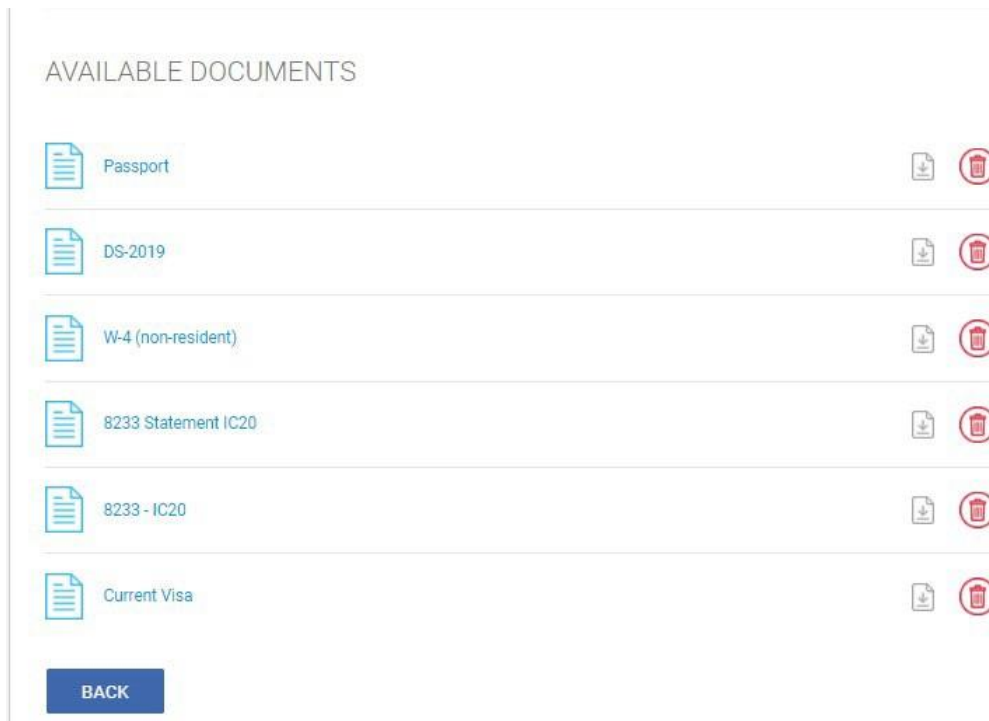


Note that in case your payor requests additional documents to be uploaded in the system, such as copies of your visa, passport, SSN card, EAD card, I-9, or anything else in addition to the documents generated on your Tax Forms step, you can upload them via the Documents Exchange tool and you should be able to choose the document type you are uploading.

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





Note that your profile might be half pre-populated by your payor on your behalf. If you believe that some of the details provided by your payor are outdated or not current, make sure to update the information in your profile when completing your account.

Make sure you sign in and update your Sprintax Forms 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 your form I-20.

If you have missing mandatory answers in your profile, the sections where there are missing mandatory details will be indicated in red.

Your account is incomplete

There is still missing information in the following sections of your account:

-  **Contact details**
-  **Tax Forms Info**







Please complete the required information as soon as possible to receive your tax forms. In certain cases, you may be required to submit the forms to the withholding agent TDS Demo 17 so that correct federal income tax can be withheld from your pay.

If you have further questions please contact the live chat team or send us an email to tds@sprintax.com

CONTINUE

sprintax

Details

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

CONTACT TDS SUPPORT
TDS@sprintax.com



Live Chat

2.10. DOWNLOADING YOUR FORM 1042-S IN Sprintax Forms

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

If you did consent to receive form 1042-S electronically and you need a copy of your form 1042-S you can download the same from your Sprintax Forms account's *Tax Forms screen*. If you did not, you can request a paper copy of your form 1042-S from your payor.

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

You have the ability to directly transfer your details forms 1042-S to Sprintax Forms where you can prepare your annual tax return(s).

Details

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

CONTACT TDS SUPPORT
TDS@sprintax.com

Live Chat

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

Xu Kai
2021

Congratulations - You completed your record!

Please follow the directions below to complete this process.

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

1042-S Forms

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

Would you like to use our Sprintax tax preparation system?

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

YES, TAKE ME TO SPRINTAX NO, THANK YOU

1042-S Income Code 20

1042-S Income Code 16

What you may find helpful when completing the questionnaire:

Frequently asked questions section: [FAQ](#)

CONTACT TDS SUPPORT
TDS@sprintax.com



Live Chat

Support email and Live chat:

sprintax
calculus

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