

State Tax Election

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

Withholding Exceptions Some states allow an exemption from state income tax withholding for military personnel, if you are a resident of a state which exempts active duty pay from taxation and you meet the criteria for exemption. The rules for exemptions can be found at [State Tax Withholding Exceptions](#).

Exemptions from SITW may only be entered by SPOs. Members cannot enter an exemption using self service. Members must submit a new W-4 Tax Information form to the SPO for entry into Direct Access.

Note: If your SPO has entered an exemption from State Tax Withholding for you, **do not make any changes to your state tax withholding via self service**. If you change your exemptions or marital status via self service the system, will begin to withhold state taxes.

Procedures See below.

Step	Action
1	<p>Select the W-4 Tax Information USA link from the Employee Pagelet.</p>  <p>The screenshot shows a web interface titled 'Employee' with a list of links. The link 'W-4 Tax Information USA' is highlighted with a red rectangular box. Other visible 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

State Tax Election, Continued

Procedures,
continued

Step	Action
2	<p>The Federal Tax information will be displayed. Scroll to the bottom and click on the State Tax Information link.</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.</p> <p>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> <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> <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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State Tax Election, Continued

Procedures,
continued

Step	Action
3	<p>Only the SPO can change the State of Residence. Make the necessary changes and then click Submit.</p> <div data-bbox="320 533 1398 1205"><h3>State Tax Information</h3><p>JAMES BOND UNITED STATES COAST GUARD Social Security Number: 123-45-6789</p><p>You last updated this information on Dec 20, 2014</p><h4>Mailing Address</h4><p>30 Wellington Square Boston, MA 02118</p><h4>State Tax Data</h4><p>State of Residence: Indiana</p><div data-bbox="347 936 1107 1070"><p>Tax Status: <input type="text" value="N/A"/></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="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>
4	<p>Once submitted, enter the Direct Access password for privacy protection. Then click Continue.</p> <div data-bbox="320 1317 1398 1585"><h3>Verify Identity</h3><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 type="text"/></p><p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p></div>
5	<p>This will appear to show the changes were successfully submitted. Now click OK.</p> <div data-bbox="320 1664 1294 1888"><h3>Submit Confirmation</h3><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 type="button" value="OK"/></p></div>

Continued on next page

State Tax Election, Continued

Non Standard Marital Status Codes Some states have non-standard marital status codes (e.g. Not the same as federal withholding codes). Refer to the appropriate state tax withholding form and instructions for more information on using these codes:

STATE	Marital Status	Description
AK	N/A	Not applicable
AL	Married	Married, and claim exemption for both yourself and your spouse(line 3 (a) from Alabama from A-4)
AL	H of House	Head of Household
AL	Marr-Sep	Married claiming exemption for self only
AL	No Exempt	Single or married but claiming no exemptions (filing status 0 on Alabama form A-4)
AL	Single	Single
AR	Married-B	Married, claiming self
AR	H-of-H-H	Head of Household
AR	Married-M	Married, claiming self and spouse
AR	N/A	Not applicable
AR	No P Exempt	No Personal Exemptions
AR	Single-S	Single
AR	Single-T	Single (low income option)
AR	Married-U	Married, claiming self and spouse (low income option)
AR	H-of-H-Y	Head of Household (low income option)
AS	Married	Married
AS	Single	Single
AZ	N/A	Not applicable
CA	H-of-H	Head of Household
CA	Married	Married (one income)
CA	S/M-2 inc	Single, or Married with two or more incomes
CO	Married	Married
CO	Single	Single
CT	M-Sep	Married or Civil Union, separate return or joint return with both spouses working and combined income less than Connecticut limit (Filing Status A)
CT	H-of-H	Head of Household (Filing Status B)
CT	M-Joint	Married or Civil Union Filing Jointly (Filing Status C)
CT	No CT-W4	Default - No Connecticut Form CT-W4 received from employee
CT	No Exempt	No Exemptions (Filing Status D)
CT	Single	Single (Filing Status F)
DC	M-Sep	Married filing separately
DC	M/DP-Sep	Married/Domestic Partners filing separately on same form
DC	H-of-H	Head of Household

STATE	Marital Status	Description
DC	M/DP-Joint	Married/Domestic Partners filing jointly
DC	Single	Single
DE	M-Sep	Married, separate return
DE	M-Joint	Married, joint return
DE	Single	Single
FL	N/A	Not applicable
FM	N/A	Not Applicable
GA	M-Both	Married Filing Joint, both spouses working. Line 3, option B
GA	M-Sep	Married Filing Separate. Line 3, option D
GA	H-of-H	Head of Household. Line 3, option E
GA	M-Joint	Married Filing Joint, one spouse working. Line 3, option C
GA	Single	Single Allowance. Line 3, option A
GU	Married	Married
GU	Single	Single
HI	Married	Married
HI	Single	Single
IA	Married	Married
IA	N/A	Not applicable
IA	Single	Single
ID	Married	Married
ID	Single	Single
IL	N/A	Not applicable
IN	N/A	Not applicable
KS	Married	Married
KS	Single	Single
KY	Married	Married
KY	N/A	Not applicable
KY	Single	Single
LA	Self+spous	Louisiana Form L-4 Line 6 = 2
LA	No Exempt	No exemption claimed (Louisiana Form L-4 Line 6 = 0)
LA	Self only	Louisiana Form L-4 Line 6 = 1
MA	H-of-H	Head of Household
MA	Married	Married
MA	Single	Single
MA	M or S Bl	Married or single taxpayer with 1 blind exemption
MA	M-Both BL	Married exemption with two additional blind exemptions
MA	H of H Bl	Claims Head of Household and Blind Exemption
MD	N/A	Not applicable
ME	Married	Married
ME	Single	Single
MH	N/A	Not Applicable
MI	No Form	No Form Option (employee CANNOT be claimed as a dependent by another taxpayer)

STATE	Marital Status	Description
MI	N/A	Not applicable
MI	NoForm-Dep	No Form Option (employee CAN be claimed as a dependent by another taxpayer)
MN	M-Sep	Married, but withhold at higher Single rate
MN	Married	Married
MN	Single	Single; Married but legally separated; or Spouse is a nonresident alien
MO	M-Both wrk	Married, employee and spouse both work.
MO	H-of-H	Head of Household
MO	Married	Married
MO	Single	Single
MP	Married	Married
MP	Single	Single
MS	M-Both Wrk	Married, both spouses working
MS	H-of-F	Head of Family
MS	M-1 work	Married, one spouse working
MS	Single	Single
MT	Married	Married
MT	Single	Single
NC	H-of-H	Head of Household
NC	Married	Married or Qualifying Widow(er)
NC	Single	Single
ND	Married	Married
ND	N/A	Not Applicable
ND	Single	Single
NE	Married	Married
NE	Single	Single
NH	N/A	Not Applicable
NJ	M-Sep	Married filing separately (use Table A)
NJ	Table C	Use Rate Table C
NJ	Table D	Use Rate Table D
NJ	Table E	Use Rate Table E
NJ	H-of-H	Head of Household (use Table B)
NJ	M-Joint	Married filing jointly (use Table B)
NJ	Single	Single (use Table A)
NM	Married	Married
NM	Single	Single
NV	N/A	Not applicable
NY	Married	Married
NY	Single	Single or Head of Household
OH	N/A	Not applicable
OK	M-Joint	Married, joint return, use optional table
OK	Married	Married, use regular table

STATE	Marital Status	Description
OK	Single	Single
OR	Married	Married
OR	Single	Single
PA	N/A	Not applicable
PR	M-1/2	Married, claiming 1/2 of personal exemption
PR	M-Both	Married/Separated, claiming all of the personal exemption
PR	Married	Married
PR	No Exempt	Claiming no personal exemption
PR	Separated	Married filing separate
PR	Single	Single
PW	N/A	Not Applicable
RI	Married	Married
RI	Single	Single
SC	N/A	Not applicable
SD	N/A	Not applicable
TN	N/A	Not applicable
TX	N/A	Not applicable
UT	Married	Married
UT	Single	Single
VA	65 / Blind	Age 65 or Blind
VA	N/A	Not applicable
VI	Married	Married
VI	Single	Single
VT	Married	Married or Civil Union
VT	N/A	Not applicable
VT	Single	Single or Civil Union, but withhold at the higher Single rate
WA	N/A	Not applicable
WI	Married	Married
WI	Single	Single
WV	2 Earner	Two Earner Percentage Method
WV	Lower Rate	Single, Head-of-Household, or Married with non-working spouse and receiving wages from only one job - withhold at lower tax rate. (This is from Line 5 of West Virginia Form WV/IT-104.)
WY	N/A	Not applicable