

State Tax Election

Introduction This guide provides the procedures for changing your state tax election in Direct Access (DA).

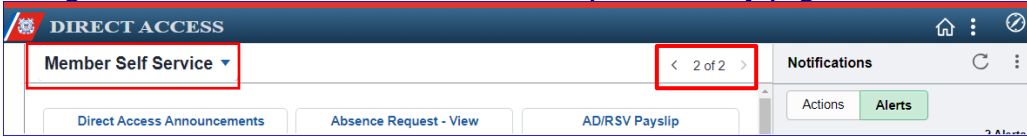
Withholding Exceptions Some states allow an exemption from State Income Tax Withholding (SITW) for military personnel, if you are a resident of a state which exempts Active Duty pay from taxation and you meet the criteria for exemption. The rules for these exemptions can be found at [State Tax Withholding Exceptions](#).

Exemptions from SITW may only be entered by SPOs. Members cannot enter an exemption using self-service. Members must submit a new W-4 Tax Information form to the SPO for entry into DA.

NOTE: If your SPO has entered an exemption from SITW for you, **do not make any changes to your State tax withholding via self-service**. If you change your exemptions or marital status through self-service, DA will begin withholding state taxes.

State of Legal Residence **You cannot change your State of Legal Residence using this procedure.** Complete [DD Form 2058](#) and forward it to your SPO to change your State of Legal Residence. **Your [Home](#) address must be in the State you are changing your legal residence to.** The Home address may be changed to another state after the State of Legal Residence is updated by the SPO.

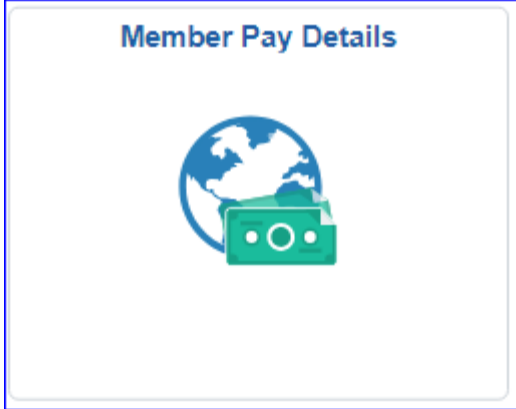
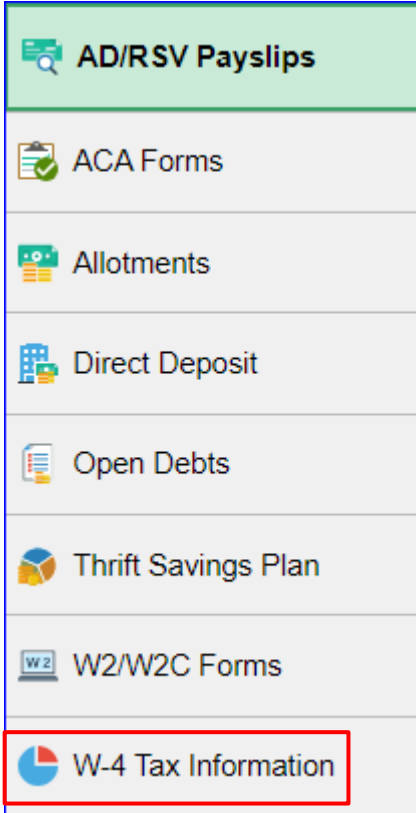
Procedures See below.

Step	Action
1	<p>Navigate to Member Self Service via the drop-down or by page arrows.</p> 

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State Tax Election, Continued

Procedures,
continued

Step	Action
2	<p>Click on the Member Pay Details tile.</p>  <p>The image shows a square tile with a light blue border. At the top, the text 'Member Pay Details' is written in blue. Below the text is a circular icon containing a blue and white globe with a green wallet icon in front of it, showing two white circles representing coins.</p>
3	<p>Select the W-4 Tax Information option.</p>  <p>The image shows a vertical list of menu items. The first item, 'AD/RSV Payslips', is highlighted with a green background. Below it are 'ACA Forms', 'Allotments', 'Direct Deposit', 'Open Debts', 'Thrift Savings Plan', 'W2/W2C Forms', and 'W-4 Tax Information'. The 'W-4 Tax Information' item is highlighted with a red border. Each item has a small icon to its left: a magnifying glass for AD/RSV Payslips, a clipboard for ACA Forms, a stack of coins for Allotments, a building for Direct Deposit, a document for Open Debts, a pie chart for Thrift Savings Plan, a W2 form for W2/W2C Forms, and a pie chart for W-4 Tax Information.</p>

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State Tax Election, Continued

Procedures, continued

Step	Action
4	<p>The W-4 Employee's Withholding Certificate (federal) tax data page will display. Scroll to the bottom of the page and click State Tax Information.</p> <p>NOTE: Ensure the Mailing Address is correct. If not, see the Home and Mailing Addresses user guide to update the mailing address.</p> <p>W-4 Employee's Withholding Certificate</p> <p>Dwight K. Shrute UNITED STATES COAST GUARD Social Security Number 123-45-6789</p> <p>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. Official Form W-4</p> <p>Step 1: Personal Information</p> <p>Mailing Address</p> <p>1725 Slough Ave Scranton, PA 18503</p> <p>Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov</p> <p>Filing Status</p> <p><input checked="" type="radio"/> Single or Married filing separately <input type="radio"/> Married filing jointly (or Qualifying widow(er)) <input type="radio"/> Head of household (Select only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualified individual)</p> <p>Step 5: Exemption from Withholding</p> <p>You may claim exemption from withholding for <input type="text" value="2020"/> if you meet both of the following conditions:</p> <p>Exemption Conditions</p> <ul style="list-style-type: none"> • Last year I had no federal income tax liability and • This year I expect to have no federal income tax liability <p><input type="checkbox"/> Check if you meet both conditions and are claiming Exemption from Withholding</p> <p>If claiming Exemption from Withholding complete only Steps 1 and 5. Do not complete any other steps on Form W-4</p> <p><input type="button" value="Submit"/> Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete</p> <p>Go To State Tax Information</p>

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State Tax Election, Continued



Procedures, continued

Step	Action
5	<p>The State of Residence cannot be changed by the member. If the State of Residence is incorrect, the member must notify their SPO.</p> <p>Make any necessary changes to the Tax Status, Total number of Allowances you are claiming, and Enter Additional Amount, if any, you want withheld from each paycheck (whole dollar amount only, no decimal) fields.</p> <p>Once all changes have been made, click Submit.</p> <div> <p>State Tax Information</p> <p>DWIGHT K SHRUTE UNITED STATES COAST GUARD</p> <p>Social Security Number: 123-45-6789</p> <p>Mailing Address</p> <p>1725 SLOUGH AVE SCRANTON PA 18503</p> <p>State Tax Data</p> <p>State of Residence: Massachusetts</p> <p>Tax Status: <input type="text" value="Single"/></p> <p>Total number of Allowances you are claiming: <input type="text" value="2"/></p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text"/></p> <p>Submit Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status.</p> <p>Go To W-4 Tax Information</p> </div>
6	<p>A verification message will display. Enter your DA Password and click Continue.</p> <div> <p>Help</p> <p>Verify Identity</p> <p>To protect your privacy, verify your identity by typing your password. If you are not this user, click Cancel.</p> <p>User ID: 1234567</p> <p>Password: <input type="text"/></p> <p>Continue Cancel</p> </div>

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State Tax Election, Continued

Procedures, continued

Step	Action
7	<p>A confirmation message will display. Click OK.</p> <div>Submit Confirmation  The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.</div> <div></div>
