# Sprintax Calculus Guide

*Step-by-Step Instructions for Users*

*Updated November 2026*

OFFICE FOR INTERNATIONAL STUDENTS & SCHOLARS (OISS)

WashU

# Sprintax Calculus

**Sprintax Calculus is a secure website** WashU uses to ensure foreign nationals receiving a WashU paycheck are **taxed correctly**. Multiple factors can affect this determination, such as country of origin/tax residency, length of stay, type of visa, and type of income. By providing accurate and timely information through Sprintax Calculus, foreign nationals can avoid additional tax liabilities and ensure any applicable tax exemptions are applied to their paychecks.

This guide provides **step-by-step instructions** for the Sprintax Calculus online questionnaire, as well as resources for assistance beyond this guide. For information about the overall Sprintax Calculus process, go to the OISS website.

***NOTE:*** *WashU employees, including FNIS Support, are not authorized or qualified to provide tax-related advice or address individual tax questions beyond the general information available on WashU websites. For assistance with your tax obligations or filing, you are encouraged to consult a qualified tax professional.*

# Basic Information

- Log in *4-6*
- Consent to receive forms electronically *7*

# Log in

Within approximately one week of your hire or start date, you will receive an email from noreply@sprintax.com sent to your email address in Workday containing information to access Sprintax Calculus.

If the instructions in your Welcome email say:

**“Log in with WashU Key”**

You will use single sign-on (SSO) with your WashU Key.

Go to page 5

**“Log in with New Password”**

You will create a new password.

Go to page 6

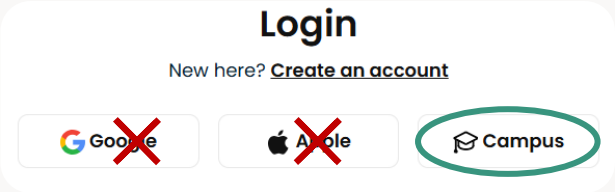
# Log in with WashU Key

**Can't log in?**

Contact calculussupport@sprintax.com, or review the Sprintax Calculus Help Center.

If you have problems with your WashU Key, contact WashU IT.

1. Go to https://calculus.sprintax.com/
2. Click the **Campus** button:




3. In the **Campus*** menu, choose “Washington University in St. Louis”
4. Click the **Continue** button.
5. Choose your preferred method for multi-factor authentication (MFA) and follow the prompts to set it up. If you need assistance, refer to How to Enable an Authenticator App for MFA.
6. In the **Select payer/payers** menu, choose “Washington University in St. Louis”
7. Click the **Continue** button.
8. In the pop-up window about system requirements, confirm you agree to both options.
9. In the pop-up window about your account information, click **Continue** to proceed to your record.
10. You’ve logged in to your Sprintax Calculus record!

# Log in with New Password

**Can't log in?**

Contact calculussupport@sprintax.com, or review the Sprintax Calculus Help Center.

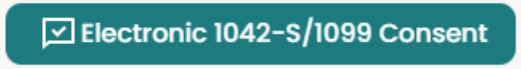
1. Click the **login link in your Welcome email.** This is your **unique** login link, and you must use it to access Sprintax Calculus for the first time.
2. Choose your password and follow the prompts to set your password.
3. Click the link to login.
4. Log in with your **personal email address** and **new password**.
5. Choose your preferred method for multi-factor authentication (MFA) and follow the prompts to set it up. If you need assistance, refer to How to Enable an Authenticator App for MFA.
6. In the **Select payer/payers** menu, choose "Washington University in St. Louis"
7. Click the **Continue** button.
8. In the pop-up window about system requirements, confirm you agree to both options.
9. In the pop-up window about your account information, click **Continue** to proceed to your record.
10. You've logged in to your Sprintax Calculus record!

# Consent to receive forms electronically

1. When you log in for the first time, a pop-up window will appear to consent to receive Form 1042-S and Form 1099 electronically. **It is recommended that you provide this consent.**
   - Without your consent, International Payroll Operations might not be able to deliver all tax or treaty documents to you electronically in Sprintax Calculus. International Payroll Operations cannot mail documents outside of the U.S.
   - If you have questions, please contact International Payroll Operations at CFU-InternationalPayroll@email.wustl.edu.

2. You may also see a pop-up window notifying you that your account is incomplete. Click **Continue** to proceed to your record.

3. In the **Residency** section, you will see a button in the top right corner: 

   - If it is gray, it is recommended that you **consent again** to receive Form 1042-S and Form 1099 electronically in Sprintax Calculus.
   - To consent, click the **Electronic 1042-S/1099 Consent** button, then click **Agree**.
   - When you have consented, the button will turn green: 

# Online Questionnaire

List of all possible sections in the online Sprintax Calculus questionnaire

*Depending upon your answers, the questionnaire will change to fit your specific needs in Sprintax Calculus.*

*You only need to answer the questions that appear in your online questionnaire.*

*Required fields have an asterisk (*), and some questions will have a blue (i) icon in the online questionnaire for more information.*


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WashU

# Residency

*The **Residency** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

**Important Note**

**Once you have logged in, choose the correct tax year next to the page title (e.g., "Residency"):** 2026

You should choose the option that matches the current year.

## Residency Information

1. **Are you (or will you be) a citizen of the United States, Guam, Puerto Rico, The US Virgin Islands, American Samoa, or the CNMI by birth or by naturalization, on the last day of 202X? ***
   - If you choose **Yes**, please contact FNIS Support at fnis@wustl.edu.
2. **Are you currently or will you be a Green Card holder on the last day of 202X? *** – Choose **Yes** or **No**.
3. **Have you applied for U.S. citizenship/naturalization or legal permanent residence in the U.S.? ***
   - If you choose **Yes**, additional required questions will be displayed online.
4. **Have you been present, or do you expect to be present in the US during 202X? *** – Choose **Yes** or **No**.
5. **Did you or do you plan to stay in the US for less than 31 days in total in 202X? *** – Choose **Yes** or **No**.

# Residency

*The **Residency** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Residency Information

6. **Please enter the entry date of your first-ever visit to the US ***
   - Enter the very first date you ever visited the U.S. after December 31, 1985, for any reason.
   - If you don't have an exact date, please use your best estimate.

7. **What is your current immigration status/legal presence program? ***
   - Choose your current immigration status from the menu.
   - If you don't see an option that pertains to you, please contact fnis@wustl.edu for assistance.

8. **What date did you first enter the US on this immigration status? ***
   - For your current status, enter the first date you entered the U.S. in this status.
   - If you were granted an extension for your current status, do not enter the date the extension was granted; enter the first date you entered the U.S. in this status.
   - If you have changed statuses while you remained in the U.S., enter the first date of this new status in the U.S.

9. **What is the expiry day of your current immigration status? ***
   - Enter the earlier of two options:
     1. The **Admit Until Date** on your most recent I-94, or
     2. The program end date on your current status document (e.g., I-20, DS-2019, EAD card, or approval notice)
   - If you don't know what date to use, please contact fnis@wustl.edu for assistance.

# Residency

*The **Residency** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Residency Information

10. **Final departure date you left or intend to leave the US**
    - Enter the date you permanently left the U.S., or intend to leave the U.S., to return to your home country.
    - ❖ **NOTE:**
        - If your status **expires** during the tax year you are updating, this field becomes **required**. For example, if you are updating your record for 2027 and your status ends in 2027, you must enter a date in this field.
        - If you enter a date that **exceeds** your status expiration date, you will see an "Out of status" row in the **Residency presence days** section (see page 13).

11. **Expiry date of your current US visa (if any)** *
    - Enter the expiration date on your current U.S. visa in your passport.
    - If you are a Canadian citizen and do not have a U.S. visa, enter the expiry date of your current immigration status (see date in #9).

12. **Country of Citizenship ***
    - Choose your country of citizenship from the drop-down menu.

13. **Country of residence ***
    - Choose the country in which you paid (or would have paid) taxes before coming to the U.S.
    - Note that the U.S. is not an option for this field, even if you are currently considered a tax resident in the U.S.

# Residency

*The **Residency** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## U.S. Immigration Status History

***Your current status will be populated here** based upon your answers to #7-9 in **Residency Information**. Importantly, you will not itemize entry/exits during each status. You will summarize each status by listing first date of entry and last date of departure. **For activity prior to your current status:***

- *List any previous immigration status since December 31, 1984. For entry and exit dates, you can refer to your 10-year travel history on the U.S. Customs and Border Protection (CBP) website and/or any status documentation. If you don't have an exact date, use your best guess.*
- *To add a previous status, use the blue **+ Add status** button in this section.*

**Your current status:**

- **Visa type/Visitor status:** Populated with your answer to #7 in **Residency Information.**
- **Subcategory:** Populated with your answer to #7 in **Residency Information.**
- **Date of entry in the US on your current status:** Populated with your answer to #8 in **Residency Information.**
- **Date when the status expires:** Populated with your answer to #9 in **Residency Information.**

**Activity prior to your current status:**

- **Visa type/Visitor status:** Choose the correct status.
- **Subcategory:** Choose the correct option.
- **Date of entry in the US on your prior status:**
  - Enter the *first* date you entered the U.S. in this status.
  - Even if you were granted an extension, enter the *first* date you entered the U.S. in this status, NOT the date the extension was granted.
  - If you changed to this status while in the U.S., enter the *status change* date.
- **Date when the status expires:**
  - Enter the date you left the U.S. in this status.
  - If you changed to another status while in the U.S., enter the day *before* you changed to the new status.

**Important Note**

If you don't have an exact date, use your best guess.

# Residency

*The **Residency** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Additional questions that may appear online

*If the following questions appear online, please complete them. If they do not appear, save your data and proceed to the next section, **Personal Data**.*

**Please select all years listed below you were out of the US for a full calendar year (01 Jan to 31 Dec)**

- Check the box for any year that you were not in the U.S. at all.
- If you were present in the U.S. for even one day in any of those years, do not check the boxes for those years.

**Residency presence days**

- Enter the total number of days you were or expect to be in the U.S. for each year. For example, if you were in the U.S. for the whole year but left for a two-week trip, you would enter **346** (i.e., 365-14).
- If you are unsure, use your best estimate.

### Save this section!

To save this page, click the **Save & Continue** button in the bottom right corner.




### Need help?

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 1 - Residency in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Personal Data

*The **Personal Data** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Personal Information

1. **Given name/First name ***
   - Enter the data that appears in your passport. Your legal given name must appear here.
2. **Middle name**
   - Enter the data that appears in your passport. Your legal middle name must appear here.
3. **Surname/Last name ***
   - Enter the data that appears in your passport. Your legal surname must appear here.
4. **Date of birth ***
   - Enter your date of birth in MM/DD/YYYY format.
5. **Place of birth**
   - Choose the country of your birth.
6. **City of birth**
   Enter the city of your birth.

### Important Note

Your legal name in your passport **must** appear in both Sprintax Calculus and your Workday record.

Be sure Workday lists your legal name correctly.

You can list your preferred name in Workday in any manner you choose.

# Personal Data

*The **Personal Data** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Tax Identification

1. **Do you have a US TIN (SSN or ITIN) ***
   - If you have an SSN or ITIN, choose **Yes**.
   - If not, these questions will appear online:
     1. **Have you applied or do you expect to apply for an SSN? ***
        - Choose **Yes**, **No**, or **I want to re-apply**.
        - If you need to apply for an SSN, please follow these OISS instructions.
     2. **Have you applied for an ITIN before? ***
        - Choose **Yes**, **No**, or **I want to re-apply**.
        - If you need to apply for an ITIN, please follow these OISS instructions.

**Important Note**

If you do not know which U.S. taxpayer identification number (TIN) you should apply for, contact FNIS Support at fnis@wustl.edu for assistance.

2. **Your US TIN (SSN or ITIN) ***
   - Enter your SSN or ITIN.
   - If you have both, **only enter your SSN**.

**Important Note**

If you have an ITIN and an SSN, stop using your ITIN. Also, notify the IRS that you have an SSN so that they can combine your tax records under one ID number.

3. **Employee ID (if applicable)**
   - If you have a WashU Employee ID, this will be populated for you. This is not the same as a WashU Student ID.

4. **SEVIS ID**
   - For F and J visa holders, enter the number that begins with “N” at the top of your I-20 or DS-2019.

# Personal Data

*The **Personal Data** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Tax Identification

5. **What is your foreign (home country) tax identification number?**
   - If you have a foreign taxpayer ID in your home country, enter it here.
   - If not, you can enter your national identification number.

6. **Student ID (if applicable)**
   - If you have a WashU Student ID, enter it here.

7. **Are you a full-time student or scholar in a US educational institution in 202X? ***
   - Choose **Yes** if you are engaged in a full-time program at a U.S. school/university this year.

8. **Are you a degree candidate in a US educational institution during 202X? ***
   - Choose **Yes** if you are pursuing a degree at a U.S. school/university this year.

9. **Are you an OPT/CPT program participant during 202X? ***
   - If you are doing OPT or CPT this year, choose **Yes**. These questions will appear online:
     1. **OPT/CPT start date *** – Enter the start date of your OPT or CPT.
     2. **OPT/CPT finish date * –** Enter the start date of your OPT or CPT.

**Important Note**

If you have multiple OPT/CPT instances in one year, use the very first start date for 9.1 and the very last end date for 9.2.

# Personal Data

*The **Personal Data** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Tax Identification

10. **Are you married? ***
    - If you are married, choose **Yes**. Depending upon the answers in the rest of your questionnaire, one of these questions (not both) will appear online:
        1. **Is your spouse a US citizen or resident alien? ***
        2. **Do you intend to file a joint US resident tax return with your spouse for 202X? ***
            - Answer **Yes** or **No** for the question that appears for you.

### Save this section!

To save this page, click the **Save And Continue** button in the bottom right corner.




### Need help?

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 2 – Personal Data in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Contact Details

*The **Contact Details** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Your US Address

***This address must match your primary home address in Workday.** This affects your U.S. state and local taxes. Be sure both addresses reflect where you live during your WashU program. **To update Workday, follow these instructions**. If you list other addresses in Workday, use a different label (e.g., permanent, mailing, etc.).*

*To list your U.S. address correctly, review WashU campus address, or off-campus address. WashU campus addresses include a Mail Stop Code (MSC). If you live on campus, use this link to find your MSC.*

1. **Address (Number, Street)***
   - Enter the street number and street name of your address (e.g., 4405 W Pine Blvd).
   - Some U.S. street names have a suffix, which can be abbreviated (e.g., Avenue = Ave, Boulevard = Blvd, Court = Ct, Drive = Dr, Place = Pl).

2. **Address (Apartment number)** – Enter the apartment number for your address (e.g., Apt 800).

3. **Address (City) ***
   - Enter the city for your address (e.g., St. Louis).
   - If you live in a St. Louis suburb, you can list it **or** St. Louis, but not both. For example, you can list “University City” or “St. Louis.”

4. **State *** – Choose the U.S. state for your address.

5. **ZIP code *** – Enter the five-digit Zip Code for your address.

# Contact Details

*The **Contact Details** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Your Home Address (Outside the US)

*This address information is required for every Sprintax Calculus record. If you don't have a permanent home address outside of the U.S., please contact FNIS Support at fnis@wustl.edu.*

1. **Address (Number, Street, Apartment number)***
   - Enter the street number, street name, and any apartment number for your home address outside of the U.S.

2. **Address (County, Province)**
   - Enter the county and/or province for your home address outside of the U.S.

3. **Address (City)***
   - Enter the city for your home address outside of the U.S.

4. **Country***
   - Choose your home country. If you select Canada, this field will appear online:
     1. **Province *** – Choose your home province.

5. **Postal code/ZIP code** –
   - Enter the postal code or ZIP code for your home address outside of the U.S.

# Contact Details

*The **Contact Details** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Your Home Address (Outside the US)

6. **Please choose your mailing address ***
   - Identify your preferred mailing address for the Internal Revenue Service (IRS) usage: **US address**, or **Your Home Address (Outside the US)**. The IRS is the national U.S. agency that administers and enforces U.S. federal tax laws.

7. **Please choose your current residential address ***
   - Identify the address where you are currently living: **US address**, or **Your Home Address (Outside the US)**.

8. **US phone number**
   - Enter your U.S. phone number in this format (XXX) XXX-XXXX.

9. **Home country phone number ***
   - Enter your phone number in your home country with the country calling code. This question is optional, not required as shown online.

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**Save this section!**

To save this page, click the **Save And Continue** button in the bottom right corner.




**Need help?**

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 3 – Contact Details in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Tax Forms Info

1. **Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from Washington University in St. Louis in 202X? ***
   - This defaults to **Yes** for all records.

## Income Types

***Multiple income type options are checked by default** to accommodate any kind of compensation you are receiving from WashU. You might not see all these options in your Sprintax Calculus record.*

***Uncheck any income type that does not apply to your WashU compensation.***

1. **Scholarship or fellowship grants (Income Code 16)**
   - This includes all fellowship stipends.
   - If you are receiving a stipend from WashU, leave this box checked.
   - If you are not receiving a stipend, uncheck the box.
   - If you are unsure if you have a stipend, check one of these resources in Workday:
     1. Go to **Job > All Positions & Jobs**, then look at the **Pay Rate Type** column on the far right. If it says “Stipend” in any row, then you are receiving a fellowship stipend.
     2. If you have received a paycheck, go to **Pay > Payslips**, then click the **View** button at the far right. Scroll to the **Earnings** table. If “Stipend” appears in the **Description** column, then you are receiving a fellowship stipend.
     3. If you are still unsure, contact FNIS Support at fnis@wustl.edu.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Income Types

2. **Compensation for dependent personal services (Income Code 18)**
   - This includes all wages (i.e., hourly and salary).
   - If you are receiving a wage from WashU, leave this box checked.
   - If you are not receiving a wage, uncheck the box.
   - If you are unsure if you have a wage, open Workday and:
     1. Go to **Job > All Positions & Jobs**.
     2. Scroll to the far right to view the **Pay Rate Type** column. If it says “Hourly” or “Salary” in any row, then you are receiving a wage.
     3. If you are still unsure, contact FNIS Support at fnis@wustl.edu.

3. **Compensation for teaching (income code 19)**
   - This includes all wages (i.e., hourly and salary).
   - If you are receiving a wage from WashU, leave this box checked.
   - If you are not receiving a wage, uncheck the box.
   - If you are unsure if you have a wage, open Workday and:
     1. Go to **Job > All Positions & Jobs**.
     2. Scroll to the far right to view the **Pay Rate Type** column. If it says “Hourly” or “Salary” in any row, then you are receiving a wage.
     3. If you are still unsure, contact FNIS Support at fnis@wustl.edu.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Income Types

4. **Compensation during studying and training (Income Code 20)**
   - This includes all wages (i.e., hourly and salary).
   - If you are receiving a wage from WashU, leave this box checked.
   - If you are not receiving a wage, uncheck the box.
   - If you are unsure if you have a wage, open Workday and:
     1. Go to **Job > All Positions & Jobs**.
     2. Scroll to the far right to view the **Pay Rate Type** column. If it says “Hourly” or “Salary” in any row, then you are receiving a wage.
     3. If you are still unsure, contact FNIS Support at fnis@wustl.edu.

## Additional Income Information

1. **How many days have you stayed or intend to stay in the US during 202X?***
   - Enter the estimated number of days you will be in the U.S. during this year.
   - For example, if you plan to leave the country for only two weeks, enter **351** (365-14).

2. **Do you have your own office, place of business in the U.S., that is maintained by you personally for performing these services?***
   - If you maintain a separate office space to perform the professional services you are doing for WashU, choose **Yes** (eg, renting office space for your independent personal services).

### Important Note

This data helps determine your **U.S. tax residency status** (i.e., Non-Resident Alien (NRA), or Resident Alien (RA)). This status affects the amount of taxes applied to your WashU paycheck.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Additional Income Information

3. **Are you legally allowed to work?***
   - Choose **Yes** if you are allowed to work at WashU. For example, these groups are legally allowed to work at WashU:
     - ✓ Students and scholars sponsored by WashU
     - ✓ Students and scholars not sponsored by WashU, but have permission from their sponsoring organization (e.g., OPT/CPT/AT authorization, etc.)
     - ✓ Foreign nationals with an EAD card (e.g., J-2 dependents, H-4 dependents, Asylum seekers, Lawful Permanent Resident applicants, etc.)
     - ✓ Lawful Permanent Residents

If you are unsure if you are legally allowed to work at WashU, please contact FNIS Support at fnis@wustl.edu.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## 8233/W-8-BEN/W-9 questions

*These are all the possible questions that can appear in this section, but only the ones that apply to you will appear in your Sprintax Calculus record. Skip the instructions below for any question that does not appear in your Sprintax Calculus record.*

1. **Foreign source income (Independent Personal Services performed outside the US)**
   - Check this box if you received compensation for independent personal services (non-employment) performed outside the U.S.

2. **Total amount you expect to be paid for dependent services performed in the US (wages and other similar payments from employment)***
   - Enter the total (or estimated) amount you expect to be paid during the year for dependent services. This includes hourly and/or salary wages.
     - If you are unsure, enter **$15,000**. *This is an estimated amount that Sprintax Calculus will use to trigger any treaty exemptions you are eligible for. It will not affect your actual earnings or year-end tax documents.*
   - If you enter an amount, this field will appear online:
     1. **Please, provide a short description of the dependent services you perform(ed)***
        - Enter your Workday job title.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## 8233/W-8-BEN/W-9 questions

3. **Total compensation you expect to be paid for teaching or research in the current tax year***
   - This field only applies to J1-Teacher, J1-Researcher, J1-Lecturer, J1-Research Scholar, or J1-Short term scholar visa holders.
   - Enter the total (or estimated) amount you expect to be paid during the year for teaching or research. This includes hourly and/or salary wages.
     - If you are unsure, enter **$15,000**. *This is an estimated amount that Sprintax Calculus will use to trigger any treaty exemptions you are eligible for. It will not affect your actual earnings or year-end tax documents.*
   - If you enter an amount, these questions will appear online:
     1. **Please, provide a short description of the dependent services related to teaching or research***
        - Enter your Workday job title.
     2. **Have you been paid for or do you expect to be paid for participation in a research activity?***
        - Choose **Yes** or **No**.
     3. **Is the research for the public interest (for a non-profit organization)?***
        - If your research is for WashU, choose **Yes**.
        - Otherwise, select the answer that applies to you.
     4. **Have you been invited by a governmental institution, educational institution, or scientific research institution as a teacher, lecturer, or to participate in research?***
        - Choose **Yes** or **No**.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## 8233/W-8-BEN/W-9 questions

4. **Total compensation you expect to be paid in wages and other similar payments from employment on- or off campus in the current tax year***
   - This field only applies to F1-Student, J1-Student, M1-Student, J1-Intern/Trainee, J1-Physician Intern/Trainee, or Q1/Q2-Intern/Trainee visa holders.
   - Enter the total (or estimated) amount you expect to be paid during the entire year for hourly and/or salary wages.
     - If you are unsure, enter **$15,000**. *This is an estimated amount that Sprintax Calculus will use to trigger any treaty exemptions you are eligible for. It will not affect your actual earnings or year-end tax documents.*
   - If you enter an amount, this field will appear online:
     1. **Please, provide a short description of the employment you perform(ed) during your study or training***
        - Enter your Workday job title.

5. **Have you or will you receive a compensatory grant or fellowship for performing services on-campus as part of the scholarship grant?***
   - This defaults to **No** for all records.

6. **Have you or do you expect to receive compensation or a compensatory grant for study and training (wages, salaries, other employment income) from another U.S. employer (University/Company)?***
   - Choose **No**.
   - However, if you expect to receive income from another U.S. employer besides WashU this year, choose **Yes**.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## 8233/W-8-BEN/W-9 questions

7. **Foreign source income (Study related activities take place outside the US)**
   - Check this box if you expect to receive income from a foreign source for study-related activities that occurred outside the United States, regardless of where payment was made (in or outside the U.S.).

8. **Please, enter the expected amount of your scholarship paid during your study to cover living expenses (room and board) or other non-tuition-related expenses in the US***
   - Enter the total (or estimated) amount of any scholarship or fellowship stipend you receive during this year that covers living expenses or other non-tuition expenses in the U.S.
     - If you are unsure, enter **$15,000**. *This is an estimated amount that Sprintax Calculus will use to trigger any treaty exemptions you are eligible for. It will not affect your actual earnings or year-end tax documents.*

9. **Have you or do you expect to receive a compensatory scholarship for working as a teacher, researcher, scholar, or as a recipient of a grant, an allowance or an award?***
   - Choose **No**.
   - However, if you must perform personal services (e.g., teaching, research) to be paid your scholarship, choose **Yes**.

10. **Passport number (from your current valid passport)***
    - Enter your current passport number.

# Tax Forms Info

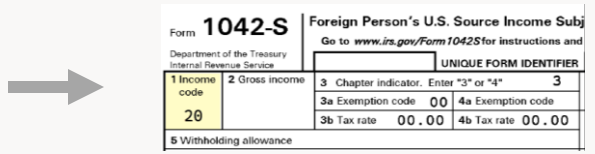
*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

## Tax treaties in prior years

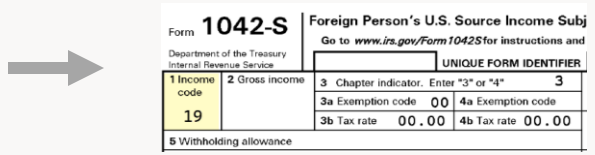
*You may see the question below listed for multiple prior tax years. This depends upon how long you've been in the U.S. Answer the question for each tax year that appears in your Sprintax Calculus record.*

1. **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 202X**

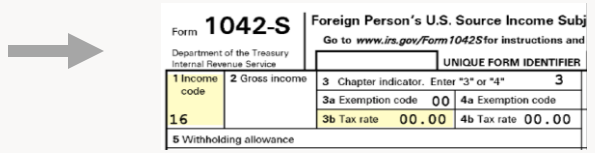
- ❑ Compensation during studying and training (employment or training on or off campus)
  - If you have a Form 1042-S for the prior tax year that shows **Income code 20 in box 1**, check this option in Sprintax Calculus.




- ❑ Compensation for teaching or research (teachers or researchers wages)
  - If you have a Form 1042-S for the prior tax year that shows **Income code 19 in box 1**, check this option in Sprintax Calculus.




- ❑ Scholarship or grant
  - If you have a Form 1042-S for the prior tax year that shows **Income code 16 in box 1** and **0 in box 3b**, check this option in Sprintax Calculus.




- ❑ Other income covered by tax treaty
  - If you've claimed any other tax treaty in the prior tax year, check this option in Sprintax Calculus.
- ❑ No tax treaty was claimed
  - If you didn't claim a tax treaty in the prior tax year, check this option in Sprintax Calculus.

# Tax Forms Info

*The **Tax Forms Info** section is composed of multiple sub-sections. Depending upon your answers, the questionnaire will change. You only need to answer the questions that appear for you. Required fields have an asterisk (*), and some questions have a blue (i) icon in the online questionnaire for more information.*

This ends the **Tax Forms Info** section of the questionnaire.

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### Save this section!

To save this page, click the **Save And Continue** button in the bottom right corner.




### Need help?

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 4 – Tax Forms Info in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Residency Summary

This page summarizes the data you've entered in all the previous sections. Review the data for accuracy and go back to any section that needs to be revised.

**Finish this section!**

To go to the next section, click the **Next** button in the bottom right corner.

Next →

**Need help?**

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 5 – Residency Summary in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Tax Treaties

If there is a tax treaty between the U.S. and your home country that includes provisions for your taxable U.S. income, you may be eligible for tax treaty benefits. These tax treaty benefits (or exemptions) can reduce the amount of U.S. tax you must pay. **This section lists any tax treaty exemptions that apply to you.**

- If you want to use a tax treaty exemption, select **Yes**.
- If you do not want to use a tax treaty exemption, select **No**.

***NOTE:*** *WashU employees, including FNIS Support, are not authorized or qualified to provide tax-related advice or address individual tax questions beyond the general information available on WashU websites. For assistance with your tax obligations or filing, you are encouraged to consult a qualified tax professional.*

### Save this section!

To save this page, click the **Save And Continue** button in the bottom right corner.




If no treaties appeared, click **Next**.




### Need help?

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 6 – Tax Treaty in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Final Summary

This page summarizes the data you've entered in all the previous sections, including the **Tax Treaties** section. Review the data for accuracy and go back to any section that needs to be revised.

1. Scroll to the bottom of the page to review the **Required Documents** list. You will need to e-sign any documents that appear in that list in the **Tax Forms** section.
2. Disregard the **Supporting Documents** list in Sprintax Calculus. If you need to supply any supporting documents for your record (e.g., passport, I-94, status document, EAD card, approval notice, etc.), your Welcome email will itemize the document copies you need to email to FNIS Support at fnis@wustl.edu. You do not need to upload any supporting documents into Sprintax Calculus.

**Finish this section!**

To go to the next section, click the **Download Your Forms** button in the bottom right corner.




**Need help?**

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 7 – Final Summary in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# 1042-S Summary

If you have any income that must be listed on Form 1042-S, this section will display a summary of that information.  If it does not apply to you, you will see “No income code entries meet the 1042-S Summary criteria for this tax year.”

Simply click **Tax Forms** in the left-hand navigation in the questionnaire to continue.

# Tax Forms

This section lists all the tax forms you need to sign. **Your Sprintax Calculus record is not finished until you sign any tax forms that appear in this section. Failure to sign all required tax forms can result in incorrect paycheck taxes.** If you do not want to sign a form, contact International Payroll Operations at CFU-InternationalPayroll@email.wustl.edu for more guidance.

**We strongly urge you to use the e-sign option** so that your forms are signed and labeled correctly. Also, you will need to use multi-factor authentication (MFA) to e-sign your documents. For more guidance, review the Multi-Factor Authentication section in the Sprintax Calculus Help Center.

**Review, sign, and date each of the tax forms listed in this section.**

1. For each document in this section, click the **Review and sign** link.
2. Follow the prompts to select or set up your MFA device. You only set up MFA once.
3. In the **Review and sign** pop-up window:
   - Click the **Download form** button
   - Review your document. If correct, indicate if you agree to both statements:
     - ❑ "Under penalties of perjury,…"
     - ❑ "By selecting the "E-sign" button,…"
   - After both options are checked, a blue **E-Sign** button will appear at the bottom of the window.
   - Click the **E-Sign** button to draw your signature.
   - Click the **Confirm** button to submit your signature.
4. Repeat the steps above for each document in this section.

### Finish this section!

To go to the next section, click the **Upload Your Forms** button in the bottom right corner.

Upload Required Documents →

### Need help?

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 8 – Tax Forms in the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Document Exchange

This section serves as a document upload section for your Sprintax Calculus record. If you did not e-sign your tax forms in the **Tax Forms** section, then you can upload copies of your signed documents into the **Document Exchange. Failure to sign and upload all required tax forms can result in your WashU paychecks being taxed incorrectly.**

## Upload

*Use this section to upload any documents that appear in the **Document Type** menu. If your Welcome email requested documents (e.g., passport, I-94, status document, EAD card, etc.), please email those to FNIS Support at fnis@wustl.edu. Type **[Secure]** in the subject line to encrypt your email.*

1. **Document Type ***
   - Select the correct document type for your file upload.
   - Drag your file to the dashed box online to upload it into Sprintax Calculus.
   - Click the green **Upload** button.

## Required Documents

*This section lists any tax documents you must submit for your Sprintax Calculus record (e.g., Form 8233, Form W-8BEN, etc.). If you have e-signed a document in the **Tax Forms** section, "(E-signed)" will appear next to the name of the document. If you still need to sign a document in this section, please do so and upload it into your Sprintax Calculus to complete your submission.*

# Document Exchange

## Other Documents

*If you need to submit other documents for your Sprintax Calculus record (e.g., passport, I-94, status document, EAD card, approval notice, etc.), please refer to your Welcome email for instructions. You are not required to upload them here.*

***If your email indicates that you must submit documents, please email those to fnis@wustl.edu as soon as possible.*** *Your Sprintax Calculus record submission will be incomplete until you email those document copies to fnis@wustl.edu. Enter* ***[Secure]*** *in the email subject line to encrypt your email.*

## Show previously signed forms that are no longer valid

*If you have any previously* ***signed*** *forms that are no longer valid, they will be listed here.*

*If you have questions about these documents, please contact International Payroll Operations at CFU-InternationalPayroll@email.wustl.edu.*

## Show previously uploaded forms that are no longer valid

*If you have any previously* ***uploaded*** *forms that are no longer valid, they will be listed here.*

*If you have questions about these documents, please contact International Payroll Operations at CFU-InternationalPayroll@email.wustl.edu.*

**Need help?**

Ask a question in the online chat (bottom right in Sprintax Calculus), review Step 9 – Document Exchange the Sprintax Calculus Help Center, or contact FNIS Support fnis@wustl.edu.

# Conclusion


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- Keep Your Record Updated *40*
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WashU

# Review and Completion

Once you have completed all required fields in your questionnaire, e-signed all **Required Documents** listed in the **Document Exchange**, and emailed any other documents requested in your Welcome email to fnis@wustl.edu, your Sprintax Calculus record will be complete.

**When your record is complete:**

- FNIS Support will notify you about any data questions in your record.
- If there are no questions, FNIS Support will email confirmation that your record has advanced to International Payroll Operations' review stage.
- International Payroll Operations will notify you about any tax form questions in your record.
- If there are no questions, International Payroll Operations will email confirmation that your record is complete.

# Keep Your Record Updated

After your initial completion of Sprintax Calculus, you should review and update your data during your WashU employment **at least once a year** (e.g., annually in October). Additionally, please **update your Sprintax Calculus record when you:**

- **return from traveling** outside the U.S.,
- get a **new EAD card** (such as for OPT),
- get a **new passport**,
- **change your local St. Louis address**, or
- make any **changes to your immigration status**.

If you don't know whether you should update your record, contact FNIS Support at fnis@wustl.edu for assistance.

# General Tax Information

As mentioned at the start of this guide, your Sprintax Calculus record allows WashU to determine the correct taxes for your WashU paychecks. **However, your WashU paycheck taxes are only part of the U.S. taxation process.** There is also an **annual process to file a tax return**, which reviews whether you paid the correct amount of tax in the prior year.

- For example, the 2026 tax return evaluates all your 2026 taxable U.S. income and how much tax you paid during 2026. It determines if you paid the correct amount of tax, or if you overpaid (and will get a refund) or underpaid (and will owe more). The 2026 tax return process begins in January 2027 and is due by April 15, 2027.

**For more information about the U.S. taxation process, review Taxes in the U.S. on the OISS website.**

Also, when your Sprintax Calculus record is analyzed, your U.S. tax residency status will be determined (i.e., Non-resident Alien (NRA) or Resident Alien (RA)). Anyone who is an NRA could use Sprintax Returns to help them file an annual tax return, which will use data from Sprintax Calculus as needed. However, RAs must use other tax return preparation options.

# Questions?

If you have any questions about **completing your Sprintax Calculus** record, please visit the Sprintax Calculus Help Center, or contact **FNIS Support** at fnis@wustl.edu.

If you have any questions about the **tax documents in your Sprintax Calculus record**, contact **International Payroll Operations** at CFU-InternationalPayroll@email.wustl.edu.

***NOTE:*** *WashU employees, including FNIS Support, are not authorized or qualified to provide tax-related advice or address individual tax questions beyond the general information available on WashU websites. For assistance with your tax obligations or filing, you are encouraged to consult a qualified tax professional.*