

September 4, 2024

Sprintax Calculus Release Notes

Version **V.2024.6.1**

New Updates

1. Date of Birth

The Date of Birth field has been updated to allow users to input any year, removing the previous restriction of 1960 to the present.

The screenshot shows the 'Personal Information' section of the Sprintax Calculus interface. The 'Date of birth' field is highlighted with a red box, showing a calendar dropdown with the year 1930 selected. The form includes fields for First name, Middle name, Surname/last name, and Date of birth. A 'Tax identification' section is also visible, with a 'Yes' radio button selected.

2. Residency Summary – Additional Information

The residency summary now includes a note with more information on the Calculations for residency status:

**Note that all calculations on this page relate to your residency status for US tax purposes and have no relation to exemption from income tax. For tax determination, refer to Final Summary.*

3. User List

The User List load time has been optimized. After an initial load time of a few seconds per record, you'll experience faster performance on subsequent loads.

Residency Status

Status: Non-resident

Canada Eight is a/on J1 - Student visa holder. Primary Purpose: Student.

Exempt individual for 2024 under the 5-year lifetime rule.

Date of entry into the United States on this status: 04/20/2024

Date of expiry of this status: 02/27/2028

Days count toward the SPT:

2024: Exempt from SPT for 2024

2023: Outside US in 2023

2022: Outside US in 2022

Total number of non-exempt days in the United States during 2024 for SPT: Exempt from SPT in 2024

Canada Eight does not meet the Substantial Presence Test.

Canada Eight is a non-resident for federal tax purposes for tax year 2024

Canada Eight Residency Starting Date under I.R.C. § 7701(b) is Not expected to change in 2024

Tax Years covered

*Note that all calculations on this page relate to your residency status for US tax purposes and have no relation to exemption from income tax. For tax determination, refer to Final Summary. ⓘ

2024: Exempt

Click on the ⓘ icon for exempt individual definition.

Residency Status

Status: Non-resident

Canada Eight is a/on J1 - Student visa holder. Primary Purpose: Student.

Exempt individual for 2024 under the 5-year lifetime rule.

Exempt individual. Do not count days for which you are an exempt individual. The term "exempt individual" does not refer to someone exempt from U.S. tax, but instead refers to anyone in the following categories. An individual temporarily present in the United States as a foreign government-related individual under an "A" or "Q" visa other than individuals holding "A-3" or "Q-5" class visas. A teacher or trainee temporarily present in the United States under a "J" or "Q" visa who substantially complies with the requirements of the visa. A student temporarily present in the United States under an "F," "J," "M," or "Q" visa who substantially complies with the requirements of this visa. A professional athlete temporarily present in the United States to compete in a charitable sports event.

this status: 04/20/2024

ⓘ

the United States during 2024 for SPT: Exempt from SPT in 2024

stantial Presence Test.

eral tax purposes for tax year 2024

under I.R.C. § 7701(b) is Not expected to change in 2024

to Final Summary. ⓘ

2024: Exempt

4. US – Russian Tax Treaty Updates for Vendors

Tax Treaty Page: Vendors who were eligible for the Russia-US Tax Treaty will see a termination note on their Tax Treaty page within their questionnaire.

Industrial royalties

Russia TT 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, Los Angeles, Educational institution, paid to Russia TT Industrial royalties \$ 355.00, covered by tax treaty article 12(1) of U.S. - Russia and will be taxed at reduced tax treaty rate of 0% withholding rate.

ARTICLE 12 Royalties

1. Royalties derived and beneficially owned by a resident of a Contracting State shall be taxable only in that State.

2. The term "royalties" as used in this Convention means payments of any kind received as a consideration for the use of, or the right to use, any copyright of literary, artistic, or scientific work, including computer programs, video cassettes, and cinematograph films and tapes for radio and television broadcasting; any patent, trademark, design or model, plan, secret formula or process, or other like right or property, or information concerning industrial, commercial, or scientific experience ("know-how").

Please, note that any payments made after 16th of August will be taxed at 30.00% withholding rate due to the US - Russia tax treaty agreement termination.

Do you want to use this tax treaty exemption? *

Yes No

Final Summary Page: A termination note will be displayed on the vendor's final summary page.

Tax treaty income code 10

Income code

10 Industrial royalties

Tax treaty article

12(1)

Tax treaty rate

0.00%

Federal Tax withholding rate

0.00% withholding rate

Wish to claim treaty benefits

Yes

Please, note that any payments made after 16th of August will be taxed at 30.00% withholding rate due to the US - Russia tax treaty agreement termination.

5. Vendor Payments

We've recently updated our system to accommodate payments for vendors over \$1 million. You are now able to input and process amounts greater than this.

Vendor 1

Payments 2024 10 Electronic 1042-S Content

Business income (Income code 23):

Vendor name	Amount
T01 Demo 2	\$ 0.00

← Back Save And Continue

6. 1042-S Forms for 2024

1042-S forms are now available for the 2024 tax year.

Document Exchange Update

We have made significant updates to enhance the document exchange section for both users and administrators. These updates provide an organized way for users to view a list of required documents to upload and for administrators to track document uploads and signing history.

1. Required Documents Section

We are excited to introduce the new Required Documents Section!

If an Institution requires mandatory documents for upload, individuals will see the list of required documents under the instruction panel on the Tax Forms page.

Tax Forms 2024 Electronic 1042-S Consent

You are almost there...
Please follow the directions below to complete this process.

1. Review, sign, and date each of the tax forms generated in this step ("Tax Forms")
- 2. Make clear scan of Passport and Custom doc 1.**
3. Submit the required tax forms in Step 1 and the required documents in Step 2 through the "Documents Exchange" tool.

[Download all documents](#)

These documents will appear in the Document Exchange under the **"Required Documents"** section.

Required Documents
[Download all documents](#)

	Form W-8 BEN, Income code 11	Required
	Form W-8 BEN, Income code 16	Required
	Form W-8 BEN, Income code 23	Required
	Form W-8 BEN, Income code 17	Required
	Form W-8 BEN, Income code 12 - Software	Required

Mandatory Documents will be marked in red until the user uploads the respective file.

Tip: Users can hover over the document name and required statement for additional info

Required Documents

[Download all documents](#)



Form W-8 BEN, Income code 11

The document must be signed or uploaded

Required

Once the documents are uploaded the status will be changed to Uploaded and marked green. The date and time stamp will be visible as well.

Form W-8 BEN, Income code 28

[Download](#)



Uploaded date

07/26/2024 06:49:38

Sprintax Tax Summary

[Download](#)



Uploaded date

07/26/2024 06:49:58

Form W-4 (Nonresident) (E-signed)

[Download](#)



Signed date

07/24/2024 13:44:39

When a user uploads all required documents, a message will appear saying all required documents have been uploaded.

Required Documents

All required documents are uploaded

[Download all documents](#)

Custom doc 1

[Download](#)



Uploaded date

07/26/2024 06:31:20

Passport

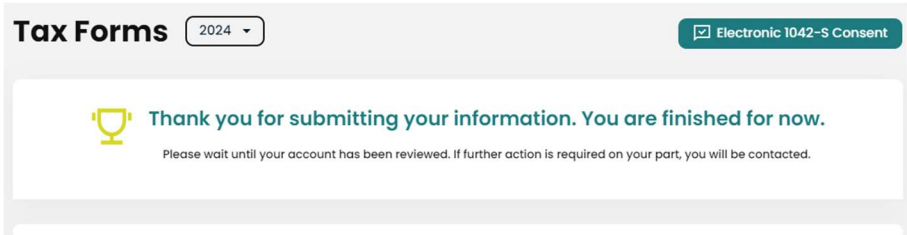
[Download](#)



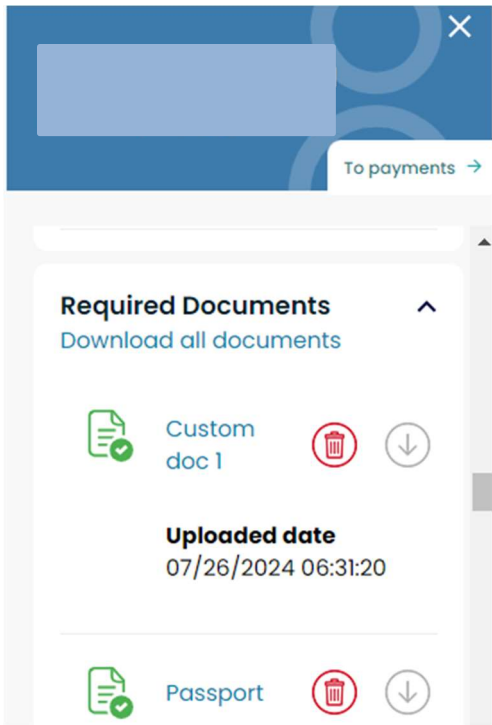
Uploaded date

07/26/2024 06:32:58

The user will be redirected to the tax forms page and will see an updated message *"Thank you for submitting your information."*



The "Required Documents" section is also available for admins on the user side panel for easy access.






These enhancements are designed to streamline the document submission process, ensuring that users can easily identify and fulfill document requirements while providing institutions with a clear and organized way to manage mandatory documents.

2. Document History

Administrators can now access users previously signed documents that are no longer valid under 'Previously Signed Section' in the **Document Exchange**.

If a user or admin deletes a form or makes changes that affect a tax form, those documents will be available under the *previously signed forms*.



Show previously signed forms that are no longer valid		Signed date	
 Form 8233, Income code 17 (E-signed)	10/31/2023 09:40:38	Download	
 Sprintax Tax Summary (E-signed)	04/10/2024 09:37:25	Download	
 Sprintax Tax Summary (E-signed)	07/05/2024 12:25:34	Download	
 Form W-8 BEN, Income code 11 (E-signed)	07/24/2024 13:40:41	Download	

If a user makes an update to their profile but then reverts the changes, the system will re-implement the tax form, causing it to disappear from the *previously signed list*.







Previously signed documents are available for Administrators on the user side panel for easy reference and access.



3. Other Documents Section


Administrators and Users can now see documents that have been uploaded but were not marked as mandatory under the "Other Documents" section.

Other Documents

 California - Form DE 4	Download 
 Connecticut - Form CT-W4	Download 
 Current Visa	Download 


4. Obsolete Documents

If a user makes changes to their Calculus profile that affects the information on the previously signed or uploaded (manual signature) forms, a message will appear asking the user to re-sign or upload an updated form.

 Form W-8 BEN, Income code 28 [Review and sign](#)

We registered changes that made the previously signed form obsolete. Please sign the updated form.


Expiry date: 12/31/2027

 Form W-8 BEN, Income code 12 - Science **Obsolete** [Review and sign](#)

One or more fields of your uploaded Form W-8 BEN, Income code 12 - Science have been changed. You may need to re-sign an updated Form W-8 BEN, Income code 12 - Science. To upload the updated form, delete the obsolete one.

Expiry date: 12/31/2027

If changes are made in the user profile that may affect the Sprintax summary page, a message will appear asking the user to re-sign the form.

 Sprintax Tax Summary [Review and sign](#)

Changes recorded. You may need to re-sign Sprintax Tax Summary or make sure to sign Sprintax Tax Summary after all other forms were signed. ✕

Document Updates will only be applied to 2024 Tax Year to Active and Unlocked Accounts.

6. User List – Document Status

Administrators can use the User List – **Filters and Views** to manage the mandatory document status for each individual user.

Status Indicators:

Not Uploaded: Indicates that no required documents have been uploaded yet.

Partially Uploaded: Indicates that some, but not all, of the required documents have been uploaded.

Uploaded: Indicates that all required documents have been successfully uploaded.

A. Click on the Users Tab > All Accounts

B. Select the Filter button and Create a new Filter

C. Add Condition > Select Document Status > Select Values & Save

D. Click on Columns Button, select the data you want to see and include 'Document Status'

All Accounts (Add user) (1642-5)

Search Filters Columns Export Actions

Rows 10 Go to: Page: 1 2 3 ... 24

User names	Approval Status	Account status	RAC 3 status	Email	Residency Status	Date of birth	Student Number	Tax Res
<input type="checkbox"/> Lara Kara	Approved	Completed	Unprocessed	independentcontractor@mysprintax.com	Non-resident	01/01/1960	0002877380	455-14
<input type="checkbox"/> Helen Burke	Unprocessed	Missing information	Unprocessed	jelenab@tds.com	Non-resident	03/09/2000	Missing information	025-38
<input type="checkbox"/> Martin Smith	Approved	Completed	Unprocessed	jmthsecond@tds.com	Resident	02/02/2001	Missing information	334-98
<input type="checkbox"/> Songun Kang	Unprocessed	Missing information	Unprocessed	park_s1@tds.com	Non-resident	08/04/2008	Missing information	455-49
<input type="checkbox"/> Baldwin Eich	Unprocessed	Missing information	Unprocessed	richardg@tds.com	Missing information	12/03/1993	Missing information	025-13
<input type="checkbox"/> Juanita Maria Gomez Gonzalez	Unprocessed	Missing information	Unprocessed	resident@sprintax.com	Missing information	12/16/1964	20204	548-95
<input type="checkbox"/> Denise Kwarzow Royalties	Unprocessed	Missing information	Unprocessed	hessufw@gmail.com	Non-resident	07/31/1960	Missing information	114-59

0 of 236 Selected

Filters
Apply criteria to the results showing in the current report

Create Filter

Filter Name:

Document Status

Select All Deselect All

Not Uploaded

Partially Uploaded

Uploaded

NOTHING SELECTED

Search Filters Columns Export Actions

Rows 10 Go to: Page: 1 2 3 ... 24

User names	Surname/last name	Email	Student Number	Document Status
<input type="checkbox"/> Lara Kara	Kara	independentcontractor@mysprintax.com	0002877380	Partially Uploaded
<input type="checkbox"/> Helen Burke	Burke	jelenab@tds.com	Missing information	Not Uploaded
<input type="checkbox"/> Martin Smith	Smith	jmthsecond@tds.com	Missing information	Not Uploaded
<input type="checkbox"/> Songun Kang	Kang	park_s1@tds.com	Missing information	Not Uploaded
<input type="checkbox"/> Baldwin Eich	Eich	richardg@tds.com	Missing information	Not Uploaded
<input type="checkbox"/> Juanita Maria Gomez Gonzalez	Gomez Gonzalez	resident@sprintax.com	20204	Not Uploaded
<input type="checkbox"/> Denise Kwarzow Royalties	Kwarzow Royalties	hessufw@gmail.com	Missing information	Partially Uploaded
<input type="checkbox"/> Beryl Chau	Chau	bcho@mysprintax.com	Missing information	Partially Uploaded

0 of 236 Selected

Audit Log Updates

The "Postpone" button was renamed to "On Hold".

Review Changes Made by User

Download

Field Name	Old Value	New Value
General Info		
Entity type	Foreign governmental agency or subsidiary of a foreign government under section 501(c)	Foreign governmental agency or subsidiary of a foreign government
Country of incorporation	France	Russia
Entity foreign TIN	79542722	16209
Vendor ID	NEA	0599543
Tax Treaty and Income Tax Details		
Country of permanent establishment	France	Russia

If you edit the record before approving or rejecting it the changes will be added here.

Approve Changes Edit **On Hold** Reject Changes

Any records in the User List that have been marked *Postponed* will be updated to *On Hold* under the Approval Status column.

Filter and Views: On Hold status is available to use in reporting.

Approval Status

On Hold

Unprocessed

Pending approval

Approved

Rejected

On Hold

Locked Accounts Update:

Previously, Administrators and users had the option to delete uploaded forms on locked records. We updated this to not allow uploaded tax forms to be deleted if the account is locked; the delete button will not be visible.

We value your feedback!

If you encounter any issues, have suggestions for improvement,
or want to share your thoughts on the new features,
please reach out to your support specialist
or email calculus@sprintax.com

Thank you for your partnership!