

Change My Federal & State Tax Information

Overview

Introduction This guide provides the procedures for **retired military personnel** to update their federal and state tax information in Direct Access (DA).

PHS, Annuitants, and Former Spouses Retired PHS personnel, Annuitants, and Former Spouses **must** call PPC Customer Care at 1-866-772-8724 to request their federal and/or state tax information be updated in Direct Access (DA).

Discussion This application gives you the ability to update your federal and state tax 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 CG-4700. 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 CG-4700. 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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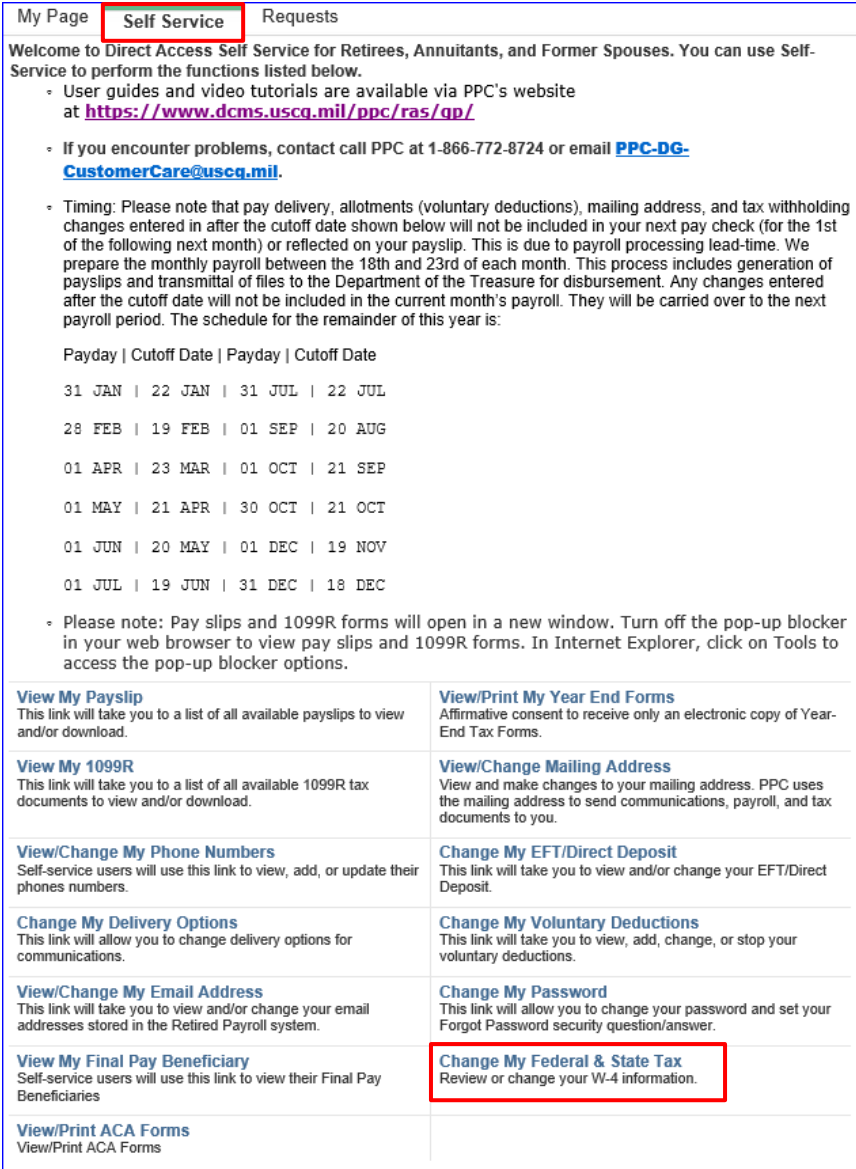
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Update My Federal Tax Information

Introduction This section provides the procedures for **retired military personnel** to update their federal tax information in Direct Access (DA).

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

Procedures See below.

Step	Action
1	<p>Select Change My Federal & State Tax.</p> <p>NOTE: Some Retirees may have more than one user access; in which case, you will need to select the Self Service tab to view the Self Service menu.</p>  <p>The screenshot shows a navigation bar with 'My Page', 'Self Service', and 'Requests'. The 'Self Service' tab is selected. The main content area contains a welcome message and a list of services. The 'Change My Federal & State Tax' link is highlighted with a red box. Below the list, there are several other service links such as 'View My Payslip', 'View/Print My Year End Forms', 'View My 1099R', 'View/Change Mailing Address', 'View/Change My Phone Numbers', 'Change My EFT/Direct Deposit', 'Change My Delivery Options', 'Change My Voluntary Deductions', 'View/Change My Email Address', 'Change My Password', 'View My Final Pay Beneficiary', and 'View/Print ACA Forms'.</p>

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Update My Federal Tax Information, Continued

Procedures,
continued

Step	Action
2	<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 style="border: 1px solid black; padding: 5px;"> <p>W-4 Employee's Withholding Certificate</p> <p>Dwight K. Shrute 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. Official Form W-4 Your withholding is subject to review by the IRS.</p> <p>Step 1: Personal Information</p> <p>Mailing Address</p> <div style="border: 1px solid red; padding: 2px;">1234 Goondocks Astoria OR 97103</div> <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> </div>
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 are married, filing jointly and you and your spouse both work.</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 style="border: 1px solid black; 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>

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Update My Federal Tax Information, Continued

**Procedures,
continued**

Step	Action
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> <p><small>Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)</small></p> <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</p>

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Update My Federal Tax Information, 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 (whole number only with no decimal). <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 style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Step 4: Other Adjustments</p> <p>▶ Step 4 Instructions</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 60%;">a) Other Income</div> <input style="width: 30%; border: 1px solid red;" type="text"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 60%;">b) Deductions</div> <input style="width: 30%; border: 1px solid red;" type="text"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 60%;">c) Extra Withholding</div> <input style="width: 30%; border: 1px solid red;" type="text"/> </div> </div>

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Update My Federal Tax Information, Continued


Procedures,
continued

Step	Action
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 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="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> </div>
7	<p>A message box will display. Enter your DA Password and click Continue.</p> <div style="border: 1px solid blue; padding: 5px;"> <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" value="....."/></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 style="border: 1px solid blue; padding: 5px;"> <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>

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Update My Federal Tax Information, Continued

**Procedures,
continued**

Step	Action
9	<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. If no further changes are needed, click the Home icon in the upper right corner to return to the Self Service menu.</p> 

Update My State Tax Information

Introduction This section provides the procedures for **retired military personnel** to update their state tax information in Direct Access (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 Change My Federal & State Tax.</p> <p>NOTE: Some Retirees may have more than one user access; in which case, you will need to select the Self Service tab to view the Self Service menu.</p> <div data-bbox="331 517 1362 1921" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; text-align: center;">My Page</td> <td style="width: 40%; text-align: center;">Self Service</td> <td style="width: 40%; text-align: center;">Requests</td> </tr> </table> <p>Welcome to Direct Access Self Service for Retirees, Annuitants, and Former Spouses. You can use Self-Service to perform the functions listed below.</p> <ul style="list-style-type: none"> - User guides and video tutorials are available via PPC's website at https://www.dcms.uscq.mil/ppc/ras/qp/ - If you encounter problems, contact call PPC at 1-866-772-8724 or email PPC-DG-CustomerCare@uscq.mil. - Timing: Please note that pay delivery, allotments (voluntary deductions), mailing address, and tax withholding changes entered in after the cutoff date shown below will not be included in your next pay check (for the 1st of the following next month) or reflected on your payslip. This is due to payroll processing lead-time. We prepare the monthly payroll between the 18th and 23rd of each month. This process includes generation of payslips and transmittal of files to the Department of the Treasury for disbursement. Any changes entered after the cutoff date will not be included in the current month's payroll. They will be carried over to the next payroll period. The schedule for the remainder of this year is: <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">Payday Cutoff Date</th> <th style="text-align: left;">Payday Cutoff Date</th> </tr> </thead> <tbody> <tr> <td>31 JAN 22 JAN</td> <td>31 JUL 22 JUL</td> </tr> <tr> <td>28 FEB 19 FEB</td> <td>01 SEP 20 AUG</td> </tr> <tr> <td>01 APR 23 MAR</td> <td>01 OCT 21 SEP</td> </tr> <tr> <td>01 MAY 21 APR</td> <td>30 OCT 21 OCT</td> </tr> <tr> <td>01 JUN 20 MAY</td> <td>01 DEC 19 NOV</td> </tr> <tr> <td>01 JUL 19 JUN</td> <td>31 DEC 18 DEC</td> </tr> </tbody> </table> <ul style="list-style-type: none"> - Please note: Pay slips and 1099R 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. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>View My Payslip This link will take you to a list of all available payslips to view and/or download.</p> </td> <td style="width: 50%; vertical-align: top;"> <p>View/Print My Year End Forms Affirmative consent to receive only an electronic copy of Year-End Tax Forms.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>View My 1099R This link will take you to a list of all available 1099R tax documents to view and/or download.</p> </td> <td style="vertical-align: top;"> <p>View/Change Mailing Address View and make changes to your mailing address. PPC uses the mailing address to send communications, payroll, and tax documents to you.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>View/Change My Phone Numbers Self-service users will use this link to view, add, or update their phones numbers.</p> </td> <td style="vertical-align: top;"> <p>Change My EFT/Direct Deposit This link will take you to view and/or change your EFT/Direct Deposit.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>Change My Delivery Options This link will allow you to change delivery options for communications.</p> </td> <td style="vertical-align: top;"> <p>Change My Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>View/Change My Email Address This link will take you to view and/or change your email addresses stored in the Retired Payroll system.</p> </td> <td style="vertical-align: top;"> <p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p> </td> <td style="vertical-align: top;"> <p>Change My Federal & State Tax Review or change your W-4 information.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>View/Print ACA Forms View/Print ACA Forms</p> </td> <td></td> </tr> </table> </div>	My Page	Self Service	Requests	Payday Cutoff Date	Payday Cutoff Date	31 JAN 22 JAN	31 JUL 22 JUL	28 FEB 19 FEB	01 SEP 20 AUG	01 APR 23 MAR	01 OCT 21 SEP	01 MAY 21 APR	30 OCT 21 OCT	01 JUN 20 MAY	01 DEC 19 NOV	01 JUL 19 JUN	31 DEC 18 DEC	<p>View My Payslip This link will take you to a list of all available payslips to view and/or download.</p>	<p>View/Print My Year End Forms Affirmative consent to receive only an electronic copy of Year-End Tax Forms.</p>	<p>View My 1099R This link will take you to a list of all available 1099R tax documents to view and/or download.</p>	<p>View/Change Mailing Address View and make changes to your mailing address. PPC uses the mailing address to send communications, payroll, and tax documents to you.</p>	<p>View/Change My Phone Numbers Self-service users will use this link to view, add, or update their phones numbers.</p>	<p>Change My EFT/Direct Deposit This link will take you to view and/or change your EFT/Direct Deposit.</p>	<p>Change My Delivery Options This link will allow you to change delivery options for communications.</p>	<p>Change My Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p>	<p>View/Change My Email Address This link will take you to view and/or change your email addresses stored in the Retired Payroll system.</p>	<p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p>	<p>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p>	<p>Change My Federal & State Tax Review or change your W-4 information.</p>	<p>View/Print ACA Forms View/Print ACA Forms</p>	
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Update My State Tax Information, Continued

**Procedures,
continued**

Step	Action
2	<p>The W-4 Employee Withholding Certificate page will display. Scroll to the bottom of the page and select State Tax Information.</p> <div style="border: 1px solid black; padding: 5px;"> <p>W-4 Employee's Withholding Certificate</p> <p>Dwight K. Shrute 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. Official Form W-4</p> <p>Step 1: Personal Information</p> <p>Mailing Address</p> <p>1234 Goondocks Astoria OR 97103</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> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <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>

Continued on next page

Update My State Tax Information, Continued

**Procedures,
continued**

Step	Action
3	<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: 5px;"> <p>State Tax Information</p> <p>DWIGHT K SHRUTE 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 1-800-772-8724.</p> <p>Mailing Address</p> <div style="border: 2px solid red; padding: 2px;"> <p>1234 Goondocks Astoria OR 97103</p> </div> <p>State Tax Data</p> <p>State of Residence: Maine ▼</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: 150.00</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>Go To W-4 Tax Information</p> </div>

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Update My State Tax Information, Continued


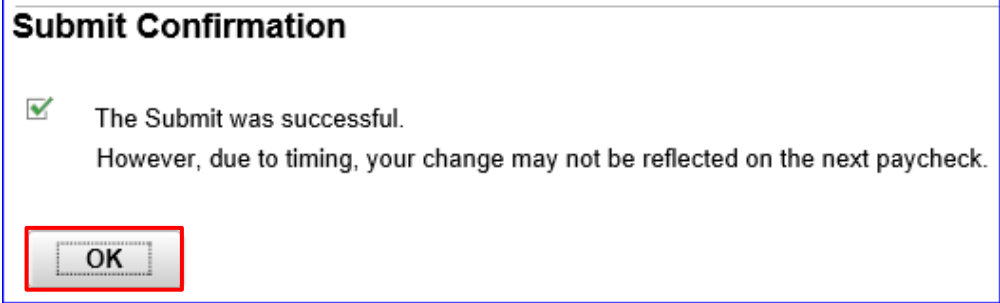
Procedures,
continued

Step	Action
4	<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 – 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). <p>Once all information has been reviewed and/or updated, click Submit.</p> <div style="border: 1px solid black; padding: 5px;"> <p>State Tax Information</p> <p>DWIGHT K SHRUTE 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 1-800-772-8724.</p> <p>Mailing Address</p> <p>1234 Goondocks Astoria OR 97103</p> <p>State Tax Data</p> <p>State of Residence: Oregon <input type="checkbox"/></p> <p>Tax Status: </p> <p>Total number of Allowances you are claiming: </p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: </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	<p>A message box will display. Enter your DA Password and click Continue.</p> 
6	<p>A confirmation message will display. Click OK.</p> 
7	<p>Once you click OK, you will be returned to the State Tax Information page.</p> <p>** 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, click the Home icon in the upper right corner to return to the Self Service menu.</p> 