



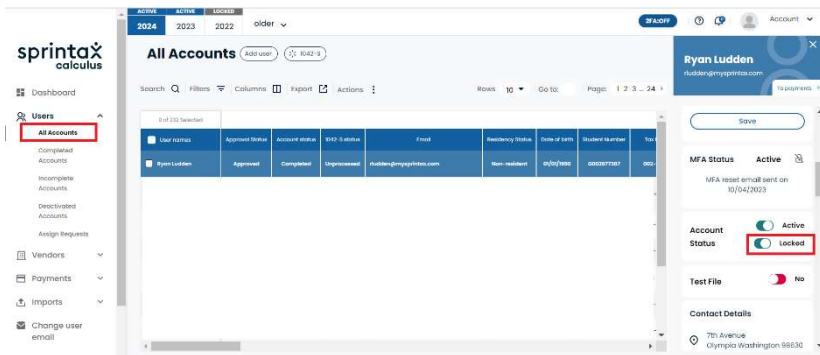
Lock and Unlock Feature

Lock & Unlock Records

We are excited to highlight the Lock and Unlock feature in Sprintax Calculus. This feature empowers administrators to lock a record for editing once they've approved a file, ensuring control and security.

How to Lock and Unlock a record

- 1) Log into your Calculus Account. On the left side panel, Navigate to Users > All Accounts to see an overview of all user records.
- 2) Click the record you want to lock or unlock and a side panel will open. From there scroll down to Account Status for a slide toggle to Lock or Unlock the selected user record



You can batch lock or unlock multiple records.

Start by selecting the records that you want to Lock or Unlock. Then click on the Actions button and a side panel will open. From there scroll down to Account Status for a slide toggle to Lock or Unlock the selected user records.

The screenshot displays the 'All Accounts' page in the Sprintax Calculus system. The main table lists account details for various users. The 'Actions' column is highlighted with a red box. On the right side, an 'Actions' panel is open, showing several options. The 'Lock Accounts' and 'Unlock Accounts' buttons in this panel are highlighted with red boxes.

User Name	Approval status	Account status	DAO-S status	Email	Residency status	Date of birth	Student Number	Actions
Tyjon Luudien	Approved	Completed	Unprocessed	tluudien@mysprintax.com	Non-resident	01/01/1990	0002877387	000
Tomvilo Harter Henke	Pending approval	Completed	Unprocessed	researcher@mysprintax.com	Non-resident	01/01/1990	Missing information	332
Eteri Kara	Pending approval	Completed	Unprocessed	independentcontractor@mysprintax.com	Non-resident	01/01/1990	00028773880	223
Heini Huika	Unprocessed	Missing information	Unprocessed	jehuika@pmts.com	Non-resident	01/01/2000	Missing information	031
Martin Smith	Pending approval	Completed	Unprocessed	junithuacand@gms.com	Resident	02/02/2001	Missing information	Missing
Stangjun Kang	Unprocessed	Missing information	Unprocessed	park_s19@pmts.com	Non-resident	06/04/2018	Missing information	455
Richardson	Unprocessed	Missing information	Unprocessed	richardg@pmts.com	Missing information	12/02/1983	Missing information	02

FAQ'S

Q: Can a user make changes to a locked record before or after their tax forms are generated?

A: Yes. The user should contact their institution's calculus administrator to unlock their record. Once unlocked, the user can make changes or updates to their profile. If any alterations impact their tax form, it must be regenerated and re-signed in accordance with the law.

Q: Can a user sign or upload supporting documents after their account is locked?

A: Yes, the user can still sign and upload docs to their account after the questionnaire is locked

Thank you for your partnership!

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