

# State Tax Election

**Introduction** This guide provides the procedures for a member to change their state tax election in Direct Access (DA).

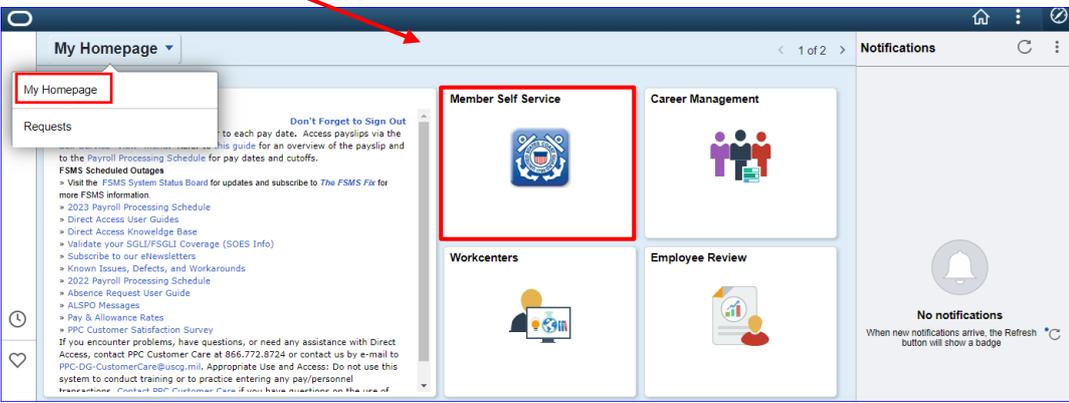
**Withholding Exceptions** Some states allow an exemption from State Income Tax Withholding (SITW) for military personnel, if you are a resident of a state which exempts Active Duty pay from taxation and you meet the criteria for exemption. The rules for these exemptions can be found at [State Tax Withholding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

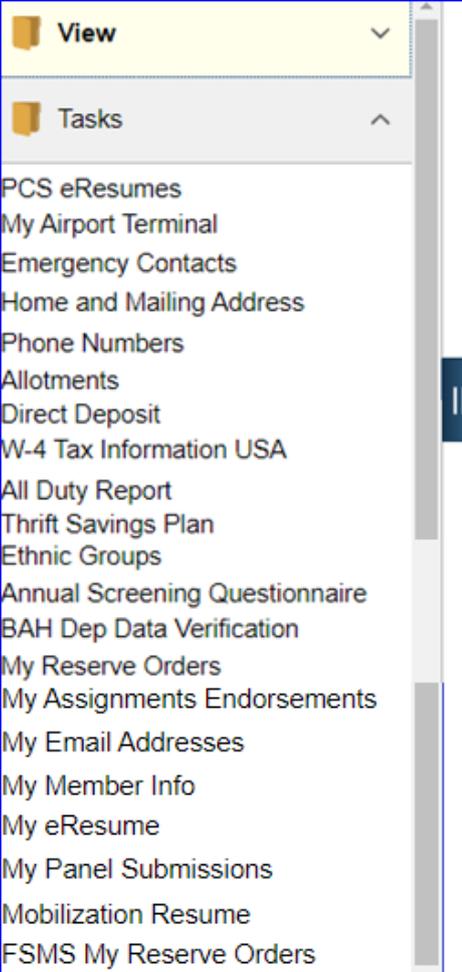
Step	Action
1	<p>Click on <b>Member Self Service</b> from the My Homepage drop-down.</p> 

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## State Tax Election, Continued

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Procedures,  
continued

Step	Action
1.5	<p>Select the <b>W-4 Tax Information USA</b> option.</p>  <p>The screenshot shows a vertical menu with a search bar at the top. The menu items are: View (highlighted in yellow), Tasks, PCS eResumes, My Airport Terminal, Emergency Contacts, Home and Mailing Address, Phone Numbers, Allotments, Direct Deposit, W-4 Tax Information USA (highlighted in blue), All Duty Report, Thrift Savings Plan, Ethnic Groups, Annual Screening Questionnaire, BAH Dep Data Verification, My Reserve Orders, My Assignments Endorsements, My Email Addresses, My Member Info, My eResume, My Panel Submissions, Mobilization Resume, and FSMS My Reserve Orders.</p>

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# State Tax Election, Continued

Procedures,  
continued

Step	Action
2	<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="316 669 1370 1070" style="border: 1px solid blue; 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> </div> <div data-bbox="316 1106 1370 1536" style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p><b>Step 5: Exemption from Withholding</b></p> <p>You may claim exemption from withholding for <input type="text" value="2020"/> 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>Go To <a href="#">State Tax Information</a></p> </div>

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# State Tax Election, Continued

Procedures,  
continued

Step	Action
<p><b>3</b></p>	<p>The <b>State of Residence</b> 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 <b>Tax Status</b>, <b>Total number of Allowances you are claiming</b>, and <b>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="316 779 1377 1375" 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>Go To <a href="#">W-4 Tax Information</a></p> </div>
<p><b>4</b></p>	<p>A verification message will display. Enter your DA <b>Password</b> and click <b>Continue</b>.</p> <div data-bbox="316 1487 1377 1854" 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="text"/></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
5	<p data-bbox="316 495 949 526">A confirmation message will display. Click <b>OK</b>.</p> <div data-bbox="316 526 1369 853" style="border: 1px solid blue; padding: 10px;"><p data-bbox="331 539 683 577"><b>Submit Confirmation</b></p><p data-bbox="347 636 1358 712"><input checked="" type="checkbox"/> The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.</p><p data-bbox="336 775 496 837"><input type="button" value="OK"/></p></div>

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