Sprintax Quick Start Guide for International / Nonresident Payees for US Tax Purposes

Suppliers: Individuals / Entities

U.S. tax and immigration laws require the University of Rochester (UR) to collect information from payees that are not US Citizens or Resident Aliens for tax purposes. UR uses Sprintax, a secure online tax compliance system, to facilitate this process.

Getting Started: You will receive a Sprintax invitation. The email contains an activation link. If you do not see the email, check your spam or junk folders. The activation link expires after 24 hours, but you can click Forgotten password? on the log in screen to continue.

Complete Your Sprintax Profile

When you first log in, you will see an Electronic 1042-S Consent Form pop-up. If you click **Agree**, you agree to receive your 1042-S form electronically in Sprintax.

Electronic 1042-S Consent Form ✕

I consent to receive Form 1042-S in electronic format in lieu of receiving a paper copy in my Calculus account. Read full consent form

Disagree   Agree

Your profile consists of four parts:

a) **Your Details**: A multi-part questionnaire
b) **Final Summary**: Your overall tax summary
c) **Tax Forms**: Downloadable tax forms
d) **Document Exchange**: Upload signed documents

As you complete your profile and upload documents in Sprintax, your progress will appear on the left side of the screen. ☑ denotes completion, while ⚠ denotes attention is needed for proper completion.

Indiviudals:

☑ Residency

☑ Personal data

☑ Contact details

☑ Tax Forms Info

☑ Payments

☑ Residency Summary

☑ Tax Treaties

Entities:

⚠ Foreign Person Determination

⚠ Permanent Establishment

⚠ Entity Determination

☑ Addresses

⚠ Tax Forms Info

☑ Payments

Important for Entities: On the Foreign Person Determination screen in Sprintax, you will confirm your entity status. If you should be treated as an entity for tax purposes, please select the second box on the top of the Foreign Person Determination screen.

☐ Are you a sole-proprietor, single-member LLC, independent contractor individual, or an individual recipient of commissions or fees for independent services?

☑ Is the entity a corporation, international organization, governmental agency, private foundation, or another multi-member business entity based outside the US?

Sign Tax Forms and Upload Documents

All documents you need to sign are generated in the **Tax Forms** section of Sprintax Calculus.

Downloading and Signing Tax Forms

1) Click **Tax Forms** in the header.
2) Click *download all documents*.
3) Following the instructions, print, and sign the downloaded tax forms.
4) Select the **Document Exchange** header.
5) Select the appropriate **document type** and select the **signed** tax form from your device.
6) Select **Upload**

> **Note**: Your profile is not complete until you finish the questionnaire and upload signed documents.

What Happens Next and Additional Support

- If clarification or more information is needed, you will receive an inquiry from UR Accounts Payable.
- For additional support, you can contact Sprintax via email (calculussupport@sprintax.com or the **Contact Sprintax** button) or **Live Chat** directly within your profile for system related questions.

Need help?

💬 Live Chat

✕ Contact Sprintax

The University of Rochester can only provide general guidance and cannot advise on any individual or personal tax matters. You are encouraged to seek advice from a professional tax advisor if guidance is needed.

Created: May 2024