

Use this task to complete or update your Federal withholding in UCPath.

**Dashboard Navigation:**

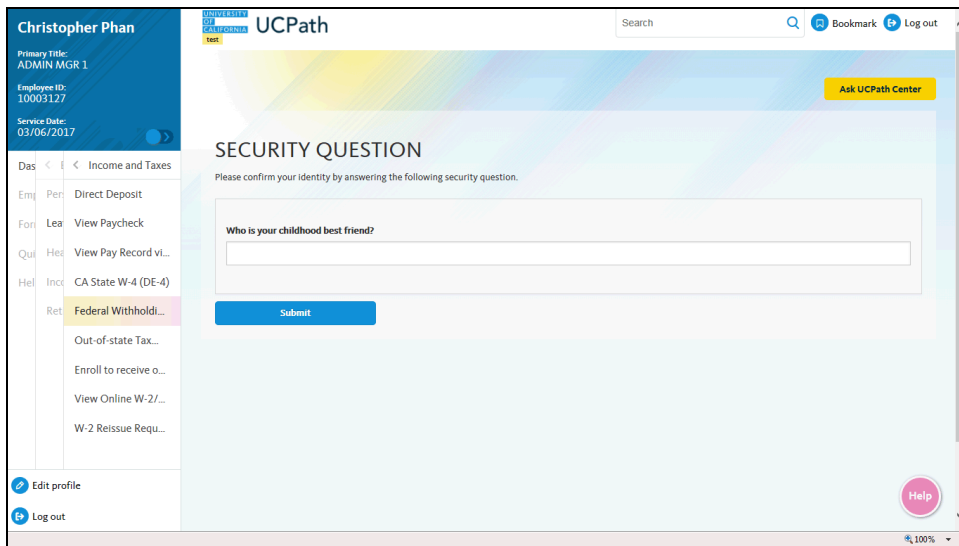
Income and Taxes > **Federal Withholding (W-4)**


or

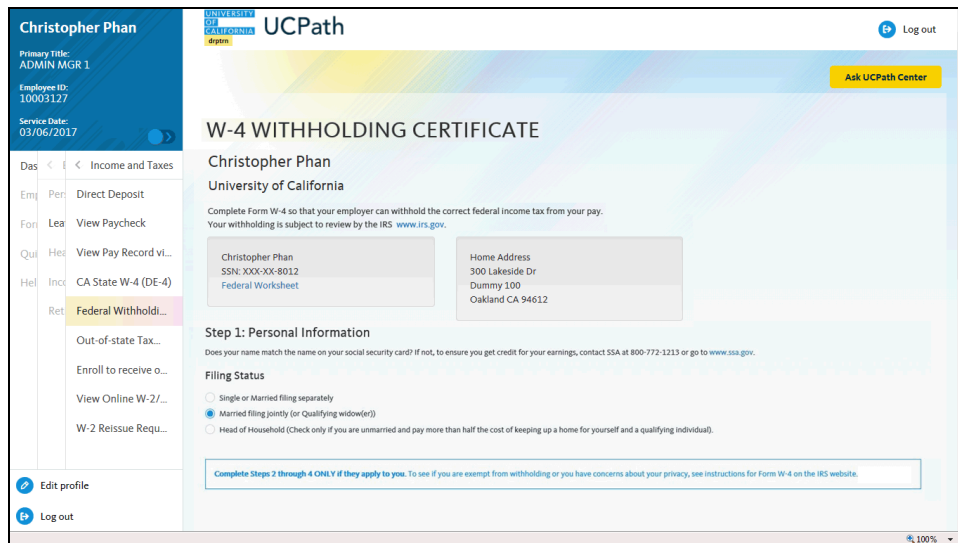
**Menu Navigation:**

Employee Actions > Income and Taxes > **Federal Withholding (W-4)**

**Note:** This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.



Step	Action
1.	<p>Before you update your federal withholding, you must validate your identity. UCPath randomly displays one of the security questions set up on your profile. Click in the <b>Security Question</b> field.</p> <p>For this example click in the <b>Who is your childhood best friend?</b> field.</p>
2.	<p>Enter the desired information into the <b>Security Question</b> field.</p> <p>For this example, enter <b>Molly</b>.</p>
3.	<p>Your answer appears as a series of dots.</p> <p>Click the <b>Submit</b> button.</p> 



Step	Action
4.	<p>If you answer the question correctly, UCPath displays the <b>W-4 Withholding Certificate</b> page, and you can make your changes.</p> <p>If you answer incorrectly, an error message appears. You have three attempts to answer this question correctly. After three incorrect answers, UCPath displays the <b>Security Questions Setup</b> page. You must provide your date of birth and the last four digits of your Social Security number to validate your identity and then update your security questions and answers.</p>
5.	<p>Use the <b>W-4 Withholding Certificate</b> page to complete or review and update your withholding information for Federal income tax. Select the appropriate option in the <b>Filing Status</b> section.</p> <p>In this example, <b>Married filing jointly (or Qualifying widow(er))</b> is selected and no change is needed.</p>
6.	Click the scroll bar.

**Christopher Phan**  
Primary Title: ADMIN MGR 1  
Employee ID: 10003127  
Service Date: 03/06/2017

**W-4 WITHHOLDING CERTIFICATE**  
Christopher Phan  
University of California

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS [www.irs.gov](http://www.irs.gov).

Christopher Phan  
SSN: XXX-XX-8012  
Federal Worksheet

Home Address  
300 Lakeside Dr  
Dummy 100  
Oakland CA 94612

**Step 1: Personal Information**  
Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov).

**Filing Status**

Single or Married filing separately  
 Married filing jointly (or Qualifying widow(er))  
 Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

**Step 2: Multiple Jobs or Spouse Works**  
[View Instructions](#)  
Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

Multiple Jobs or Spouse Works

[Complete Steps 3 through 4\(b\) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. \(Your withholding will be most accurate if you complete Steps 3 through 4\(b\) on the Form W-4 for the highest paying job.\)](#)

Step	Action
7.	Complete steps 2 through 4 on the form <u>only if they apply to you</u> .
8.	Click the <b>View Instructions</b> link for more information regarding <b>Step 2: Multiple Jobs or Spouse Works</b> .  <a href="#">View Instructions</a>

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**Filing Status**

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**Step 2: Multiple Jobs or Spouse Works**  
[Hide Instructions](#)  
Do only one of the following:  
(a) Use the estimator at [www.irs.gov/1044App](http://www.irs.gov/1044App) for most accurate withholding; **or**  
(b) Use the Multiple Jobs Worksheet and enter the result in Step 4 (c) below for roughly accurate withholding; **or**  
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.  
**CAUTION:** If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).  
Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

Multiple Jobs or Spouse Works

[Complete Steps 3 through 4\(b\) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. \(Your withholding will be most accurate if you complete Steps 3 through 4\(b\) on the Form W-4 for the highest paying job.\)](#)

Step	Action
9.	Read the instructions for <b>Step 2: Multiple Jobs or Spouse Works</b> .
10.	Complete Steps 3 through 4(b) on the form for <u>only one</u> of these jobs.
11.	Click the scroll bar.

Step	Action
12.	If applicable, complete the fields under <b>Step 3: Claim Dependents</b> .
13.	Click the <b>View Instructions</b> link for more information regarding Step 3. <a href="#">View Instructions</a>

Step	Action
14.	Read the instructions for <b>Step 3: Claim Dependents</b> .
15.	If applicable, complete the fields under <b>Step 4: Other Adjustments</b> .
16.	Click the <b>View Instructions</b> link for more information regarding Step 4. <a href="#">View Instructions</a>

Step	Action
17.	Read the instructions for <b>Step 4: Other Adjustments</b> .
18.	Enter or verify the tax year for which you are claiming an exemption.
19.	If you are claiming an exemption, select the last check box on the page.
20.	Click the <b>Submit</b> button.

Step	Action
21.	A confirmation message indicates that changes may not be reflected on your next paycheck due to the timing of your W-4 changes.  Click the <b>OK</b> button.

Step	Action
22.	<p>You have completed or updated your Federal withholding in UCPath online.</p> <p>A confirmation email is sent to the primary email address on your account. You can identify your primary email address under Employee Actions &gt; Personal Information &gt; <b>Personal Information Summary</b>.</p> <p><b>End of Procedure.</b></p>