

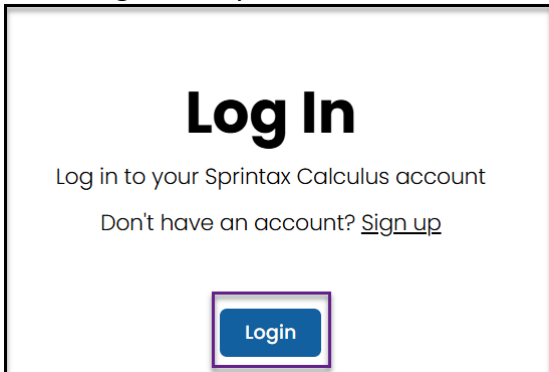
Sprintax Calculus Guide

OU requires Non-US Citizen/Green Card Holder employees to complete a profile in Sprintax Calculus, upload all supporting documents and sign all required forms in the system to ensure OU's compliance with tax laws. Please note that if your Green Card is still pending, you are required to complete your Sprintax Calculus activation.

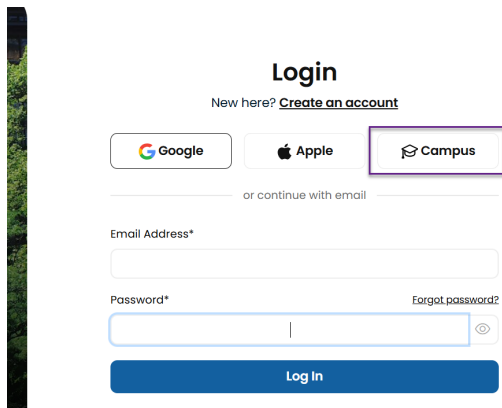
When you receive the email from noreply@sprintax.com with the subject, "ACTION NEEDED: Please Register and Update Tax Information." Read the instructions within that email in addition to the following detailed information.

Click on the following link to create an account, the system will open in a browser.

- <https://calculus.sprintax.com/>
- Click "Log in with your institution account" to get started.



- Select "Campus"
 - Email Address and Password must be left blank in this page.



- Search for and/or click the “University of Oklahoma/ University of Oklahoma Health Sciences Center.”

Please select your campus affiliation:

Start searching for university:

Campus *

University of Oklahoma/University of Oklahoma Health Sciences ▾


If you do not see your inviting entity in the list, it may be because the entity has not chosen to use campus credentials for accessing Sprintax. In this case, click "Go Back" and sign in using your Sprintax credentials instead.

[← Go Back](#) [Continue →](#)

University of Oklahoma Health Sciences Center = OKC Campus

University of Oklahoma = OU Main/Norman campus

- You will be taken to your Single-Sign on page.
- As an employee, you will sign on using Single Sign-On, which means you will be logging in using your University user account credentials.
- Sign in using your OU username and password that you use to sign into your computer.
- Click Sign In



One account. One university.

Sign in to Sprintax Calculus using your OU Email or OUNetID.

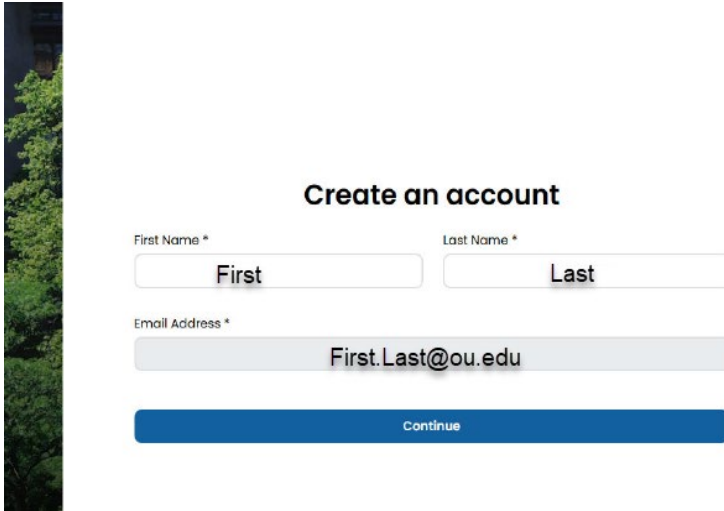
[Sign In](#)

[Forgot password?](#) [Forgot OUNetID?](#)

[New to OU? Setup your OU account.](#)

Having trouble signing in? Let us help!
needhelp.ou.edu

- Under create an account, enter your first and last name.



Create an account

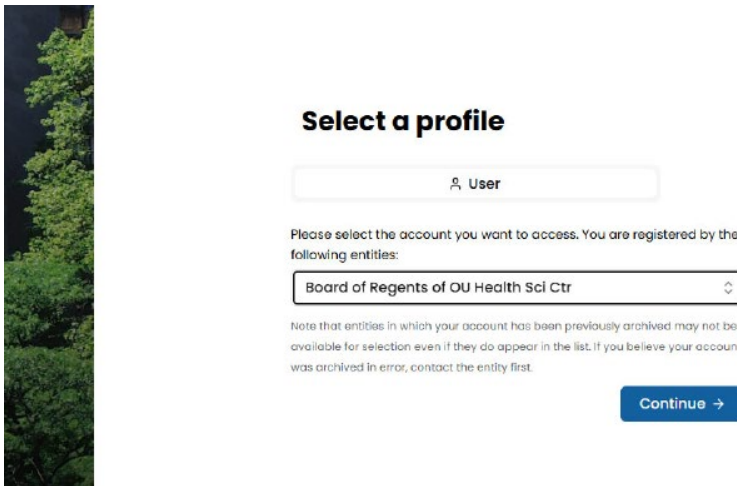
First Name *

Last Name *

Email Address *

[Continue](#)

- Your user profile will show, select Board of Regents of OU Health Sci Ctr.



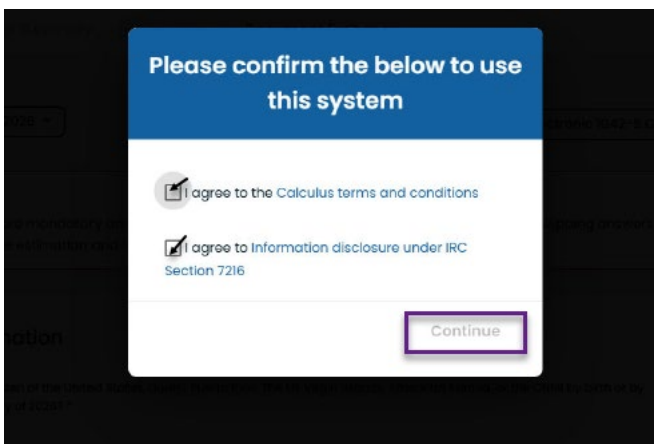
Select a profile

Please select the account you want to access. You are registered by the following entities:

Note that entities in which your account has been previously archived may not be available for selection even if they do appear in the list. If you believe your account was archived in error, contact the entity first.

[Continue →](#)

- A sign of agreeing to terms and conditions will appear. Click the boxes and select Continue.



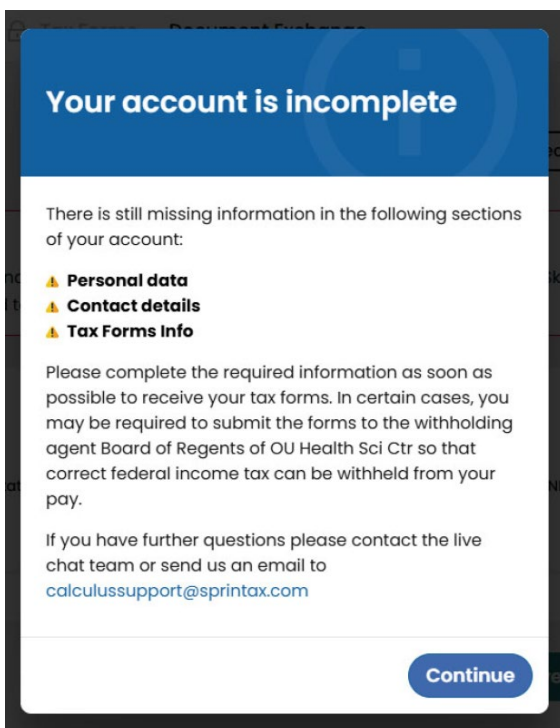
Please confirm the below to use this system

I agree to the Calculus terms and conditions

I agree to information disclosure under IRC Section 7216

[Continue](#)

- Next is a message stating that your account is incomplete. The next pages will show you how to fill out the sections listed in this message.



- In the next screen, you will then be prompted to elect online tax forms. This allows you to receive a 1042-S form (if applicable) online through the system. You do have the option to change your election later in your profile.

Read full consent form'. Below the text are two buttons: 'Disagree' in red text and 'Agree' in a green rounded rectangle."/>

Electronic 1042-S Consent Form X

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

Complete/Validate your Information

Important Reminder: Update your Sprintax Calculus profile every time there is a change in information throughout the year and your employment.

- Use the Menu on the left to navigate through each tab. All steps must be completed to finish the process. Refer to the color guide below to understand what the letter colors indicate:

BLUE = Tab currently being viewed.

GREEN = Tab is completed.

RED = Tab is missing information.

BLACK = Tab is not available yet. The Final Summary and Tax Forms tabs will remain unavailable until all required information has been completed.

- NOTE: Please review each tab to ensure all information is correct before signing the forms.

sprintax
calculus

Progress:

- 1** Residency
- ✓ Personal data
- ✓ Contact details
- ⚠ Tax Forms Info
- ✓ Payments
- ✓ Residency Summary
- 7 Final Summary
- 8 Tax Forms
- ✓ Document Exchange

1 Residency

Based on the information provided in this tab, you will be treated as a non-resident or resident alien for US tax purposes. Answer/Verify all Residency Information requested.

➡ Click ⓘ next to any question to get more information about the question. ⬅

Residency Information

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 2025? *

Yes No

Are you currently or will you be a Green Card holder on the last day of 2025? *

Yes No

Have you applied for U.S. citizenship/naturalization or legal permanent residence in the U.S.? *

Yes No

Have you been present, or do you expect to be present in the US during 2025? *

Yes No

Did you or do you plan to stay in the US for less than 31 days in total in 2025? *

Yes No

If you have applied for legal permanent residence in the U.S., select "Pending" in the next question unless your I-485 has been approved.

When did you first ever enter the US? * *You first entered the US, regardless of immigration status*

07-21-2024

What is your current immigration status/legal presence program? * *Refer to I-20/DS-2019 (box4)/I-797*

F1 - Student

What date did you first enter the US on this immigration status? * *End date on I-20/DS-2019 (box4)/I-797/EAD*

07-21-2024

What is the expiry date of your current immigration status? * *Same date as expiry date of current immigration status*

08-19-2027

Final departure date you left or intend to leave the US *The date you entered on CURRENT immigration status. If you have changed your status while in the US and have not left to re-enter, enter the date you switched to current (new) status.*

08-19-2027

Expiry date of your current US visa (if any) *

02-27-2026

Country of Citizenship *

Iran

Country of residence * *US is not an option on this question. This should be your tax residency country prior to the US. DACA individuals may choose "Other Country"*

Iran

The date you entered on CURRENT immigration status. If you have changed your status while in the US and have not left to re-enter, enter the date you switched to current (new) status.

You can check your I-94 online: <https://i94.cbp.dhs.gov/i94/#/home> or, check the stamps in your passport

US is not an option on this question. This should be your tax residency country prior to the US.

DACA individuals may choose "Other Country"

- If you do not remember the exact date of your first entry into the US, you can check your I-94 arrival/departure record if you traveled with your current passport here: <https://i94.cbp.dhs.gov/home>. Select view travel history and enter your information to obtain the records.
 - If you traveled with a different document, enter an approximate date.
- If your visa has changed and you have not left the country, the date on your current visa status would be the date you switched to your new status.
 - If you were granted an extension on the same visa, fill in the date on your current status, not the date the extension was granted.

- If you are a citizen of two countries, select the country under whose documents you entered the US.
- If the first date of entry into the US was under a different visa, you must enter those earlier visits before adding your current one.
 - Click “Add status” to add any needed additional statuses.
- Final Departure date you left or intend to leave the US - If you intend to leave the US at expiration of current visa, use the current expiration date. If you intend to renew your current visa, use the date you intend to leave the US on the future visa. This is critical in determining the correct tax status for the tax year and preventing backup withholding mid-year.

2 Personal data

Personal Information

First name *	Middle name
<input type="text" value="Legal First Name"/>	<input type="text"/>
Surname/Last name *	Date of birth *
<input type="text" value="Legal Last Name"/>	<input type="text" value="00-00-0000"/>
Place of birth	City of birth
<input type="text" value="Iran"/>	<input type="text" value="Tehran"/>

Tax Identification:

Do you have US TIN (SSN or ITIN) * ⓘ

Yes No

Your US TIN (SSN or ITIN) *

Student Number

Program Type/Occupation

Payroll system ID

What is your foreign (home country) tax identification number?

If you don't have a foreign tax identification number you can enter your national identification number which appears on your national ID card, or any unique number in your home country you are identified by.

Supplier ID

Employment Authorization Document Form I766

Are you a full-time student or scholar in a US educational institution in 2025? * ⓘ

Yes No

Are you a degree candidate in a US educational institution during 2025? * ⓘ

Yes No

Are you an OPT/CPT program participant during 2025? * ⓘ

Yes No

Are you married? *

Yes No

You cannot edit this field. If this number is incorrect, please contact Payroll and Tax team.

All employees are also assigned a Student Number in our system.

This is your employee ID at the University.

If you have an EAD card, select YES

Select No if your OPT/CPT has not been approved yet.

- If there is a discrepancy with your Name, SSN, Student Number, or Payroll System ID, in your Sprintax Calculus, please notify payroll and tax team using the email or phone number that corresponds to your campus:
 - OUHSC: hsc-tax@ouhsc.edu P:405-271-2055
 - Norman: payroll@ou.edu P:405-325-2961

3 Contact details

Enter your current US address and your foreign address where you lived prior to you coming into the US. Enter your US phone number and/or home country phone number.

Your US Address

Address (Number, Street)	Address (Apartment number)
<input type="text"/>	<input type="text"/>
Address (City)	State
<input type="text"/>	<input type="text" value=""/>
ZIP code	
<input type="text"/>	

Your Home Address (Outside the US)

Address (Number, Street, Apartment number) *	Address (County, Province)
<input type="text"/>	<input type="text"/>
Address (City)	Country *
<input type="text"/>	<input type="text" value=""/>
Postal code/Zip code	
<input type="text"/>	
Please choose your mailing address *	
<input checked="" type="radio"/> US address <input type="radio"/> Your Home Address (Outside the US)	
Please choose your current residential address *	
<input checked="" type="radio"/> US address <input type="radio"/> Your Home Address (Outside the US)	
US phone number	Home country phone number
<input type="text"/>	<input type="text"/>

4 Tax Forms Info

Click Yes to receiving income from the University.

Tax Forms Info

Have you or do you expect to receive income (wages, scholarship, commissions, royalties, or other payments) from Board of Regents of OU Health Sci Ctr in 2025? *

Yes No

For Income types, **ONLY** select the types of income that will pertain to the wages/income you receive from the University of Oklahoma for your current Visa. Uncheck all other boxes.

Income types

Scholarship or fellowship grants (Income Code 16) ⓘ

Compensation for independent personal services (Income Code 17) ⓘ

This includes honorarium and speaker fee payments to non-employees.

Compensation for dependent personal services (Income Code 18) ⓘ

Other income (awards, prizes) (Income Code 23) ⓘ

This includes awards, participant payments, and other non-service payments.

Select the icon to view the definition of each Income Code

Additional income information

How many days have you stayed or intend to stay in the US during 2025? * ⓘ

Do you have your own office, place of business in the U.S., that is maintained by you personally for performing these services? * ⓘ

Yes No

Are you legally allowed to work? * ⓘ

Yes No

If you are authorized to work for OU, the answer is Yes

W-4 questions

Do you have or expect to have more than one job in the US in 2025? *

Yes No Are you working more than one job outside of OU?

Do you have or expect to have three or more jobs in 2025? *

Yes No

Is this current job the highest paying job you had during the 2025? *

Yes No

Enter the expected annual amount from your highest-paying job *

\$ Enter the annual amount of pay for current/new job

Select payment period for this job *

Biweekly

Enter the expected annual amount from your lowest-paying job *

\$ If you had a second job enter the job that has the lowest amount here

Please choose your Employer/Payer *

Board of Regents of OU Health Sci Ctr

First date of employment with this employer

Enter first day of employment at OU

8233/W-8BEN/W-9 questions

Foreign source income (Independent Personal Services performed outside the US)

Leave blank unless you will not be in the US.

Total amount you expect to be paid for the dependent services you performed (wages and other similar payments from employment) *

\$

Note: Enter an estimated amount if you do not know the exact amount.
Please, provide a short description of the dependent services you perform(ed) *

Estimated compensation is important for complete tax forms.

Enter a short description, i.e., teaching, graduate assistant, etc.

Examples for acceptable descriptions of Dependent personal services
 A nonresident alien student can enter "part-time library assistant," "part-time restaurant worker," or "teaching one chemistry course per semester to undergraduate students."
 A nonresident alien professor or teacher can enter "teaching at ABC University."
 A nonresident alien researcher can enter "research at ABC University's school for liquid crystal research."
 A nonresident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."
 Please, complete in the field below income earned ONLY under JI-Teacher, JI-Researcher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar

Total compensation you expect to be paid for teaching or research in the current tax year *

\$

Note: Enter an estimated amount if you do not know the exact amount.
Please, provide a short description of the dependent services related to teaching or research *

Enter a short description, i.e., teaching, graduate assistant, etc.

Please, complete in the field below income earned ONLY under JI-Teacher, JI-Researcher, JI-Lecturer, JI-Research Scholar OR JI-Short term scholar
 Have you been paid for or do you expect to be paid for participation in a research activity? *

Yes No

Note: Consider only research activity under your current immigration status and while being enrolled with the institution you are completing this questionnaire for.

Is the research for the public interest (for a non-profit organization)? *

Yes No

Have you been invited by a governmental institution, educational institution, or scientific research institution as a teacher, lecturer, or to participate in research? *

Yes No

Please, provide a short description of the employment you perform(ed) during your study or training

Examples for acceptable descriptions
 A nonresident alien student can enter "part-time library assistant," "part-time restaurant worker," or "teaching one chemistry course per semester to undergraduate students."
 A nonresident alien business/vocational trainee can enter "neurosurgical residency at ABC Hospital" or "one-year internship in hydraulic engineering at XYZ Corporation."
 A nonresident alien student working on-campus

Passport number (from your current valid passport) *

Some individuals may see this additional question on the page:

Tax treaties in prior years

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 2024

Compensation during studying and training (employment or training on or off campus)

Compensation for teaching or research (teachers or researchers wages)

Scholarship or grant

Other income covered by tax treaty

No tax treaty was claimed

Note: please, check your previous years tax returns (if, any). You can find this information on 1040NR, page 5, table L (i) or 1040NR-EZ, page 2, table J (i)

← Back Save And Continue →

5 Residency Summary

This tab provides a summary of how Sprintax Calculus has determined your residency status for tax purposes. Under U.S tax law, non-citizens are classified as either Nonresident Alien (NRA) or Resident Alien (RA). If you have entered information for prior years, the software will generate a timeline showing your tax status for those years.

- If the timeline in Sprintax Calculus differs from what you have previously filed, please note that information from prior years is for reference only. For questions or concerns regarding past tax filings, consult a qualified tax advisor.

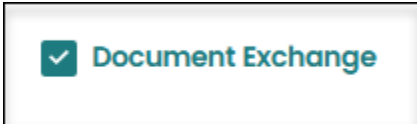
When you Save and Continue at the bottom of the Payments page, you should be taken to the Tax Treaty page.

6 Tax Treaties

Certain individuals may be eligible for tax treaty benefits. However, OUHSC may choose not to accept an individual's claim for tax treaty benefits. This typically occurs when the claim could result in a retrospective or prospective loss, violate a two-year limit clause, or if the individual plans to apply for U.S. lawful permanent residence (a "green card"), even if they have not yet applied.

OUHSC's decision not to recognize an individual's tax treaty claim does not revoke their eligibility for tax treaty benefits. Individuals may still claim these benefits when filing their tax return. However, they are responsible for any back taxes, penalties, or interest if they later violate the terms of the treaty.

When you click Save and Continue at the bottom of the Tax Treaties page, you should be taken to the Final Summary page. On this page, you will find a breakdown of not only your residency status but the information provided in all previous tabs.



Lastly, we have the **Document Exchange** page. In this page, you must upload all required documents.

- The required documents will be listed and colored red.
- Once you upload the documents by selecting a Document Type and clicking upload, the documents will turn green and provide the date and time they were submitted.
- If you need to make any changes or upload a more recent document, delete the old one and the document option will become available in Document Type dropdown once again.

Once all required documents have been submitted, the Tax team will review and verify the information provided. If no additional details are needed, you will receive an informational email from the Tax team with the subject line “20XX Tax Residency Status,” where “20XX” reflects the current tax year. This email will inform you of your classification for tax purposes as either a Resident Alien (RA) or a Nonresident Alien (NRA), and will also indicate whether you qualify for FICA exemptions.