

Change My Federal & State Tax Information

Overview

Introduction This guide provides the procedures for you to update your federal and state tax information in Direct Access (DA).

Information

Federal Tax Changes:

- When your retirement account is created, the federal tax information from your active duty account will be used unless specified differently on your DD-2656. If specified differently, your RAS technician will update the information.
- You will be able to update your marital status, number of withholding allowances, and additional withholding amount.
- The minimum amount for federal additional tax withholding is \$1.00 and the maximum is \$2000.00 (whole dollar amounts only).

State Tax Changes:

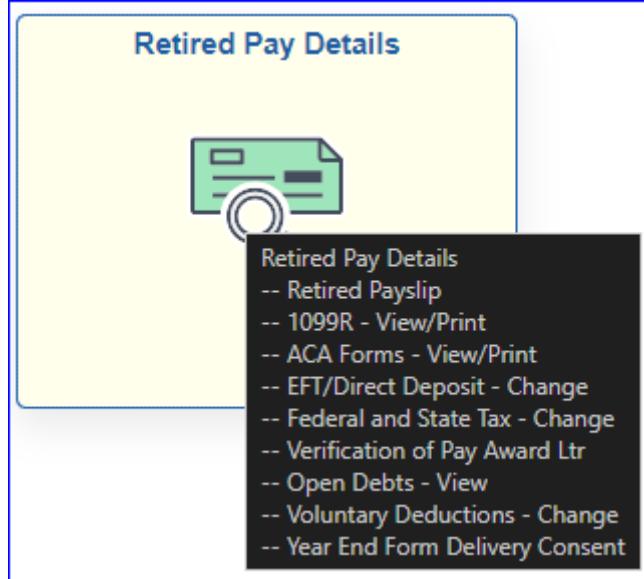
- When your retirement account is created, your state of residence will be based on your mailing address state, unless specified differently on your DD-2656. If specified differently, your RAS technician will update the information.
- You will be able to update your state of residence for state tax purposes and additional withholding amount. **NOTE:** You will not be allowed to change your state of residence to a state that doesn't have an agreement with the Coast Guard to withhold state taxes.
- The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00 (whole dollar amounts only).

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Overview, Continued

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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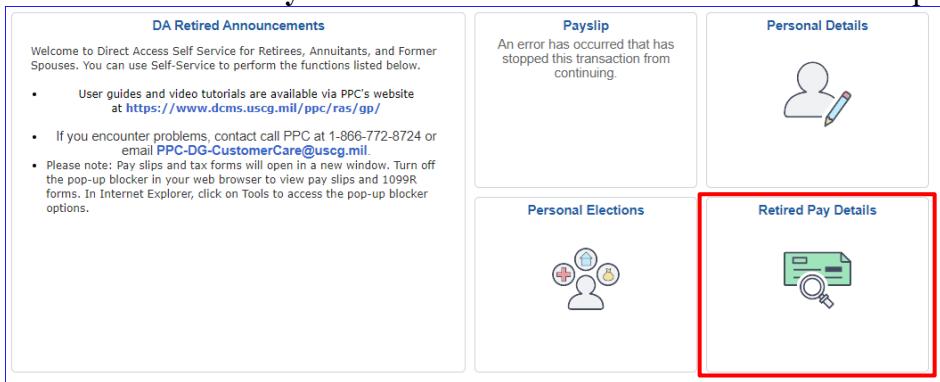
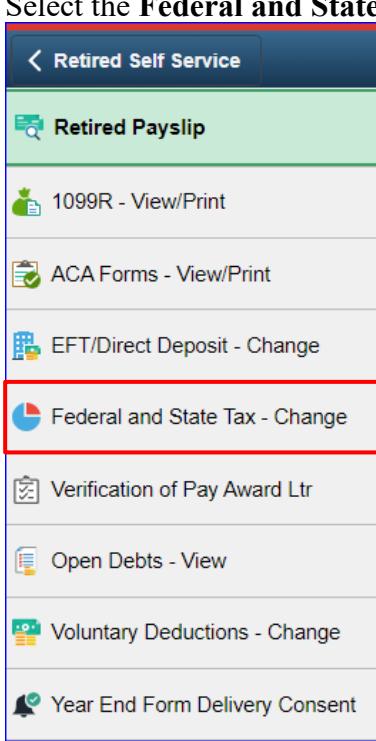
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Update My Federal Tax Information

Introduction This section provides the procedures for updating your federal tax information in DA.

Information Log into DA Self Service at [Direct Access Sign In](#).

Procedures See below.

Step	Action
1	<p>Select the Retired Pay Details tile from the Retiree Self Service homepage.</p>  <p>The screenshot shows the homepage with several tiles: DA Retired Announcements, Payslip (with an error message), Personal Details, Personal Elections, and Retired Pay Details (which is highlighted with a red box).</p>
2	<p>Select the Federal and State Tax - Change option.</p>  <p>The screenshot shows the Retired Self Service menu with the Federal and State Tax - Change option highlighted with a red box.</p>

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Update My Federal Tax Information, Continued

Procedures, continued

Step	Action
3	<p>The W-4 Employee 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 Mailing Address user guide to update the mailing address. • Select the appropriate Filing Status. <div data-bbox="335 707 1233 1131"> <p>W-4 Employee's Withholding Certificate</p> <p>WALT KOWALSKI US COAST GUARD RETIRED 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.</p> <p>Official Form W-4</p> <p>Step 1: Personal Information</p> <p>Mailing Address</p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</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 checked="" 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>Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. To see if you are exempt from withholding or if you have concerns about your privacy, see instructions.</p> </div>
4	<p>Step 2: Income from a Job and/or Multiple Pensions/Annuities</p> <p>If applicable, enter Total Taxable Annual Pay for all Jobs from W-4 and/or Total Taxable Pension/Annuity Payments data (whole number only with no decimal) and the Total field will auto-populate with the data.</p> <div data-bbox="335 1188 1233 1482"> <p>Step 2: Income from a Job and/or Multiple Pensions/Annuities</p> <p>►Step 2 Instructions</p> <p>Total Taxable Annual Pay for all Jobs from W-4 <input type="text"/></p> <p>Total Taxable Pension/Annuity Payments <input type="text"/></p> <p>Total <input type="text"/></p> <p>If you (or your spouse) have a job, do not complete Steps 3-4(b) If you (or your spouse) do not have a job, complete Steps 3-4(b) on Form W-4P for only the pension/annuity that pays the most annually</p> </div>

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Update My Federal Tax Information, Continued

Procedures, continued

Step	Action
5	<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 whole dollar amount 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>Multiply the number of qualifying children under age 17 by \$2,000 <input type="text"/></p> <p>Multiply the number of other dependents by \$500 <input type="text"/></p> <p>Other tax credits <input type="text"/></p> <p>Total <input type="text"/></p> </div>
6	<p>Step 4: Other Adjustments</p> <ul style="list-style-type: none"> • (a) Other Income (not from 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 <u>each pay period</u> (whole number with no decimal). <p>NOTE: Do NOT 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 style="border: 1px solid blue; padding: 5px;"> <p>Step 4: Other Adjustments</p> <p>► Step 4 Instructions</p> <p>a) Other Income (not from jobs) <input type="text"/></p> <p>b) Deductions <input type="text"/></p> <p>c) Extra Withholding <input type="text"/> \$100</p> </div>

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Update My Federal Tax Information, Continued

Procedures, continued

Step	Action
7	<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 to check this box.</p> <div 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="2023"/> 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 checked="" 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>Submit <small>Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete</small></p> <p>State Tax Information</p> </div>
8	<p>A message box will display. Enter your DA Password and click Continue.</p> <div style="border: 1px solid blue; padding: 10px; width: fit-content; margin: auto;"> <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 type="password"/></p> <p>Continue Cancel</p> </div>
9	<p>A confirmation message will display. Click OK.</p> <div style="border: 1px solid blue; padding: 10px; width: fit-content; margin: auto;"> <p>Submit Confirmation</p> <p><input checked="" type="checkbox"/> The Submit was successful.</p> <p>However, due to timing, your change may not be reflected on the next paycheck.</p> <p>OK</p> </div>
10	<p>Once you click OK, you will be returned to the W-4 Tax Information page. If you need to update your state tax information, see Update My State Tax Information section.</p> <p>If no further changes are needed, return to the main homepage by clicking the Retired Self Service back arrow or the House icon.</p> <div style="background-color: #005a99; color: white; text-align: center; padding: 5px;"> Retired Self Service Retired Personal Details House Bell : </div>

Update My State Tax Information

Introduction

This section provides the procedures for updating your state tax information in DA.

Before you Begin

The following states/territories do NOT have state income tax. You will NOT be able to withhold state taxes for them.

• Alaska	• Florida
• Nevada	• New Hampshire
• South Dakota	• Tennessee
• Texas	• Washington
• Wyoming	• Federated States of Micronesia (FM)
• Palau (PW)	• Republic of the Marshal Islands (MH)

Important Information

After completing any changes to your State Tax information, it is important to review your Federal Tax information as changes to State Tax data may also affect your Federal Tax data. See [Update My Federal Tax Information](#) section of this guide.

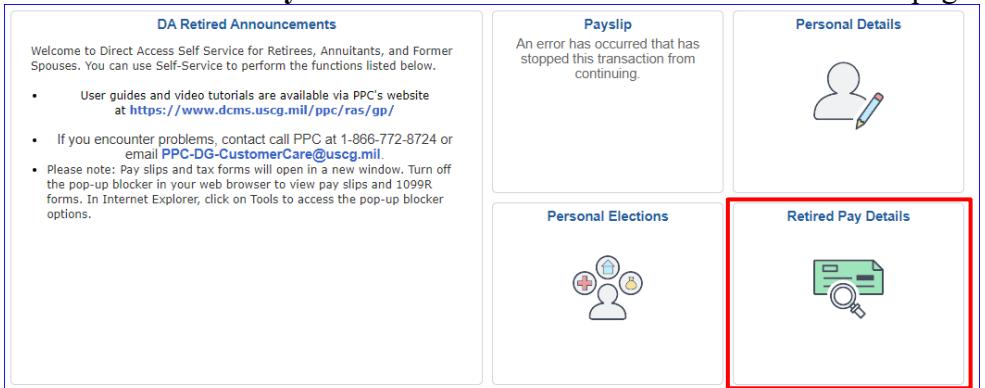
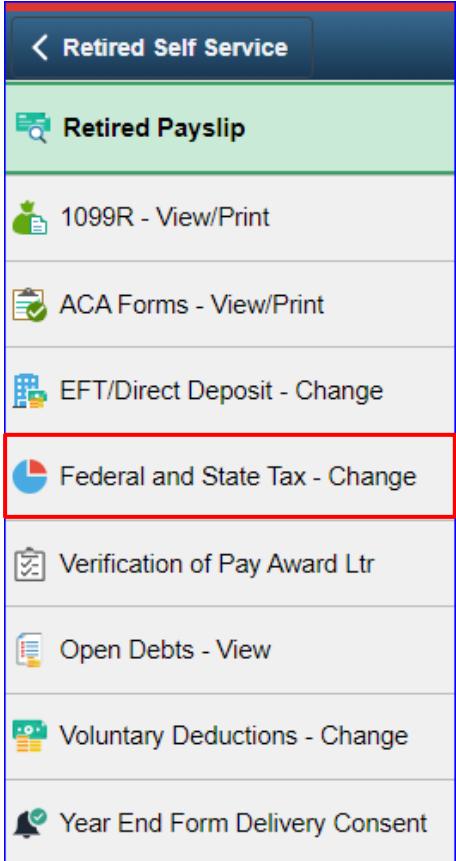
Information

Log into DA Self Service at [Direct Access Sign In](#).

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Update My State Tax Information, Continued

Procedures See below.

Step	Action
1	<p>Select the Retired Pay Details tile from the Retiree Self Service homepage.</p>  <p>The homepage features several tiles:</p> <ul style="list-style-type: none"> DA Retired Announcements: Welcome to Direct Access Self Service for Retirees, Annuitants, and Former Spouses. You can use Self-Service to perform the functions listed below. <ul style="list-style-type: none"> User guides and video tutorials are available via PPC's website at https://www.dcms.uscg.mil/ppc/ras/gp/ If you encounter problems, contact call PPC at 1-866-772-8724 or email PPC-DG-CustomerCare@uscg.mil. Please note: Pay slips and tax forms will open in a new window. Turn off the pop-up blocker in your web browser to view pay slips and 1099R forms. In Internet Explorer, click on Tools to access the pop-up blocker options. Payslip: An error has occurred that has stopped this transaction from continuing. Personal Details: Edit personal information. Personal Elections: Manage elections. Retired Pay Details: View and manage state tax information. This tile is highlighted with a red box.
2	<p>Select the Federal and State Tax - Change option.</p>  <p>The menu includes the following options:</p> <ul style="list-style-type: none"> Retired Self Service Retired Payslip 1099R - View/Print ACA Forms - View/Print EFT/Direct Deposit - Change Federal and State Tax - Change (highlighted with a red box) Verification of Pay Award Ltr Open Debts - View Voluntary Deductions - Change Year End Form Delivery Consent

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Update My State Tax Information, Continued

Procedures, continued

Step	Action
3	<p>The W-4 Employee Withholding Certificate page will display. Scroll to the bottom of the page and click on State Tax Information.</p> <div style="border: 1px solid blue; padding: 10px;"> <p>W-4 Employee's Withholding Certificate</p> <p>WALT KOWALSKI US COAST GUARD RETIRED 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.</p> <p><small>Official Form W-4</small></p> <p>Step 1: Personal Information</p> <p>Mailing Address</p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</p> <p><small>Does your name match the name on your social security card? If not, to ensure you get credit for</small></p> <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>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>State Tax Information</p> </div>
4	<p>The State Tax Information page will display. Ensure the Mailing Address is correct. If not, see the Mailing Address user guide to update your mailing address.</p> <div style="border: 1px solid blue; padding: 10px;"> <p>State Tax Information</p> <p>WALT KOWALSKI US COAST GUARD RETIRED Social Security Number 123-45-6789</p> <p>Enter your State of Residence for tax purposes. Enter the monthly state tax you desire to be withheld from your retired pay. The minimum amount is \$10.00, the maximum is \$1,000.00. If you wish to elect more, contact your RAS technician.</p> <p>If you have any questions, please contact PPC (RAS) at 1-866-772-8724.</p> <p>Mailing Address</p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</p> <p>State Tax Data</p> <p>State of Residence: Kansas</p> <p>Tax Status: Married</p> <p>Total number of Allowances you are claiming: 4</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: 40.00</p> <p>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 W-4 Tax Information</p> </div>

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Update My State Tax Information, Continued

Procedures, continued

Step	Action
5	<ul style="list-style-type: none"> State of Residence – If correct, leave as is; if incorrect, select the appropriate State from the drop-down. Tax Status – Cannot be edited on the State Tax Information page. Total number of Allowances you are claiming – Cannot be edited on the State Tax Information page. Enter Additional Amount, if any, you want withheld from each paycheck <ul style="list-style-type: none"> – If you wish to have additional state taxes withheld from your retirement pay, enter the amount. – If you currently have an additional amount withheld and wish to stop it, delete the existing amount from the field and leave the field blank. – (NOTE: The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00 whole dollar amounts only).

Once all information has been reviewed and/or updated, click **Submit**.

State Tax Information

WALT KOWALSKI
US COAST GUARD RETIRED Social Security Number 123-45-6789

Enter your State of Residence for tax purposes.
Enter the monthly state tax you desire to be withheld from your retired pay.
The minimum amount is \$10.00, the maximum is \$1,000.00. If you wish to elect more, contact your RAS technician.
If you have any questions, please contact PPC (RAS) at 1-866-772-8724.

Mailing Address
1582 SW HILLCREST AVENUE
SANTA CRUZ KS 66614-2755

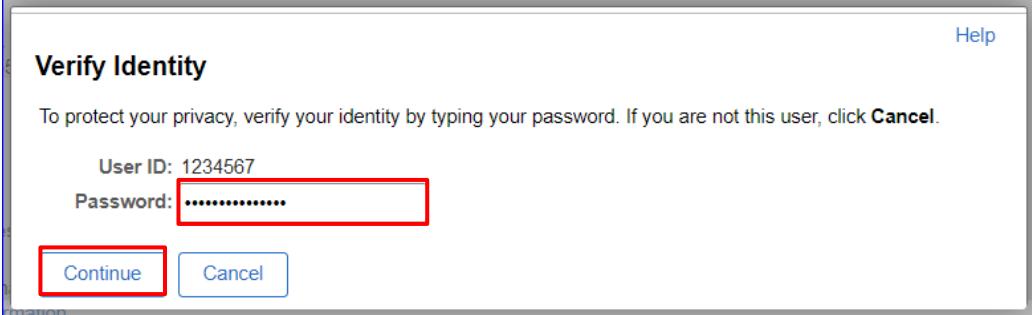
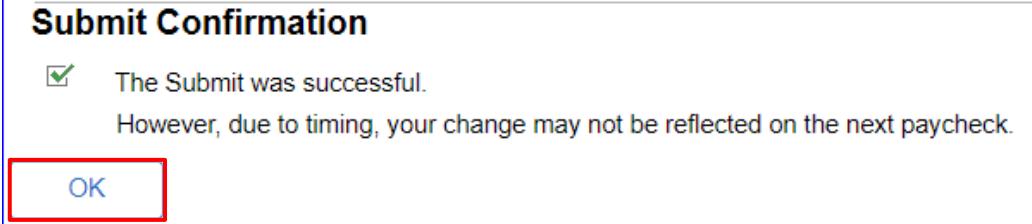
State Tax Data

State of Residence:	<input style="border: 1px solid red; width: 100%; height: 25px; padding: 2px; font-size: 10px; font-family: sans-serif; border-radius: 5px;" type="text" value="Kansas"/>
Tax Status:	<input style="border: 1px solid red; width: 100%; height: 25px; padding: 2px; font-size: 10px; font-family: sans-serif; border-radius: 5px;" type="text" value="Married"/>
Total number of Allowances you are claiming:	<input style="border: 1px solid red; width: 100%; height: 25px; padding: 2px; font-size: 10px; font-family: sans-serif; border-radius: 5px;" type="text" value="40.00"/>
Enter Additional Amount, if any, you want withheld from each paycheck:	
<input style="border: 1px solid red; padding: 2px 10px; font-size: 10px; font-family: sans-serif; border-radius: 5px;" 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.	
Go To W-4 Tax Information	

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Update My State Tax Information, Continued

Procedures, continued

Step	Action
6	<p>A Verify Identity message box will display. Enter your DA Password and click Continue.</p> 
7	<p>A Confirmation message will display. Click OK.</p> 
8	<p>Once you click OK, you will be returned to the State Tax Information page.</p> <p>NOTE: After completing any changes to your State Tax information, it is important to review your Federal Tax information as changes to State Tax data may also affect your Federal Tax data. See Update My Federal Tax Information section of this guide.</p> <p>If no further changes are needed, return to the main homepage by clicking the Retired Self Service back arrow or the House icon.</p> 