A Guide to Sprintax Calculus

SPRINTAX CALCULUS GUIDE

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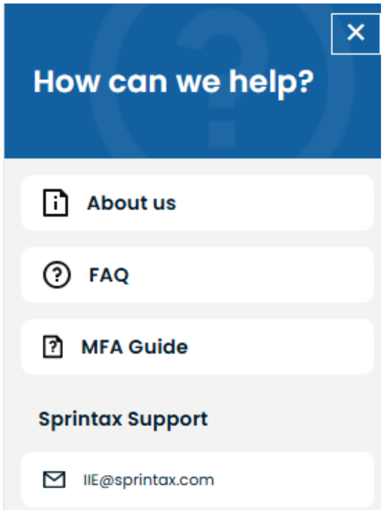
Logging in to Sprintax Calculus



- 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.

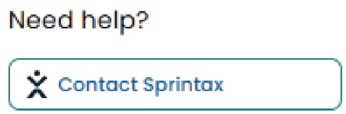
  If the link is inactive, navigate to https://calculus.sprintax.com/forgotten-password/

- 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:

  - 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.

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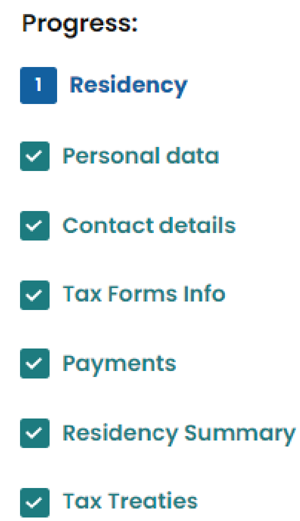
Your details



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

- 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.

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.

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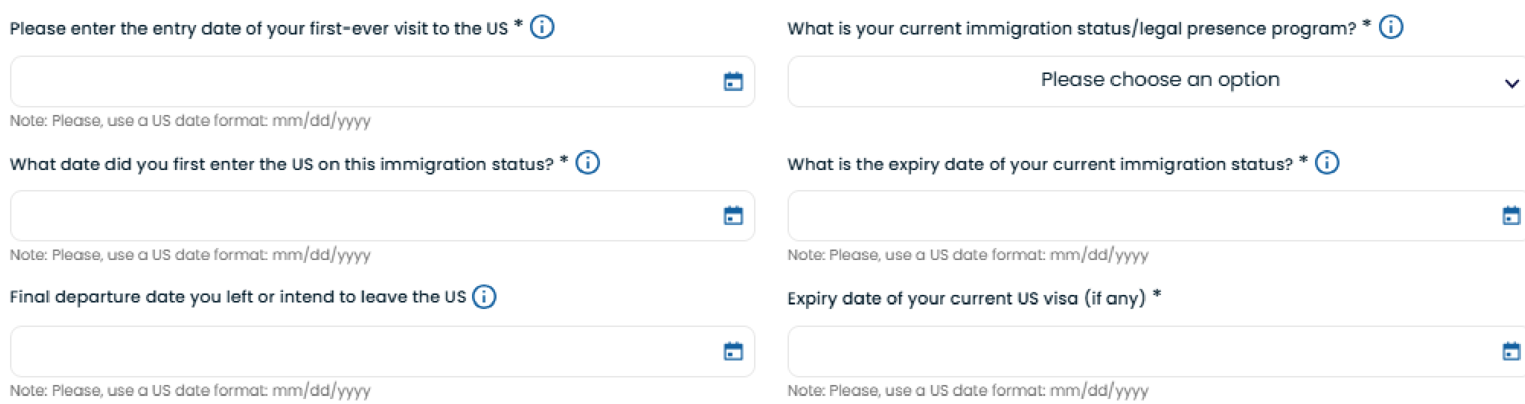
Residency

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



- 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 current status. If you have not been to the US prior to entering on your current status, then please put the date you entered on this status in this field.
- Field “**What is your current immigration status**” should show your correct immigration status as indicated on your immigration documentation (DS-2019 form, box 4, if you are on J status, F1 - Student, if you have an I-20, etc). 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 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 status expires (DS-2019 form, I-20 expiration date,etc).
- 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 expiry date of your status (for example SEVIS end date on your DS 2019 or I-20).

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- 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.


Country of Citizenship *

Indonesia

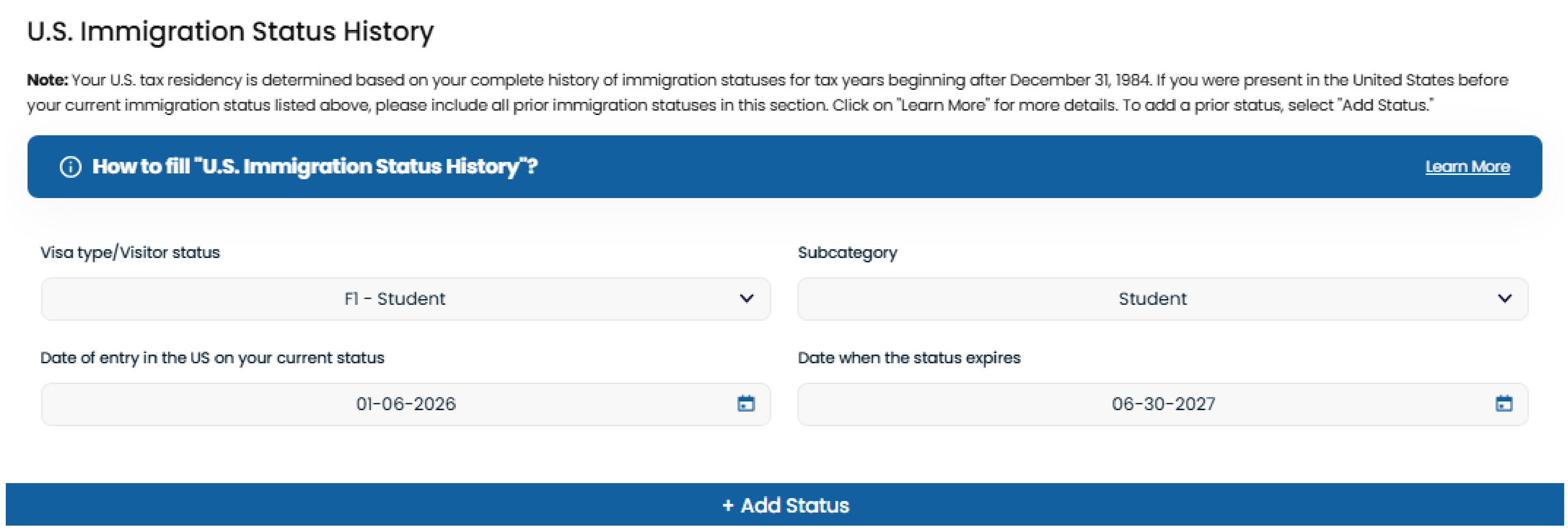
Country of residence *

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 competed if you have visited the US on a different occasion prior to your current visit.

You should only complete prior visits to the US on a F, J, M, or Q visa since 1989 or have visited the U.S. in the last 3 years on any other immigration status/visa.


U.S. Immigration Status History

Note: Your U.S. tax residency is determined based on your complete history of immigration statuses for tax years beginning after December 31, 1984. If you were present in the United States before your current immigration status listed above, please include all prior immigration statuses in this section. Click on "Learn More" for more details. To add a prior status, select "Add Status."

How to fill "U.S. Immigration Status History"? Learn More

Visa type/Visitor status: F1 - Student

Subcategory: Student

Date of entry in the US on your current status: 01-06-2026

Date when the status expires: 06-30-2027

+ Add Status

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- If you’d like to add previous visits to the US, please click on **+Add Status**.

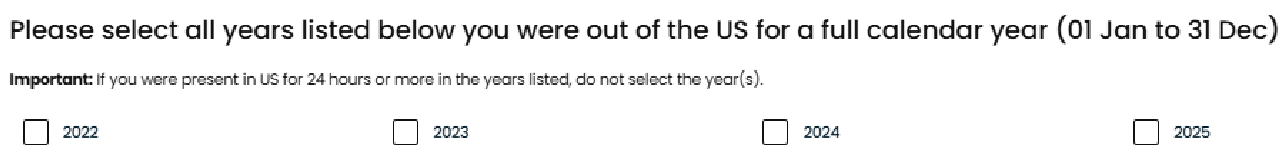
  - For previous statuses on F, J, M or Q visa you can enter initial entry and final exit dates (you do not have to enter temporary absences from US during those periods for vacation) for visits to the US after 1989.

Example: Your 2026 status is J1 - Student, however, you have previously been on F1 - Student status from 2018 until 2022. In “Visits to the US”, please enter the initial entry date in 2018 and the final exit date in 2022 of the previous F1 status.

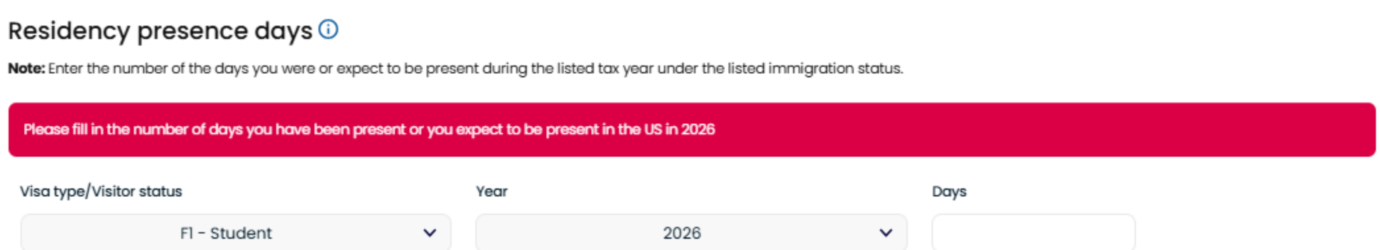
  - For previous statuses that are **not** F, J, M or Q please provide all entry and exit dates for the last 3 calendar years only.

Example: Your 2026 status is J1 - Student. You previously held a B2 – Tourist visa in 2018, 2020, and 2024. Only the 2024 visit falls within the last 3 years, so enter that visit only. The 2018 and 2020 visits are outside this period and do not need to be entered.

- 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.



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



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Personal Data

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

Personal Informaton

Given name/First name *

Middle name

Surname/Last name *

Date of birth *

Place of birth

Please choose an option

City of birth

- 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

Note: *Select "Yes" only if you have applied for an SSN (Form SS-5), and you are still waiting for it to be processed. Otherwise, select "No" or "I want to reapply".*

Have you applied for an ITIN before? *

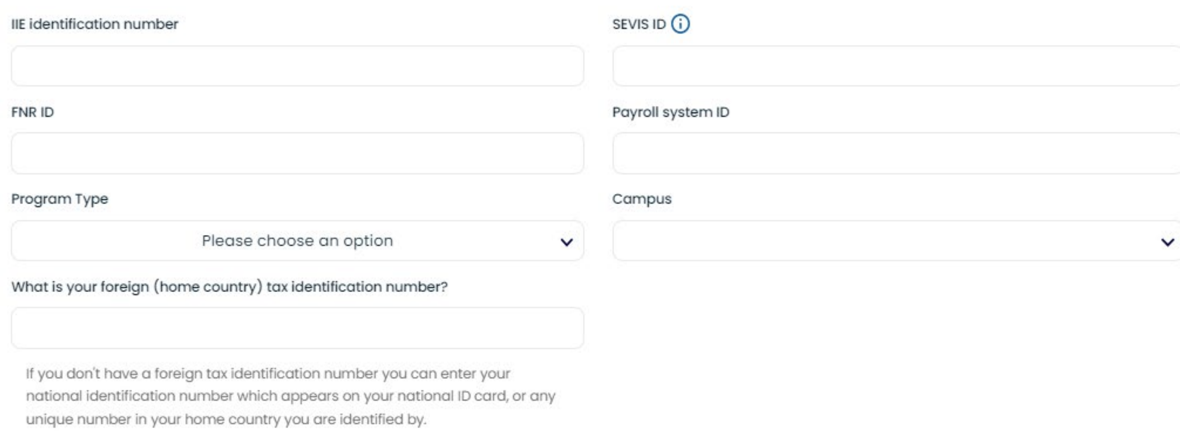
Yes No I want to re-apply

Note: *Select "Yes" only if you have applied for an ITIN (Form W-7), and you are still waiting for it to be processed. Otherwise, select "No" or "I want to reapply".*

- Fields “IIE Identification number”, “FNR ID”, “Program Type” and “Campus” would be pre-populated by IIE and/or locked for editing.

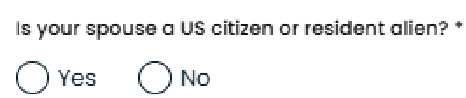
- If SEVIS ID field is blank you can locate the number at the top right corner of your DS-2019, otherwise you can leave blank.
  Note: SEVIS ID field is mandatory if you did not enter U.S. SSN or ITIN, otherwise, you can leave blank.

- 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.



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

- If you select you are married, please also make a selection whether your spouse is a US citizen or resident alien.



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Contact Details

- Enter your **US address**

Enter the address you reside, or resided, while in US during 2026. **Do not enter IIE's address.**

Your US Address

Address (Number, Street)

Address (Apartment number)

Address (City)

State

Please choose an option

ZIP code

- 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)

Address (City)

Country *

Please choose an option

Postal code/Zip code

- 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.
- Your contact details, especially your US address and phone number, should match what IIE has on file. If not please update it with IIE in addition to updating it in Sprintax.

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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 2025? *

◉ **Yes** ○ No

- **Scholarship or fellowship grants (Income Code 16)** is selected by default

☑ 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.”

Tax treaties in prior years

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 2025

- [ ] 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

Jasmine 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 2026, Jasmine Smith was F1 - Student visa holder under subcategory: Student. As a Student at Demo Institution, Educational institution, Jasmine Smith receives Scholarship or fellowship grants, covered by tax treaty article 19(1) of U.S. - Indonesia.

ARTICLE 19 Students and Trainees

(1) (a) An individual who is a resident of a Contracting State immediately before making a visit to the other Contracting State and is temporarily present in the other State solely: (ii) as a recipient of a grant, allowance or award for the primary purpose of study, research or training from the Government of either state or from a scientific, educational, religious or charitable organization or under a technical assistance program entered into by the Government of either State; shall be exempt from tax in that other State for a period not exceeding five years from his date of arrival in that other State on amounts described in subparagraph (b). (b) The amounts referred to in subparagraph (a) are: (ii) the amount of such grant, allowance or award;

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.

The United States has income tax treaties with a number of foreign countries. Under these treaties, residents of foreign countries may be eligible to be taxed at a reduced rate or exempt from U.S. income taxes on certain items of income they receive from sources within the United States. Since your country of residence does not have a treaty with the United States, you will be taxed at the applicable tax rate.

- 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.

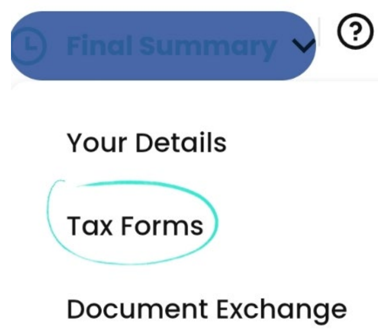
Final Summary

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).

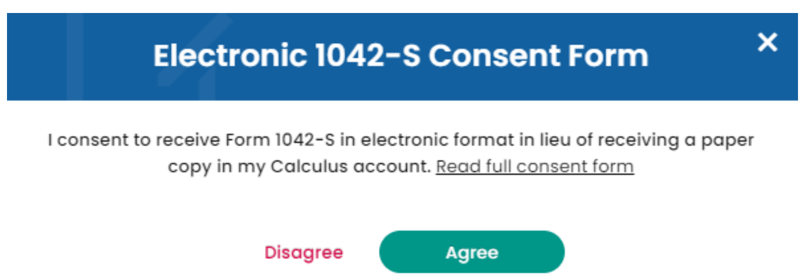
If you are accessing Calculus from a mobile device, click on the drop-down at top to access "Tax Forms" section.



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

Consent missing

Consent present



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- **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 “Your Details” section. You can either e-sign or download and sign manually.

Non-Resident Tax forms

Form W-8 BEN, Income code 16 — Review and sign

Expiry date: Not Determined

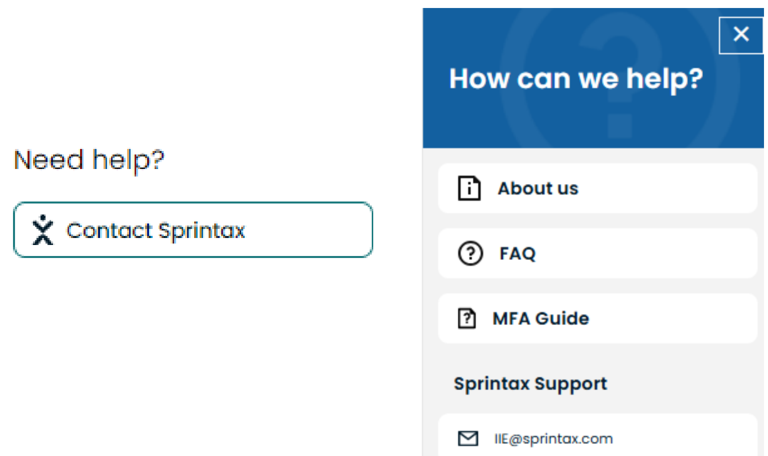
Purpose of form:

Form W-8BEN "Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding" is used by nonresident aliens, that received payments subject to US withholding that are from US sources, to establish their foreign status. The form also provides an exemption from, or reduction of, withholding for certain types of income under a tax treaty benefit (such as scholarships, fellowships, grants and stipends that do not require the performance of a service; dividends; royalties; pay for independent personal services performed, etc.).

What to do next: Providing Form W-8BEN to the Withholding Agent: Demo

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.



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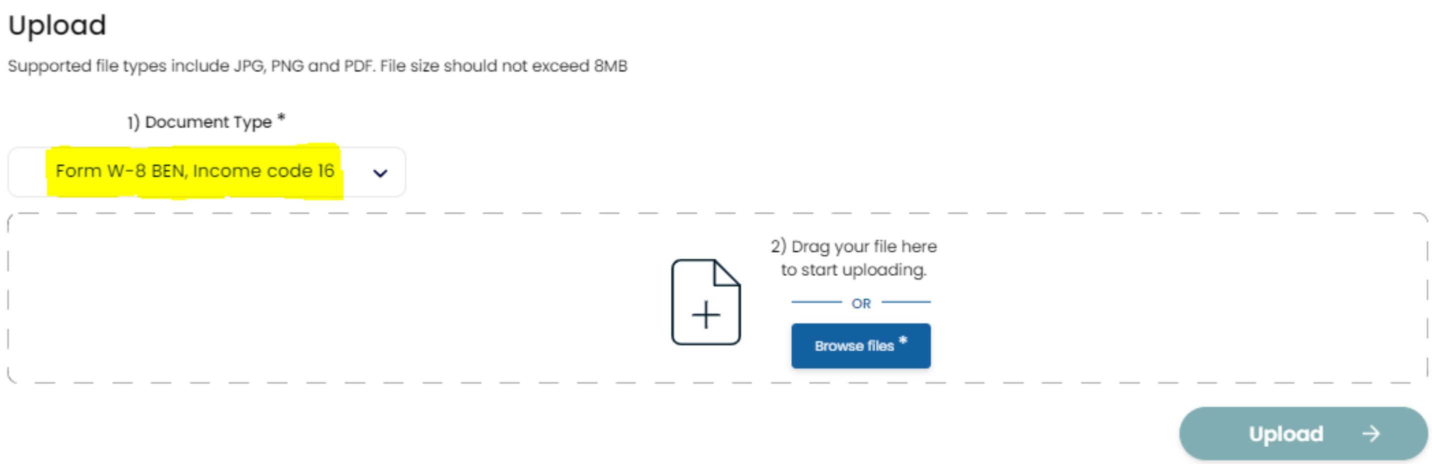
- To sign manually, click on the document itself, download, sign and then upload signed Form W-8BEN to the **Document Exchange**.

- Be sure to choose the correct Document Type “Form W-8 BEN Income Code 16” when uploading:



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

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