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).

Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>See Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update My Federal Tax Information</td>
<td>2</td>
</tr>
<tr>
<td>Update My State Tax Information</td>
<td>7</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Change My Federal &amp; State Tax.</td>
</tr>
</tbody>
</table>

**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.

Welcome to Direct Access Self Service for Retirees, Auxiliaries, and Former Spouses. You can use Self-Service to perform the functions listed below.

- User guides and video tutorials are available via PPC’s website at [https://www.dcms.uscg.mil/ppc/res/asp/](https://www.dcms.uscg.mil/ppc/res/asp/)

- If you encounter problems, contact PPC at 1-866-772-8724 or email PPC-DCM CustomerCare@uscg.mil.

- Timing: Please note that pay delivery, allotments (voluntary deductions), mailing address, and tax withholding changes entered after the cutoff date shown below will not be included in your next pay check (for the list of the following month) or reflected on your pay slip. This is due to payroll processing lead-time. We prepare the monthly payroll between the 11th and 23rd of each month. This process includes generation of pay slips and transmission of file 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 the year is:

- Payday | Cut-off Date | Payday | Cut-off Date
- 31 Jan | 22 Jan | 31 Jul | 22 Jul
- 20 Feb | 19 Feb | 01 Sep | 20 Aug
- 31 Mar | 23 Mar | 01 Oct | 31 Oct
- 31 May | 21 Apr | 30 Oct | 31 Oct
- 31 Jun | 20 May | 01 Dec | 19 Nov
- 31 Jul | 19 Jun | 31 Dec | 18 Dec

- 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.
Update My Federal Tax Information, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2    | The W-4 Employee Withholding Certificate page will display. There are 5 steps that require review/completion before changes may be submitted.  

**Step 1: Personal Information** –  
- Ensure the **Mailing Address** is correct. If not, see the **Mailing Address** user guide to update the mailing address.  
- Select the appropriate **Filing Status**.  

**W-4 Employee's Withholding Certificate**  
Dwight K. Shute  
US COAST GUARD RETIRED  
Social Security Number: 123-45-6789  
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**  

**Step 1: Personal Information**  

**Mailing Address**  
1234 Gowdowns  
Aptone 01: 3703  

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 1-800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov)  

**Filing Status**  
- Single or Married filing separately  
- Married filing jointly (or Qualifying widow(er))  
- 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)  

| 3    | **Step 2: Multiple Jobs or Spouse Works** – Check the box as appropriate.  

**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.  

*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.*  

**Step 2: Multiple Jobs or Spouse Works**  

- [ ] Step 2 Instructions  
- [x] Multiple Jobs or Spouse Works  

*Continued on next page*
### Step 3: Claim Dependents –

- 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).

**NOTE:** For more information on eligibility requirements for tax credits, see IRS Pub. 972, *Child Tax Credit and Credit for Other Dependents*.

### Step 4: Other Adjustments –

- **(a) Other Income** – this should be the total of your other estimated income for the year, if any (whole number only with no decimal).
- **(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).

**NOTE:** For more information on taxable income and extra withholdings, see IRS Pub. 505: *Tax Withholding and Estimated Tax* guide.
### Update My Federal Tax Information, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6</strong></td>
<td><strong>Step 5: Exemption from Withholding</strong> – Ensure all the information entered is correct and click <strong>Submit</strong>.</td>
</tr>
</tbody>
</table>

**WARNING:** If the Check if you meet both conditions and are claiming Exemption from Withholding box is checked, **NO FEDERAL TAXES WILL BE WITHHELD.** You must meet the Exemption Conditions to check this box.

**Step 5: Exemption from Withholding**

You may claim exemption from withholding for 2020 if you meet both of the following conditions:

**Exemption Conditions**

- Last year I had no federal income tax liability and
- This year I expect to have no federal income tax liability

[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

[Submit] Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete

| **7** | A message box will display. Enter your DA **Password** and click **Continue**. |

**Verify Identity**

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Cancel**.

User ID: 1234567
Password: ***************

[Continue] [Cancel]

| **8** | A confirmation message will display. Click **OK**. |

**Submit Confirmation**

☑️ The Submit was successful.

However, due to timing, your change may not be reflected on the next paycheck.

[OK]
**Update My Federal Tax Information, Continued**

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>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 <strong>Home</strong> icon in the upper right corner to return to the Self Service menu.</td>
</tr>
</tbody>
</table>
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)

Information
Log into DA Self Service at Direct Access Sign In.

Continued on next page
**Update My State Tax Information**, Continued

**Procedures**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Select <strong>Change My Federal &amp; State Tax</strong>.</td>
</tr>
</tbody>
</table>

**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.

![Table](https://www.dcms.uscg.mil/ppc/ras/up/)

- User guides and video tutorials are available via PPC’s website at [https://www.dcms.uscg.mil/ppc/ras/up/](https://www.dcms.uscg.mil/ppc/ras/up/)
- If you encounter problems, contact call PPC at 1-866-772-8724 or email PPC-DG-CustomerCare@uscg.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 pay stub. 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 paystubs 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>
<thead>
<tr>
<th>Payday</th>
<th>Cutoff Date</th>
<th>Payday</th>
<th>Cutoff Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>31 JAN</td>
<td>22 JAN</td>
<td>31 JUL</td>
<td>22 JUL</td>
</tr>
<tr>
<td>28 FEB</td>
<td>19 FEB</td>
<td>30 APR</td>
<td>21 APR</td>
</tr>
<tr>
<td>01 MAY</td>
<td>21 APR</td>
<td>30 OCT</td>
<td>21 OCT</td>
</tr>
<tr>
<td>01 JUN</td>
<td>20 MAY</td>
<td>01 DEC</td>
<td>19 NOV</td>
</tr>
<tr>
<td>01 JUL</td>
<td>19 JUN</td>
<td>31 DEC</td>
<td>18 DEC</td>
</tr>
</tbody>
</table>

- 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>
<thead>
<tr>
<th>View My Pay stub</th>
<th>View/Print Your Year End Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>This link will take you to a list of all available pay stubs to view and/or download.</td>
<td>Affirmative consent to receive only an electronic copy of Year End Tax Forms.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View My 1099R</th>
<th>View/Change Mailing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>This link will take you to a list of all available 1099R tax documents to view and/or download.</td>
<td>View and make changes to your mailing address. PPC uses the mailing address to send communications, payroll, and tax documents to you.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View/Change My Phone Numbers</th>
<th>Change My EFT/Direct Deposit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-service users will use this link to view, add, or update their phone numbers.</td>
<td>This link will take you to view and/or change your EFT/Direct Deposit.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change My Delivery Options</th>
<th>Change My Voluntary Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>This link will allow you to change delivery options for communications.</td>
<td>This link will take you to view, add, change, or stop your voluntary deductions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View/Change My Email Address</th>
<th>Change My Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>This link will take you to view and/or change your email address stored in the Retired Payroll system.</td>
<td>This link will allow you to change your password and set your Forget Password security question/answer.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View/Print ACA Forms</th>
<th>Change My Federal &amp; State Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-service users will use this link to view their Final Pay Beneficiaries.</td>
<td>Review or change your W-4 information.</td>
</tr>
</tbody>
</table>

**Continued on next page**
Update My State Tax Information, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>The W-4 Employee Withholding Certificate page will display. Scroll to the bottom of the page and select <strong>State Tax Information</strong>.</td>
</tr>
</tbody>
</table>

**W-4 Employee’s Withholding Certificate**

<table>
<thead>
<tr>
<th>Name</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dwight K. Stote</td>
<td>123-45-6789</td>
</tr>
</tbody>
</table>

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.

**Step 1: Personal Information**

- **Mailing Address**
  - 1234 Goonsocks
  - Astoria OR 97103

  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](http://www.ssa.gov)

- **Filing Status**
  - Single or Married filing separately
  - Married filing jointly (or Qualifying widow(er))
  - 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)

**Step 5: Exemption from Withholding**

You may claim exemption from withholding for **2020** if you meet both of the following conditions:

- Last year I had no federal income tax liability and
- This year I expect to have no federal income tax liability

[Submit] Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete

[Go To] **State Tax Information**

Continued on next page
**Update My State Tax Information**, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3    | **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.**  
  
**State Tax Information**  
  
Dwight K Shute  
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 1-800-772-8724.  
  
**Mailing Address**  
1234 Gooreocks  
Astoria OR 97103  
  
**State Tax Data**  
  
State of Residence:  
Married  
  
Tax Status:  
Total number of Allowances you are claiming:  
Enter Additional Amount, if any, you want withheld from each paycheck: 150.00  
  
Submit  
Go To W-4 Tax Information  
  
*Continued on next page*
Update My State Tax Information, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4    | • 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)). |

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

State Tax Information

Dwight K Shrute  
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 1-800-772-8724.

Mailing Address

1234 Goondocks  
Astoria OR 97103

State Tax Data

State of Residence: Oregon  
Tax Status:  
Total number of Allowances you are claiming:  
Enter Additional Amount, if any, you want withheld from each paycheck:  

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

Continued on next page
Update My State Tax Information, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5    | A message box will display. Enter your DA **Password** and click **Continue**.  

Verify Identity

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Cancel**.

User ID: 1234567  
Password: ***************  

[Continue][Cancel]

| 6    | A confirmation message will display. Click **OK**.  

Submit Confirmation

- The Submit was successful  
  However, due to timing, your change may not be reflected on the next paycheck.

[OK]

| 7    | Once you click **OK**, you will be returned to the State Tax Information page. If you need to update your Federal tax information, see Update My Federal 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. |