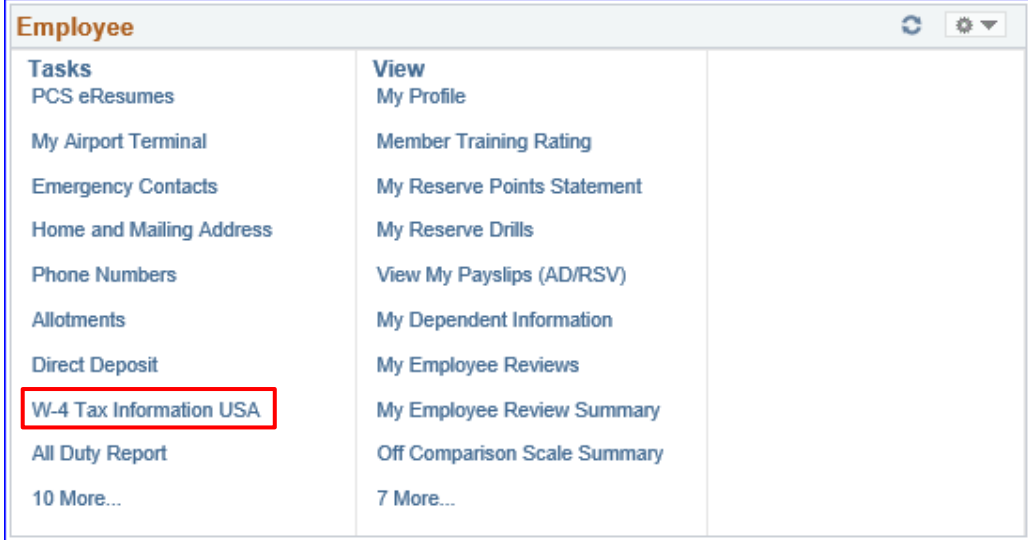
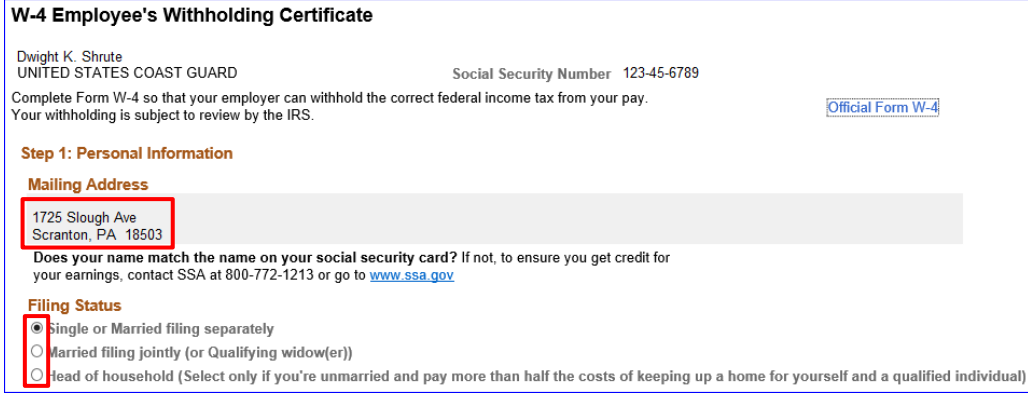


Federal Tax Election

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

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 grid of links. The link "W-4 Tax Information USA" is highlighted with a red rectangular box. Other visible links include "Tasks", "View", "PCS eResumes", "My Profile", "My Airport Terminal", "Member Training Rating", "Emergency Contacts", "My Reserve Points Statement", "Home and Mailing Address", "My Reserve Drills", "Phone Numbers", "View My Payslips (AD/RSV)", "Allotments", "My Dependent Information", "Direct Deposit", "My Employee Reviews", "W-4 Tax Information USA", "My Employee Review Summary", "All Duty Report", "Off Comparison Scale Summary", and "10 More...".</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, UNITED STATES COAST GUARD, with Social Security Number 123-45-6789. It includes instructions to complete Form W-4 and a link to "Official Form W-4". The "Step 1: Personal Information" section is visible, with the "Mailing Address" field containing "1725 Slough Ave, Scranton, PA 18503" highlighted in a red box. Below it, the "Filing Status" section has three radio button options: "Single or Married filing separately" (which is selected), "Married filing jointly (or Qualifying widow(er))", and "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>

Continued on next page

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, <u>filing jointly and you and your spouse both work.</u></p> <div style="border: 1px solid blue; padding: 10px;"> <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: 10px;"> <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>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>Multiply the number of other dependents by \$500 <input style="width: 80px; height: 20px; border: 1px solid red;" type="text"/></p> <p>Other tax credits <input style="width: 80px; height: 20px; border: 1px solid red;" type="text"/></p> <p style="text-align: right;">Total</p> </div>

Continued on next page

Federal Tax Election, Continued

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="336 969 1369 1249" style="border: 1px solid blue; padding: 5px;"> <p>Step 4: Other Adjustments</p> <p>▶ Step 4 Instructions</p> <p>a) Other Income <input style="border: 1px solid red;" type="text"/></p> <p>b) Deductions <input style="border: 1px solid red;" type="text"/></p> <p>c) Extra Withholding <input style="border: 1px solid red;" 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 1512 1369 1854" style="border: 1px solid blue; padding: 5px;"> <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 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> </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="336 562 1361 913" 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="336 987 1361 1308" 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>
