



Filing tax returns through Sprintax Returns

Q: How do I get help from Sprintax?

Clicking on the  icon once you're logged in will bring up Sprintax FAQ section and online search assistant. If the online assistant isn't answering your question, you can click on . You can request to speak to a Live Chat agent if you write "agent", "real person", "chat with a real person". If you have a more in-depth questions that is specific to your IIE grant, you may e-mail IIE@sprintax.com.

Q: What Visa type to select in Step 1 Residency?

Please make sure to select the exact category of your J1 Visa from box 4 of your DS-2019 form. DO NOT GUESS or use a title given to you by your host institution—use only the designation on your DS-2019 form.

Examples:

- 1) J1 Research scholar's designation in box 4 of DS-2019

4. Exchange Visitor Category: RESEARCH SCHOLAR

- 2) J1 - Professor/Lecturer/Teacher's designation in box 4 of DS-2019

4. Exchange Visitor Category: PROFESSOR

Q: What is Country of Residence?

This refers to the country where you were a tax resident before arriving in the US. For most Fulbright Visiting Scholars, this will be their home country/country of citizenship, but depending on your individual situation note that your country of residence may differ from the country of your citizenship.

Q: I am still in the US. What do I fill under last exit date?

Please enter the expiration date of your visa or any future date you plan to depart from the US.

Q: Do I need to report all my entry and exit dates?

In Step 1, please report your entry and exit dates in chronological order. Ensure each entry and its corresponding exit date are recorded on separate rows. Avoid any overlapping rows that duplicate the same dates. Reserve the final row exclusively for indicating your actual intention to depart from the US or your actual exit date.

Q: I have overlapping dates and I cannot continue further. What should I do?

In the Residency section, Step 1, you must chronologically record all your dates, beginning from your first-ever date. Please note that if you left the US and returned on the same day, it is still considered a day spent in the US. Consequently, refrain from reporting such visits to avoid overlapping your dates. Report only travel outside the US that has lasted longer than 24 hours.

Example: if you go on a day trip from US to Mexico and return the same day, you do not need to report the trip. However, if you go on a trip to Mexico from US and return the next day, then please enter the dates in Residency, Step 1.

Q: There is an error on Date you first entered the US. What should I do?

This field is filled automatically using the information provided in Step 1 - Residency, Residency status. It considers your initial visit, regardless of the visa type, not just your current visa for the tax year. Please refrain from making any alterations and leave it as auto populated by Sprintax.

Q: My spouse is not with me in the US. How should I answer to the question asking if I am married?

Regardless of whether your spouse is not currently in the U.S., if you are legally married, please respond with "Yes" to the following question: "Were you married on the last day of the tax year?"

Q: Can I claim a tax treaty?

Sprintax Returns will determine if you are eligible to claim a tax treaty benefit. Please make sure to provide the accurate details of your Visa category, country of residence, income documents and payer information, so the system can correctly determine if you can claim this benefit.

To determine the correct J category, please check box 4 "Exchange visitor category" of your DS-2019.

Example:

4. Exchange Visitor Category: RESEARCH SCHOLAR

Q: The software is skipping steps 3 and 4 for me. What should I do?

Steps 3 and 4 are only applicable for those who received US payments during the tax year from IIE sources or other. If you received a 1042-S form from IIE or an income document from any other entity for tax year 2024, please return to Step 2: "Getting to Know You," under the section "About You," and answer "Yes" to the question: "Did you have US income (wages, scholarships, or other payments) in 2024?". After that click next and Steps 3 and 4 will be available for you.

Q: How many 1042-S forms to add in Step 3 Let's talk money?

Please note that IIE may issue you more than one 1042-S form that show different amounts and state information. Make sure they are entered separately and in entirety.

In your Sprintax Calculus account download the PDF 1042-S in "Tax Forms" page. The 1042-S PDF would have copies B, C and D for each unique form (the copy indication is located in the upper right corner of the 1042-S). You need to only enter copy C of each unique 1042-S form when preparing your tax return.

Example: If you have received one 1042-S form only enter Copy C of the 1042-S form in Sprintax Returns and enter it once. If you have received two unique 1042-S forms, enter each one separately and in its entirety.

Q: Should I report foreign income on Step 3?

Nonresidents are not obligated to disclose non-U.S. income on their federal income tax returns. Consequently, when completing Step 3, "Let's talk money - income document," refrain from reporting any income from foreign sources. Some states, however, may require reporting foreign income. If that is the case, you may be prompted to enter foreign income amounts received during the year you are completing a tax return for in Step 6.

Q: What to select under quantity of payment documents on Step 3 Let's talk money, income documents?

To input information for each distinct form you received, select "+add document" in the system. In the case of receiving a form with multiple identical copies from one payer, consider it as a single form (for example form 1042-S you have been provided could have copies B, C and D which represent the same income and tax information).

Q: How to complete box 17c on my 1042-s form on Step 3?

If there is no state indicated on your IIE 1042-S form please select the state where you were physically present while receiving that income.

Q: How to remove the Crypto report in Step 3 Lets' talk money?

To remove Step 3 Crypto Reports:

- Go back to Step 2 Getting to know you, About You;
- Answer with NO to the following question: "At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?"
- Click next and Step 3 Crypto Reports will not be available.

Q: I don't see option Outside the US on Step 6?

If you have input US entry or exit date during the year you are completing a tax return for in Step 1 Residency, "outside of US" period will automatically show in Step 6 when completing Sprintax Returns. If based on the entry/exit dates you entered in Step 1 you have been in US for the whole year you are completing Sprintax Returns for, "Outside of US" period will not show in Step 6. If you need to make a correction go back to Step 1 and correct the dates of visit(s).

Q: Why can't I change the entry date from Jan 1 on Step 6?

Step 6 of Sprintax Returns views the living arrangements for the entire year in question starting with Jan 1 and ending with Dec 31.

Q: I can't change the answer to certain questions on Step 6. What should I do?

Please be aware that the response to certain questions may be restricted based on the information you have supplied thus far.

Q: Where to find the discount code?

Any discount codes provided by IIE are sent via email alongside the instructions for your tax filing. Please check your inbox and Spam/Junk folder as well. If you cannot locate the tax code sent to you contact your IIE advisor. Please note that the discount codes change every tax year and you will receive an email with the code you'd need to use for the tax filing fees each year.

Q: Sprintax says I don't need to file a State return? How to fix this?

Please note that you may not have State tax filing obligations based on the details provided in your account. Each State tax office has different regulations regarding who needs to file a State tax return depending on the income received, tax paid and period of stay in that state amongst other requirements.

Q: Why do I owe money to the State tax office on my Fulbright grant?

Different states have different tax laws and regulations so you may owe state tax on your scholarship funds disbursed by IIE. In that case you may be eligible to receive a refund from IIE on the taxes owed on scholarship disbursed by the organization. First you must submit your state tax return with the taxes owed directly to the state. Then you can submit a request for reimbursement to IIE. You must include a copy of your state tax return and documentation of payment (copy of check or copy of bank statement).

This reimbursement request can be submitted through your IIE self-service portal or alternatively send your request to tax@iie.org. You must include documentation verifying that you paid the states taxes and a copy of the state tax return verifying the owed amount.

If approved, you can expect reimbursement within 4 weeks of submitting your request.

You should not owe Federal taxes on your IIE-administered scholarship, however, you may owe taxes from another source of income such as university scholarship or work-related income reported on a W2 form. If you have questions about why you owe taxes, please contact the source of your other income or email IIE@sprintax.com.

Q: How to pay my State tax liability?

You can pay the amount you owe to the State tax office either by sending a check with your return or online on the tax office website. The payment methods may differ from state to state but in general, the majority of the state tax offices should be able to accept online payments via credit/debit card. In the PDF prepared by Sprintax, you will find full instructions on how to file your return and how to pay the amount due.

Q: Can I e-file?

You may be eligible to e-file and if that's the case you will see the 'Proceed with e-file' button at the last page of Sprintax (Step 8 Finalizing).

You can e-file your Federal return and you will be notified if it's accepted or rejected. If you're not eligible to e-file or the return is rejected, you will need to print your Federal form and mail/post it to the IRS on paper.

The e-filing option is only available for the Federal income tax return. If you have any other forms prepared by Sprintax, for example state tax returns, you will need to mail/post them. The official tax filing deadline is the 15th of April after the year you are filing for (example: for 2023 tax returns the

deadline was 15th of April 2024). You can still submit your tax returns after the official due date as well, but please note late filing of a tax return may result in penalties for late filing and/or payment of tax in some cases if tax is due on the tax return.

Q: How to post/mail my forms? Where to post/mail my forms?

After you complete Sprintax Returns and generate the tax forms (federal tax return, state tax return, etc.) you will be able to download each tax form pack with instructions.

The instructions would contain the filing deadline for the particular tax form, what documents, if any you'd need to attach to the tax return, where to sign the tax form before mailing, etc.

It will also include the mailing address for each tax form. Please keep in mind that each tax form may have a different mailing address. For example, federal tax return would have one mailing address listed in the instructions where you'd need to send the tax return, while a state tax return may have a different address. Please mail each form to the address listed in the instructions of each tax pack.

Q: The Zip code box is in red, and I cannot continue further. What should I do?

To proceed, please provide the accurate zip code corresponding to your U.S. state and address.

Q: What is a billing address?

Billing address is the address linked to your bank account and the one you registered with your bank when you set up your payment method with your bank. A billing address is usually your listed home address and should be updated if you move house.

Q: How to track my Federal tax refund?

You can check the status of your Federal refund here: <https://www.irs.gov/refunds> and if no information is provided on their website this means that they either haven't started working on your forms yet or they haven't received them. You can confirm the delivery of your papers to the tax office by contacting the postal services used.