



A Guide to Sprintax Calculus

Specially prepared for Fulbright
Visiting Scholar Program
Participants
(J-1 Research Category)



SPRINTAX CALCULUS GUIDE

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Logging in to Sprintax Calculus


- Login to Sprintax using the link in the activation email sent from noreply@sprintax.com.

The link expires 24 hours after you received the activation email.

If the link is inactive, navigate to <https://calculus.sprintax.com/forgotten-password/>

- To reset your password or login, you must use the email where you received the activation email.
- **Do not click on “Sign up” or you will be prompted to pay a fee.**

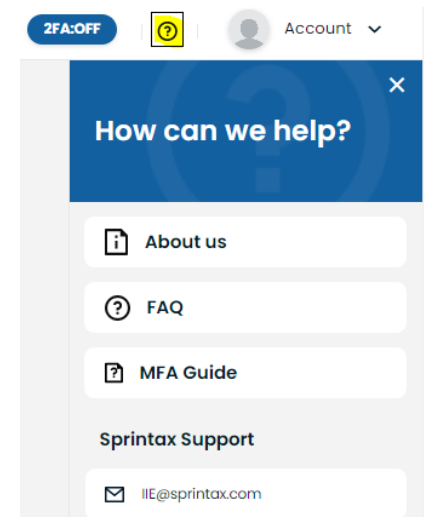
- If you need help while completing your profile, you have the following options available:
 - Click on the information button next to a question:

When did you first enter the US? * 

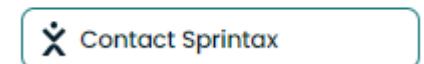
- Navigate to the Help menu to access the FAQ on the top right or click on “Contact Sprintax” button on the left:



- Use the Live Chat function on the right:
- Send an email to IIE@sprintax.com to contact Sprintax Support. It may take up to 48 hours to receive a reply.



Need help?



Your details

- Once you have successfully logged in, you will be at the “**Your Details**” section on the top bar.

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

- Under this section there are various subsections listed on the left-hand side.

**Some participants may have different sub sections such as “ITIN questions” or “Tax Treaties” available.*

- Questions or fields with an asterisk at the end are required. You will not be able to navigate to the next section or complete your profile if you do not complete the required fields.






Progress:

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

IMPORTANT Much of the information in these sections has been pre-filled by IIE. However, you must look through each section and verify that the information is correct. If it is incorrect or blank, complete it.

Residency

IMPORTANT To answer questions in the residency section you will need your DS-2019, visa, I-94 card and passport.

When did you first ever enter the US? * 	What is your current immigration status? * 
<input type="text"/>	<input type="text" value="Please choose an option"/>
What date did you first enter the US on this immigration status? * 	What is the expiry date of your current immigration status? * 
<input type="text"/>	<input type="text"/>
Final departure date you left or intend to leave the US 	Expiry date of your current US visa (if any) *
<input type="text"/>	<input type="text"/>


- Field **“When did you first ever enter the US”** should be completed with the first date you entered US on any visa. Please put the first ever entry date to the US if you have been to the US prior to your current visit on your Fulbright J-1 status. If you have not been to the US prior to entering on your Fulbright J-1 status, then please put the date you entered on this J-1 status in this field.
- Field **“What is your current immigration status”** should show your correct immigration status as indicated on your DS-2019 form (if you are on J status), box 4, for example Please, note that IIE may have pre-populated the immigration status for you.
- Field **“What date did you first enter the US on this immigration status”** should be completed with the date you entered the US on your current Fulbright J-1 status for the first time (without considering temporary absence from US).
- Field **“What is the expiry date of your current immigration status”** should be completed with the date your DS-2019 expires (if you are on J status).
- Field **“Final departure date you left or intend to leave the US”** is mandatory if your status is to expire within the year you are completing Calculus for. If you do not have an exact date when you intend to leave the US, you can put the SEVIS end date on your DS 2019.

- Field “**Expiry date of your current US visa**” should be completed with the expiry date as shown on your visa.
- Please note that fields “**Country of Citizenship**” and “**Country of residence**” are locked for editing. If incorrect, please reach out to IIE@sprintax.com or tax@iie.org

Country of Citizenship *

Indonesia 

Country of residence * 

Indonesia 

IMPORTANT If your country of citizenship or country of residence is incorrect, please contact IIE@Sprintax.com or tax@iie.org to update the information.

- **Visits to the US** should only be completed if you have visited the US on a different occasion prior to your current Fulbright J-1 visit. You should only complete prior visits to the US on a F, J, M, or Q visa since 1986 or have visited the U.S. in the last 3 years on any other immigration status.


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

J1 - Research scholar 


Subcategory

Research scholar 

Date of entry in the US on your current status

01-31-2024 

Date when the status expires

01-30-2026 

[+ Add Status](#)

- If you'd like to add previous visits to the US, please click on **+Add Status**.
 - For previous statuses on F, J, M or Q visa you can enter initial entry and final exit dates (you do not have to enter temporary absences from US during those periods for vacation) for visits to the US after 1986.

Example: Your 2024 status is J1 – Research Scholar, however, you have previously been on F1 - Student status from 2017 until 2021. In “Visits to the US”, please enter the initial entry date in 2017 and the final exit date in 2021 of the previous F1 status.

- For previous statuses that are not F, J, M or Q please provide all entry and exit dates for the last 3 calendar years only.

Example: Your 2024 status is J1 - Scholar/Short-Term Scholar, however, you have previously been on B2 – Tourist visa in 2016, 2017 and 2022. Only the visit in 2022 is in the last 3 calendar years so please enter that visit only. The entries on B2 – Tourist visa in 2016 and 2017 are outside of the prior 3 calendar years so you do not need to enter them.

- If section “**Select if you were out of the US for a full year (01 Jan to 31 Dec) in any of the years listed below**” is visible you may see specific to your immigration status(es) years. If you have been present in US even for a day in the year(s) listed in this question do not make a selection and move on to the next question/section.

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).

2021

2022

- If section “**Residency presence days**” is visible to you please enter the actual days of presence in US for the year(s) in question.

Residency presence days ⓘ

Note: Enter the number of the days you were or expect to be present during the listed tax year under the listed immigration status.

Visa type/Visitor status	Year	Days
J1 – Research scholar ▼	2024 ▼	<input type="text"/>

Personal Data

- Please, verify your name, date of birth and other personal information.

Personal Information

First name *	Middle name
<input type="text" value="FNU"/>	<input type="text"/>
Surname/Last name *	Date of birth *
<input type="text" value="LNU"/>	<input type="text" value=""/>
Place of birth *	City of birth *
<input type="text" value="Please choose an option"/>	<input type="text"/>

- Please, enter your U.S. SSN (Social Security Number) or ITIN (Individual Taxpayer Identification Number).
- If you do not have SSN or ITIN, please select “No” and proceed to next questions.

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 before? *

Yes No I want to re-apply

- Fields “IIE Identification number”, “FNR ID”, “Program Type” and “Campus” would be pre-populated by IIE and/or locked for editing.
- If SEVIS ID field is blank you can locate the number at the top right corner of your DS-2019.
Note: SEVIS ID field is mandatory if you did not enter U.S. SSN or ITIN, otherwise, you can leave blank.
- If you have a tax identification number from your home country, please enter it in box “What is your foreign (home country) tax

identification number”. If you do not or are unsure, then leave the field blank.

IIE identification number	SEVIS ID ⓘ
<input type="text"/>	<input type="text"/>
FNR ID	Payroll system ID
<input type="text"/>	<input type="text"/>
Program Type	Campus
<input type="text" value="Please choose an option"/>	<input type="text"/>
What is your foreign (home country) tax identification number?	
<input type="text"/>	

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.

➤ If you are a researcher or scholar you may see the following question:

Are you a degree candidate in a US educational institution during 2024? * ⓘ

Yes No

The answer to this question for Fulbright scholars should be “No”.

➤ If you are married, to a foreign or US citizen, please select “Yes” to question “Are you married”.

Are you married? *

Yes No

➤ If you can be claimed as a dependent on someone else’s U.S. tax return, please select “Yes” to question “Can you be claimed as a dependent on someone else’s tax return”.

Can you be claimed as a dependent on someone else’s tax return? ⓘ

Yes No

The term “dependent” means:

- A qualifying child*, or
- A qualifying relative*

You can be claimed as a dependent if your parent (or someone else) can claim you as their dependent on their US Tax return.

Note: The below qualifying child and relative information is only relevant for US residents and residents of Canada, Mexico, South Korea or India.

* A qualifying child is:

- Child must be a son, daughter, stepchild, foster child, brother, sister, half brother, half sister, stepbrother, stepsister, or a descendant of any of them.
- Child must be: (a) under age 19 at the end of the year and younger than the tax return filer, (b) under age 24 at the end of the year, a fulltime student, and younger than the tax return filer (or spouse, if filing jointly), or (c) any age if permanently and totally disabled.
- Child must have lived with the tax return filer for more than half of the year.
- Child must not have provided more than half of their own support for the year.
- Child isn't filing a joint return for the year (unless that joint return is filed only to claim a refund of income tax withheld or estimated tax paid).
- If the child meets the rules to be a qualifying child of more than one person, the tax return filer must be the person entitled to claim the child as a qualifying child.

** A qualifying relative is:

- A person that can't be the tax return filer's qualifying child or the qualifying child of any other taxpayer. A child isn't the qualifying child of any other taxpayer if the child's parent (or any other person for whom the child is defined as a qualifying child) isn't required to file an income tax return or files an income tax return only to get a refund of income tax withheld.
- The person either
 - (a) must be related to the tax return filer in one of the following ways:
 - son, daughter, stepchild, foster child, or a descendant of any of them (i.e., grandchild)
 - brother, sister, half brother, half sister, or a son or daughter of any of them
 - father, mother, or an ancestor or sibling of either of them
 - stepbrother, stepsister, stepfather, stepmother, son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law, or sister-in-law
 - (b) must live with the tax return filer all year as a member of the household.
- The person's gross income for the year must be less than \$4,300. Gross income means all income the person received in the form of money, goods, property and services, that isn't exempt from tax (excluding Social Security benefits unless the person is married filing a separate return and lived with their spouse at any time during the tax year or if 1/2 the Social Security benefits plus their other gross income and tax exempt interest is more than \$25,000, or \$32,000 if Married Filing Jointly).
- Tax return filer must provide more than half of the person's total support for the year.

Contact Details

➤ Enter your **US address**

Enter the address you reside, or resided while in US during 2024. **Do not enter IIE's address.**

Your US Address

Address (Number, Street)	Address (Apartment number)
<input type="text"/>	<input type="text"/>
Address (City)	State
<input type="text"/>	<input type="text" value="Please choose an option"/>
ZIP code	
<input type="text"/>	

➤ Enter your **home address (Outside US)**

Enter your address in your home country. If you do not currently have one enter the last address you resided at in your home country.

Your Home Address (Outside the US)

Address (Number, Street, Apartment number) *	Address (County, Province)
<input type="text"/>	<input type="text"/>
Address (City)	Country *
<input type="text"/>	<input type="text" value="Please choose an option"/>
Postal code/Zip code	
<input type="text"/>	

➤ Please choose **mailing address**

Choose the address you'd like to show as mailing address on your tax documents.

Please choose your mailing address *

US address Your Home Address (Outside the US)

➤ Please choose **residential address**

Choose your regular residential address (could be different than mailing address)

Please choose your current residential address *

US address Your Home Address (Outside the US)

➤ **US and home country's phone number** fields are optional to be completed.

Tax Forms Info

This section asks questions so that Sprintax can determine if you need a Form W8-BEN or Form W-9. Scholarships or grants issued by IIE are not for compensation so you should only be issued a W8-BEN form or Form W-9.

- **Do you have US income** is selected by default to “yes” and cannot be changed.

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from Institute of International Education Inc in 2024? *

Yes No

- **Scholarship or fellowship grants (Income Code 16)** is selected by default and cannot be unchecked.

Scholarship or fellowship grants (Income Code 16) ⓘ

- Question “**Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant**” is selected to “No” by default as this is for your IIE grant.

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

Yes No

- If “**Foreign source income (Study related activities take place outside the US)**” is visible to you, **do not** check it as it is related to your IIE grant.

Foreign source income (Study related activities take place outside the US)

- Section “**Please, select the type of tax treaty you claimed as a student, scholar, researcher, teacher or a trainee on F1, J1, M1 or Q visa in <other tax year(s)>**” may only appear if you indicated in the **Residency** section that you were in the US in previous years, and you are from certain tax treaty country. Please complete this section based on the type of income you received in previous years. If you received a scholarship disbursed by IIE in the given year, select “Scholarship or grant.”

Please, select the type of tax treaty you claimed as a student, scholar, researcher, teacher or a trainee on F1, J1, M1 or Q visa in 2023

- Compensation during studying and training (employment or training on or off campus)
- Compensation for teaching or research (teachers or researchers wages)
- Scholarship or grant
- Other income covered by tax treaty
- No tax treaty was claimed

Note: please, check your previous years tax returns (if, any). You can find this information on 1040NR, page 5, table L (1) or 1040NR-EZ, page 2, table J (1)

Residency Summary

This section provides information whether you have been deemed resident or non-resident for U.S. tax purposes.

If you are deemed non-resident for tax purposes you will find Form W-8BEN in the Tax Forms section.

If you are deemed resident for tax purposes you will find Form W-9 in the Tax Forms section.

Tax Treaties

Depending on various factors, you may be eligible to claim treaty on all or part of your IIE scholarship/grant. If you're eligible based on the information provided we will show the treaty you can use in the "Tax Treaties" section.

➤ **Treaty is available**

Make sure to select "Yes" to question "Do you want to use this tax treaty exemption".

Scholarship or fellowship grants

John Smith 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 2024, John Smith was J1 - Research scholar visa holder under subcategory: Research scholar. As a Research scholar at Tokyo, Educational institution, John Smith receives Scholarship or fellowship grants, covered by tax treaty article 21(1) of U.S. - France.

ARTICLE 21 Students and Trainees

1. (a) An individual who is a resident of a Contracting State immediately before his visit to the other Contracting State and who is temporarily present in the other Contracting State for the primary purpose of: (iii) studying or doing research as a recipient of a grant, allowance, or award from a not-for-profit governmental, religious, charitable, scientific, artistic, cultural, or educational organization, shall be exempt from tax in that other State with respect to amounts referred to in subparagraph (b). (b) The amounts referred to in subparagraph (a) are: (ii) a grant, allowance, or award described in subparagraph (a) (iii); (c) The benefits of this paragraph shall only extend for such period of time as may be reasonably or customarily required to effectuate the purpose of the visit, but in no event shall any individual have the benefits of this Article and Article 20 (Teachers and Researchers) for more than a total of five taxable periods. (d) The provisions of subparagraph (a) shall not apply to income from research if such research is undertaken not in the public interest but primarily for the private benefit of a specific person or persons.

Do you want to use this tax treaty exemption? *

Yes No

➤ **Treaty is not available**

- If your country of residence does not have a tax treaty agreement with the US you will see the following message:

Your country does not have a tax treaty agreement with USA covering any of your income.

- There is treaty agreement between the US and your country of residence, but you either do not cover the conditions to use it or the treaty agreement does not cover scholarship/grant income.

There is a tax treaty agreement between your country and the United States covering certain items of income. However, based on the information provided, none of your income is eligible for tax treaty benefits because you do not meet some or all of the treaty requirements.

Final Summary

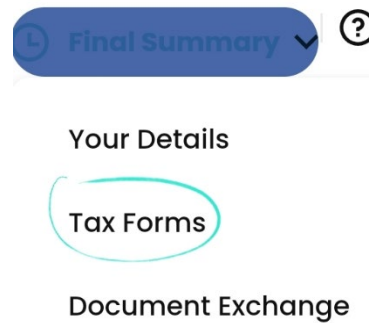
Final Summary section shows the information you have entered and the treaty/tax determinations for your IIE scholarship/grant. Please, review and if you find an error go back to the specific section to correct the information.

Tax Forms

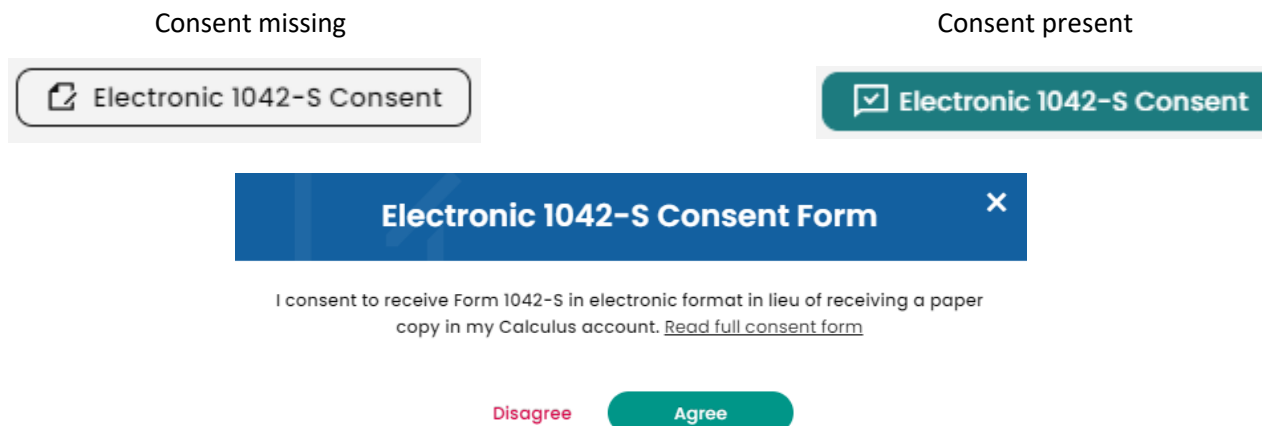
- Navigate to the **Tax Forms** section (third tab on top navigation bar).

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

If you are accessing Calculus from a mobile device, click on the drop-down at top to access “Tax Forms” section.



- Make sure that you have **consented to receive Form 1042-s electronically** by clicking the box at the top right



- Review all the tax forms in this section.
- You are required to sign W-8BEN (or W-9 form).

The form is pre-filled based on the information you input and reviewed in the “Your Details” section. You can either e-sign or download and sign manually.

Non-Resident Tax forms



Form W-8 BEN, Income code 16

Expiry date: Not determined

[Review and sign](#)

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).

What to do next: Providina Form W-8BEN to the Withholding Agent: Tokvo
[Read More](#)

- To e-sign the form click on “review and sign” in blue on the right-hand side of the screen. [Here are more detailed instructions](#) or click on “Contact Sprintax” tab and then select MFA Guide.

Need help?

[Contact Sprintax](#)

How can we help?

[About us](#)

[FAQ](#)

[MFA Guide](#)

Sprintax Support

calculussupport@sprintax.com

- To sign manually, click on the document itself, download, sign and then upload signed Form W-8BEN to the **Document Exchange**.
- Be sure to choose the correct Document Type “Form W-8 BEN Income Code 16” when uploading:

Upload

Supported file types include JPG, PNG and PDF. File size should not exceed 8MB

1) Document Type *

Form W-8 BEN, Income code 16



2) Drag your file here
to start uploading.

OR

Browse files *

Upload →

Contact IE@sprintax.com or Sprintax Live Chat, if you have questions about completing your Sprintax Calculus profile or form W-8BEN:

