SPRINTAX CALCULUS JOB AID

Overview:

Sprintax Calculus determines the taxation applied to payments made by the university to non-U.S. citizens. This includes foreign national students, visitors, and suppliers. Some examples are undergraduate and graduate students, scholars, visiting professors, teachers, researchers, scientists, athletes, and guest speakers.

Access to Sprintax Calculus:

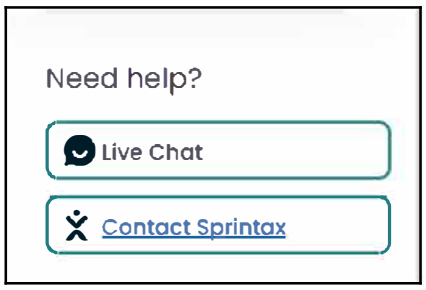
- A profile is created by Brown University an email, using a first and last name
- Do not use the Sign-Up option on the Sprintax Calculus login page
- Once your profile is created, you will receive an activation email from
- no-reply@sprintax.com
- Email will contain a **unique link** which you will need to create your password

Steps to Complete Your Profile in Sprintax Calculus:

1. Residency
2. Personal Data
3. Contact Details
4. Tax Forms Information
5. Payments
6. Residency Summary
7. Tax Treaties

Help: Sprintax Calculus assistance is available 24/7 and can be accessed by using:

- Live Chat
- Email-foreignnationaltax@brown.edu



Completing Sprintax Calculus Sections:

- Complete all fields marked with an asterisk (*) these are required. Leaving blank could result in incomplete estimation and tax forms
- Use the ⓘ for more detailed information pertaining to the question
- Use the **Save and Continue** button to save entered information and advance to the next section
- Use the **Back** button to return to previous screens



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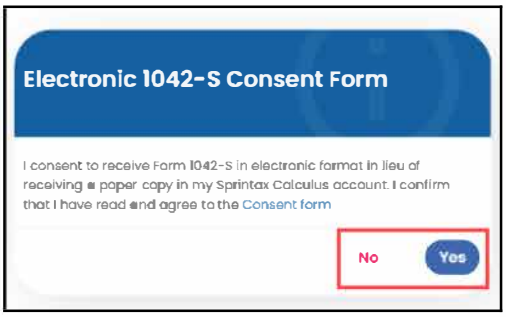
1. **RESIDENCY-** Information relating to your residency for tax purposes
   - **Complete Consent Form**-Confirm how you would like to receive form 1042-S:
     - Electronically (as a download in Sprintax Calculus) after the tax year ends
       Or
     - Paper form to be mailed to your mailing address on file



   Note: This can be changed if needed on the **Tax Forms** screen
   - Select **Add Status** to add additional statuses or visits to the current one

2. **PERSONAL DATA-** Enter personal information in this section
   - Date of birth
   - US tax identification number (TIN) (SSN or your ITIN (individual taxpayer identification number) whichever is applicable

   Note: Place of birth and city of birth are not mandatory to complete if you have a US TIN.

3. **CONTACT DETAILS-**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.
   - Provide the following information:
     - Enter your US address if applicable
     - Foreign residential address (where you lived prior to you coming to the US)

4. **TAX FORMS INFORMATION-**Used to collect tax related information. This form needs to be completed annually:
   - To produce Form 8233
   - Claim exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual
   - If 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 (ex: enrolled with new job, changes to wage amount, marital status, etc.)
   - **Editing of Form**
     - **Unlocked for Editing:** If you are able to select/deselect option(s) on the tax form, please select the income type you expect to be paid by Brown University in the calendar year you are completing for (example:
     - **Locked for Editing:** If your tax forms page shows a list of pre-selected income types locked for editing, you need to proceed with answering all questions. If any of the income types do not apply to you, skip the optional amount fields
     - **Available for Editing:** If your tax forms page shows a list of pre-selected income types and you can edit the selections, you can unselect the one(s) that do not apply by leaving the one(s) that you anticipate from Brown University

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5. **PAYMENTS-** Provide approximate amounts of expected wages/compensation for the calendar year as applicable:
    - Scholarship/Grant income
    - Compensation in wages from employment on or off campus

6. **RESIDENCY SUMMARY-** Summarizes how your residency status for tax purposes has been determined in Sprintax Calculus system
    - **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"
    - **Residency Starting Date RSD**
        - Date which you are no longer an exempt Individual for SPT purposes. It is not necessarily the date on which you will become or became a Resident for US tax purposes
        - 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 midpoint of year date

7. **TAX TREATIES-** Summarizes if you are eligible for tax treaty
    - You cannot claim treaty benefits if you do not have a US TIN (a SSN or ITIN), unless you provide your TIN on the **Personal Data** screen and produce the applicable tax forms to provide to Brown University
    - Payor cannot grant treaty benefits before you sign the required forms listing a valid US TIN

FINAL SUMMARY-A Personal Tax Summary that has a downloadable PDF version located on the **Tax Forms** screen.

Note: The PDF version has an area to sign and date the document to confirm the information accuracy for Brown University. The document is optional and whether it needs to be signed and uploaded is to be decided by the University.

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

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

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E-SIGNING TAX FORMS- If you see **Review and Sign** as an option on a form, Brown University has enabled Sprintax Calculus E-signatures. Use the functionality to:

- Sign your tax forms directly in the software without having to download them and then upload signed versions

Note: You will be prompted to enable multi-factor authentication (MFA) before gaining access to Sprintax Calculus E-signatures

DOCUMENTS EXCHANGE- This section is intended as your document exchange system. Uploading scanned copies of your documents will allow Brown University to access documents remotely without the need for you to email copies to our office.

