

Job Aid: How to Claim Tax Exemption

Per the Internal Revenue Service (IRS), to continue exemption from withholding in a new calendar year, you must provide a new Form W-4 or DE-4 claiming exempt status by February 15 of the new calendar year.

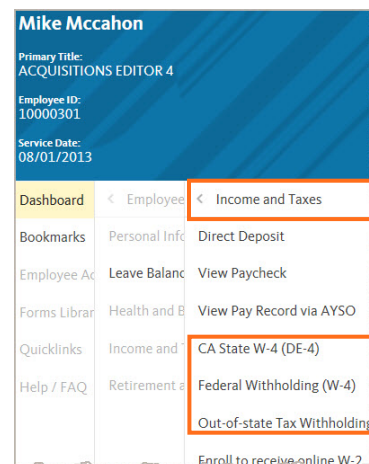
1. Visit UCPath at <http://ucpath.universityofcalifornia.edu>.
2. **Menu Navigation:** Employee Actions > **Income and Taxes**.

OR

Dashboard Navigation: Income and Taxes widget

- ◆ For Federal exemption, click **Federal Withholding (W-4)**.
- ◆ For state exemption, click **CA State Withholding (DE-4)**.
- ◆ For exemption for another state, click **Out-of-State Tax Withholding**.

Note: Submit the out-of-state form via the **Ask UCPath Center** tool on the UCPath website.



3. In the **Claim Exemption** section, enter the year for which you want to claim exemption.
4. Select the check box if you meet the conditions for exemption and then click **Submit**.

Note: This must be completed before February 15. If your exemption is not flagged in the system, your record reverts to **Single with Zero Allowances**.

Claim Exemption

I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption

- [This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.]

☐ Check this box if you meet both conditions to claim exempt status.

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this online certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status. I declare that I have examined this online certificate and to the best of my knowledge and belief, it is true, correct, and complete.

SUBMIT