Use this task to update your out-of-state income tax withholding in UCPath.

**Dashboard Navigation:**
Forms Library > Access Forms > Payroll > Out-Of-State Income Tax Withholding

**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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Out-Of-State Income Tax Withholding link.</td>
</tr>
</tbody>
</table>
UCPath Task:
Update My Out-Of-State Income Tax Withholding

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Search</strong> link.</td>
</tr>
</tbody>
</table>

2. Click the Search link.

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Step 3. If you live in the U.S. **but outside of California**, update your out-of-state income tax withholding with this form.

4. Click the scroll bar.

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Form ID: 175568

Out-of-State Income Tax Withholding: Withholding Information

This form determines the tax withholding for an employee who works and lives in a state other than California. Employees are categorized as one of the following:

- California tax residents—subject to tax withholding on their worldwide income regardless of where the work is performed.
- California tax residents—subject to tax withholding under the conditions set forth under the Service Member Residency Pandemic Act.
- California non-residents who work in California—subject to tax withholding on their portion of income that is earned in the State of California.
- Non-residents working and living outside California—subject to California tax withholding. They may be subject to state income tax withholding in the state in which they are working.

Please Note: An asterisk (*) next to a field name indicates a required field.

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**Home Address**: Check the "Out-of-State Address" checkbox to be able to edit the "Home Address" fields. Check the "Military Spouse (MORPA)" checkbox if you are a military spouse claiming or state tax exemption under MORPA.

**Changing Address Information Below will not Update Address Information in UCP**

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**Employee Information**:

- **Employee ID**: 10121212
- **Home**: Address
  - **Address Line 1**: 560 Lakeside Dr
  - **City**: Oakland
  - **State**: Ca. California
  - **Postal Code**: 94612
- **Employee Telephone**: Phone number

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**Employee Contact Information**:

- **Home Telephone**: Phone number
- **Preferred Email**: Email address
### Step 5
Review the defaulted **Home Address** information. Change if needed for tax purposes.

**Note:** Changing Address Information here will **not** update any other address information in UCPath.

### Step 6
For this example, change your Home Address.

Click the **Override Address** slider to open the fields for update.

### Step 7
Update your address.

Click in the **Address Line 1** field.

300 Lakeside Dr

### Step 8
For this example, enter **123 Oak Street**.

### Step 9
If applicable, enter apartment or suite number in the **Address Line 2** field.

The default value will be replaced with blanks if not changed.

For this example, do not enter a value.
<table>
<thead>
<tr>
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</table>
| 10. | Update your city.  
Click in the **City** field.  
**Oakland** |
| 11. | For this example, enter **Phoenix**. |
| 12. | Update your state.  
Click in the **State** field.  
**CA** |
| 13. | Enter or look up your state.  
For this example, enter **AZ**. |
| 14. | Enter postal code.  
Click in the **Postal Code** field.  
For this example, enter **85003**. |
| 15. | The state in which you reside must be entered here.  
Click in the **State of Residence** field. |
| 17. | Click the lookup button of the **State of Residence** field. |
## Step 18
Click in the **begins with** field.

## Step 19
Enter the desired information into the **begins with** field.
For this example, enter **AZ**.

![Lookup](image)

## Step 20
Click the **Search** button.

## Step 21
Click the **Select** link in the **Select Row** column.
Step | Action
--- | ---
22. | Click the scroll bar.

23. | Update **Employee Contact Information** if needed.
   
   For this example, accept the defaults.
<table>
<thead>
<tr>
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</table>
| 24.  | Enter your non-California income tax address in the **Non-Resident of California** section.  
Review all instructions carefully and completely before taking action. |
| 25.  | Enter a starting date.  
Click in the **Start Date** field. |
| 26.  | Enter the desired information into the **Start Date** field.  
For this example, type **07/06/2020**. |
| 27.  | If an ending date is known, enter it in the **End Date** field.  
If unknown, click **End Date Unknown/TBD**.  
For this example, click the **End Date Unknown/TBD** slider. |
| 28.  | Enter the city.  
Click in the **City** field. |
| 29.  | Enter the desired information into the **City** field.  
For this example, enter **Phoenix**. |
### UCPath Task:
**Update My Out-Of-State Income Tax Withholding**

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| 30.  | If county taxes apply, enter the county.  
      | Click in the **County** field. |
| 31.  | Enter the desired information into the **County** field.  
      | For this example, enter **Maricopa**. |
| 32.  | Enter the state using the **State** field.  
      | Click the **Look Up State** button. |

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<tbody>
<tr>
<td>33.</td>
<td>Click in the <strong>begins with</strong> field.</td>
</tr>
</tbody>
</table>
| 34.  | Enter the desired information into the **begins with** field.  
      | For this example, enter **AZ**. |
Step | Action
--- | ---
35. | Click the Search button.
36. | Click the Select link in the Select Row column.
37. | Click the scroll bar.
Step 38. Use the **File Attachments** section to determine U.S. state income tax requirements and to download and fill out required tax forms.

**Review all instructions carefully and completely before taking any action.**

Step 39. States require notification for income tax obligations via state tax forms.

Current tax withholding requirements and forms for states with income taxes can be accessed here; choose as appropriate.

**Carefully read and follow all instructions.**
Step 40. Current information on states with reciprocal agreements are found here. Carefully read and follow all instructions.
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<tr>
<td>41.</td>
<td>Upload <strong>completed and signed</strong> state income tax forms and relevant documents one at a time or scan multiple documents together and load them as one. Upload completed state income tax withholding forms only; do not upload year-end tax returns or documentation showing residence. Click the <strong>Upload</strong> button.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>Upload File</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>43.</td>
<td>Find the applicable tax form. Click the appropriate file. FORMS_WITHHOLDING_2020_A-4_f.pdf</td>
</tr>
<tr>
<td>44.</td>
<td>Click the <strong>Open</strong> button.</td>
</tr>
</tbody>
</table>
**UCPath Task:**
*Update My Out-Of-State Income Tax Withholding*

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<tr>
<td>45.</td>
<td>Click the <strong>Upload</strong> button.</td>
</tr>
<tr>
<td>46.</td>
<td>Click the scroll bar.</td>
</tr>
</tbody>
</table>

**Form Action Items**

1. I understand that I must submit a new UCPath form for out-of-state income tax withholding when my assignment is in the state listed above.

2. I certify to the best of my knowledge that the above information is true, correct and complete.

3. By checking this box, I am certifying I understand that updating my address in this form does not update my address in the UCPath system.

**Comments**

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<tr>
<td>47.</td>
<td>Completion of the <strong>Form Action Items</strong> section is required before form submission.</td>
</tr>
<tr>
<td>48.</td>
<td>Review and complete the first <strong>Action Item</strong> and then acknowledge completion. Click the <strong>Acknowledgement</strong> slider.</td>
</tr>
<tr>
<td>49.</td>
<td>Review and complete the next <strong>Action Item</strong> and then acknowledge completion. Click the <strong>Acknowledgement</strong> slider.</td>
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<tr>
<td>50.</td>
<td>Review and complete the next <strong>Action Item</strong> and then acknowledge completion. Click the <strong>Acknowledgement</strong> slider.</td>
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### Step 51. Action

Enter text in the **Comments** field if needed.

For this example, leave the field blank.

### Step 52. Action

After completing all applicable fields in all the sections, **submit the form for processing.**

Click the **Submit** button.
Step | Action
--- | ---
53. | Click the **Yes** button.

Step | Action
--- | ---
54. | Your submission was successfully submitted to the approval process.
Step | Action
--- | ---
55. | You have submitted your out-of-state income tax withholding request in UCPath. **End of Procedure.**