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.


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**.