



sprintax  
calculus

# 1042-S Manual

Version 2025 2.1

Forms 1042-S forms in Sprintax Calculus can be generated using two different methods up to the administrator's choice.

## I. Importing external 1042-S data

This method allows payors to import the financial part of forms 1042-S in Calculus database in bulk using an XL CSV-format spreadsheet. A CSV blank sample can be downloaded directly from the software.

**Note:** In order to use the Import 1042-S method, first you shall turn off the Payments module if it has been switched on from the Account Settings -> General Settings:

### Payment Entry Module (PEM)

Do you want to use the Payment entry module (PEM)? \*

Yes  No

Then, from the 1042-S Form tab at the Settings, you need to tick the following option:

### Individual Users

I want to use 1042-S import function

Note: Use this function only if you are calculating 1042-S data outside of Sprintax Calculus PEM module.

1) **Download Import 1042-S CSV file** if you do not already have it.

#### How to download the CSV workbook?

Log in Sprintax Calculus and go to **Imports -> New Import**

1. Click on **Individual 1042-S**
2. Click on '**sample spreadsheet here**' to download the import csv file.


## New Import

### Upload foreign person data

Document type:

Individuals  Vendors  Individual 1042s  Vendor 1042s  Documents

Please upload your foreign person data file to Calculus. Acceptable formats are **CSV** types of **MS Excel** files (Comma Delimited).  
(download our [sample spreadsheet here](#))



Drag your file here to start uploading.

OR

[Browse Files](#)

**2) Start completing your CSV file.** Note that this file collects only the financial part of form 1042-S.  
The financial part of the 1042-S data of foreign persons in receipt of forms 1042-S includes the following mandatory fields/values needed for 1042-S forms:

#### Unique form identifier (UFI)



The UFI is a random 10-digit unique number which must be different to all other 1042-S forms' UFIs. It must be unique for the form. If a single recipient is in receipt of more than one forms 1042-S, each form must show a different UFIs as well.

#### Example of entries:

2020031591 (any random 10-digit number)  
0000023563 (any random 10-digit number)  
256 (the system will assign 7 zeroes in front of the provided number until its length reaches the required 10 digits - 0000000256)  
1 (the system will assign 9 zeroes in front of the provided number until its length reaches the required 10 digits - 0000000001)

**Box 1:** Income code (1042-S Instructions, p.32; <https://www.irs.gov/pub/irs-prior/i1042s--2022.pdf>)

**Box 2.** Gross income

**Box 3.** Chapter indicator (*generally 3 unless Ch.4 withholding applies*)

**Box 3a.** Chapter 3 Exemption code (from Form 1042-S instructions, p. 33)

**Box 3b.** Tax rate

**Box 4a.** Chapter 4 Exemption code (from Form 1042-S instructions, p. 33)

**Box 4b.** Chapter 4 Tax Rate (*generally 00.00 unless Ch. 4 withholding applies*)

**Box 7a.** Federal Tax Withheld

**Box 10.** Total withholding credit (*mandatory if different from 7a; If 10 = 7a, enter either 7a in Box 10 or leave blank*)

**Box 12b.** Withholding agent's Ch. 3 status code (from Form 1042-S instructions, p. 33)

**Box 12c.** Withholding agent's Ch.4 status code (from Form 1042-S instructions, p. 34)

**Box 13f.** Recipient's Ch.3 Status code (from Form 1042-S instructions, p. 33)

**Box 13g.** Recipient's Ch.3 Status code (from Form 1042-S instructions, p. 33) (*Generally blank unless Ch. 4 withholding applies*)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
Ind_Vend	E-mail	Student number	UNIQUE FOR	Is the curr	The curre	Income C	Gross Incc	Chapter 3	Chapter 3	Chapter 3	Chapter 4	Chapter 4	Withhold	Net Incom	Federal T	Check if t	Check if w	Tax withh	Overwith	Total with	Tax paid b	Withhold	Withhold	Withhold	Recipient	Recipi
	browna107@tds.com			11		20	2000	3	4	0	16	0			0					0		20	24		16	
	browna107@tds.com			12		16	6380	3	4	0	16	0			0					0		20	24		16	
	dones107@tds.com			13		19	8088	3	4	0	16	0			0					0		20	24		16	
	akkayae107@tds.com			14		16	5438	3	0	14	16	0			478.35					478.35		20	24		16	
	jelenab107@tds.com			15		16	16888	3	4	0	16	0			0					0		20	24		16	
	jsmithsecond107@tds.com			16		17	23567.88	3	0	30	16	0			3500					3569		20	24		16	
	kim107@kr.com			17		16	18500.88	3	4	0	16	0			0					0		20	24		16	
	park_107@tds.com			18		16	13139.88	3	0	14	16	0			1839.53					1839.53		20	24		16	
	SS_US108@egu.edu			19		16	9632	3	4	0	16	0			0					0		20	24		16	
	Hamler107@egu.edu			20		16	19966	3	0	14	16	0			2604.65					2604.65		20	24		16	
	Richard0107@tds.com			21		16	12563	3	0	14	16	0			1302.33					1302.33		20	24		16	

Note that you should match the relating row in the file to a specific Calculus registered user. The match must happen using either recipient's Calculus registered email address (**Column B**) or recipient's Student ID (**Column C**).

The red colored columns are mandatory minimum information collected for the production of form 1042-S. If any of the remaining is also applicable, please list the information in the relating columns.

**3) Make sure there is minimum required information available in 1042-S recipients' profiles in the software**

Once you have your CSV filled in with all 1042-S forms data, make sure there is minimum required information to produce a 1042-S to a user. Generally, each recipient who is supposed to receive a 1042-S form must have the following information in their Calculus profile **before importing the 1042-S data**:

1. US TIN/Foreign Tax Number/Date of birth - at least one of the three is mandatory for the production of 1042-S (use the latter two only in case the recipient does not have or is not required to have a US TIN)

2. Address – non-mandatory, but recommended
3. Country of residence – mandatory if lower tax treaty rate was applied

If those are missing in Calculus, make sure to either manually add this information for the users or perform an upfront bulk **user data import** before the actual import of the 1042-S data.

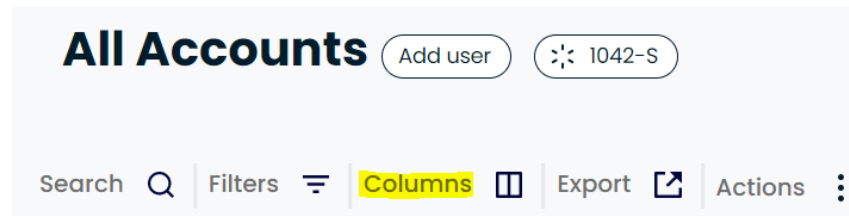
3.1 You can setup a View to allocate the users who do not have this information.

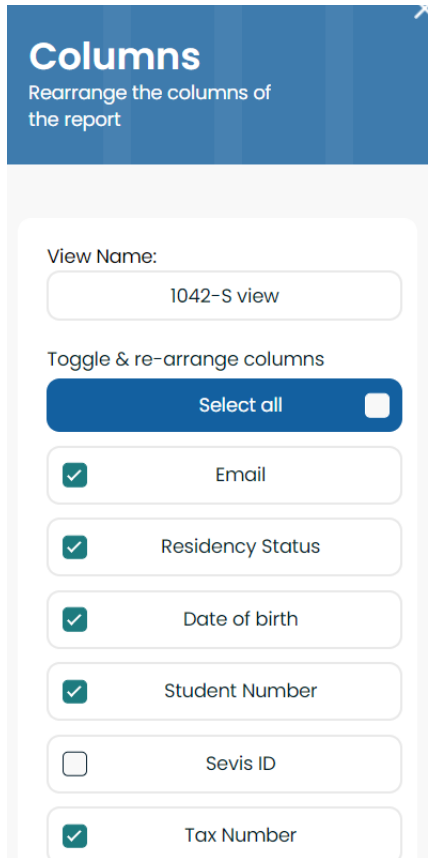
**To do so:**

> go to Users -> All Accounts and click on Columns, then click on **New View +**

> choose the columns Email, Student ID, Tax Number, Foreign tax number, Date of birth and country of residence (you can add addresses columns if you want to verify if a user is missing address in Calculus), enter the name of your View and hit the *Save and apply* button at the bottom of the list.

This view will give you quick overview of the relevant columns. You can also Export the information to an external Csv file by clicking on the *Export* button.





**Columns**  
Rearrange the columns of the report

View Name:  
1042-S view

Toggle & re-arrange columns  
Select all

Email

Residency Status

Date of birth

Student Number

Sevis ID

Tax Number

You can further use excel filters to check the users with missing TINs/DOB or country of residence in the software.

#### 4) Importing the data in Calculus database

After making sure that all 1042-S recipients have the necessary information to produce their 1042-S form, proceed with uploading the spreadsheet in Calculus.

##### Steps:

- 1.1.If your 1042-S data spreadsheet is in a format different to either CSV(Comma delimited) or CSV (MS-DOS), convert the file into csv by Saving it As "CSV (Comma Delimited)" or CSV (MS- DOS)
- 1.2.Go to Imports -> New import and select 'Individual 1042-S'.
- 1.3.You can either drag and drop your file or click on the 'Browse files' button to browse your computer. Then, click on **Upload** after selecting the file.

## New Import

### Upload foreign person data

Document type:

Individuals
  Vendors
  Individual 1042s
  Vendor 1042s
  Documents

Please confirm your file:

import\_template\_1042s CSV.csv  
(2.72 KB)

✖ Remove

📁 Upload


Upon clicking on the 'Upload' button, you will be automatically redirected to Imports -> Imports History. You need to click on the 'Import' button.

## Imports History

Type	Created	Sub-Imports	Status	Actions	Download	Delete
Forms 1042s (Individual)	12/21/2022 12:55:44	—	New	Import	—	 

The import will be automatic, without need to map fields. Please, allow some time until the import action is completed. You should receive an email when the import is completed and the rows for which the import was successful. If a row is not imported, an explanatory text will be displayed in the email. Depending on the errors, you can update your spreadsheet (or the Calculus profile of the recipient) wherever needed and upload the file (updated file) again.

If the import is successful for a 1042-S recipient, the status in column "1042-S status" will change to Completed in the User list and 'Imported' in the Imports menu.

Type	Created	Sub-Imports	Status	Actions	Download	Delete
Forms 1042s (Individual)	11/10/2022 16:17:15	—	Imported	View result	—	 —

**All Accounts** Add user 1042-S

Search  Filters  Columns  Export  Actions

<input type="checkbox"/>	User names	Account status	1042-S status	Email	Residency Status	Date of birth
<input type="checkbox"/>	Joseph Sloman	Unprocessed	Completed	dones109@tds.com		12/24/1995
<input type="checkbox"/>	Joseph Sloman	Unprocessed	Completed	jsloman@sprintax.tds		12/24/1995

Tip: You can compare the number of the users who have “Completed” 1042-S status to the number of the recipients in your 1042-S import spreadsheet by setting a quick filter in the software.

*Example:*

*Filters > Create filter + > Filter name (“1042-S imported”) > Add condition > Filter by field > 1042-S status > Where value\* Contains > Criteria “completed” > **Save and apply***

**Filters**  
Apply criteria to the results showing in the current report

**Create Filter** ✕

Filter Name

Join conditions using \*  
 AND  OR

Filter Conditions \*  
 AND

■ Filter by Field \*

Where value \*

Criteria \*

*Once the import steps are completed, proceed to next Step:*

**5) Click on the 1042-S button in order to open the 1042-S control modal**

**All Accounts** Add user 1042-S

After confirming that the total of “completed” recipients match the number of the total number of recipients from the 1042-S spreadsheet (all 1042-S import spreadsheets if information is imported in parts),

hit the **Generate** button.

### 1042-S

Generate 1042-S PDFs, export PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.


### 1042-S

Please make sure you have imported 1042-S forms or you have reviewed all payments in Sprintax Calculus before you generate the 1042-S forms.

**Generate**

In order to export 1042-S forms in PDF, TXT or CSV, the forms must be generated first.


**Export**






**Finalize Year** 

Allow time until the Generation is completed. You will receive an email and a notification upon completion of the Generation process. It may take time depending on the number of the forms being issued. After the generation is completed, the status of all 'completed' users (1042-S column) will change to **'1042-S Generated'**.

## All Accounts

Add user

 1042-S

Search  Filters  Columns  Export  Actions 

The 1042-S forms are being generated. You will receive an email when the forms you requested are available for download.

## Your 1042-S PDF Report is ready

Hello,

The 1042-S PDF Report that you requested is available in Sprintax Calculus.

Log into your profile to access it.

Regards,  
Sprintax [Read more](#)

0 of 19 Selected			
User names	Account status	1042-S status	Email
<input type="checkbox"/> Joseph Sloman	Unprocessed	1042-S Generated	dones109@tds.com
<input type="checkbox"/> Joseph Sloman	Unprocessed	1042-S Generated	jsloman@sprintax.tds

Tip: Setting up a filter "1042-S forms generated" will help you to quickly check if all of the expected forms are "generated", in other words ready to be exported for the foreign person recipient. Go to *Filters* → *Create Filter +* → *Name your filter* → *Add condition (1042-S status)* → *Where value\* Contains* → *Criteria " 1042-S Generated"* → *Save and Apply*.

### Filters

Apply criteria to the results showing in the current report

1042-S Generated

Join conditions using \*

AND  OR

Filter Conditions \*

AND

Filter by Field \*

1042-S status ▼

Where value \*

Contains ▼

Criteria \*

1042-S GENERATED ▲

After confirming that all 1042-S forms are generated (Step 5), proceed to Next Step:

## 6) Export 1042-S

The Export option is available in three types - CSV, TXT and PDF



Recipients' copies may sometimes contain another sub-folder named "Paper 1042-S forms". The latter one will be available only in cases where at least one recipient did not consent to the electronic receipt of form 1042-S. You can quickly allocate those paper 1042-S in this sub-folder as the forms of recipients who did not consent to electronic 1042-S will not be attached to their profiles. The name of the PDF copies will contain Student ID and/or recipient's name and email address.

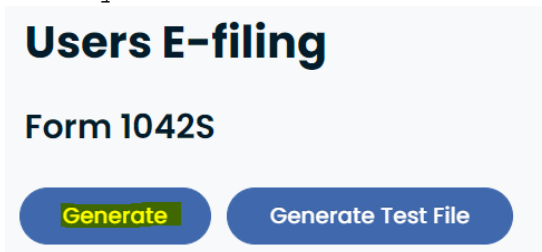
**Note: Export PDF option will contain the Recipients' copies only after finalizing the tax year in Calculus**

Name	Type	Compressed size	Password ...	Size
Recipients' copies	File folder			
E1270982_Joonggi_Song__brown1...	Adobe Acrobat Document	80 KB	No	171 KB
E1270983_Doroty_Done__dones107...	Adobe Acrobat Document	42 KB	No	104 KB
E1270984_Yusuf_Akkaya__akkayae1...	Adobe Acrobat Document	42 KB	No	104 KB
E1270985_Helen_Burke__jelenab107...	Adobe Acrobat Document	42 KB	No	103 KB
E1270986_Martin_Smith__jsmithsec...	Adobe Acrobat Document	42 KB	No	103 KB
E1270987_Sena_Kim__kim107_at_kr...	Adobe Acrobat Document	42 KB	No	103 KB
E1270988_Songjun_Kang__park_s10...	Adobe Acrobat Document	42 KB	No	104 KB
E1270989_Saera_Li__ss_us108_at_eg...	Adobe Acrobat Document	42 KB	No	103 KB
E1270991_Baldwin_Eich__richardgy...	Adobe Acrobat Document	42 KB	No	103 KB

**Export TXT** - you can download a transcribed as per the IRS e-filing requirements text version of generated 1042-S forms.

To request txt export, click on *Export* → *TXT* → *Generate*

You will receive an email and a notification confirming that the text file is ready.



The link in the email will bring you to the screen "E-filing" again where you can download the generated file by clicking on "View".

**Users E-filing**

Form 1042S

Generate Generate Test File

Created On	File Name	Type	View	Status
12/06/2022 18:43:06	2021.ORIGINAL22639.0002.txt	Original	View	Generated

If you are e-filing forms 1042-S this file should be downloaded from Calculus and uploaded in IRS FIRE. Keep track of your e-file and update the status in the software once you have confirmation that the IRS accepted and processed the information.

## Users E-filing

### Form 1042S

Generate

Generate Test File

Created On	File Name	Type	View	Status
12/06/2022 18:43:06	2021.ORIGINAL22639.0002.txt	Original	<button>View</button>	Generated
11/08/2022 13:37:48	2021.TEST22639.0001.txt	Test	<button>View</button>	Generated

- Generated
- Not Yet Processed
- Good, Federal Reporting
- Bad

**Note:** If you have your own TCC (Transmitter Control Code) for e-filing forms 1042-S, make sure you update it in **Settings -> 1042-S Form** tab before generating a TXT export. To do so, go to Settings→1042-S tab -> Do you want to use Calculus for FIRE file generation (Yes)→ I want to use my own details for FIRE system **Enter details**→ Submit the **Settings**

Fire system details \*

- I want to use my own details for FIRE system - TCC and transmitter's data
- I want to use Calculus details for FIRE system - TCC and transmitter's data

Your FIRE system Transmitter's data (TCC)

Transmitter's Contact Person Name * <input type="text" value="Charlotte Lucas"/>	Transmitter's Contact Person Title (Controller/Responsible Officer/Etc) * <input type="text" value="Responsible Officer"/>	Transmitter's Contact Telephone Number and Extension * <input type="text" value="(888) 846-4841"/>
TCC * <input type="text" value="11111"/>	Transmitter's EIN * <input type="text" value="11-111111"/>	Transmitter's Name * <input type="text" value="Charlotte"/>
Transmitter's Address * <input type="text" value="US Address"/>	City * <input type="text" value="Boston"/>	State Code * <input type="text" value="MA"/>
ZIP Code * <input type="text" value="10111"/>		

### Generating Form 1042-T

If you are filing forms 1042-S copy A by paper to the IRS, you can generate form 1042-T in Calculus to send with the batch. In order to be able to do so:

A) Make sure Account Settings are set to "file 1042-S by paper"

Please select method of 1042-S transmission: \*

- Electronic (through FIRE)
- Paper

B) Hit "Export" in the 1042-S modal upon finalizing the tax year (described above)

## 1042-S

Generate 1042-S PDFs, export PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.

imported 1042-S forms or you have reviewed all payments in Sprintax Calculus before you generate the 1042-S forms.

Generate

In order to export 1042-S forms in PDF, TXT or CSV, the forms must be generated first.

Export

## 1042-T

Export Form 1042-T, Annual Summary and Transmittal of Forms 1042-S

Export

Form 1042-T will be automatically downloaded in your browser.

### 7) Finalizing the Tax Year

Finalizing the tax year in Sprintax Calculus using the **Finalize Year** button locks foreign persons' profiles and them or an administrator will be no longer able to edit/change their profile information.

If the forms have been generated and the tax year has **not** been locked immediately, foreign persons will still be able to sign in and change information in their profiles. Note that, the already generated PDFs or an already generated FIRE text file will not reflect the changes made after the generation process. A new Generation and a new Export must be run to reflect those changes.

## 1042-S

Generate 1042-S PDFs, export PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.

### 1042-S

Please make sure you have imported 1042-S forms or you have reviewed all payments in Sprintax Calculus before you generate the 1042-S forms.

Generate

In order to export 1042-S forms in PDF, TXT or CSV, the forms must be generated first.

Export

Finalize Year



Finalizing the tax year will also attach recipients' copies B, C and D in the Tax Forms section of the recipient's profile. They can download the forms by signing in into their accounts.

Finalize Year using the button after making sure that the generated forms reflect the current information:

You will see text that the tax year was locked:

ACTIVE	LOCKED	ACTIVE
2023	2022	2021

The foreign persons' profiles will look inactive after performing the finalization and the forms will be available for download:

## Tax Forms 2021 2020 2023 **2022**

### Congratulations – Your 2022 record has been finalized!

Note that your record is locked for changes after the tax year is finalized. If you want to apply changes to your record that you believe can affect your form 1042-S, contact TDS Demo 2.

I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Calculus account. [Consent form](#)

#### 1042-S Forms

Note: this is your 1042-S copy. You only need to keep it for your records. You will need it for your end of year tax return

#### Would you like to use our Sprintax tax preparation system?

You can automatically transfer your details and 1042-S forms to Sprintax Returns. Please select "Yes" below, and sign in to Sprintax Returns using the same credentials as your Forms account.

Yes, Take Me To Sprintax

No, Thank You

Download all documents



1042-S Income Code 20

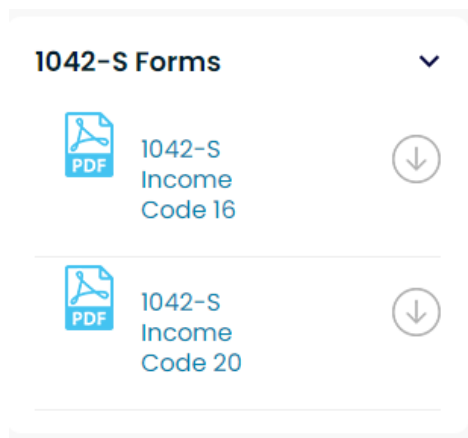
[Preview](#)



1042-S Income Code 16

[Preview](#)

Shortcuts to copies A and E are also available in the right panel of the related profile:



### 8) Sending notification email to all 1042-S recipients

Recipients who are supposed to receive their forms electronically, have to be notified when the forms are ready for download. You can do that directly in Sprintax Calculus.

A) To allocate only the ones that are supposed to receive 1042-S, set up the filter named "1042-S Exported"

Go to *Filters* → *Create Filter +* → *Name your filter* → *Add condition*

(1042-S status)

→ Where value\* Contains → Criteria "Exported" → Save and Apply

**Filters**  
Apply criteria to the results showing in the current report

**Create Filter** ✕

Filter Name  
1042-S Exported

Join conditions using \*  
 AND  OR

Filter Conditions \*  
AND

Filter by Field \*  
1042-S status ▼

Where value \*  
Contains ▼

Criteria \*  
1042-S EXPORTED ▲

B) Then from the 'Actions', click on **Select All Users** for this filter from the right-hand side panel. This will send the email script only to those selected in the active filter.

**Actions**  
Apply criteria to the results showing in the current report

**Select All Users**

All of 23 Selected Accounts

C) Select *Create new template* from the drop-down menu in the *Activation email* or *Send custom email*.

### Actions

Apply criteria to the results showing in the current report

Tax Residency



Tax Treaty



E-Mail



Activation E-mail

Missing Info Email

Missing Info Reminder

Custom Email

## Send custom email

Receipients: **All users selected**

Select an Email template

\* Create a new template



Select an Email template

\* Create a new template ▼

Template name

1042-S ready

Subject

!!! Important: Your 1042-S Form is ready!!!

Select an email template type

Select template type ▼

Email Text

↶ ↷ Paragraph Markers **B** *I* U

**Note** that if there are recipients, who have not activated their profiles throughout the year and are supposed to log in for the first time to download their 1042-S forms, instead of sending the custom email, you should rather target them with an activation email. The activation email contains a unique link where they can set their passwords and proceed to their accounts.

Considering this, you may want to adjust the activation email text instead to fit to both cases as per your needs.

Tips you may find useful:

To filter the recipients who did not consent to receive 1042-S electronically, go to Filters → Create a New Filter → enter Filter name → Add condition → Filter by field\* *Electronic consent* → Where value\* *No* → **Save and apply**

Set a quick View to check the 1042-S details and consent information of 1042-S recipients.

Go to Columns → New View → choose the columns you prefer to see (example: student ID, email address, residency status, 1042-S status, electronic consent) → **Save and apply**.

You can Export the columns into an external CSV and further use excel filters to allocate specific information.

The screenshot shows the 'All Accounts' interface with the following table:

User names	Email	Account status	1042-S status	Electronic consent
<input type="checkbox"/> Donika Vladimirova	dvladimirova@taxback.com	Locked	1042-S Exported	No
<input type="checkbox"/> Beryl Chou	bchou@mysprintax.com	Locked	No 1042-S Income	No
<input type="checkbox"/> Gino Nelson	gnelson@mysprintax.com	Locked	No 1042-S Income	No

In case you need to make any modification to the already generated 1042-S forms, you can use the 'Unlock' button. That will unlock the tax year and hide the recipient copies from the 1042-S recipients, so that you can make the needed edits upon filing the 1042-S forms to the IRS.

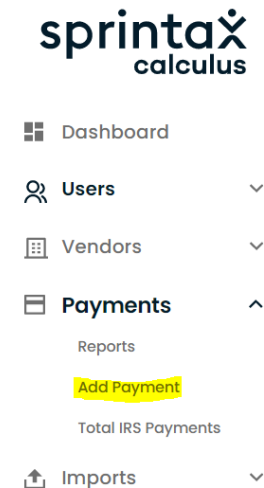
## II. Generating 1042-S forms based on Sprintax Calculus calculations

Note: that the tax calculations in Calculus are entirely dependent on the completion of recipients' profiles. It is very likely that tax treaty eligibility and rates could not be determined due to an incomplete profile, that a 14% rate could not be applied if a recipient never added their visa in Calculus, or certain treaty rates could not be applied due to a US TIN not provided in the software.

To generate 1042-S forms with Calculus payment information, make sure that all payments made to foreign persons in the tax year being reported are entered in the software. You can register payments manually or in bulk.

Adding payment for income recipients:

Go to Payments → Add Payment



### Add payment manually

Allocate the person you want to indicate manual payment for and click on their record until the right side panel shows. From the panel choose the first option "Add payment" and enter payment information → **Add payment +**

^

Foreign Person

**Tomiko Hando**

researcher@mysprintax.com

[View Account](#) →

[View all Payments](#) →

**Add Payment**
✕

Income code \*

16 Scholarship or fell...
▼

Payment subcategory \*

Other. Non-qualified ...
▼

Payment date \*

01-01-2022

Amount \*

\$
4600

Note, after adding a manual payment in Payments Module (either manually or in bulk), you can later edit any payment details but the payment date. If you want to adjust a payment made in error, simply change its amount to zero.

	A	B	C	D	E	F	G
	Email	Student_Number	Income_type	Subcategory	Payment_date	Payment_amount	Tax_rate_method
1	jsmith@template.com	999999999		16 Cultural Development. Non-qualified Education Expenses	01/17/2020	300	gross up
2	jsmith@template.com	999999999		16 Educational Materials. Qualified Education Expenses	02/13/2020	600	
3	jsmith@template.com	999999999		16 Health Insurance. Non-qualified Education Expenses	03/14/2020	120	gross up
4	jsmith@template.com	999999999		16 Housing Allowance. Non-qualified Education Expenses	05/18/2020	360	gross up
5	jsmith@template.com	999999999		16 Other. Non-qualified Education Expenses	09/08/2020	1200	
6	jwilliams@template.com	888888888		19 Income code 19	02/17/2020	980	
7	jwilliams@template.com	888888888		17 Income code 17	06/17/2020	330	
8	jwilliams@template.com	888888888		12 Royalties for Computer Software	12/28/2020	540	
9	jwilliams@template.com	888888888		12 Royalties for copyrights of literary, artistic	07/31/2020	660	
10	jwilliams@template.com	888888888		12 Royalties for copyrights of scientific works	08/24/2020	9700	
11	sgrant@template.com	777777777		19 Income code 19	08/31/2020	780	
12	sgrant@template.com	777777777		19 19 - Compensatory Grant	04/26/2020	2500	
13	manderson@template.com	666666666		16 Professional Development. Non-qualified Education Expenses	04/11/2020	310	
14	manderson@template.com	666666666		16 Stipend. Non-qualified Education Expenses	03/29/2020	780	
15	manderson@template.com	666666666		16 Taxes. Non-qualified Education Expenses	10/20/2020	580	
16	manderson@template.com	666666666		16 Travel. Non-qualified Education Expenses	10/22/2020	650	

### Add payments in bulk using a CSV file.

You can either create your own CSV or download a sample in the payment entry module:

Import + → Payments

## Add Payments

Import + | Export ▾

### New Import


#### Upload foreign person data

Document type:

Individuals
  Vendors
  Payments
  Vendor 1042s
  Documents

Please upload your foreign person data file to Calculus. Acceptable formats are **CSV** types of **MS Excel** files (Comma Delimited).

(download our [sample spreadsheet here](#))



Drag your file here to start uploading.

OR

[Browse Files](#)

Mandatory information to add payments in bulk:

**Unique identifier** - serves to match the payment to a specific Calculus user. The match must happen either by user's email address or Student ID (Columns A or B).

**Income type (code)** - the code of the income paid as per 1042-S instructions p 32, Appendix A

**Income sub-type** - this is required for Calculus import purposes.

Example: Tuition. Qualified Education Expenses or Stipend. Non-qualified Education Expenses

Acceptable income sub-types are. The name should be "Exact match".

Income code	Payment sub-category
Income code 10	Income Code 10
Income code 11	Income Code 11

Income code 12	Royalties for Computer Software
	Royalties for copyrights of literary, artistic
	Royalties for copyrights of scientific works
Income code 16	Tuition. Qualified Education Expenses
	Educational Materials. Qualified Education Expenses
	Health Insurance. Non-qualified Education Expenses
	Travel. Non-qualified Education Expenses
	Stipend. Non-qualified Education Expenses
	Taxes. Non-qualified Education Expenses
	Housing Allowance. Non-qualified Education Expenses
	Professional Development. Non-qualified Education Expenses
	Cultural Development. Non-qualified Education Expenses
	Other. Non-qualified Education Expenses
Income code 17	Income Code 17
Income code 18	Income Code 18
Income code 19	Income Code 19
Income code 20	Income Code 20
Income code 23	Income Code 23
Income code 42	Income code 42

**Payment Date** - mm/dd/yyyy

**Payment amount** - gross amount paid

*Optional:* for income codes 16 and 17 you can bulk import rate method as "Gross up" if you are grossing up the payments. You do not need to specifically list "Flat" in Column G. This is set by default for all imported payments unless gross-up is gross up is chosen.

**Generating 1042-S forms based on imported in Calculus throughout the year payment information.**

**Steps:**

### 1. Review payments information (Summary) of all 1042-S recipients:

You can refer to Summary in foreign person profile (if the profile was completed), or in all other cases, when the profile is missing sufficient information and the Summary step is locked, you can refer to *PDF summary* in the user side panel which represents the PDF version of *Calculus Online summary*. You can also review taxation of payments in Payments module directly either by allocation the recipients via Search or by requesting exports of 1042-S taxable income in payment entry module.

If payment information is complete, proceed to Step 2.

### 2. Generate 1042-S forms

Return to **Step 4** of Page 5 of these instructions.

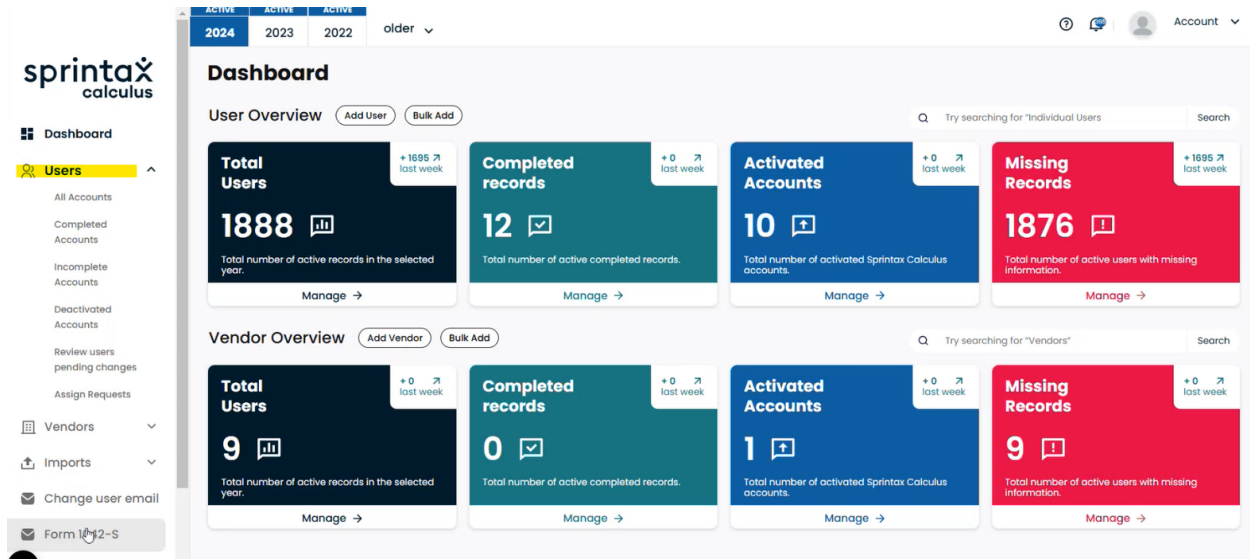
Note that the CSV samples used to import external 1042-S data and the one used to bulk import payments in the payments module are different.

The users supposed to receive a 1042-S in Calculus must have at least one of the three mandatory items: US TIN, Foreign tax number or a date of birth. If none of these is available, a 1042-S will not be produced even though a payment is available.

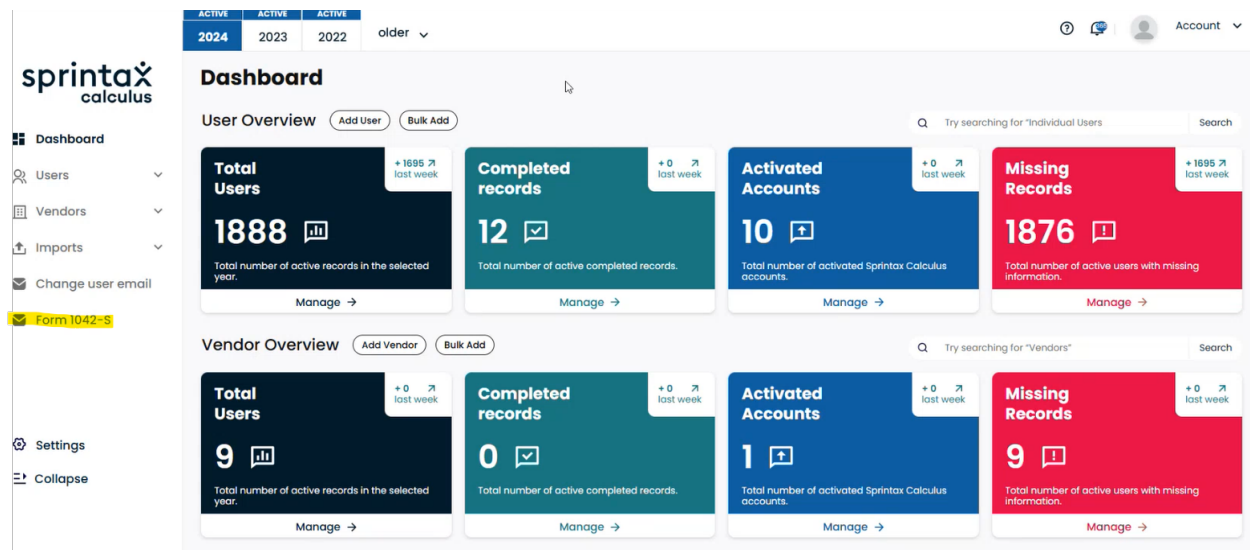
## Update: New 1042-S List Feature

Please note, the above-described process can be performed in a new list which provides a more visual experience for the 1042-S generation process.

The new 1042-S button in Calculus provides a separate list displaying details and fields for all generated 1042-S forms. These forms can also be found and exported from the user list in the left-hand panel.



## 1. Accessing the 1042-S List



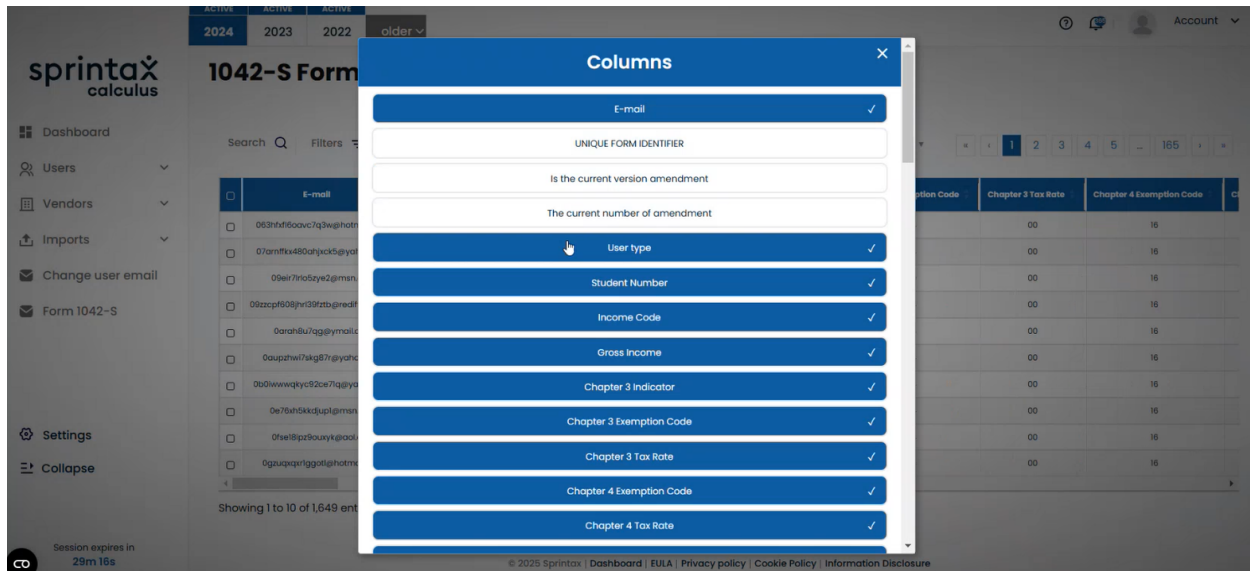
Click the 1042-S button to view a list populated with columns such as user type, chapter 3 and 4 codes, income code, gross income, and other details included in the 1042-S forms. Columns can be rearranged by clicking and dragging them.

The screenshot shows the '1042-S Forms List' interface. At the top, there are tabs for 'ACTIVE' years: 2024, 2023, and 2022, with a dropdown for 'older'. The interface includes a search bar, filters, columns, states, and actions. A table displays 10 entries, each with a checkbox, an email address, a user type, a student number, a unique form identifier, and other details. The table is titled 'Showing 1 to 10 of 1,649 entries'.

<input type="checkbox"/>	E-mail	User type	Student Number	UNIQUE FORM IDENTIFIER	is the current version amendment	The current number of amendment	Income Code	Gross Income	Chapter 3 Exemption Code
<input type="checkbox"/>	063hmf6oavc7q3w@hotmail.com	User	7986330487	000000126	off		12	\$2125	
<input type="checkbox"/>	07amfkk480ajuck5@yahoo.com	User	448124875	0000001670	off		12	\$2669	
<input type="checkbox"/>	09eir7ri0szye2@msn.com	User	2903256330	0000000688	off		17	\$1887	
<input type="checkbox"/>	0tzcpcf908jvr39fzb@rediffmail.com	User	621096744	0000001484	off		20	\$2483	
<input type="checkbox"/>	0arah8u7ag@gmail.com	User	460200659	0000000656	off		19	\$1855	
<input type="checkbox"/>	0aupzhl7akg87@yahoo.com	User	8661725287	0000001466	off		18	\$2465	
<input type="checkbox"/>	0b0lwwqky52ce7i@yahoo.com	User	5329200180	0000000988	off		18	\$1897	
<input type="checkbox"/>	0e76ah5kjdjupl@msn.com	User	2375469676	0000001496	off		11	\$2495	
<input type="checkbox"/>	0fse18prlouyk@aol.com	User	93637234	0000001708	off		19	\$1707	
<input type="checkbox"/>	0guzqqr1ggof@hotmail.com	User	877271707	0000001354	off		18	\$2353	

## 2. Columns Button

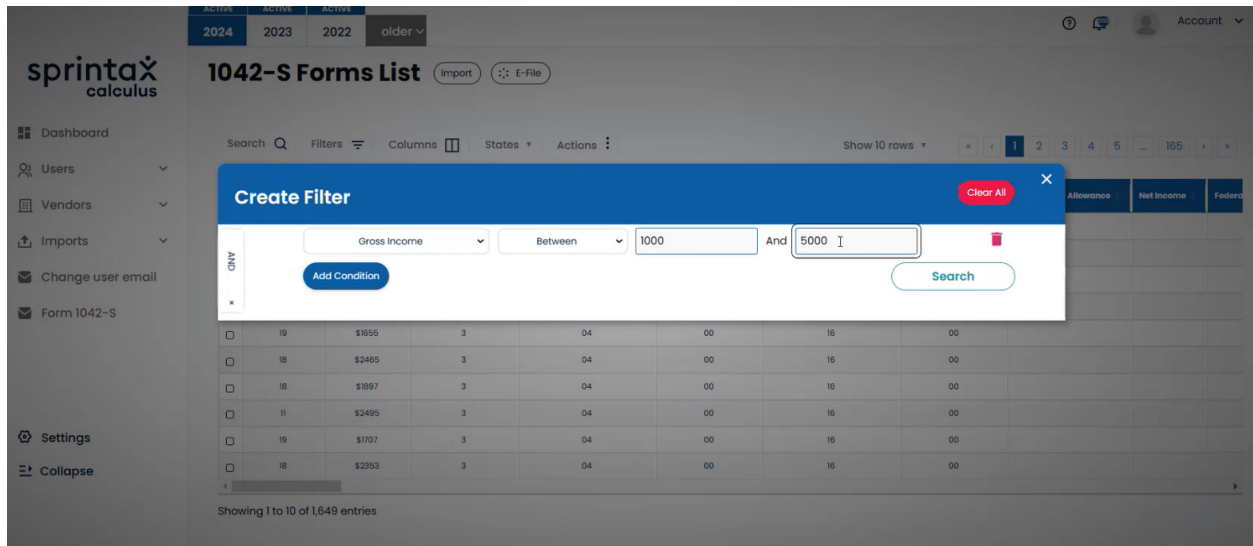
The Columns button allows you to select which columns to display. Unchecked columns will disappear from the list, while checked columns will remain visible.



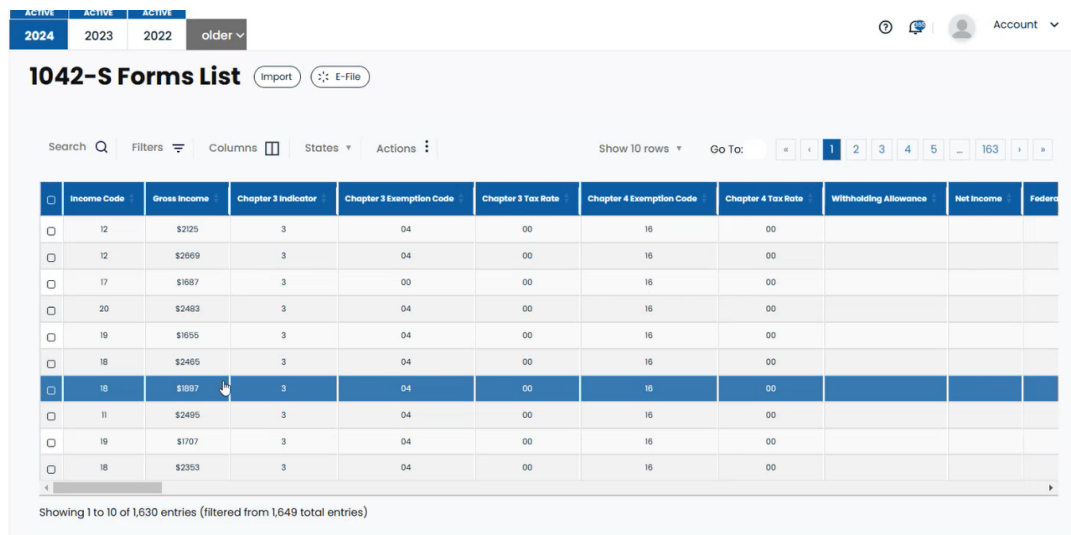
To close the window, click the "X" button or click outside the window to return to the list.

### 3. Filters Button

You can filter the list based on any displayed column. For example, to create a report with foreign nationals who have received an income between \$1,000 and \$5,000, click the gross income column, set the range, and then click "Search."

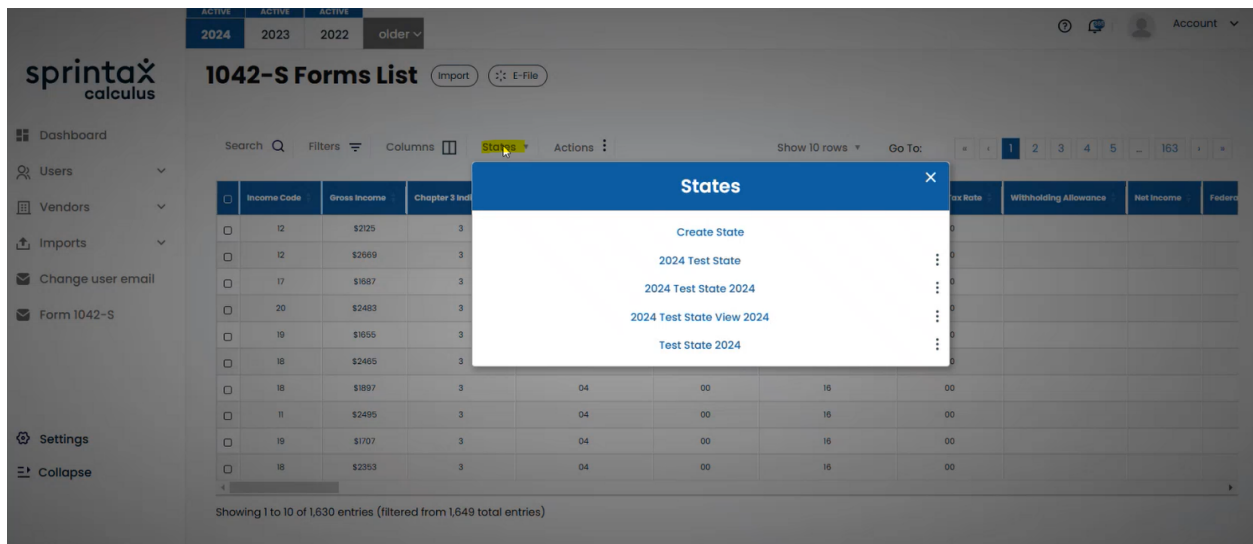


The filtered results will appear in the list.



### 4. States Button

The States button locks in the current list with any applied changes. To save a previously created state, use the three-dot button to either rename or remove it.



Click "Create State" to name and save the current list configuration.

## 5. Actions Button

After selecting the desired 1042-S forms, the following options will appear in the side panel:

- **Generate:** Creates copies of the selected 1042-S forms.
- **Export to CSV:** Exports the selected 1042-S forms into a CSV Excel file.
- **Export to PDF:** Exports the selected 1042-S forms into a PDF.
- **Delete:** Removes selected 1042-S forms from the list.

**1042-S Forms List** Import E-File

Search Filters Columns States Actions Show 10 rows Go To: 1

	E-mail	UNIQUE FORM IDENTIFIER	is the current version amendment	The current number of amendment	User type	Student Number
<input checked="" type="checkbox"/>	063hfhf0oavc7q3e@hotmail.com	000000126	off		User	7985330487
<input type="checkbox"/>	07amfpx480ahyck5@yahoo.com	0000001670	off		User	4481248715
<input checked="" type="checkbox"/>	08eir7r1o8nye2@msn.com	0000000988	off		User	2903258330
<input type="checkbox"/>	09zcpf608jyr39fxt@rediffmail.com	0000001484	off		User	6211086744
<input checked="" type="checkbox"/>	0arab8u7ag@gmail.com	0000000956	off		User	460200659
<input checked="" type="checkbox"/>	0aupthw7kqg87@yahoo.com	0000001466	off		User	8661725267
<input checked="" type="checkbox"/>	0b0lwwwky52ce71q@yahoo.com	0000000998	off		User	5329200190
<input type="checkbox"/>	0e76h5kklupj@msn.com	0000001495	off		User	2375469676
<input type="checkbox"/>	0fse18jpdouytk@aol.com	0000000708	off		User	9316372314
<input type="checkbox"/>	0gzuqxpr1ggott@hotmail.com	0000001354	off		User	8772771017

Showing 1 to 10 of 1,649 entries 5 rows selected

**Actions**  
Apply criteria to the results showing in the current report

Select All  5 of 1649 Selected Accounts

Generate

Export to CSV

Export to PDF

Delete

**Please note:** The delete function is only available for 1042-S forms generated using the 1042-S Import Sheet method and not for accounts with the Payments Entry Module active.

## 6. E-File Button

Located at the top left of the page, the E-File button opens a side panel with two options:

- **Generate All:** Generates copy A of all 1042-S forms in the list.
- **Export :** Produces a TXT copy of the 1042-S forms.

ACTIVE ACTIVE ACTIVE  
2024 2023 2022 older

sprintax  
calculus

1042-S Forms List Import **1042-S E-file**

Records were deleted successfully.

Search Filters Columns States Actions Show 25 rows Go To: 1

	E-mail	UNIQUE FORM IDENTIFIER	Is the current version amendment	The current number of amendment	User type	Student Number
<input type="checkbox"/>	06374f16a0vc7q3w@hotmail.com	0000001126	off		User	7986330487
<input type="checkbox"/>	07amfka480ahjck5@yahoo.com	0000001670	off		User	4481248715
<input type="checkbox"/>	09er7rn05ye2@msn.com	0000002688	off		User	2903258330
<input type="checkbox"/>	09zcpf608jrt39ztb@rediffmail.com	0000001484	off		User	621086744
<input type="checkbox"/>	0arah8u7ag@ymail.com	0000000656	off		User	460200859
<input type="checkbox"/>	0aup2hw7rkq87@yahoo.com	0000001466	off		User	8691725287
<input type="checkbox"/>	0b0lwwqlyc92ce7qg@yahoo.com	0000000998	off		User	5329200180
<input type="checkbox"/>	0e76ah5kxupl@msn.com	0000001496	off		User	2375469676
<input type="checkbox"/>	0fse19p2louxk@aol.com	0000000708	off		User	9316372314
<input type="checkbox"/>	0gzuqxqvt1g9ot@hotmail.com	0000001354	off		User	8772717017
<input type="checkbox"/>	0jy5v2trtt30pkr8@gmail.com	0000000012	off		User	9886297254
<input type="checkbox"/>	0jrs55nim680qmgd@msn.com	0000000878	off		User	1832241122

1042-S  
Generate 1042-S PDFs, export PDF in bulk, generate and download PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.

1042-S  
Please make sure you have imported 1042-S forms or you have reviewed all payments in Sprintax Calculus before you generate the 1042-S forms.

Generate All

In order to create 1042-S forms text file for e-filing with FIRE, the forms must be generated first.

Export

Session expires in 25m 24s

## 7. Imports Button

The Imports button transfers you to the Imports section for payment registration, depending on whether you use the 1042-S Import method or the Payments Entry Module.

ACTIVE ACTIVE ACTIVE  
2024 2023 2022 older

sprintax  
calculus

New Import

Upload foreign person data

Document type:

Individuals  Foreign entities  Individual 1042s  Documents  Visits History  Days of Presence

Please upload your foreign person data file to Calculus. Acceptable formats are CSV types of MS Excel files (Comma Delimited).  
(download our [sample spreadsheet here](#))

Drag your file here to start uploading.  
OR  
Browse Files

Session expires in 29m 58s

For 1042-S form generation, ensure that both the User List and Vendor List are finalized and locked. Click the 1042-S button within each list and select "Finalize Here" before generating the form.

The screenshot shows the 'All Accounts' page in the Sprintax Calculus interface. The top navigation bar includes 'ACTIVE' tabs for 2024, 2023, and 2022, along with an 'older' dropdown. The main content area features a table with the following columns: First name, Middle name, Surname/Last name, Approval Status, Edited by user, Account status, 1042-S status, and Email. The table lists several accounts, including Makenna, Yamilet, Gloria, Tahj, Dakotah, Josh, Mitchell, and others. The '1042-S status' column indicates that most accounts are 'Generated'. On the right side, a sidebar titled '1042-S' provides instructions: 'Generate 1042-S PDFs, export PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.' Below the instructions are buttons for 'Generate', 'Export', and 'Finalize Year'. The 'Finalize Year' button is highlighted with a yellow box and a cursor.

Once finalized, go to the 1042-S form list and use the "E-File" button and easily see and "Generate" the 1042.

The screenshot shows the '1042-S Forms List' page in the Sprintax Calculus interface. The top navigation bar includes 'LOCKED' tabs for 2024, 2023, and 2022, along with an 'older' dropdown. The main content area features a table with the following columns: E-mail, User type, Student Number, UNIQUE FORM IDENTIFIER, Is the current version amendment, and The current number of amendment. The table lists several forms, including those for users like 063nxf6oavc7q3w@hotmail.com, 07amfkk480ahjck5@yahoo.com, and others. The 'Is the current version amendment' column shows 'off' for all entries. On the right side, a sidebar titled '1042-S' provides instructions: 'Generate 1042-S PDFs, export PDF in bulk, generate and download FIRE TXT file, generate and download 1042-S CSV file, generate Form 1042.' Below the instructions are buttons for 'Generate All' and 'Export'. The 'Generate' button is highlighted with a yellow box and a cursor. The bottom of the page shows a session expiration notice: 'Session expires in 29m 55s'.

Once generated, Calculus will allow you to e-file the 1042 form.

2024 2023

**sprintax  
calculus**

- Dashboard
- Users
- Vendors
- Imports
- Change user email
- Form 1042-S
- Settings
- Collapse

Session expires in 29m 49s

### Form 1042, Annual Withholding Tax Return

**Withholding agent's details**

If this is an amended return, check here  
 Yes  No

Employer Identification Number of Damian & Victoria: **33-3333333**

City or town, State or Province, country, and zip or foreign postal code:  
**Chicago Illinois 60601**

Name of Withholding agent:  
**Damian & Victoria**

Street and number:  
**333 N.MICHIGAN AVE., STE 915**

[Clear](#)

1042-S tax liability calculated per deposit periods			
Period ending	Amount (\$)	Period ending	Amount (\$)
7	0	7	0
15	0	15	0
<b>Jan.</b>		<b>Feb.</b>	
22	1,450	22	0
31	0	28	0
<b>Jan. Total</b>	1,450	<b>Feb. Total</b>	0

I confirm that the entries on this form are complete

[Close](#) [Generate](#)

**1042-S**

Generate 1042-S PDFs, export PDF in bulk, generate and download F98, TXT file, generate and download 1042-S CSV file, generate Form 1042

**1042-S**

Please make sure you have imported 1042-S forms or you have reviewed all payments in Sprintax Calculus before you generate the 1042-S forms.

[Generate All](#)

In order to create 1042-S forms text file for e-filing with F98, the forms must be generated first.

[Export](#)

**1042**

Complete and export Form 1042, Annual Withholding Tax Return. Make sure all applicable forms have been generated.

[Generate](#)

Form 1042, Annual Withholding Tax Return has not been generated yet.

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