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.

   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.