
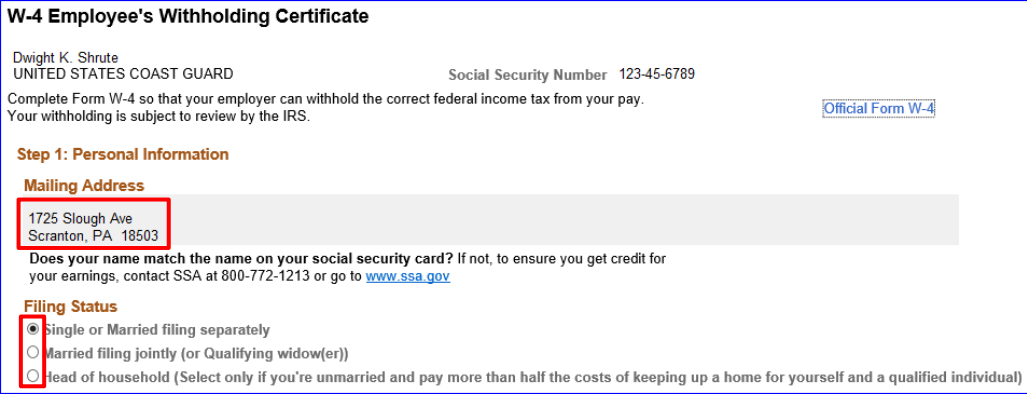


Federal Tax Election

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

Please see the IRS’s Frequently Asked Questions (FAQ) for additional information: <https://www.irs.gov/newsroom/faqs-on-the-2020-form-w-4>.

Procedures See below.

Step	Action
1	<p>Select W-4 Tax Information USA from the Employee pagelet.</p>  <p>The screenshot shows a web interface titled "Employee" with a list of tasks and a "View" column. The task "W-4 Tax Information USA" is highlighted with a red rectangular box.</p>
2	<p>The W-4 Employee’s Withholding Certificate page will display. There are 5 steps that require review/completion before changes may be submitted.</p> <p>Step 1: Personal Information –</p> <ul style="list-style-type: none"> • Ensure the Mailing Address is correct. If not, see the Home and Mailing Addresses user guide to update the mailing address. • Select the appropriate Filing Status.  <p>The screenshot shows the "W-4 Employee's Withholding Certificate" page for Dwight K. Shrute. The "Mailing Address" section is highlighted with a red box, showing "1725 Slough Ave, Scranton, PA 18503". The "Filing Status" section is also highlighted with a red box, showing the "Single or Married filing separately" option selected with a radio button.</p>

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Federal Tax Election, Continued

Procedures,
continued

Step	Action
3	<p>Step 2: Multiple Jobs or Spouse Works – Check the box as appropriate.</p> <p>NOTE: Check this box if you (1) have more than one job at the same time and/or (2) are married, filing jointly and you and your spouse both work.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>Step 2: Multiple Jobs or Spouse Works</p> <p>▶ Step 2 Instructions</p> <p><input checked="" type="checkbox"/> Multiple Jobs or Spouse Works</p> </div>
4	<p>Step 3: Claim Dependents –</p> <ul style="list-style-type: none"> • Multiply the number of qualifying dependents under the age of 17 by \$2,000 and enter the dollar amount (whole number only with no decimal, i.e. 2000, 4000, etc.). • Multiply the number of other qualifying dependents by \$500 and enter the dollar amount (whole number only with no decimal, i.e. 500, 1000, etc.). • Enter any Other tax credits, such as education tax credits and foreign tax credit (whole number only with no decimal). <p>NOTE: For more information on eligibility requirements for tax credits, see IRS Pub. 972, Child Tax Credit and Credit for Other Dependents.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>Step 3: Claim Dependents</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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Procedures,
continued

Step	Action
5	<p>Step 4: Other Adjustments –</p> <ul style="list-style-type: none"> • (a) Other Income (NOT FROM OTHER JOBS) – this should be the total of your other estimated income for the year, if any (whole number only with no decimal). See NOTE. • (b) Deductions – 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). • (c) Extra Withholding – Enter in this step any additional tax you want withheld from your pay each pay period. <p>NOTE: Do <u>NOT</u> enter income from other jobs where that income is already taxed. For more information on taxable income and extra withholdings, see IRS Pub. 505: Tax Withholding and Estimated Tax guide.</p> <div data-bbox="336 920 1369 1205" style="border: 1px solid blue; padding: 5px;"> <p>Step 4: Other Adjustments</p> <p>▶ Step 4 Instructions</p> <p style="text-align: right;">a) Other Income <input style="border: 1px solid red; width: 100px; height: 20px;" type="text"/></p> <p style="text-align: right;">b) Deductions <input style="border: 1px solid red; width: 100px; height: 20px;" type="text"/></p> <p style="text-align: right;">c) Extra Withholding <input style="border: 1px solid red; width: 100px; height: 20px;" type="text"/></p> </div>
6	<p>Step 5: Exemption from Withholding – Ensure all the information entered is correct and click Submit.</p> <p>WARNING: If the <u>Check if you meet both conditions and are claiming Exemption from Withholding</u> box is checked, NO FEDERAL TAXES WILL BE WITHHELD. You must meet the Exemption Conditions.</p> <div data-bbox="336 1462 1369 1809" style="border: 1px solid blue; padding: 5px;"> <p>Step 5: Exemption from Withholding</p> <p>You may claim exemption from withholding for <input style="width: 40px; text-align: center; border: 1px solid gray;" 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 style="border: 1px solid red;" type="checkbox"/> Check if you meet both conditions and are claiming Exemption from Withholding</p> <p><small>If claiming Exemption from Withholding complete only Steps 1 and 5. Do not complete any other steps on Form W-4</small></p> <p><input style="border: 1px solid red; padding: 2px 10px;" 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> </div>

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Federal Tax Election, Continued

Procedures,
continued

Step	Action
7	<p>A verification message will display. Enter your DA Password and click Continue.</p> <div data-bbox="336 510 1361 869" style="border: 1px solid blue; padding: 10px;"> <p style="text-align: right;">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 style="border: 1px solid red;" type="password"/></p> <p><input style="border: 1px solid red;" type="button" value="Continue"/> <input type="button" value="Cancel"/></p> </div>
8	<p>A confirmation message will display. Click OK.</p> <div data-bbox="336 943 1361 1261" style="border: 1px solid blue; padding: 10px;"> <p>Submit Confirmation</p> <p><input checked="" type="checkbox"/> The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.</p> <p><input style="border: 1px solid red;" type="button" value="OK"/></p> </div>
