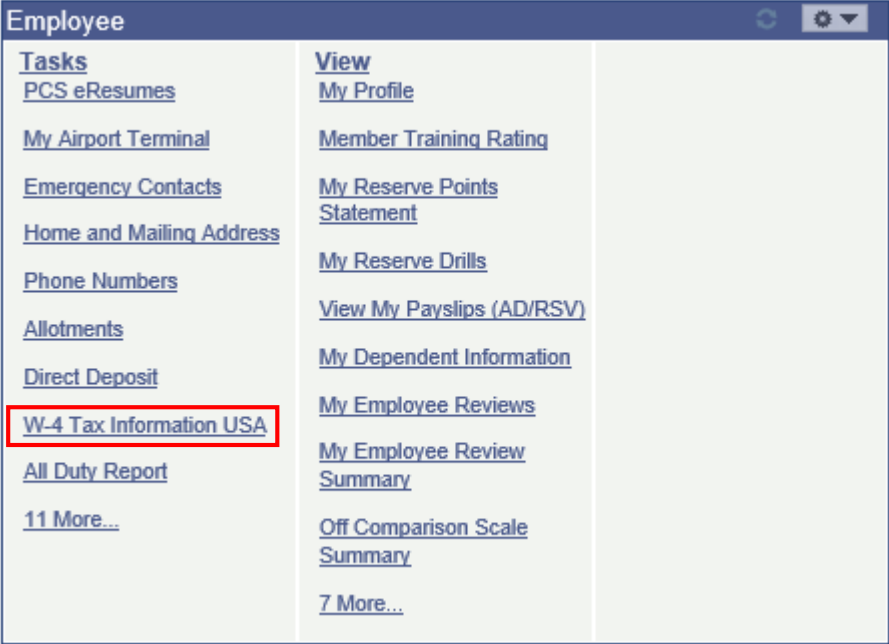


Federal Tax Election

Introduction This guide provides the procedures on how a member can change their Federal Tax election in Direct Access.

Procedures See below.

Step	Action
1	<p>Select the W-4 Tax Information USA link from the Employee pagelet.</p>  <p>The screenshot shows an 'Employee' pagelet with two columns of links. The 'W-4 Tax Information USA' link is highlighted with a red box. Other links include: Tasks, PCS eResumes, My Airport Terminal, Emergency Contacts, Home and Mailing Address, Phone Numbers, Allotments, Direct Deposit, All Duty Report, 11 More..., View, 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...</p>

Continued on next page

Federal Tax Election, Continued

Procedures,
continued

Step	Action
2	<p>Make all necessary changes, then click Submit.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>W-4 Tax Information</p> <p>JAMES BOND UNITED STATES COAST GUARD Social Security Number 123-45-6789</p> <p>You must complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Because your tax situation may change, you may want to refigure your withholding each year. Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS. You last updated this information on Dec 20, 2014</p> <p>Mailing Address</p> <p>30 Wellington Square Boston, MA 02116</p> <p>W-4 Tax Data</p> <div style="border: 2px solid red; padding: 5px;"> <p>Indicate Tax Status</p> <p><input checked="" type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Married/Withhold Single (Married, but withhold at higher single rate)</p> <p>Total number of Allowances you are claiming: <input type="text"/></p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text"/></p> </div> <p><input type="checkbox"/> If your last name differs from that shown on your social security card, check here You must call 1-800-772-1213 for a new card.</p> <p>Claim Exemption</p> <p>I claim exemption from withholding for <input type="text" value="2018"/> and I certify that I meet BOTH of the following conditions for exemption</p> <ul style="list-style-type: none"> • Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND • This year I expect a refund of ALL Federal income tax withheld because I expect to have no tax liability. <p><input type="checkbox"/> If you meet both conditions, check "Exempt" here:</p> <p>Note: If Marital Status and/or Allowances is changed and Exempt is checked, then Exempt will take precedence over your prior selection of Marital Status and Allowances.</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 Official Form W-4 State Tax Information</p> </div>

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Federal Tax Election, Continued

Procedures,
continued

Step	Action
3	<p>Once submitted, enter the Direct Access password for privacy protection. Then click Continue.</p> <div data-bbox="365 562 1422 894" style="border: 1px solid blue; padding: 10px;"> <p>Verify Identity</p> <p>To protect your privacy, verify your identity by typing your password. If you are not this user, click Sign Out.</p> <p>User ID: 1953007</p> <p>Password: <input style="border: 1px solid red;" type="password"/></p> <p><input style="border: 1px solid red;" type="button" value="Continue"/> <input style="border: 1px solid black;" type="button" value="Cancel"/></p> </div>
4	<p>This will appear to show the changes were successfully submitted. Now click OK.</p> <div data-bbox="365 978 1326 1318" style="border: 1px solid blue; padding: 10px;"> <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>
