

**U. S. Coast Guard
Pay & Personnel Center
Direct Access II/Retired Global Pay
Self-Service**

Retiree – Update Federal/State Tax Information

Introduction This document provides the procedure for updating your federal or state tax information in Direct Access II/Retired Global Pay Self-Service.

Before you Begin If you haven't used Self Service before, please review the initial log-on instructions available at <http://www.uscg.mil/ppc/ras/gp/> or in Issue 01/2010 of the **Retiree Newsletter** (<http://www.uscg.mil/ppc/retnews/2010/January10newsletter.pdf>).

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.

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.

Retiree – Update Federal/State Tax Information,

Continued

Procedures to Change Federal Tax

Log into DA II Self-Service at <https://portal.direct-access.us/> and follow these steps to update your federal tax information:

Note: If you have any issues with submitting a change to your federal tax information, please call RAS at 1-800-772-8724.

Step	Action		
1	<p>Click on the “Change My Federal & State Tax” link from the home page menu.</p> <div data-bbox="305 620 1349 1349" style="border: 1px solid black; padding: 5px;"> <p>Welcome to Direct Access II Self Service for Retirees, Annuitants, and Former Spouses.</p> <p>You can use Self-Service to: review your Pay Statements and IRS Form 1099R; update your mailing address and phone number(s); update your voluntary deductions (Retirees only); and opt out of receiving a Retiree Newsletter by mail. Over the next year, you will be able to perform other Self-Service functions, including: changing your taxes and updating your direct deposit. As additional Self-Service functionality is rolled out, we will notify you through the Retirees' Newsletter.</p> <p>If you encounter problems, contact PPC (RAS) at 1-800-772-8724.</p> <p>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.</p> <table border="0" style="width: 100%;"> <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> <p>View/Change My Mailing Address This link will allow you to view and make changes to your mailing address.</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 Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p> <p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p> <p style="border: 1px solid red; padding: 2px;">Change My Federal & State Tax Review or change your W-4 information.</p> </td> <td style="width: 50%; 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> <p>View/Change My Phone Number(s) This link will allow you to view, add, or update their phone number(s).</p> <p>Change My Delivery Options This link will allow you to change delivery options for communications.</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>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p> </td> </tr> </table> </div>	<p>View My Payslip This link will take you to a list of all available payslips to view and/or download.</p> <p>View/Change My Mailing Address This link will allow you to view and make changes to your mailing address.</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 Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p> <p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p> <p style="border: 1px solid red; padding: 2px;">Change My Federal & State Tax Review or change your W-4 information.</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 My Phone Number(s) This link will allow you to view, add, or update their phone number(s).</p> <p>Change My Delivery Options This link will allow you to change delivery options for communications.</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>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p>
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2	<p>The system will take you to your current federal tax information. The page shows when your federal taxes were last updated.</p> <div data-bbox="305 1498 1312 1865" style="border: 1px solid black; padding: 5px;"> <h3 style="color: blue;">W-4 Tax Information</h3> <p>US COAST GUARD RETIRED Social Security Number:</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.</p> <p>Your employer may be required to send a copy of this form to the IRS.</p> <p style="border: 1px solid red; padding: 2px;">You last updated this information on Sep 19, 2008</p> </div>		

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Retiree – Update Federal/State Tax Information,

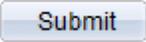
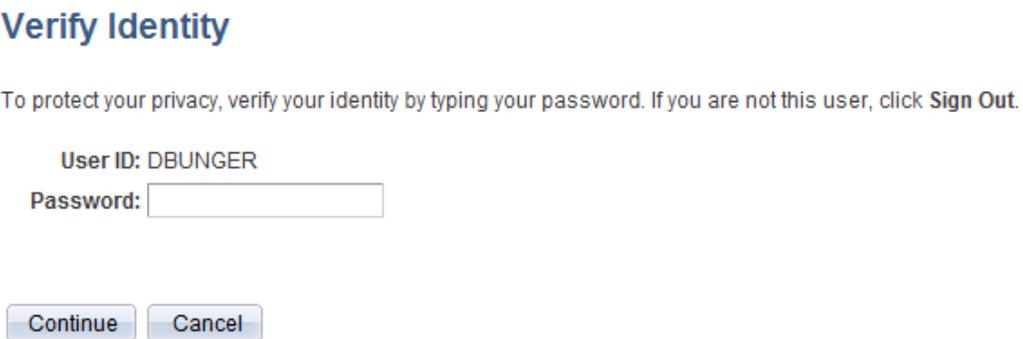
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Step	Action
2	<p>It also shows what your current mailing address is. If it's incorrect, please update it via the View/Change My Mailing Address self service page.</p> <div data-bbox="305 476 1425 591" style="border: 1px solid #ccc; padding: 5px;"> <p>Mailing Address</p> <p>1234 Jesup IA 50648-1090</p> </div>
3	<p>Click on the Marital Status you want your federal taxes based on.</p> <div data-bbox="305 716 1414 880" style="border: 1px solid #ccc; padding: 5px;"> <p>W-4 Tax Data</p> <p>Indicate Marital Status</p> <p><input checked="" type="radio"/> Single</p> <p><input type="radio"/> Married</p> <p><input type="radio"/> Married/Withhold Single (Married, but withhold at higher single rate)</p> </div>
4	<p>Enter the number of allowances you want. Leave the field blank if you wish to have zero allowances.</p> <p>Total number of Allowances you are claiming: <input type="text"/></p> <p>Note: If the field is blank, it means that zero allowances were claimed.</p>
5	<p>Enter the amount of federal tax you want withheld from your retirement pay each month. If you want to remove the additional amount, then just blank the field out.</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text" value="150.000000"/></p> <p>Note: The minimum amount for federal additional tax withholding is \$1.00 and the maximum is \$2000.00.</p>
6	<p>If you are exempt from federal taxes, click the 'If you meet both conditions, check "Exempt" here:' field. Taxable gross will be maintained but no FWT will be withheld.</p> <div data-bbox="305 1600 1414 1841" style="border: 1px solid #ccc; padding: 5px;"> <p>Claim Exemption</p> <p>I claim exemption from withholding for: <input type="text" value="2013"/> and I certify that I meet BOTH of the following conditions for exemption:</p> <p>>> Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND</p> <p>>> This year I expect a refund of ALL Federal income tax withheld because I expect to have no tax liability.</p> <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> </div>

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Retiree – Update Federal/State Tax Information,

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Step	Action
7	<p>If you want to change your state tax information, click on the State Tax Information link. Follow step's 3-11 under the procedures to change state tax information discussed later in this guide.</p> <p>If you're not going to update your state tax information, go to the next step below.</p>
8	<p>Click the Submit button.</p> 
9	<p>Enter your password and click Continue.</p>  <p>The screenshot shows a 'Verify Identity' section with the text: 'To protect your privacy, verify your identity by typing your password. If you are not this user, click Sign Out.' Below this, it displays 'User ID: DBUNGER' and a 'Password:' field with an input box. At the bottom are 'Continue' and 'Cancel' buttons.</p>
10	<p>The confirmation page should appear. Click OK.</p> <p>VERY IMPORTANT: You must click OK for the changes to occur.</p> <hr/> <p>Submit Confirmation</p> <p><input checked="" type="checkbox"/> The Submit was successful.</p> <p><input type="button" value="OK"/> However, due to timing, your change may not be reflected on the next paycheck.</p>
11	<p>You will be taken back to the W4 Tax Information page. If you wish to update your state tax information, click on the State Tax Information link and update your information. Procedures on how to do this are discussed later in this guide.</p> <p>State Tax Information</p> <p>If you're done with updating taxes, click on the Home Link.</p>

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Retiree – Update Federal/State Tax Information, Continued

Procedures to Change State Tax

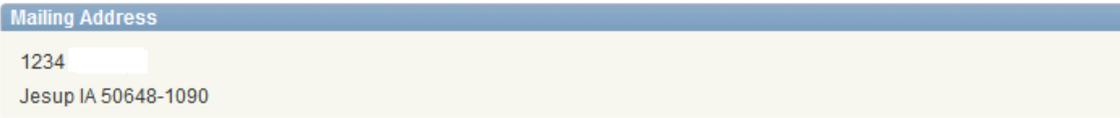
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Note: If you have any issues with submitting a change to your state tax information, please call RAS at 1-800-772-8724.

Step	Action		
1	<p>Select the “Change My Federal & State Tax” link from the home page menu.</p> <div data-bbox="305 620 1349 1345" style="border: 1px solid black; padding: 5px;"> <p>Welcome to Direct Access II Self Service for Retirees, Annuitants, and Former Spouses.</p> <p>You can use Self-Service to: review your Pay Statements and IRS Form 1099R; update your mailing address and phone number(s); update your voluntary deductions (Retirees only); and opt out of receiving a Retiree Newsletter by mail. Over the next year, you will be able to perform other Self-Service functions, including: changing your taxes and updating your direct deposit. As additional Self-Service functionality is rolled out, we will notify you through the Retirees' Newsletter.</p> <p>If you encounter problems, contact PPC (RAS) at 1-800-772-8724.</p> <p>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.</p> <table border="0" style="width: 100%;"> <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> <p>View/Change My Mailing Address This link will allow you to view and make changes to your mailing address.</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 Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p> <p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p> <p style="border: 1px solid red; padding: 2px;">Change My Federal & State Tax Review or change your W-4 information.</p> </td> <td style="width: 50%; 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> <p>View/Change My Phone Number(s) This link will allow you to view, add, or update their phone number(s).</p> <p>Change My Delivery Options This link will allow you to change delivery options for communications.</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>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p> </td> </tr> </table> </div>	<p>View My Payslip This link will take you to a list of all available payslips to view and/or download.</p> <p>View/Change My Mailing Address This link will allow you to view and make changes to your mailing address.</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 Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.</p> <p>Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.</p> <p style="border: 1px solid red; padding: 2px;">Change My Federal & State Tax Review or change your W-4 information.</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 My Phone Number(s) This link will allow you to view, add, or update their phone number(s).</p> <p>Change My Delivery Options This link will allow you to change delivery options for communications.</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>View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries</p>
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2	<p>The system will take you to your current federal tax information. Click on the State Tax Information link.</p> <p>State Tax Information</p>		
3	<p>The system will take you to your current state tax information. The page shows when your state taxes were last updated.</p> <div data-bbox="305 1618 1235 1911" style="border: 1px solid black; padding: 5px;"> <p>State Tax Information</p> <p>Dale US COAST GUARD RETIRED</p> <p style="text-align: right;">Social Security Number:</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>You last updated this information on Sep 19, 2008</p> </div>		

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Retiree – Update Federal/State Tax Information,
Continued

Step	Action
4	<p>It also shows what your current mailing address is. If it's incorrect, please update it via the View/Change My Mailing Address self service page.</p> 
5	<p>If changing state of residence, select the state you are wanting to elect:</p> 
6	<p>The following fields are not necessary for state tax election for retirees and are not updateable:</p> <p>Marital Status: Single</p> <p>Total number of Allowances you are claiming:</p>
7	<p>Enter the amount of state tax you want withheld from your retirement pay each month. If you want to remove the additional amount, then just blank the field out. The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00.</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text" value="200.00"/></p> <p>Note: State tax withholding is not based on marital status or exemptions. For state tax to be withheld you must enter an amount in this field.</p>
8	<p>Click the Submit button.</p> 
9	<p>Enter your password and click Continue.</p> <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: DBUNGER</p> <p>Password: <input type="password"/></p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p>

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Retiree – Update Federal/State Tax Information,
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10	<p>The confirmation page should appear. Click OK.</p> <p>VERY IMPORTANT: You must click OK for the changes to occur.</p> <hr/> <p>Submit Confirmation</p> <p> The Submit was successful.</p> <p> However, due to timing, your change may not be reflected on the next paycheck.</p>
11	<p>You will be taken back to the State Tax Information page. If you're done with updating taxes, click on the Home Link.</p>