

January 4, 2024



## Important Tax and Payroll Reminders

Here are some important reminders and announcements related to your pay, taxes, and benefits. Some items may require action, so please note these upcoming deadlines.

### **January 12, 2024: Deadline to update or verify tax information**

UCPath begins creating W-2s in late January. To ensure the information on your W-2 is complete, accurate, and reaches you, please take the following steps by **January 12, 2024**:

- **Verify your personal email and home address in UCPath online.** Even if you opt for a digital W-2, it's important that UC can reach you. [Learn more about how to update your personal information.](#)
- **Verify your dependents.** The Affordable Care Act (ACA) requires UC to make reasonable efforts to obtain Social Security numbers for employees, their spouses/domestic partners, and dependents. To review or update your information, [log in to UCPath online](#) and select Employee Actions > Health and Welfare > Dependent Coverage.
- **Opt-in to an electronic W-2.** Online W-2s are easy, secure, and oh-so-convenient! To sign up, [log in to UCPath online](#) and select Employee Actions > Income and Taxes > Enroll to Receive Online W-2.
- **International workers: Verify your GLACIER account information.** International employees may receive a W-2 or 1042-S (Foreign Person's U.S. Source Income Subject to Withholding). To ensure your tax information is sent correctly, verify that your personal email and home addresses match exactly in UCPath online and the GLACIER tax database. You may also opt to have an electronic 1042-S through GLACIER. [Learn more about Form 1042-S.](#)

### **February 15, 2024: Deadline to claim exemption from withholding**

The IRS requires you to complete a new W-4 form each year if you are claiming exemption from tax withholding. If you wish to claim exemption from withholding in 2024, you must make this choice on [UCPath online](#) before **February 15, 2024**.

### **Federal and State Earned Income Tax Credit (EITC or EIC)**

- Per the Earned Income Tax Credit Information Act, UC includes a notice with all W-2 statements notifying employees that they may be eligible for the federal EITC. This is a benefit for working people with low to moderate income.
- To qualify, you must [meet certain requirements](#) and file a tax return, even if you do not owe any tax or are not required to file. EITC reduces the amount of tax you owe and may give you a refund. For more information about the federal EITC, reference [IRS Notice 797](#) or contact the Internal Revenue Service at (800) 829-3676 or via [www.irs.gov](http://www.irs.gov).
- You also may be eligible to receive the California EITC, starting with the 2015 tax year. The California EITC is a refundable state income tax credit for low-income working individuals and families. It is treated in the same manner as the federal EITC and generally will not be used to determine eligibility for welfare benefits under California law.

- To claim the California EITC, even if you do not owe California taxes, you must file a California income tax return and complete and attach the California EITC Form (FTB 3514). For information on the availability of the credit, eligibility, and how to obtain necessary forms and help filing, contact the Franchise Tax Board at (800) 852-5711 or via [www.ftb.ca.gov](http://www.ftb.ca.gov).

## Important Security Reminder

**UC does not send 1095-C or W-2 statements by email or text.** If you receive an email or text with a link or an attachment for viewing these statements, it is a phishing scam designed to gain private information. Do not open attachments or click email links that claim to provide access to your 1095-C or W-2. To access your electronic tax documents, always visit [UCPath online](#) using a safe/known link.

## Have questions or need help?

[Log in to UCPath](#) and select **Ask UCPath** to submit an inquiry. You may also call the UCPath Center to speak with an associate at (855) 982-7284 from 8:00 a.m. to 5:00 p.m. (PST), Monday through Friday.



UC San Diego

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