

Job Aid: Change Tax Status from International to U.S.

Overview

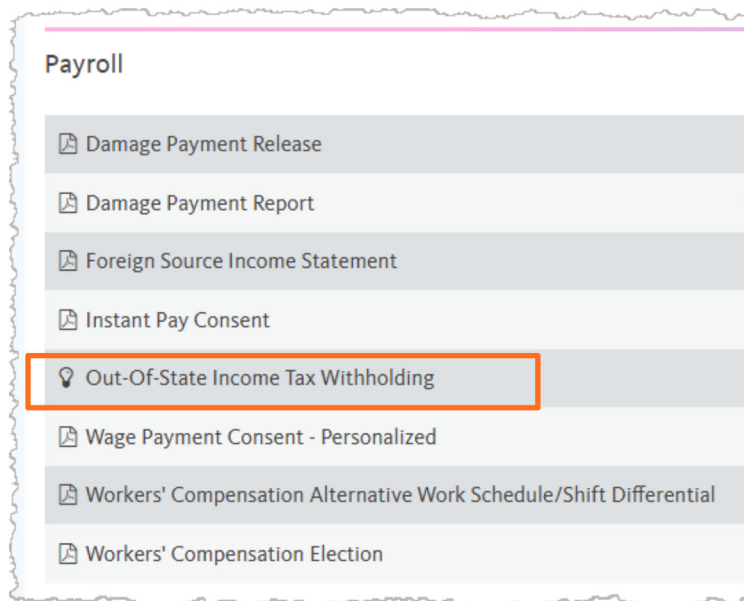
Employees who work outside of the U.S., whether U.S. citizens or not, and relocate to the United States are required to submit an updated **Out-of-State Income Tax Withholding** form. This will cancel their international tax status and set up a new tax status for the U.S. state from where they will be working.

Non-Resident Alien (NRA) employees must update **GLACIER**.

Use this job aid to submit an updated **Out-of-State Income Tax Withholding** form to cancel international tax status and to set up tax status for the U.S. state from where work will be done.

Note: See *Complete the Foreign Source Income Statement* form and *Complete the Out-Of-State Income Tax Withholding* form simulations for information on how to set up tax status for international hires.

1. **Dashboard Navigation:** Forms Library > Access Forms > Payroll > **Out-Of-State Income Tax Withholding**
2. Click the **Out-Of-State Income Tax Withholding** link.



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3. The **Out-Of-State Income Tax Withholding** form displays current tax information. Review to ensure correct selection. If incorrect, use the back arrow and click the **Out-Of-State Income Tax Withholding** link.

OUT-OF-STATE INCOME TAX WITHHOLDING

eForm ID: 22952

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 – not subject to tax withholding under the conditions set forth under the *Service Member Civil Relief Act*, as amended by the *Military Spouses Residency Relief 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 – not 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.

Employee Information

Empl ID:
10191147

Job Title:
TRAINER 4

Name:
Megan Mejia

Department:
830300 - UCPATH CENTER

4. In the **Home Address** section, click **Override Address** to update with the new U.S. address.

Home Address

Check the "Override Address" checkbox to be able to edit the "Home Address" fields.

Check the "Military Spouse (MSRRA)" checkbox if you are a military spouse claiming CA state tax exemption under MSRRA.

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

☐ Military Spouse (MSRRA)

☒ Override Address

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5. Enter Home Address fields as appropriate.

Home Address

Check the "Override Address" checkbox to be able to edit the "Home Address" fields.

Check the "Military Spouse (MSRRA)" checkbox if you are a military spouse claiming CA state tax exemption under MSRRA.

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

☐ Military Spouse (MSRRA)

☒ Override Address

Address Line 1:

300 Lakeside Dr

Address Line 2:

City:

Oakland

State:

CA

Postal Code:

94612

Type of Request:

Stop Existing Request

State of Residence *

CA

Field/Section	Description
Address Line 1	Enter mailing street number and name.
Address Line 2	If applicable, enter apartment, suite or space number.
City	Enter U.S. city.
State	Enter U.S. state.
Postal Code	Enter U.S. Zip Code.
Type of Request	Defaults to "Stop Existing Request" or select from drop-down list.
State of Residence	Enter U.S. state of residence.

6. Update Employee Contact Information as needed.

Employee Contact Information

Home Telephone

510/987-0457

Preferred Email *

joansmith@ucop.com

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7. Enter **Cancel Withholding** fields as appropriate.

Cancel Withholding

This section should only be completed when an individual no longer works out of state or wants to cancel a previous state's withholding. Please cancel state income tax withholding deductions for the city, county and state listed below.

End Date 02/19/2019	Stop County Germany
Stop City Berlin	Stop State: FC
Start Date: 02/20/2019	Start County: Riverside
Start City: Riverside	Start State: CA - California

Field/Section	Description
End Date	Enter the last valid date of the foreign address. Cannot equal Start Date .
Stop County	Enter the foreign <u>country</u> that you are moving from.
Stop City	Enter the foreign city that you are moving from.
Stop State	Enter "FC" to indicate "foreign country".
Start Date	Enter the date that the new address becomes valid. Cannot equal End Date .
Start County	Enter the U.S. county of your new address.
Start City	Enter the U.S. city of your new address.
Start State	Enter the U.S. state of your new address.

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8. Use the **File Attachments** section to determine U.S. state tax requirements and download required tax forms. Review all instructions carefully and completely before taking action.

File Attachments

Unless you are claiming Out-of-State taxes in one of the following states, you must attach a State Tax Form:

- AK
- FL
- NV
- NH
- SD
- TN
- TX
- WA
- WY

You can find the list of State Tax Forms [here](#).

If you work in a state that has a reciprocal state of which you are a resident, you can be considered for exemption. With a reciprocal agreement exemption, no withholding will be taken out of your paycheck for the state in which you work. [Click here](#) to see which states have reciprocal agreements and to access the agreement documents.

Upload	View	Description	Doc Id	Delete
<input type="button" value="Upload"/>		<input type="text" value="Select an Option"/> ▼		<input type="button" value="Delete"/>
<input type="button" value="Add File Attachment"/>				

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9. Upload completed **tax forms** and all relevant documents.

File Attachments

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- AK
- FL
- NV
- NH
- SD
- TN
- TX
- WA
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Upload	View	Description	Doc Id	Delete
	<button>View</button>	State 1 Tax Form ▼	101911472020-06-29-14.30.03	<button>Delete</button>
<button>Upload</button>		Select an Option ▼		<button>Delete</button>
<button>Add File Attachment</button>				

Field/Section	Description
Upload	Use this button to upload documents. Upload documents one at a time, or scan multiple documents together and upload as a single document.
Description	Use the drop-down menu to select a description for each uploaded attachment. <ul style="list-style-type: none">◆ State 1 Tax Form: Select to identify the first state tax form uploaded.◆ State 2 Tax Form: Select to identify the second state tax form uploaded.◆ State 3 Tax Form: Select to identify the third state tax form uploaded.
Delete	This button deletes uploaded documents.
Add File Attachment	This button creates a new upload row.


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10. Review and complete all **Action Items**. Click each check box after carefully reading each **Action Item**.

Action Items

	Message Text	Description
<input checked="" type="checkbox"/>	Required Acknowledgement	I understand that I must submit a new UCPath Center Out-of-State Income Tax Withholding Form when my assignment in the state listed above ends.
<input checked="" type="checkbox"/>	Required Acknowledgement	I certify to the best of my knowledge that the above information is true, correct and complete.
<input checked="" type="checkbox"/>	Required Acknowledgement	By checking this box, I am confirming I understand that updating my address in this form does not update my address in the UCPath Portal.

11. Add **Comments** if appropriate.

Comments 

12. After completing all applicable fields in all sections, submit the form. Click the **Submit** button to start the process.

Search

Submit

Save

Conclusion

You have submitted an updated **Out-of-State Income Tax Withholding** form to cancel international tax status and to set up tax status for the U.S. state from where work will be done.