

## Frequently asked questions about Sprintax Calculus

Sprintax Calculus portal: <https://calculus.sprintax.com/>

The software that you are using to file your personal tax returns is called **Sprintax Returns**. GW does not have access to this software; therefore, GW Tax cannot provide much guidance on it. You will use **Returns** to file you required ANNUAL tax return, such as 1040-NR and/or 8843. You will use certain tax forms such as 1042-S, W-2, etc. to report information to the IRS.

**Sprintax Calculus** is the system GW uses to maintain your international tax documents as required for IRS compliance. **Calculus** does NOT transfer data to **Returns**, therefore, they act separately of each other. GW uses **Calculus** to securely collect your visa, passport, signed tax forms, deliver tax forms, etc. and determine tax residency.

1. **When should I update my Sprintax Calculus profile?**
  - a. As a foreign national who receives payments from GW, changes to your immigration status, income types, residency country, residency state, tax ID, or certain other biographical information can greatly impact your tax withholding and reporting to the federal and state tax jurisdictions. To ensure that GW maintains your up-to-date and complete profile for the application of withholding tax and potential tax benefits, please update your profile as soon as circumstances change.
2. **Residency**
  - a. **Residency Information**
    - i. When did you first enter the U.S.?
      1. Enter the date which your first entered the U.S. on any immigration/visa status. If that date is different than the date you entered the U.S. on your current status, describe your previous entries in the section “Visits to the U.S.”. Please provide your I-94 full travel history or passport stamp as the support for this date.
    - ii. What is your current immigration status?
      1. Please select the combination of your visa type and the primary purpose of your visit in the U.S. For example, if you are a J visa holder, you will find your primary purpose of visit (program type) in box 4 of Form DS2019.
    - iii. What date did you first enter the U.S. on this immigration status?
      1. If you have previously received the same type of visa before, please enter the entry date associated with your earliest issued visa of this type.
      2. If you have changed your status while in the U.S. and have not left to re-enter the U.S. on your new status, fill in the date you switched to your new status.
      3. If you have been granted extension to your existing status while in the U.S. (i.e., OPT, CPT, or extended DS2019) and have not left to re-enter the U.S., fill in the date you entered on your current status, not the date the extension was granted.
    - iv. What is the expiry date of your current immigration status?

1. If you currently are a F or M visa holder, fill in the Program End Date in the Program of Study section. If you have an OPT or CPT ends on a date later than the original Program End Date, please enter the OPT or CPT end date.
  2. If you are a J visa holder, fill in the end date found in Box 3.
  3. If you are exempt from visa requirements and travel under ESTA, or visa waiver, or hold a B visa type, enter your expected departure date.
- v. Expiry date of your current U.S. visa
  - vi. Country of citizenship
  - vii. Country of residence
    1. This is the country in which you are a tax resident during your visit to the US or immediately before coming to the US for this visit. Your country of tax residence determines the tax treaty that applies to reduce your taxes on US income if you meet the conditions of the applicable treaty provision.
- b. **Visits to the U.S.**
- i. Please add all Visa/Immigration statuses that satisfy ANY of the following criteria:
    1. Any Visa immigration activity within the past three calendar years.
    2. F, J, M or Q visa immigration activity since January 1, 1985.
    3. Visa immigration activity since January 1, 1985 for which you received treaty benefits.
  - ii. **NOTE:** Select the years you were out of the U.S. for a full calendar year (1/1-12/31). If you were present in US for 24 hours or more in the years listed, do not select the year(s).
3. **Tax Forms Information**
- a. Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from George Washington University in 20XX? Click ALL income types that apply. If you are unsure whether certain income codes apply to you, please select them and complete the relevant forms. Doing so will not affect you if you do not ultimately receive the associated payment.
  - b. Income types:
    - i. Income Code 16 Scholarships and Fellowship Grants:
      1. A scholarship or fellowship grant is an amount given to an individual for study, training, or research, and which does not constitute compensation for personal services. Certain stipends, scholarships, or fellowships that do not fall under this Income Code should be reported under Income Code 23, see section below.
    - ii. Applicable visa type: F1, J1Income Code 17 Compensation for independent personal service
      1. Payments made to a non-employee individual who provided professional services to the educational institution. The individual is engaged in an independently established professional or business and provide a service outside of the educational institution's usual course of

business. For example, an academic guest speaker or lecturer, or a non-recurring workshop seminar leader or consultant.

- iii. Applicable visa type: F1, J1Income Code 18 Compensation for dependent personal services
  - 1. Payments made for personal services performed by an employee of the educational institution.
- iv. Applicable visa type: J1Income Code 19 Compensation for teaching or research
  - 1. Payments made to a professor, teacher, researcher or a research scholar for teaching or doing research at or for the educational institution.
  - 2. Applicable visa type: J1
- v. Income Code 20 Compensation during studying and training
  - 1. Payments for personal services performed while an alien is temporarily in the U.S. as a student, trainee, or apprentice, or while acquiring technical, professional, or business experience.
- vi. Applicable visa type: F1Income Code 23 Other income (awards, prizes)
  - 1. Use this category to report U.S. source FDAP (fixed, determinable, annual, or periodic) income that is not reportable under any of the other income categories. For example, prizes and awards are amounts received primarily in recognition of religious, charitable, scientific, educational, artistic, literary, or civic achievement, or are received as the result of entering a contest.
  - 2. Applicable visa type: F1, J1
- vii. References for income codes noted above:
  - 1. [2024 Publication 515](#)
  - 2. [Taxation of Wages for International Students | Tax Department | Finance Division | The George Washington University](#)
  - 3. [Taxation of Scholarships, Fellowships & Stipends | Tax Department | Finance Division | The George Washington University](#)
- viii. State forms:
  - 1. If you select income codes 18, 19, or 20, the following question will appear.

**In which state or states you have performed or expect to perform services for this employer/paying institution - George Washington University**

If you live in the DMV area, please select your resident state. Income tax in the DC, MD, and VA tri-state area is based on the location of residence rather than on place (or source) of income received.

If you live in other states, please select DC and your resident state.

If you move to a different state at any point throughout the year, please ensure that you update your state selection according to your new

resident address and complete the new state form generated. Please check all the states (up to 3) in which you resided.

- a. W-4 questions Complete Form W-4 questions so that your employer can withhold the correct federal income tax from your pay. Please include all your jobs in the U.S. during the calendar year. If you have two jobs at the same employer on two different payroll schemes, you need to consider them as two different jobs.
- ix. 8233/W-8BEN/W-9 questions
1. Compensation:
    - a. The amount you expect to receive during the current calendar year in exchange of you performing services (Income Code 17, 18, 19, or 20). An estimate is acceptable for these fields.
  2. Scholarship:
    - a. The amount you expect to receive during the current calendar year for Income Code 16. If you don't know the exact amount you will receive for the calendar year, an estimate is acceptable.
4. **GW Tax Dept provided Tax Forms:**
- 1042-S:** If you are a nonresident for tax purposes who received a non-payroll award (i.e., stipend, prize, award, excess financial aid or honorarium) or if you had a tax treaty benefit in the tax year, Form 1042-S will be provided to you by GWU. If you have not received it by March 15th, please contact the GWU Tax Department ([tax@gwu.edu](mailto:tax@gwu.edu)).

**Sprintax Calculus resources:**

- [GW Tax Department | Information for International Students and Scholars](#)
- [Sprintax Calculus Instruction Manual](#)
- Multi-factor authentication ("MFA") to e-sign documents: [Sprintax 2FA Guide](#) and the [Sprintax 2FA Video](#)
- Sprintax Live Chat for online assistance (Monday-Sunday 09:30 EST - 18:00 EST)
- Email Sprintax at [calculussupport@sprintax.com](mailto:calculussupport@sprintax.com)