

## Using Sprintax Calculus

- Website: [www.calculus.sprintax.com](http://www.calculus.sprintax.com)
- All international visitors that receive funds from CMU need to complete steps one through eight to determine treaty eligibility
- Will also be required to upload any travel documents in the Document Exchange
- Utilize the Live Chat feature if needed
  - 24-hour support
  - Will assist with any questions regarding the questionnaire or software issues

**sprintax**  
calculus

Progress:

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Need help?

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Test Person

### Residency 2023

**Please Note:**

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

#### 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

- You can hover over the small icon by each question for more information on how to answer

### Tax Identification:

Do you have US TIN (SSN or ITIN) \*

Yes  No

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

Yes  No  I want to re-apply

Have you applied for an ITIN? \*

Yes  No  I want to re-apply

Your US Title (see instructions) \*

Global ID

Program Title

Are you a full-time student or scholar in a US educational institution in 2023? \*

Yes  No

Who is a full-time student?  
 You are a full-time student if, during some part of each of 5 calendar months (not necessarily consecutive) during the calendar year, you are either:  
 > A full-time student at a school that has a regular teaching staff, course of study, and regularly enrolled body of students in attendance, or  
 > A student taking a full-time, on-farm training course given by either a school that has a regular teaching staff, course of study, and regularly enrolled body of students in attendance, or a state, county, or local government.  
 "What is an educational institution?  
 An eligible educational institution is one whose primary function is the presentation of formal instruction and that normally maintains a regular faculty and curriculum and normally has a regularly enrolled body of students in attendance at the place where it carries on its educational activities."

FNR ID

What is your foreign (home) ID number?

If you don't have a foreign ID number, enter your national identification number, national ID card, or any other ID number you are identified by.

#### Section 4: Tax forms Info

- Read questions carefully
- Calculus will ask you to select what type of income you are going to receive
  - See examples below each code
  - **Most visitors will select Compensation during studying and training - Income code 20**
  - Possible to select more than one income code

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from Central Michigan University in 2023? \*

Yes  No

Scholarship or fellowship grants (Income Code 16) ⓘ  
 Scholarships received to help pay the cost of attendance. ←

Compensation for independent personal services (Income Code 17) ⓘ  
 Examples; Honorarium payments, or independent contractor wages. ←

Compensation during studying and training (Income Code 20) ⓘ  
 Most common. Includes income earned from working a campus job or from being a graduate assistant. ←

Other income (awards, prizes) (Income Code 23) ⓘ  
 Examples; Gift cards or a prize from winning a contest ←

- Calculus will ask you how much income you make and a job description
  - You only need to enter an **estimated** dollar amount
  - Job description examples include:

*Grad Assistant for Music department  
Student worker for campus dining*

Please, complete in the field below **ONLY** income received as an F1 - Student, a J1 - Student, an M1 - Student, a J1 - Intern/Trainee, a J1 - Physician Intern/Trainee, or a Q1/Q2 - Intern/Trainee

Total compensation you expect to be paid in wages and other similar payments from employment on- or off campus in the current tax year \* [i](#)

\$

**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:

- If treaty is available, Calculus will ask you if you want to use that benefit
  - If you want your wages to be tax exempt (so federal and state taxes are not withheld), you need to select YES
  - If you select NO, your wages and other monies paid to you will be taxed as a U.S. citizen

**Compensation during studying and training**

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

During 2023, Test Person was F1 - Student visa holder under subcategory: Student. As a Student at Central Michigan University, Educational institution, Test Person receives Compensation during studying and training, which is covered by tax treaty article 20(c) of U.S. - China for not more than \$ 5,000.00 .

**ARTICLE 20 (Students and Trainees)**

A student, business apprentice or trainee who is, or was immediately before visiting a Contracting State, a resident of the other Contracting State and who is present in the first- mentioned Contracting State solely for the purpose of his education, training or obtaining special technical experience shall be exempt from tax in that Contracting State with respect to: (c) income from personal services performed in that Contracting State in an amount not in excess of 5,000 United States dollars or its equivalent in Chinese yuan for any taxable year. The benefits provided under this Article shall extend only for such period of time as is reasonably necessary to complete the education or training."

Do you want to use this tax treaty exemption with this university/employer? \*

Yes     No

- Then Calculus will ask you to consent receiving your 1042-S form electronically
  - We recommend selecting **YES** since many international visitors are not physically in the United States at the time when this form is available



### You are almost there..

Please follow the directions below to complete this process.

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

- Any generated forms need to be reviewed and signed

#### Non-Resident Tax forms

 <b>Statement to Form 8233, Income code 20</b>	<a href="#">Review and sign</a>
 <b>Form 8233, Income code 20</b>	<a href="#">Review and sign</a>

- In order to sign electronically you need to download a mobile app called Google Authenticator. This app is used by Calculus as a way to verify your identity.
  - See additional **Sprintax MFA guide for Users**
- Finally, you need to navigate to the Document Exchange to upload your travel documentation
  - Examples: Current visa, I-94 and Passport

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

## Tax Forms 2023