

# Year End and Tax Forms

## Overview

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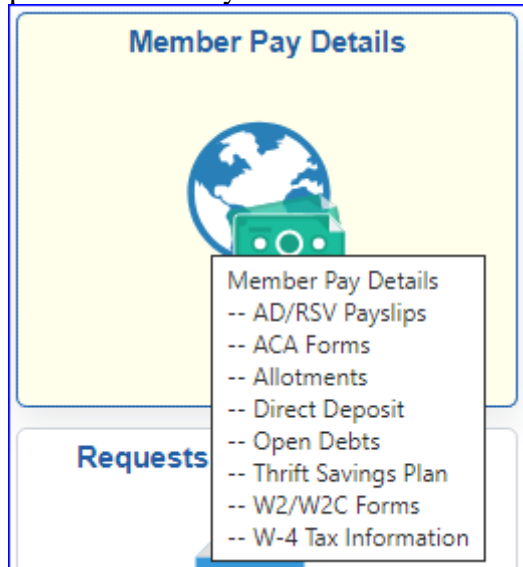
### Introduction

This guide provides the procedures for viewing, printing, saving, and processing year-end tax forms, in addition to changing your federal tax election in Direct Access (DA).

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### Changes to Direct Access Homepage

You will notice a change in how Direct Access displays upon login. There is a new “hover” feature that shows what is covered under a particular tile as your mouse moves over the tile as shown below.



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### Contents

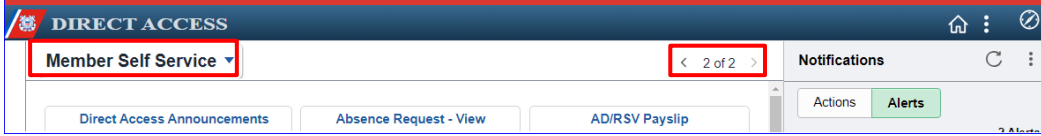

Topic	See Page
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# Year End Forms

**Introduction** This section provides the procedures for viewing, downloading, and/or printing your year-end forms in DA.


**Procedures** See below.

Step	Action
1	<p>Select <b>Member Self Service</b> via the drop-down or by page arrows.</p> 
2	<p>Select the <b>Year End Forms Consent</b> tile.</p> 

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## Year End Forms, Continued

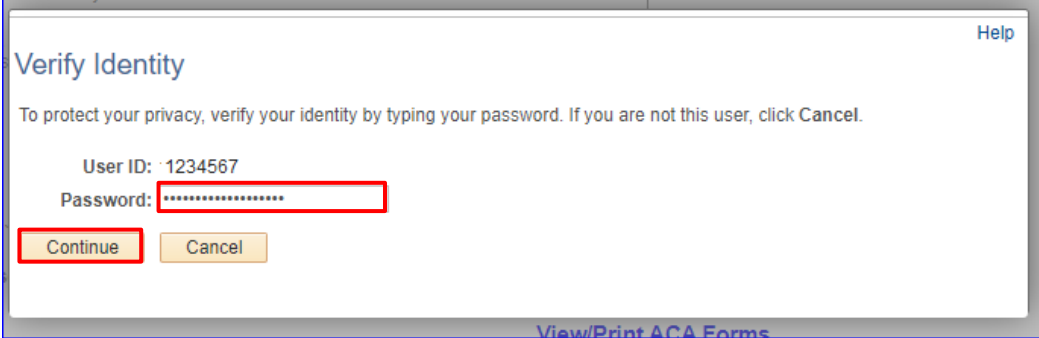
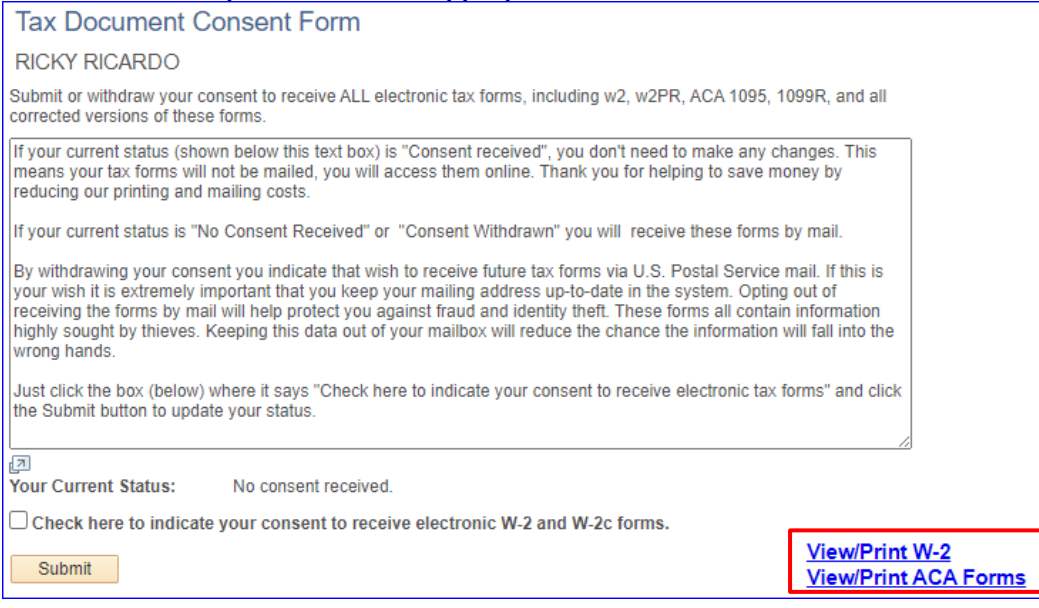
**Procedures,**  
continued

Step	Action
3	<p>The Tax Document Consent Form page will display.</p> <ul style="list-style-type: none"> <li>• This page offers you the opportunity to consent to accessing tax forms online. <b>If you consent to accessing them online, they will not be mailed.</b> Check the <b>box</b> and click <b>Submit</b> to consent.</li> <li>• In this example, the member has not previously consented to receive their year-end tax forms electronically. To consent, check the <b>box</b> and click <b>Submit</b>.</li> </ul> <div data-bbox="331 741 1370 1339" style="border: 1px solid black; padding: 10px;"> <p><b>Tax Document Consent Form</b></p> <p>RICKY RICARDO</p> <p>Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your tax forms will not be mailed, you will access them online. Thank you for helping to save money by reducing our printing and mailing costs.</p> <p>If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.</p> <p>By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail. If this is your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out of receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain information highly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will fall into the wrong hands.</p> <p>Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax forms" and click the Submit button to update your status.</p> </div> <p> Your Current Status: No consent received.</p> <div style="border: 2px solid red; padding: 5px; margin: 5px 0;"> <input type="checkbox"/> Check here to indicate your consent to receive electronic W-2 and W-2c forms.         </div> <p style="text-align: center;"><input type="button" value="Submit"/></p> <p style="text-align: right;"> <a href="#">View/Print W-2</a>  <a href="#">View/Print ACA Forms</a> </p> </div>

*Continued on next page*

# Year End Forms, Continued

**Procedures,**  
continued

Step	Action
<p><b>4</b></p>	<p>Whether giving or withdrawing consent to receive year end forms electronically, DA will require you to verify your identity before processing your request. Enter your DA <b>Password</b> and click <b>Continue</b>.</p> 
<p><b>5</b></p>	<p>To view and/or print your year-end forms, click <b>View/Print W2</b> or <b>View/Print ACA Forms</b> to open a list of the appropriate tax forms.</p> 

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## Year End Forms, Continued

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Procedures,  
continued

Step	Action																																				
<p><b>6</b></p>	<p>Depending on the link selected, a list of available forms will display. Click on the appropriate button to open the form.</p> <p><b>View/Print W-2 link:</b></p> <div data-bbox="327 622 1276 1160" style="border: 1px solid blue; padding: 5px;"> <p><b>View My W-2/W-2c</b> Jack Sparrow Review your available W-2 and W-2c forms below</p> <table border="1" data-bbox="335 779 1268 1153"> <thead> <tr> <th>Empl ID</th> <th>Calendar Year</th> <th>W-2 Form Type</th> <th>View Tax Form</th> </tr> </thead> <tbody> <tr> <td>1 1234567</td> <td>2021</td> <td>W-2</td> <td><a href="#">View W2</a></td> </tr> <tr> <td>2 1234567</td> <td>2020</td> <td>W-2</td> <td><a href="#">View W2</a></td> </tr> <tr> <td>3 1234567</td> <td>2020</td> <td>W-2c</td> <td><a href="#">View W2</a></td> </tr> <tr> <td>4 1234567</td> <td>2019</td> <td>W-2</td> <td><a href="#">View W2</a></td> </tr> </tbody> </table> </div> <p><b>View/Print ACA Forms link:</b></p> <div data-bbox="327 1198 1369 1612" style="border: 1px solid blue; padding: 5px;"> <p><b>View My Affordable Care Act Forms</b> Jack Sparrow</p> <table border="1" data-bbox="335 1299 1356 1601"> <thead> <tr> <th>Empl ID</th> <th>Year</th> <th>Original/Voided/Corrected?</th> <th>View Affordable Care Act Forms</th> </tr> </thead> <tbody> <tr> <td>1 1234567</td> <td>2019</td> <td>Original</td> <td><a href="#">1095-C</a></td> </tr> <tr> <td>2 1234567</td> <td>2020</td> <td>Original</td> <td><a href="#">1095-C</a></td> </tr> <tr> <td>3 1234567</td> <td>2021</td> <td>Original</td> <td><a href="#">1095-C</a></td> </tr> </tbody> </table> </div>	Empl ID	Calendar Year	W-2 Form Type	View Tax Form	1 1234567	2021	W-2	<a href="#">View W2</a>	2 1234567	2020	W-2	<a href="#">View W2</a>	3 1234567	2020	W-2c	<a href="#">View W2</a>	4 1234567	2019	W-2	<a href="#">View W2</a>	Empl ID	Year	Original/Voided/Corrected?	View Affordable Care Act Forms	1 1234567	2019	Original	<a href="#">1095-C</a>	2 1234567	2020	Original	<a href="#">1095-C</a>	3 1234567	2021	Original	<a href="#">1095-C</a>
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<p><b>7</b></p>	<p>The selected form will open in a new window. They may be printed and/or saved to a personal file.</p>																																				

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# State Tax Election

**Introduction** This section provides the procedures for a member to change their state tax election in DA.

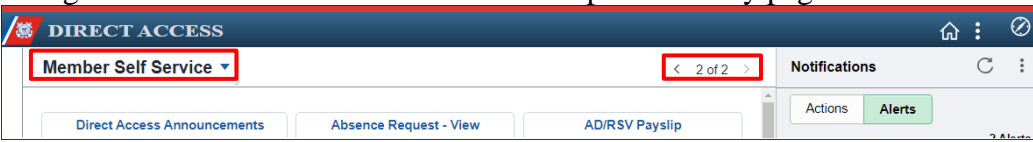
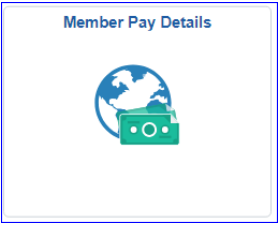
**Withholding Exceptions** Some states allow an exemption from State Income Tax Withholding (SITW) for military personnel, if you are a resident of a state which exempts Active Duty pay from taxation and you meet the criteria for exemption. The rules for these exemptions can be found at [State Tax Withholding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

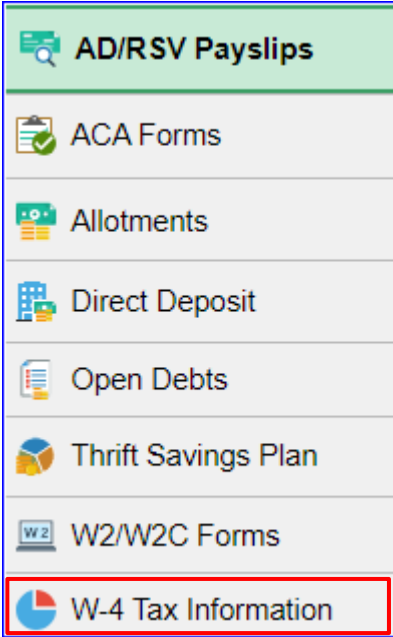
Step	Action
1	Navigate to <b>Member Self Service</b> via the drop-down or by page arrows. 
2	Select the <b>Member Pay Details</b> tile. 

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## State Tax Election, Continued

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Procedures,  
continued

Step	Action
3	<p>Select the <b>W-4 Tax Information</b> option.</p>  <p>The screenshot shows a vertical list of menu items. The first item, 'AD/RSV Payslips', is highlighted with a green background. The last item, 'W-4 Tax Information', is highlighted with a red border. The other items are on a light gray background.</p> <ul style="list-style-type: none"><li>AD/RSV Payslips</li><li>ACA Forms</li><li>Allotments</li><li>Direct Deposit</li><li>Open Debts</li><li>Thrift Savings Plan</li><li>W2/W2C Forms</li><li>W-4 Tax Information</li></ul>

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*Continued on next page*

# 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 <b>State Tax Information</b>.</p> <p><b>NOTE:</b> Ensure the <b>Mailing Address</b> is correct. If not, see the <a href="#">Home and Mailing Addresses</a> user guide to update the mailing address.</p> <div data-bbox="328 667 1377 1456" style="border: 1px solid black; padding: 5px;"> <p><b>W-4 Employee's Withholding Certificate</b></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. <a href="#">Official Form W-4</a></p> <p><b>Step 1: Personal Information</b></p> <p><b>Mailing Address</b></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 <a href="http://www.ssa.gov">www.ssa.gov</a></p> <p><b>Filing Status</b></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> <hr/> <p><b>Step 5: Exemption from Withholding</b></p> <p>You may claim exemption from withholding for <input type="text" value="2023"/> if you meet both of the following conditions:</p> <p><b>Exemption Conditions</b></p> <ul style="list-style-type: none"> <li>Last year I had no federal income tax liability and</li> <li>This year I expect to have no federal income tax liability</li> </ul> <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><input type="button" value="State Tax Information"/></p> </div>

Continued on next page



# State Tax Election, Continued

## Procedures, continued

Step	Action
<p><b>5</b></p>	<p>The <b>State of Residence</b> cannot be changed by you. If the State of Residence is incorrect, you must notify your SPO.</p> <p>Make any necessary changes to the <b>Tax Status, Total number of Allowances you are claiming, and Enter Additional Amount, if any, you want withheld from each paycheck</b> (whole dollar amount only, no decimal) fields.</p> <p>Once all changes have been made, click <b>Submit</b>.</p> <div data-bbox="328 775 1377 1368" style="border: 1px solid black; padding: 5px;"> <p><b>State Tax Information</b></p> <p>DWIGHT K SHRUTE UNITED STATES COAST GUARD <span style="float: right;">Social Security Number: 123-45-6789</span></p> <p><b>Mailing Address</b></p> <p>1725 SLOUGH AVE SCRANTON PA 18503</p> <p><b>State Tax Data</b></p> <p>State of Residence: <span style="margin-left: 50px;">Massachusetts</span></p> <p>Tax Status: <span style="margin-left: 50px;"><input type="text" value="Single"/></span></p> <p>Total number of Allowances you are claiming: <span style="margin-left: 50px;"><input type="text" value="2"/></span></p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <span style="margin-left: 50px;"><input type="text"/></span></p> <p><input type="button" value="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><a href="#">Go To</a> <a href="#">W-4 Tax Information</a></p> </div>
<p><b>6</b></p>	<p>A verification message will display. Enter your DA <b>Password</b> and click <b>Continue</b>.</p> <div data-bbox="328 1480 1366 1805" style="border: 1px solid black; padding: 5px;"> <p style="text-align: right;"><a href="#">Help</a></p> <p><b>Verify Identity</b></p> <p>To protect your privacy, verify your identity by typing your password. If you are not this user, click <b>Cancel</b>.</p> <p>User ID: 1234567</p> <p>Password: <input type="password" value="....."/></p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p> </div>

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## State Tax Election, Continued

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### Procedures, continued

Step	Action
7	<p data-bbox="328 488 959 517">A confirmation message will display. Click <b>OK</b>.</p> <div data-bbox="328 517 1366 757" style="border: 1px solid blue; padding: 5px;"><p data-bbox="355 528 695 564"><b>Submit Confirmation</b></p><p data-bbox="368 589 754 620">✔ The Submit was successful.</p><p data-bbox="440 633 1345 665">However, due to timing, your change may not be reflected on the next paycheck.</p><p data-bbox="392 696 435 725">OK</p></div>

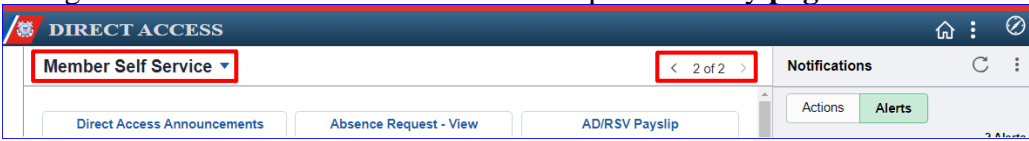
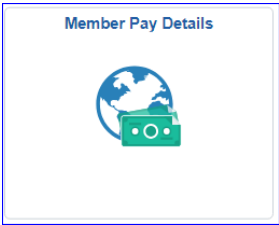
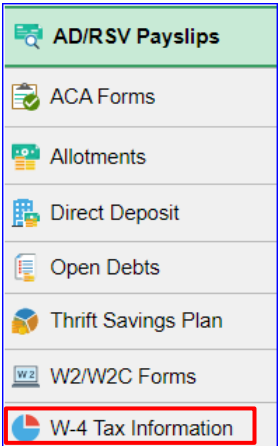
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# Federal Tax Election

**Introduction** This section provides the procedures for a member to change their Federal Tax election in DA.

- Information**
- Please see the IRS’s Frequently Asked Questions (FAQ) for additional information:  
<https://www.irs.gov/newsroom/faqs-on-the-2020-form-w-4>.
  - Members, who meet the conditions for an exemption from FITW, must submit a signed **IRS form W-4** to the their SPO, per IRS requirements. **Members claiming exemption from federal withholding must file a new IRS Form W-4 each year by 15 February.**
  - See **State Tax Withholding Exceptions** (rule 4) for special rules if you are a resident of Puerto Rico (PR).

**Procedures** See below.

Step	Action
1	Navigate to <b>Member Self Service</b> via the drop-down or by <b>page arrows</b> . 
2	Select the <b>Member Pay Details</b> tile. 
3	Select the <b>W-4 Tax Information</b> option. 

*Continued on next page*

## Federal Tax Election, Continued

Procedures,  
continued

Step	Action
4	<p>The W-4 Employee's Withholding Certificate page will display. There are <b>5 steps</b> that require review/completion before changes may be submitted.</p> <p><b>Step 1: Personal Information –</b></p> <ul style="list-style-type: none"> <li>• Ensure the <b>Mailing Address</b> is correct. If not, see the <a href="#">Home and Mailing Addresses</a> user guide to update the mailing address.</li> <li>• Select the appropriate <b>Filing Status</b>.</li> </ul> <div data-bbox="339 719 1369 1106" style="border: 1px solid black; padding: 5px;"> <p><b>W-4 Employee's Withholding Certificate</b></p> <p>Dwight K. Shrute UNITED STATES COAST GUARD <span style="float: right;">Social Security Number 123-45-6789</span></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. <a href="#">Official Form W-4</a></p> <p><b>Step 1: Personal Information</b></p> <p><b>Mailing Address</b></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 <a href="http://www.ssa.gov">www.ssa.gov</a></p> <p><b>Filing Status</b></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> </div>

*Continued on next page*

## Federal Tax Election, Continued

Procedures,  
continued

Step	Action
5	<p><b>Step 2: Multiple Jobs or Spouse Works</b> – Check the box as appropriate.</p> <p><b>NOTE:</b> Check this box if you (1) have more than one job at the same time <b>and/or</b> (2) are married, filing jointly and you and your spouse both work.</p> <div style="border: 1px solid blue; padding: 10px;"> <p><b>Step 2: Multiple Jobs or Spouse Works</b></p> <p>▶ Step 2 Instructions</p> <p><input checked="" type="checkbox"/> Multiple Jobs or Spouse Works</p> </div>
6	<p><b>Step 3: Claim Dependents</b> –</p> <ul style="list-style-type: none"> <li>• Multiply the number of <b>qualifying dependents under the age of 17</b> by \$2,000 and enter the dollar amount (whole number only with no decimal, i.e., 2000, 4000, etc.).</li> <li>• Multiply the number of <b>other qualifying dependents</b> by \$500 and enter the dollar amount (whole number only with no decimal, i.e., 500, 1000, etc.).</li> <li>• Enter any <b>Other tax credits</b>, such as education tax credits and foreign tax credit (whole number only with no decimal).</li> </ul> <p><b>NOTE:</b> For more information on eligibility requirements for tax credits, see <a href="#">Child Tax Credit and Credit for Other Dependents</a>.</p> <div style="border: 1px solid blue; padding: 10px;"> <p><b>Step 3: Claim Dependents</b></p> <p>▶ Step 3 Instructions</p> <p>If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):</p> <p style="text-align: right;">Multiply the number of qualifying children under age 17 by \$2,000 <input style="width: 80px; height: 20px; border: 1px solid red;" type="text"/></p> <p style="text-align: right;">Multiply the number of other dependents by \$500 <input style="width: 80px; height: 20px; border: 1px solid red;" type="text"/></p> <p style="text-align: right;">Other tax credits <input style="width: 80px; height: 20px; border: 1px solid red;" type="text"/></p> <p style="text-align: right;">Total</p> </div>

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## Federal Tax Election, Continued

Procedures,  
continued

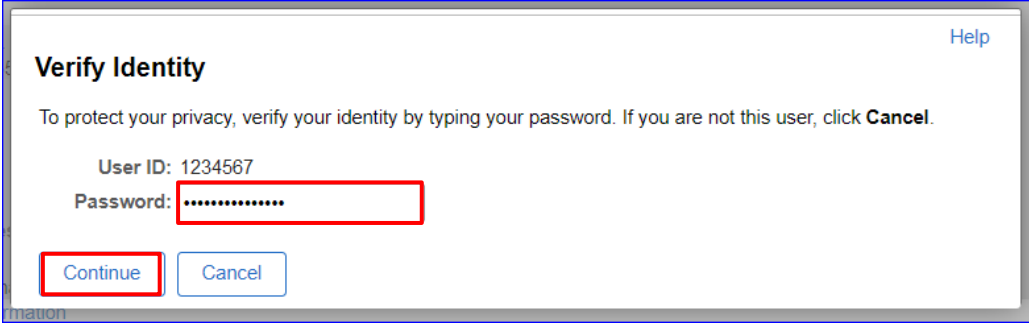
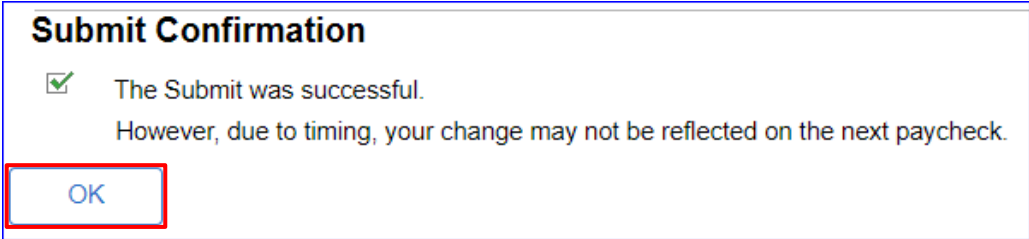
Step	Action
7	<p><b>Step 4: Other Adjustments –</b></p> <ul style="list-style-type: none"> <li>• <b>(a) Other Income (NOT FROM OTHER JOBS)</b> – this should be the total of your other estimated income for the year, if any (whole number only with no decimal). <b>See NOTE.</b></li> <li>• <b>(b) Deductions</b> – if you expect to claim deductions other than the basic standard deduction and want to reduce your tax withholding to account for these, enter the amount here (Page 3, Line 5 of 2020 W-4).</li> <li>• <b>(c) Extra Withholding</b> – Enter in this step any additional tax you want withheld from your pay <b>each pay period.</b></li> </ul> <p><b>NOTE:</b> Do <b>NOT</b> enter income from other jobs where that income is already taxed. For more information on taxable income and extra withholdings, see <a href="#">IRS Pub. 505: Tax Withholding and Estimated Tax guide</a>.</p> <div data-bbox="336 965 1369 1245" style="border: 1px solid blue; padding: 5px;"> <p><b>Step 4: Other Adjustments</b></p> <p>▶ Step 4 Instructions</p> <p style="text-align: right;">a) Other Income <input style="border: 1px solid red;" type="text"/></p> <p style="text-align: right;">b) Deductions <input style="border: 1px solid red;" type="text"/></p> <p style="text-align: right;">c) Extra Withholding <input style="border: 1px solid red;" type="text"/></p> </div>
8	<p><b>Step 5: Exemption from Withholding –</b> Ensure all the information entered is correct and click <b>Submit</b>.</p> <p><b>WARNING:</b> If the <u>Check if you meet both conditions and are claiming Exemption from Withholding box</u> is checked, <b>NO FEDERAL TAXES WILL BE WITHHELD</b>. You <b>must</b> meet the Exemption Conditions.</p> <div data-bbox="336 1541 1369 1895" style="border: 1px solid blue; padding: 5px;"> <p><b>Step 5: Exemption from Withholding</b></p> <p>You may claim exemption from withholding for <input type="text" value="2023"/> if you meet both of the following conditions:</p> <p><b>Exemption Conditions</b></p> <ul style="list-style-type: none"> <li>• Last year I had no federal income tax liability and This year I expect to have no federal income tax liability</li> </ul> <p><input style="border: 1px solid red;" 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 style="border: 1px solid red;" 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 style="text-align: center;"><a href="#">State Tax Information</a></p> </div>

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## Federal Tax Election, Continued

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Procedures,  
continued

Step	Action
<p><b>9</b></p>	<p>A verification message will display. Enter your DA <b>Password</b> and click <b>Continue</b>.</p> 
<p><b>10</b></p>	<p>A confirmation message will display. Click <b>OK</b>.</p> 

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