

## Change My Federal & State Tax Information

### Overview

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#### Introduction

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

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#### 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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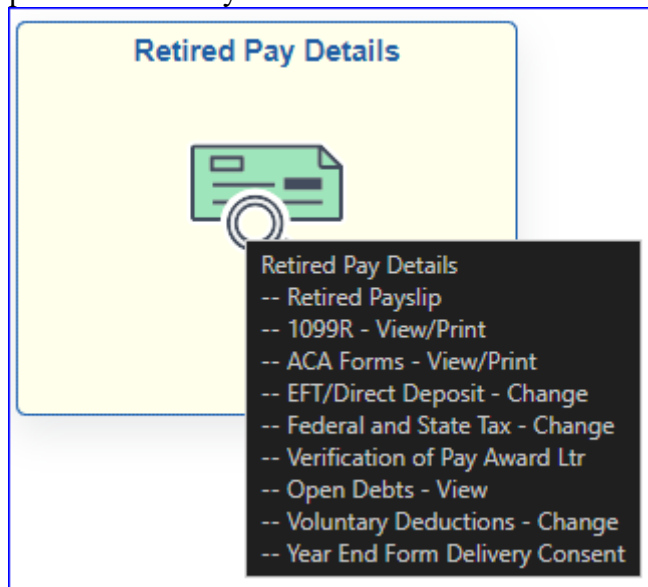
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## Overview, Continued

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### 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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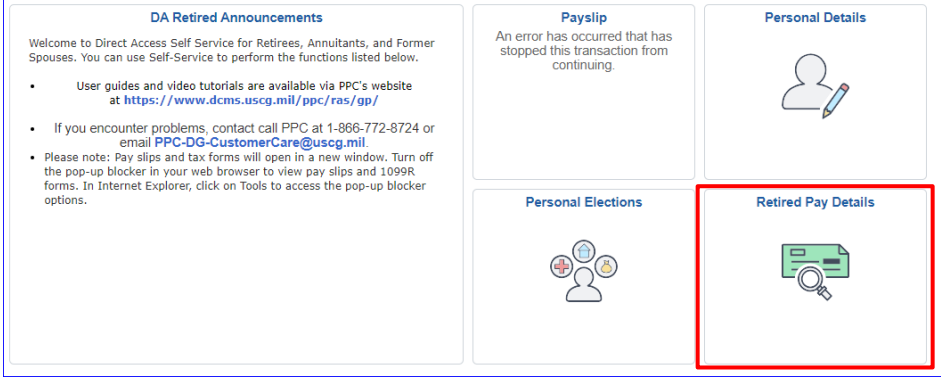
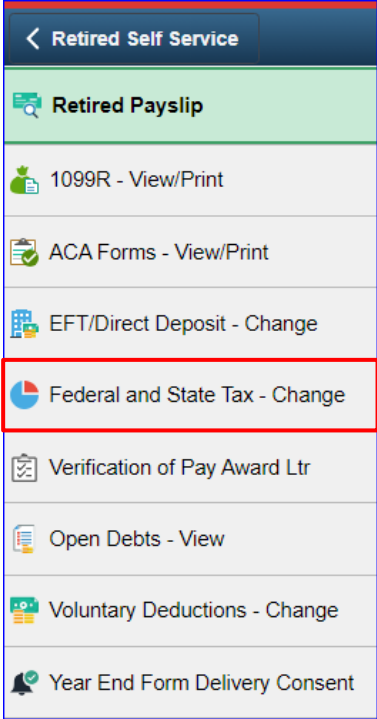
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# Update My Federal Tax Information

**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 <b>Retired Pay Details</b> tile from the Retiree Self Service homepage.</p>  <p>The screenshot shows the DA Retired Announcements homepage. It features a 'DA Retired Announcements' section on the left with a welcome message and links to user guides, contact information for PPC, and a note about pay slips and tax forms. On the right, there are four tiles: 'Payslip' (with an error message), 'Personal Details' (with a person icon), 'Personal Elections' (with a group icon), and 'Retired Pay Details' (with a document and magnifying glass icon). The 'Retired Pay Details' tile is highlighted with a red border.</p>
2	<p>Select the <b>Federal and State Tax - Change</b> option.</p>  <p>The screenshot shows the 'Retired Self Service' menu. It includes a back arrow and the title 'Retired Self Service'. Below the title are several options: 'Retired Payslip', '1099R - View/Print', 'ACA Forms - View/Print', 'EFT/Direct Deposit - Change', 'Federal and State Tax - Change' (highlighted with a red border), 'Verification of Pay Award Ltr', 'Open Debts - View', 'Voluntary Deductions - Change', and 'Year End Form Delivery Consent'.</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><b>Step 1: Personal Information</b></p> <ul style="list-style-type: none"> <li>• Ensure the <b>Mailing Address</b> is correct. If not, see the <a href="#">Mailing Address</a> user guide to update the mailing address.</li> <li>• Select the appropriate <b>Filing Status</b>.</li> </ul> <div> <p><b>W-4 Employee's Withholding Certificate</b></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. <a href="#">Official Form W-4</a></p> <p><b>Step 1: Personal Information</b></p> <p><b>Mailing Address</b></p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</p> <p><b>Does your name match the name on your social security card?</b> 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 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><b>Step 2: Income from a Job and/or Multiple Pensions/Annuities</b></p> <p>If applicable, enter <b>Total Taxable Annual Pay for all Jobs from W-4</b> and/or <b>Total Taxable Pension/Annuity Payments</b> data (whole number only with no decimal) and the <b>Total</b> field will auto-populate with the data.</p> <div> <p><b>Step 2: Income from a Job and/or Multiple Pensions/Annuities</b></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

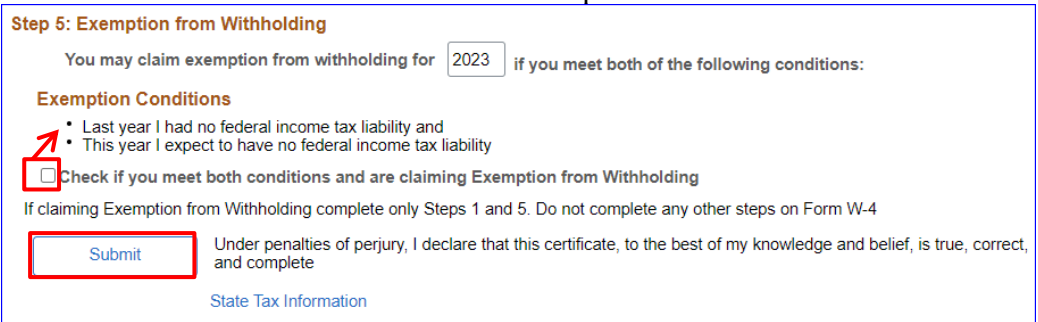
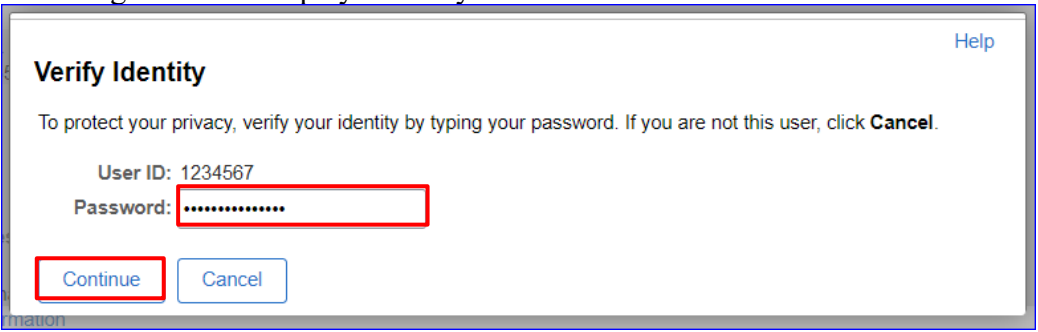
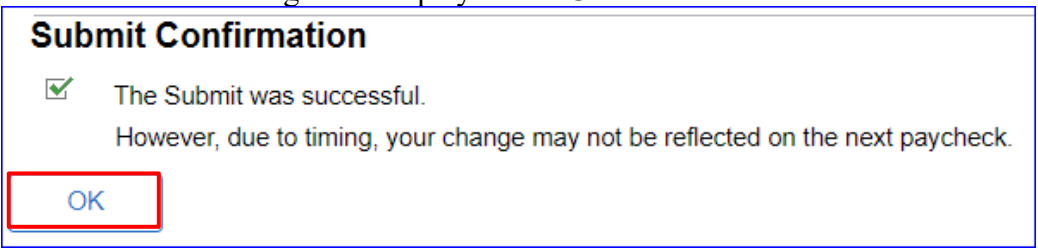
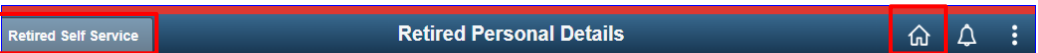



### Procedures, continued

Step	Action
5	<p><b>Step 3: Claim Dependents</b></p> <ul style="list-style-type: none"> <li>• Multiply the number of <b>qualifying dependents under the age of 17</b> by \$2,000 and enter the whole dollar amount with no decimal, i.e., 2000, 4000, etc.).</li> <li>• Multiply the number of <b>other qualifying dependents</b> by \$500 and enter the dollar amount (whole number only with no decimal, i.e., 500, 1000, etc.).</li> <li>• Enter any <b>Other tax credits</b>, such as education tax credits and foreign tax credit (whole number only with no decimal).</li> </ul> <p><b>NOTE:</b> For more information on eligibility requirements for tax credits, see <a href="#">IRS Pub. 972, Child Tax Credit and Credit for Other Dependents</a>.</p> <div style="border: 1px solid blue; padding: 10px;"> <p><b>Step 3: Claim Dependents</b></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="border: 1px solid red;" type="text"/></p> <p>Multiply the number of other dependents by \$500 <input style="border: 1px solid red;" type="text"/></p> <p>Other tax credits <input style="border: 1px solid red;" type="text"/></p> <p>Total <input style="border: 1px solid gray;" type="text"/></p> </div>
6	<p><b>Step 4: Other Adjustments</b></p> <ul style="list-style-type: none"> <li>• <b>(a) Other Income (not from jobs)</b> – This should be the total of your other estimated income for the year, if any (whole number only with no decimal). See <b>NOTE</b>.</li> <li>• <b>(b) Deductions</b> – 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 <a href="#">2020 W-4</a>).</li> <li>• <b>(c) Extra Withholding</b> – Enter in this step any additional tax you want withheld from your pay <u>each pay period</u> (whole number with no decimal).</li> </ul> <p><b>NOTE:</b> Do <b>NOT</b> enter income from other jobs where that income is already taxed. For more information on taxable income and extra withholdings, see <a href="#">IRS Pub. 505: Tax Withholding and Estimated Tax</a> guide.</p> <div style="border: 1px solid blue; padding: 10px;"> <p><b>Step 4: Other Adjustments</b></p> <p>▶ Step 4 Instructions</p> <p>a) Other Income (not from jobs) <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"/> \$100</p> </div>

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## Update My Federal Tax Information, Continued

### Procedures, continued

Step	Action
7	<p><b>Step 5: Exemption from Withholding</b> – Ensure all the information entered is correct and click <b>Submit</b>.</p> <p><b>WARNING:</b> If the <u>Check if you meet both conditions and are claiming Exemption from Withholding</u> box is checked, <b>NO FEDERAL TAXES WILL BE WITHHELD</b>. You must meet the Exemption Conditions to check this box.</p>  <p><b>Step 5: Exemption from Withholding</b></p> <p>You may claim exemption from withholding for <span>2023</span> 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><b>Submit</b> Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete</p> <p><a href="#">State Tax Information</a></p>
8	<p>A message box will display. Enter your DA <b>Password</b> and click <b>Continue</b>.</p>  <p><b>Verify Identity</b> <a href="#">Help</a></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="password"/></p> <p><b>Continue</b> <b>Cancel</b></p>
9	<p>A confirmation message will display. Click <b>OK</b>.</p>  <p><b>Submit Confirmation</b></p> <p>✓ The Submit was successful.</p> <p>However, due to timing, your change may not be reflected on the next paycheck.</p> <p><b>OK</b></p>
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 <a href="#">Update My State Tax Information</a> section.</p> <p>If no further changes are needed, return to the main homepage by clicking the <b>Retired Self Service</b> back arrow or the <b>House</b> icon.</p>  <p><b>Retired Self Service</b> Retired Personal Details   </p>

## Update My State Tax Information

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### Introduction

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

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### 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)

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### 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.

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### Information

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

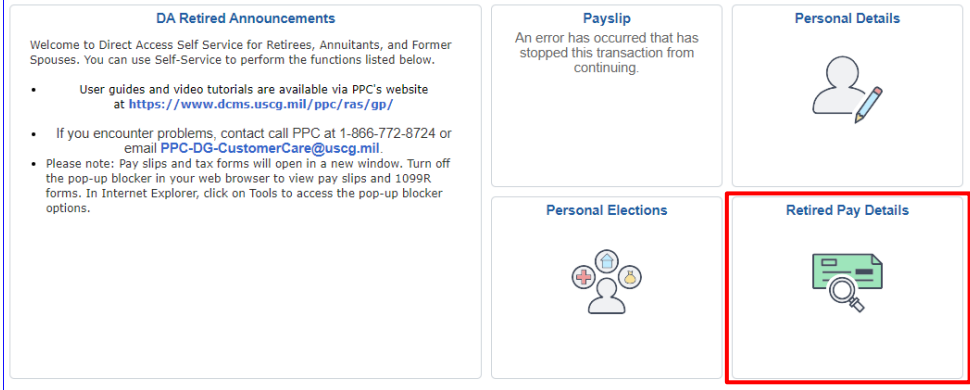
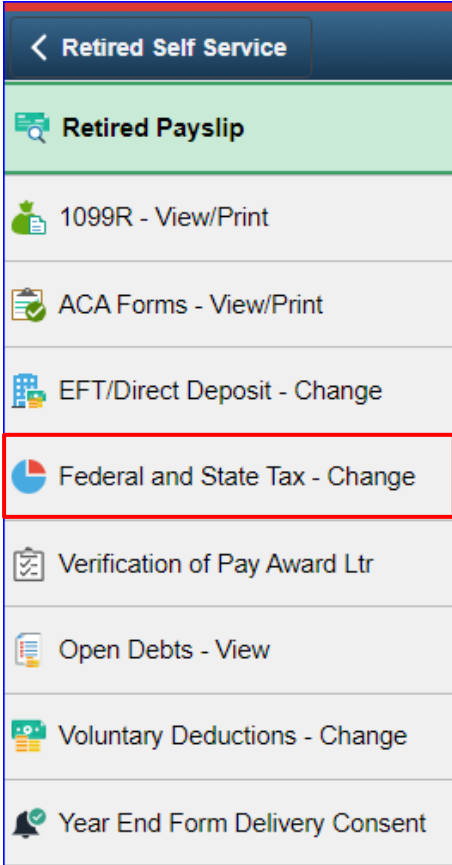
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# Update My State Tax Information, Continued

## Procedures

See below.

Step	Action
1	<p>Select the <b>Retired Pay Details</b> tile from the Retiree Self Service homepage.</p>  <p>The screenshot shows the Retiree Self Service homepage with four main tiles: DA Retired Announcements, Payslip, Personal Details, and Retired Pay Details. The Retired Pay Details tile is highlighted with a red border. It contains a magnifying glass icon over a document.</p>
2	<p>Select the <b>Federal and State Tax - Change</b> option.</p>  <p>The screenshot shows a list of options under the 'Retired Self Service' header. The 'Federal and State Tax - Change' option is highlighted with a red border. It features a pie chart icon.</p>

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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 <b>State Tax Information</b>.</p> <div> <p><b>W-4 Employee's Withholding Certificate</b></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. <a href="#">Official Form W-4</a></p> <p><b>Step 1: Personal Information</b></p> <p><b>Mailing Address</b></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</p> <p><input type="checkbox"/> Check if you meet both conditions and are claiming Exemption from Withholding 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><a href="#">State Tax Information</a></p> </div>
4	<p>The State Tax Information page will display. Ensure the <b>Mailing Address</b> is correct. If not, see the <a href="#">Mailing Address</a> user guide to update your mailing address.</p> <div> <p><b>State Tax Information</b></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. If you have any questions, please contact PPC (RAS) at 1-866-772-8724.</p> <p><b>Mailing Address</b></p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</p> <p><b>State Tax Data</b></p> <p>State of Residence: <input type="text" value="Kansas"/></p> <p>Tax Status: Married</p> <p>Total number of Allowances you are claiming:</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text" value="40.00"/></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><a href="#">Go To</a> <a href="#">W-4 Tax Information</a></p> </div>

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## Update My State Tax Information, Continued

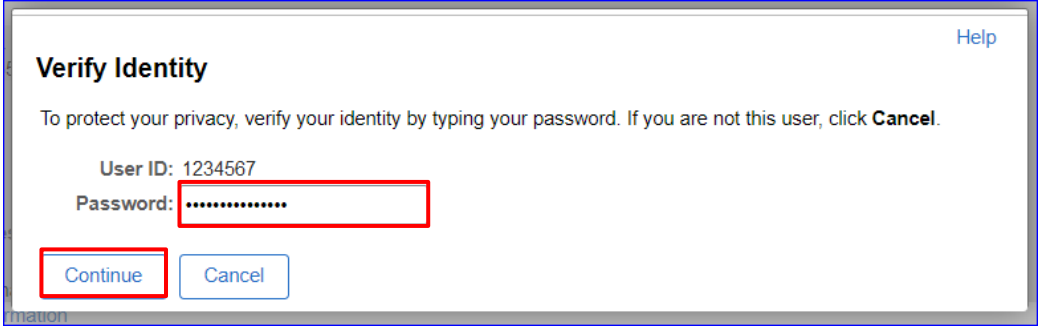
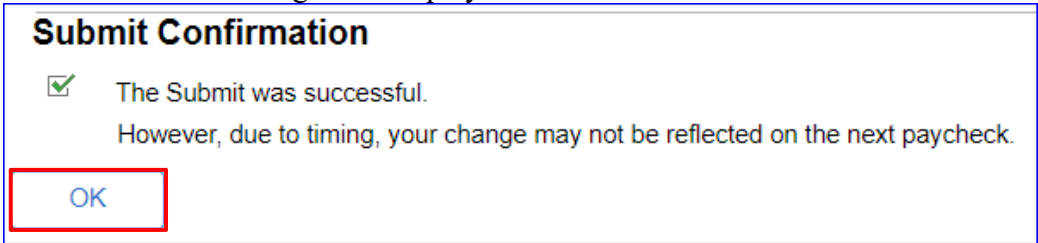
### Procedures, continued

Step	Action
5	<ul style="list-style-type: none"> <li>• <b>State of Residence</b> – If correct, leave as is; if incorrect, select the appropriate State from the drop-down.</li> <li>• <b>Tax Status</b> – Cannot be edited on the State Tax Information page.</li> <li>• <b>Total number of Allowances you are claiming</b> – Cannot be edited on the State Tax Information page.</li> <li>• <b>Enter Additional Amount, if any, you want withheld from each paycheck</b> <ul style="list-style-type: none"> <li>– If you wish to have additional state taxes withheld from your retirement pay, enter the amount.</li> <li>– 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.</li> <li>– <b>(NOTE: The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00 (whole dollar amounts only).</b></li> </ul> </li> </ul> <p>Once all information has been reviewed and/or updated, click <b>Submit</b>.</p> <div> <p><b>State Tax Information</b></p> <p>WALT KOWALSKI US COAST GUARD RETIRED</p> <p>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. If you have any questions, please contact PPC (RAS) at 1-866-772-8724.</p> <p><b>Mailing Address</b></p> <p>1582 SW HILLCREST AVENUE SANTA CRUZ KS 66614-2755</p> <p><b>State Tax Data</b></p> <p>State of Residence: <span>Kansas</span></p> <p>Tax Status: Married</p> <p>Total number of Allowances you are claiming:</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <span>40.00</span></p> <p><span>Submit</span> 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>

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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 <b>Password</b> and click <b>Continue</b>.</p> 
7	<p>A Confirmation message will display. Click <b>OK</b>.</p> 
8	<p>Once you click OK, you will be returned to the State Tax Information page.</p> <p><b>NOTE:</b> 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 <a href="#">Update My Federal Tax Information</a> section of this guide.</p> <p>If no further changes are needed, return to the main homepage by clicking the <b>Retired Self Service</b> back arrow or the <b>House</b> icon.</p> 