

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.

Procedures See below.

Step	Action
1	<p>Select W-4 Tax Information USA from the Employee pagelet.</p>  <p>The screenshot shows an 'Employee' pagelet with two columns: 'Tasks' and 'View'. The 'Tasks' column includes links like 'PCS eResumes', 'My Airport Terminal', 'Emergency Contacts', 'Home and Mailing Address', 'Phone Numbers', 'Allotments', 'Direct Deposit', 'W-4 Tax Information USA' (highlighted with a red box), 'All Duty Report', and '10 More...'. The 'View' column includes links like 'My Profile', 'Member Training Rating', 'My Reserve Points Statement', 'My Reserve Drills', 'View My Payslips (AD/RSV)', 'My Dependent Information', 'My Employee Reviews', 'My Employee Review Summary', 'Off Comparison Scale Summary', and '7 More...'. There are also refresh and settings icons in the top right of the pagelet.</p>

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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 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> <div data-bbox="316 674 1369 1541" style="border: 1px solid blue; padding: 5px;"> <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> </div>

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Step	Action
5	<p data-bbox="316 501 951 533">A confirmation message will display. Click OK.</p> <div data-bbox="316 533 1372 862" style="border: 1px solid blue; padding: 10px;"><p data-bbox="331 546 683 584">Submit Confirmation</p><p data-bbox="347 640 1362 723"><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="336 779 497 842"><input type="button" value="OK"/></p></div>
