

# Self Service – Federal Tax Election

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

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**Procedures** See below.

| Step | Action  |
|------|---|
| 1    | <p>Select the <b>Federal &amp; State Tax Elections</b> link from the Employee pagelet.</p>  <p>The screenshot shows a window titled "Employee" with a menu structure:</p> <ul style="list-style-type: none"> <li><b>Profile</b> <ul style="list-style-type: none"> <li>My Profile</li> </ul> </li> <li><b>Tasks</b> <ul style="list-style-type: none"> <li>PCS eResumes</li> <li>My Airport Terminal Orders</li> <li>Emergency Contacts</li> <li>Home and Mailing Address</li> <li>Phone Numbers</li> <li>Allotments</li> <li>Direct Deposit</li> <li><b>Federal &amp; State Tax Elections</b> (highlighted with a red box)</li> <li>All Duty Report</li> <li>9 More...</li> </ul> </li> <li><b>View</b> <ul style="list-style-type: none"> <li>Member Training Rating</li> <li>My Reserve Points Statement</li> <li>My Reserve Drills</li> <li>View My Payslips (AD/RSV)</li> <li>My Employee Reviews</li> <li>Employee Review Summary</li> <li>Off Comparison Scale Summary</li> <li>SWE PDE</li> <li>5 More...</li> </ul> </li> </ul> |

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# Self Service – Federal Tax Election, Continued

Procedures,  
continued

| Step | Action  |
|------|---|
| 2    | <p data-bbox="358 491 967 525">Make all necessary changes, then click <b>Submit</b>.</p> <p data-bbox="358 527 643 556"><b>W-4 Tax Information</b></p> <p data-bbox="358 573 1174 623">Joe Coastie<br/>UNITED STATES COAST GUARD                      Social Security Number:    123-45-6789</p> <p data-bbox="358 636 1174 659">You must complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.</p> <p data-bbox="358 669 1049 693">Because your tax situation may change, you may want to refigure your withholding each year.</p> <p data-bbox="358 703 875 768">Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS.<br/>Your employer may be required to send a copy of this form to the IRS.</p> <p data-bbox="358 781 768 804">You last updated this information on Feb 4, 2016</p> <p data-bbox="358 816 516 840"><b>Mailing Address</b></p> <p data-bbox="380 856 591 907">987 SAILOR BLVD<br/>OCEAN CITY, MD 13452</p> <p data-bbox="358 930 488 953"><b>W-4 Tax Data</b></p> <p data-bbox="380 968 578 991"><b>Indicate Marital Status</b></p> <p data-bbox="415 999 1089 1081"><input type="radio"/> Single<br/><input checked="" type="radio"/> Married<br/><input type="radio"/> Married/Withhold Single      (Married, but withhold at higher single rate)</p> <p data-bbox="380 1094 857 1117">Total number of Allowances you are claiming:    <input type="text" value="2"/></p> <p data-bbox="380 1129 1232 1152">Enter Additional Amount, if any, you want withheld from each paycheck:    <input type="text"/></p> <p data-bbox="380 1165 1133 1224"><input type="checkbox"/> If your last name differs from that shown on your social security card, check here<br/>You must call 1-800-772-1213 for a new card.</p> <p data-bbox="358 1241 524 1264"><b>Claim Exemption</b></p> <p data-bbox="358 1276 1360 1327">I claim exemption from withholding for:    <input type="text" value="2016"/>    and I certify that I meet BOTH of the following conditions for exemption:</p> <p data-bbox="380 1327 1281 1377">&gt;&gt; Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND<br/>&gt;&gt; This year I expect a refund of ALL Federal income tax withheld because I expect to have no tax liability.</p> <p data-bbox="380 1390 857 1413"><input type="checkbox"/> If you meet both conditions, check "Exempt" here:</p> <p data-bbox="358 1423 1422 1467">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 data-bbox="380 1480 1401 1524"><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 data-bbox="380 1537 912 1560">Go To:    <a href="#">Official Form W-4</a>                      <a href="#">State Tax Information</a></p> |

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## Self Service – Federal Tax Election, Continued

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Procedures,  
continued

| Step | Action  |
|------|---|
| 3    | <p>Once submitted, enter the Direct Access password for privacy protection. Then click <b>Continue</b>.</p> <div data-bbox="358 558 1421 894" style="border: 1px solid blue; padding: 5px;"><p><b>Verify Identity</b></p><p>To protect your privacy, verify your identity by typing your password. If you are not this user, click <b>Sign Out</b>.</p><p>User ID: 1234567</p><p>Password: <input data-bbox="511 730 766 764" type="password"/></p><p><input data-bbox="365 846 500 888" type="button" value="Continue"/> <input data-bbox="511 846 630 888" type="button" value="Cancel"/></p></div> |
| 4    | <p>This will appear to show the changes were successfully submitted. Now click <b>OK</b>.</p> <div data-bbox="358 968 1312 1171" style="border: 1px solid blue; padding: 5px;"><p><b>Submit Confirmation</b></p><p><input checked="" data-bbox="375 1077 407 1098" type="checkbox"/> The Submit was successful.</p><p><input data-bbox="375 1129 446 1163" type="button" value="OK"/> However, due to timing, your change may not be reflected on the next paycheck.</p></div>  |

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