

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.

Christopher Pl	an UCPath	Search	Q 😡 Bookmark 🕑 Log out 🔺
Primary Title: ADMIN MGR 1 Employee ID:			Ask UCPath Center
10003127 Service Date: 03/06/2017			
Das < I < Incon	e and Taxes Please confirm your identity by answering the following security question.		
Emj Per: Direct D	posit		
Fori Lea View Pay	check Who is your childhood best friend?		
Qui Hea View Pay	Record vi		
Hel Inco CA State	W-4 (DE-4)		
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Out-of-s	ate Tax		
Enroll to	eceive o		
View On	ine W-2/		
W-2 Reis	ue Requ		
🖉 Edit profile			Help
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Step	Action
1.	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 Security Question field.
	For this example click in the Who is your childhood best friend? field.
2.	Enter the desired information into the Security Question field. For this example, enter Molly .
3.	Your answer appears as a series of dots. Click the Submit button.
	Subint



Christopher Phan	UCPath	🕒 Log out	^
Primary Title: ADMIN MGR 1			
Employee ID: 10003127		.Path Center	
Service Date: 03/06/2017	W-4 WITHHOLDING CERTIFICATE		
Das 🦿 E < Income and Taxes	Christopher Phan		
Emp Per: Direct Deposit	University of California		
Fori Lear View Paycheck	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.		
Qui Hea View Pay Record vi	Christopher Phan Home Address		
Hel Inco CA State W-4 (DE-4)	SSN: XXX-XX-8012 300 Lakeside Dr Federal Worksheet Dummy 100		
Ret Federal Withholdi	Oakiand CA 94612		
Out-of-state Tax	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 55A at 800-772-1213 or go to www.ssa.gov.		
Enroll to receive o	Filing Status		
View Online W-2/	Single or Married filing separately		
W-2 Reissue Requ	Married filing pointly (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).		
Edit profile	Complete Steps 2 through 4 ONLY if they apply to you. To see If you are exempt from withholding or you have concerns about your privacy, see instructions for form W-4 on the IRS website.		
U LOg OUL		a 100%	- ×

Step	Action
4.	If you answer the question correctly, UCPath displays the W-4 Withholding Certificate page, and you can make your changes.
	If you answer incorrectly, an error message appears. You have three attempts to answer this question correctly. After three incorrect answers, UCPath displays the Security Questions Setup 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.
5.	Use the W-4 Withholding Certificate page to complete or review and update your withholding information for Federal income tax. Select the appropriate option in the Filing Status section.
	In this example, Married filing jointly (or Qualifying widow(er)) is selected and no change is needed.
6.	Click the scroll bar.

			Christenher Dhan
Prima ADN	y Title:	GR 1	Christopher Phan
			University of California
Employee ID: 10003127			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.
03/0	6/201		Christopher Phan Home Address
Das	< 1	< Income and Taxes	SSN: XXX-XX:8012 300 Lakeside Dr
Emį	Per	Direct Deposit	Pederal Worksheet Dummy 100 Oakland CA 94612
For	Lea	View Paycheck	Step 1: Personal Information
Qui	Hea	View Pay Record vi	Does your name match the name on your social security cart? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.
Hel	Inco	CA State W-4 (DE-4)	Single or Married filing separately
	Ret	Federal Withholdi	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).
		Out-of-state Tax	
		Enroll to receive o	Complete Steps 2 through 4 ONLY If they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.
		View Online W-2/	Step 2: Multiple Jobs or Spouse Works
			View Instructions
		W-2 Reissue Requ	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
	dit or	ofile	
	une pr		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.)

letion
Complete steps 2 through 4 on the form <u>only if they apply to you</u> .
Click the View Instructions link for more information regarding Step 2: Multiple obs or Spouse Works .

Christopher Phan	Christopher Phan
Primary Title: ADMIN MGR 1 Employee ID: 10003127	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.ins.gov.
Service Date: 03/06/2017	Christopher Phan Home Address SSN: XXX-XX8012 300 Lakeside Dr Federal Worksheet Dummy 100 Oakland CA 94612
Emi Per Direct Deposit	Step 1: Personal Information Dee your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact 55A at 800 772-1213 or go to www.sag.gov.
Qui Hea View Pay Record vi Hel Inco CA State W-4 (DE-4)	Filing Status Single or Married filing separately Single or Married filing jointly (or Qualifying widow(er))
Ret Federal Withholdi	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 Head Instructions
Enroll to receive o	Do only one of the following. (a) Use the estimator at www.zow/W44pof or most accurate withholding or (b) Use the Multiple look 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.
W-2 Reissue Requ	CAUTOR (I you have privacy concerns, choose (a) or (b). If you and/or your posuce have income from self-employment, including as an independent contractor, choose (a). Complete this step if you (a) hold more than one job at a time, or (a) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.
Edit profile Log out	Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps black 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 Step 2: Multiple Jobs or Spouse Works.
10.	Complete Steps 3 through 4(b) on the form for <u>only one</u> of these jobs.
11.	Click the scroll bar.



Christopher Phan Primey Title: ADMIN MGR 1 Employee ID: 10003127 Service Date: 03/06/2017		Step 3: Claim Dependents Vew instruction If your income will be \$200,000 or less (#400,000 or less If married filing jointy): Multiply the number of quilifying children under age 12 by \$2,000 Multiply the number of other dependents by \$500 Other tax credits
Das 🕓	I < Income and Taxes	Total
Emp Per	Direct Deposit	Stan & Other Adjustments
For Lea	a View Paycheck	Step 4. Other Adjustments
Oui He	View Pay Record vi	(a) Other Income
Hel Inc	CA State W-4 (DE-4)	(b) Deductions
Dei		(c) Extra Withholding
Kei	Out-of-state Tax	Claim Exemption from Withholding I claim exemption from withholding for the year 2020 and I certify that I meet 80114 of the following conditions for exemption from withholding:
	Enroll to receive o	Last year I owed no federal income tax. This year I expect to owe no federal income tax.
	View Online W-2/	Check this box if you meet both conditions to claim exemption from tax
	W-2 Reissue Requ	withouting 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 exampt status. I declare that I have examined this online certificate and to be best of my knowledge and belief, it is true, correct, and complete.
🖉 Edit p	profile	Submit
🕒 Log a	out	

Step	Action	
12.	If applicable, complete the fields under Step 3: Claim Dependents.	
13.	Click the View Instructions link for more information regarding Step 3. View Instructions	

Christopher Phan Primary Ittle ADMIN MGR 1 Imployee ID: 10003127 Service Date: 03/06/2017		pher Phan GR 1	Step 3: Claim Dependents Held Instruction To qualify for the dolt tax credit, the dolt must be under age 12 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number, You may be able to claim an credit for other dependents for whom a dolt tax credit care to claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include other tax credits in this step, such a education tax credits and the foreign tax credit. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return. If your increme will be \$20,0000 or less (Hou,000 or less if married filing jointly): Method to under a class if the outbod on return to the total mount in the part to the total mount in the part to the total mount in the part to the outbod or tax credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return. If your increme will be \$20,0000 or less (Hou,000 or less if married filing jointly): Method to under a credit incredition and the tax to the tax	>
Das	< 1	< Income and Taxes	thomps the number of quark trainer are to be a second	
Emp	Pen	Direct Deposit	Multiply the number of other dependents by \$500	
For	Lea	View Paycheck	Other tax credits	
Qui	Hea	View Pay Record vi	Step 4: Other Adjustments	
Hel	Inco	CA State W-4 (DE-4)	(a) Other Income	
	Ret	Federal Withholdi	(b) Deductions	
		Out-of-state Tax	(c) Extra Withholding	
		Enroll to receive o View Online W-2/ W-2 Reissue Requ	Claim Exemption from Withholding Laim exemption from withholding for the year 2020 and Lortify that I meet 801H of the following conditions for exemption from withholding: Lait year I owned no federal income tax. This year I expect to own on forear al income tax. Check this or you meet both conditions to claim exemption from tax withholding	
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Qui Hel	Hea Inco Ret Edit pr	View Pay Record vi CA State W-4 (DE-4) Federal Withholdi Out-of-state Tax Enroll to receive o View Online W-2/ W-2 Reissue Requ ofile	Step 4: Other Adjustments Vervices User instruction Up Order traceme Up Order tracements Up Order tracem	0%

Step	Action
14.	Read the instructions for Step 3: Claim Dependents.
15.	If applicable, complete the fields under Step 4: Other Adustments.
16.	Click the View Instructions link for more information regarding Step 4. View Instructions



Christopher Phan	\$2,000
Primary Title:	Multiply the number of other dependents by \$500
ADMÍN MGR 1	Other tax credits
Employee ID: 10003127	Total
Service Date:	Step 4: Other Adjustments
03/06/2017	Hide Instructions
Das 🦿 🗧 < Income and Taxes	(a) Other income. If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs.
Em. Bon Direct Deposit	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here.
Emp Per Direct Deposit	(c) Extra withholding. Enter any additional tax you want withheld each pay period.
Fori Lea View Paycheck	
Out Het View Pay Record vi	(a) Other Income
Qui nei neuraj necora n	(b) Deductions
Hel Inco CA State W-4 (DE-4)	
Ret Federal Withholdi	(c) Extra Withholding
	Claim Exemption from Withholding
Out-of-state Tax	I claim exemption from withholding for the year 2020 and I certify that I meet BOTH of the following conditions for exemption from withholding:
Enroll to receive o	Last year I owed no federal income tax. This was to federal income tax.
View Online W-2/	this year respect to over no recear an accurate sace Charle blic has former and hash confidence to also accuration form has
view Online w-27	the clies of the source of the local control of the source of the s
W-2 Reissue Requ	
	under the penatuses of perjury, Licertury that the number of withholding, that Lam entitled to claim the exempt status. Licectare that Lawe examined this online certificate and to the best of my knowledge and belief, it is true, correct, and complete.
	Submit
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Step	Action
17.	Read the instructions for Step 4: Other Adjustments.
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 Submit button.

Christopher Phan	California UCPath 6 Log out
Primary Title: ADMIN MGR 1 Employee ID: 10003127	Ask UCPath Center
Service Date: 03/06/2017	SUBMIT CONFIRMATION
Das 🗧 🔍 Income and Taxes	
Emj Per: Direct Deposit	✓ The Submit was successful. However, due to limite your charge may not be reflected on the east psychick.
Fori Lea View Paycheck	nomerer, que to uning, your claige may not de relected on the next paytieck.
Qui Hea View Pay Record vi	ОК
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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 OK button.



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