

Self Service W-4 and MWR Tax Information

Introduction

Employees can view and change federal adjustments and state withholding information using Self Service. Data is secured by a user ID and password. Federal and state tax withholding information can be updated on the W-4 pages. North Dakota and Michigan residents can also enter MWR Reciprocity Exemption/Affidavit of Residency information.

Employees in the following situations cannot use the Self Service W-4 pages to update all of their tax records. To complete their withholding, they must submit forms to their HR/Payroll staff for entry:

- Employees with tax records for a state/territory that requires unique information cannot use Self Service to update records for that state/territory but can update federal information or state records for other states. Some examples are Arizona (AZ), California (CA), Connecticut (CT), Indiana (IN), Louisiana (LA), Mississippi (MS), Nebraska (NE), and Vermont (VT).
- Employees who are Wisconsin (WI) residents and have filed a WT-4A form cannot use Self Service to update their WI record but can update federal information or state records for other states.
- Employees who are claiming exemption from state withholding for a state/territory other than Minnesota (MN) cannot use Self Service to update records for that state/territory but can use Self Service to update federal information or state records for Minnesota.

NOTE: Employees who are residents of Michigan (MI) or North Dakota (ND) and are claiming exemption can use Self Service to update their records by completing the MWR page in Self Service.

- Employees who are nonresident aliens cannot use Self Service to submit federal or state W-4 information.
- Employees with a home address outside of the USA.

You are not required to enter withholding changes on these Self Service pages. Agency HR/payroll staff will continue to process paper W-4 and MWR forms if they are submitted.

DO NOT COMPLETE PAPER FORMS IF YOU COMPLETE AND SUBMIT INFORMATION ONLINE.

When to Update Form W-4 or MWR Information

All employees must provide their employer with accurate and appropriate information for withholding the correct federal and state income tax from pay. At the time an employee is hired, tax records are created in the payroll system. If an employee was hired prior to 1/1/2020 the federal and state record for each state in which an employee lives and works are set up with tax marital status of single and withholding allowances of zero. If an employee was hired on 1/1/2020 or later, the federal tax records will default to marital status single without additional adjustments and state as marital status of single and withholding allowance of zero. When subsequent W-4 information is entered, it updates the information that was originally established.

Tax withholding records entered in Self Service are assigned an effective date equal to the date of entry. You can enter updates to withholding records at any time. However, because of timing limitations, your change may not be reflected on the very next paycheck.

Update your W-4 tax withholding information if any of the following apply:

- You want to update your tax marital status or total number of allowances for state.
- You want to update your tax marital status or adjustments for federal withholding.
- You want to update the additional amount or percentage for state withholding.
- You want to claim exemption from state withholding or exempt from federal withholding.
- You reside in North Dakota or Michigan and want to claim exemption from Minnesota withholding.
- You have moved and your state of residence has changed.
- You have changed your work location to another state.
- You want to refile W-4 or MWR information for the new calendar year in order to maintain exempt status.

Access W-4 Information

To access **W-4 Tax Information**, take the following steps.

ACTION	RESULT
1. Go to https://mn.gov/selfservice .	Self Service Portal Sign In page displays.
2. Sign in with the same user ID and password that you use to view your paystub. New employees obtain sign in instructions from your Human Resources or Payroll office.	My Homepage displays.
3. Select the Self Service tile.	Self Service Landing page displays.
4. Select Tax Forms tile.	Tax Forms page displays.
5. Select W-4 and MWR tile.	W-4 and MWR displays.
<p>6. Select W-4 and MWR.</p> <p>The tax record has three pages that are linked, to navigate between the pages, select the appropriate buttons.</p> <ul style="list-style-type: none"> • W-4 Tax Information – Federal • W-4 Tax Information – State • MWR – Reciprocity Exemption/Affidavit of Residency (Used only if you work in Minnesota and live in North Dakota or Michigan and want to be exempt from Minnesota tax withholding.) <p>The W-4 Tax Information – Federal page always displays first. From that page, you can access the W-4 Tax Information – State page. From that page, you can access the MWR – Reciprocity Exemption/Affidavit of Residency page.</p> <p><i>No matter which page(s) you update, you sign (electronically) and submit your information on the W-4 Tax Information – Federal page.</i></p>	

Update W-4 Tax Information if You Live and Work in the Same State

Review the **W-4 Tax Information** pages. Your current tax withholding information displays. If changes are needed, follow the instructions below.

Modifications to tax information entered in Self Service are assigned an effective date equal to the date of entry. To make a change effective on a future date, enter it on the desired date or submit a paper form(s) to your agency HR/payroll office for processing. Future effective-dated records do not display in Self Service.

- Steps below are to update tax withholding information for employees hired on 1/1/2020 or later.
- If you have been hired prior to 1/1/2020 and have not submitted new Form W-4, [**TO ENTER A NEW FEDERAL W-4 FOR CALENDAR YEAR 2020 OR LATER CLICK HERE**] button will display. Once selected, you will be directed to the new W-4 Tax Information – Federal page and can continue with Action Step 1.
- If you wish to update state withholding information **only** and have not submitted the new Form W-4, continue to Action Step 9.

ACTION	RESULT
<p>1. On the W-4 Tax Information – Federal page, check the information displayed in the Review Home Address section. If you recently moved and submitted an address change, be certain it displays correctly here.</p>	<p>Home address information cannot be changed on this page. It is view-only.</p>
<p>At the time of hire, the payroll system creates a state tax record for each state in which you either live or work. If you change your resident address in Self Service, the new address displays on this page once it is approved. At that time, you can update your state tax record(s). Your state tax data will display the appropriate state tax records for the state(s) in which you live and work.</p>	
<p>2. If your last name as displayed on this page differs from the last name on your Social Security card, you must follow the instructions for obtaining a new card.</p>	<p>Present the new card to your HR office so your name can be updated in the system.</p>
<p>3. If you are only claiming exempt, you may skip to Action Step 8.</p>	
<p>4. Step 1: Personal Information section Select the appropriate Filing Status radio button:</p> <ul style="list-style-type: none"> • Single or Married filing separately. • Married filing jointly (or Qualifying widow(er)). • Head of Household. 	<p>Blank</p>
<p>5. Step 2: Multiple Jobs or Spouse Works section Complete this step only if it applies to you. For help making the determination, you may refer to <u>IRS Form W-4</u>.</p>	

ACTION	RESULT
<p>6. Step 3: Claim Dependents section</p> <p>Complete this step only if it applies to you. For help making the determination, you may refer to IRS Form W-4.</p>	Blank
<p>7. Step 4: Other Adjustments section</p> <p>Complete this step only if it applies to you. For help making the determination, you may refer to IRS Form W-4.</p>	
<p>8. Claim Exemption from Withholding section</p> <p>Complete the exemption portion only if you claim exemption from federal or state tax withholding.</p> <p>In the Claim Exemption section:</p> <ul style="list-style-type: none"> To make a tax withholding change effective on a future date you must either submit a paper form(s) to your agency HR/Payroll Office for processing or wait until the effective date and enter the tax withholding change in Self Service. If you meet both conditions for federal exemption, select the check box to indicate you are claiming exemption. 	A check displays in the check box field.
<p>If you want to review and/or print the IRS's Form W-4, worksheets, and instructions, select IRS Form W-4 at the bottom of the page.</p>	
<p>9. Update your state W-4 information if changes are needed. Choose one of the following:</p> <ul style="list-style-type: none"> If you have state withholding information to enter, continue with step 10. If you have no further updates, go to step 16. <p>If [ENTER HERE] button displays, there is no state withholding record and you must update your state withholding information before you can submit.</p>	
<p>10. If the [STATE WITHHOLDING] button displays, you may enter W-4MN for state withholding.</p>	W-4 Tax Information – State page displays.
<p>11. In the State Information section, verify that the state where you live, and work displays in the State field. Since you live and work in the same state, only one state tax record exists – most likely MN Minnesota.</p>	Blank
<p>12. The Resident check box is selected.</p> <p>If this is not your state of residency, check the contents of this document for instructions on entering state tax information for your situation.</p>	A check displays in the checkbox field.

ACTION	RESULT
<p>13. Complete the fields in the W-4 Tax Data section – or – if you are exempt, skip to step 14 below.</p> <ul style="list-style-type: none"> • Enter the total number of state allowances you are claiming. • Enter the dollar amount and/or the percentage of taxable gross wages, if any, for any <u>additional</u> state withholding you want withheld from each paycheck. • In the Indicate Marital Status field, select the [LOOK UP MARITAL STATUS] button and select the appropriate value. 	<p>Marital status description displays.</p>
<p><i>Complete this step only if you claim exemption from state tax withholding in Minnesota. If you claim exemption from a state other than Minnesota, you must submit the appropriate form to your HR/Payroll office.</i></p>	
<p>14. In the Claim Exemption section:</p> <ul style="list-style-type: none"> • To make a tax withholding change effective on a future date you must either submit a paper form(s) to your agency HR/Payroll Office for processing or wait until the effective date and enter the tax withholding change in Self Service. • Select the Exempt check box to indicate you are claiming exemption. • Select a radio button to indicate the reason you are exempt. <p>If you are claiming exemption as the spouse of a military service member assigned to a military location in Minnesota, but your state of domicile (legal residence) is in another a state, and you are in Minnesota solely to be with your spouse, then also enter your state of domicile.</p>	<p>A check displays in the check box field and the Marital Status field is automatically set to X: Claiming exemption from withholding.</p>
<p>15. Review the information you entered for accuracy. Select the ‘Go Back’ button to go to the W-4 Tax Information – Federal page to submit the information.</p>	<p>W-4 Tax Information – Federal page displays.</p>
<p>16. If you have no further updates, read the statement in the Submit My Federal W-4, State W-4 and MWR section, sign your form electronically by selecting the [SUBMIT] button.</p>	<p>The Submit Confirmation page displays a message indicating that your information was successfully saved.</p>

ACTION	RESULT
<p>If you do not want to submit the information, return to the Self Service Homepage by selecting the [HOME] icon.</p> <p>To exit Self Service Portal:</p> <p style="padding-left: 40px;">Select the [ACTIONS] button (the icon with three dots in the banner region) and select Sign Out.</p> <p style="text-align: center;">OR</p> <p style="padding-left: 40px;">Select the [SIGN OUT] link located on the Welcome banner near the top left.</p>	<p>Self Service Portal Homepage displays.</p>

Update W-4 Tax Information if You Live and Work in Different States

- Steps to Update Tax Withholding Information for Employees hired on 1/1/2020 or later.
- If you have been hired prior to 1/1/2020 and have not submitted new Form W-4 **[TO ENTER A NEW FEDERAL W-4 FOR CALENDAR YEAR 2020 OR LATER CLICK HERE]** button will display. Once selected, you will be directed to the new W-4 Tax Information – Federal page and can continue with Action Step 1.
- If you wish to update state withholding information **only** and have not submitted the new Form W-4, continue to Action Step 8.

Review the **W-4 Tax Information** pages. Your current tax withholding information displays. If changes are needed, follow the instructions below.

Modifications to tax information entered in Self Service are assigned an effective date equal to the date of entry. To make a tax withholding change effective on a future date you must either submit a paper form(s) to your agency HR/Payroll Office for processing or wait until the effective date and enter the tax withholding change in Self Service.

Steps to Update Tax Withholding Information if You Live and Work in Different States

ACTION	RESULT
<p>1. On the W-4 Tax Information – Federal page, check the information displayed in the Review Home Address section. If you recently moved and submitted an address change, be certain it displays correctly here.</p>	<p>Home address information cannot be changed on this page. It is view-only.</p>
<p><i>At the time of hire or after a home address change to another state is approved by human resources staff, the payroll system creates a state tax record for each state in which you live and work. You can update your state tax record(s) once the change is approved and the new address displays.</i></p>	

ACTION	RESULT
<p>2. Step 1: Personal Information section</p> <p>Select the appropriate Filing Status radio button:</p> <ul style="list-style-type: none"> • Single or Married filing separately. • Married filing jointly (or Qualifying widow(er)). • Head of Household. 	Blank
<p>3. Step 2: Multiple Jobs or Spouse Works section</p> <p>Complete this step if it is applicable. For help making the determination, you may refer to IRS Form W-4.</p>	
<p>4. Step 3: Claim Dependents section</p> <p>Complete this step if it is applicable. For help making the determination, you may refer to IRS Form W-4.</p>	Blank
<p>5. Step 4: Other Adjustments section</p> <p>Complete this step if it is applicable. For help making the determination, you may refer to IRS Form W-4.</p>	
<p>6. Claim Exemption from Withholding section</p> <p>Complete the exemption portion only if you claim exemption from federal or state tax withholding.</p> <p>In the Claim Exemption section:</p> <p>If you meet both conditions for federal exemption, select the check box to indicate you are claiming exemption.</p>	A check displays in the check box field.
<p><i>If you want to review and/or print the IRS's Form W-4, worksheets, and instructions, select IRS Form W-4 at the bottom of the page.</i></p>	
<p>7. You have completed entering your federal W-4 information. Update your state W-4 information for each state in which you live and work if changes are needed. Choose one of the following:</p> <ul style="list-style-type: none"> • If you have state withholding information to enter, continue with step 8. • If you have no further updates, go to step 18 	Blank
<p><i>If [ENTER HERE] button displays, there is no state withholding record and you must update your state withholding information before you can submit.</i></p>	
<p>8. If the [STATE WITHHOLDING] button displays, you may enter W-4MN for state withholding.</p>	W-4 Tax Information – State page displays.
<p>9. Select the [VIEW ALL] link to display records for all states. Multiple records exist if you live and work in different states. You need a state tax record for each state. Be certain to enter the appropriate information for each record.</p>	
<p>10. Locate the state tax record for the state in which you live.</p>	Blank

ACTION	RESULT
<p>11. Verify the information in the State field. This record is based on the current home address in the system. The Resident check box should be checked.</p>	<p>A check displays in the check box field.</p>
<p>12. In the tax record for your state of residence, complete the fields in the W-4 Tax Data section – or – if you are exempt from taxes in your state of residency, skip to step 13.</p> <ul style="list-style-type: none"> • Enter the total number of state allowances you are claiming. • Enter the dollar amount and/or percentage of taxable gross wages, if any, for any additional state withholding you want withheld from each paycheck. • In the Indicate Marital Status field, select the [LOOK UP MARITAL STATUS] button. On the page that displays select the appropriate value. <p>Do NOT select the value X – doing this alone will not claim exemption from withholding tax, and tax will continue to be withheld. To indicate that you claim exemption from state withholding tax, you must select the Exempt check box. The system will automatically set the Marital Status field to X.</p>	<p>Marital status description displays.</p>
<p><i>Complete this step only if you claim exemption from state tax withholding in your state of residency and you are a Minnesota resident. If you claim exemption from a state other than Minnesota, you must submit the appropriate form to your HR/Payroll office.</i></p>	
<p>13. If you are exempt from taxes in your state of residency, in the Claim Exemption section:</p> <ul style="list-style-type: none"> • Select the Exempt check box to indicate you are claiming exemption. • Select a radio button to indicate the reason you are exempt. <p>If you are claiming exemption as the spouse of a military service member assigned to a military location in Minnesota, but your state of domicile (legal residence) is in another state, and you are in Minnesota solely to be with your spouse, then also enter your state of domicile.</p>	<p>A check displays in the check box field and the Marital Status field is automatically set to X: Claiming exemption from withholding.</p>
<p>14. You have completed entering tax information for your state of residence. Scroll to the state tax record for the state in which you work.</p>	
<p>15. Complete the fields in the W-4 Tax Data section – or – if you are exempt, skip to step 16.</p> <ul style="list-style-type: none"> • Enter the total number of state allowances you are claiming. • Enter the dollar amount and/or percentage of taxable gross wages, if any, for any additional state withholding you want withheld from each paycheck. <p>In the Indicate Marital Status field, select the [LOOK UP MARITAL STATUS]. On the page that displays select the appropriate value.</p>	<p>Marital status description displays.</p>

ACTION	RESULT
<p><i>Complete this step only if you claim exemption from state tax withholding in the state in which you work, and you work in Minnesota. If you claim exemption from a state other than Minnesota, you must submit the appropriate form to your HR/Payroll office.</i></p>	
<p>16. If you are exempt from taxes in the state in which you work, in the Claim Exemption section:</p> <p>Choose one of the following:</p> <p>Select the Exempt check box to indicate you are claiming exemption and select a radio button to indicate the reason you are exempt:</p> <p>NOTE: If you are claiming exemption as the spouse of a military service member assigned to a military location in Minnesota, but your state of domicile (legal residence) is in another a state, and you are in Minnesota solely to be with your spouse, then also enter your state of domicile.</p> <p>OR</p> <p>If you work in Minnesota and wish to claim exemption from Minnesota tax withholding because you are a resident of Michigan or North Dakota, continue with the directions to Enter Form MWR on page 10.</p>	<p>A check displays in the check box field and the Marital Status field is automatically set to X: Claiming exemption from withholding.</p>
<p>17. Review the information you entered for accuracy. Select the Go Back button to go to the W-4 Tax Information – Federal page and submit the information.</p>	<p>W-4 Tax Information – Federal page displays.</p>
<p>18. Choose one of the following:</p> <ul style="list-style-type: none"> • If you have no further updates, read the statement in the Submit My Federal W-4, State W-4 and MWR section, sign your form electronically by selecting the [SUBMIT] button (only once). • If you do not want to submit the information, return to the Self Service Home Page by doing the following: • Select the [HOME] icon. 	<p>The Submit Confirmation page displays a message indicating that your information was successfully saved.</p>
<p>To exit Self Service Portal:</p> <p>Select the [ACTIONS] button (the icon with three dots in the banner region) and select Sign Out.</p> <p>OR</p> <p>Select the [SIGN OUT] link located on the Welcome Banner near the top left.</p>	

Enter Form MWR Information for North Dakota and Michigan residents who work in Minnesota

You can process an MWR (Reciprocity Exemption/Affidavit of Residency form) now or later or you may complete a paper MWR and submit it to your agency HR/payroll office.

Minnesota has income tax reciprocity agreements with North Dakota and Michigan. If you reside in one of these states, you may have Minnesota income tax withheld on wages you earn in Minnesota, but you are not required to do so. You will normally have state income tax withheld for your state of residence on wages earned from a Minnesota employer. To claim exemption from Minnesota tax withholding, you must file Form MWR. You can complete the MWR form in Employee Self Service.

If you wish to complete the **MWR-Reciprocity Exemption/Affidavit of Residency** page, you must complete the **W-4 Tax Information – Federal** and **W-4 Tax Information – State** pages before continuing with these instructions. The three pages in this component are linked together and are always accessed in order, beginning with the **W-4 Tax Information – Federal** page. (Return to page 6 of these instructions if necessary.)

To Access MWR Information

Steps to Access MWR Information

ACTION	RESULT
<p>On the W-4 Tax Information – State page, navigate to the page containing Minnesota state information (in most instances it will be page 2 of 2 located on the upper right) and select the [FILE MWR] button.</p> <ul style="list-style-type: none">• If the [FILE MWR] button displays, you are eligible, but not required, to submit Form MWR because your home address is North Dakota or Michigan, but your work location is Minnesota.• If the [VIEW MWR] button displays, you have already entered an MWR Form for the year indicated. You can view the information already entered.	<p>MWR – Reciprocity Exemption/Affidavit of Residency page displays.</p>

To Change or Add MWR Information

Steps to Change or Add MWR Information

ACTION	RESULT
1. Once the [FILE MWR] button has been selected, the Permanent Address section should display your home address in North Dakota or Michigan.	Blank
2. In the Residence information section, you must answer all 4 questions. NOTE: Be certain to use the correct date format (mm/dd/yyyy) when a date is required or select the [CHOOSE A DATE] button and select a date from the calendar that displays.	

ACTION	RESULT
<p>3. In the Sign here section, read the statements and select one of the following:</p> <ul style="list-style-type: none"> • Radio button [FILE MWR] to retain the MWR information. • Radio button [CANCEL – DO NOT FILE MWR] to discard the MWR information. <p>If you want to review and/or print the MN Department of Revenue’s Reciprocity Exemption /Affidavit of Residency (MWR) form and instructions, select MN Department of Revenue MWR form.</p>	<p>A new window opens, displaying Form MWR.</p>
<p>4. If you selected the radio button [FILE MWR], you must complete the save and submit process by returning to the W-4 Tax Information – Federal page.</p>	
<p>5. Select the [GO BACK] button.</p>	<p>W-4 Tax Information – State page displays.</p>
<p>6. On the W-4 Tax Information – State page, review the information you entered for accuracy.</p> <p>NOTE: In the Claim Exemption section on the Minnesota state record, the <i>Exempt because an MWR form has been filed</i> statement displays with the check box selected.</p>	
<p>7. Select the [GO BACK] button to go to the W-4 Tax Information – Federal page to submit the information.</p>	<p>W-4 Tax Information – Federal page displays.</p>
<p>8. Choose one of the following:</p> <ul style="list-style-type: none"> • If you have no further updates, read the statement in the Submit My Federal W-4, State W-4 and MWR section, sign your form electronically by selecting the [SUBMIT] button (only once), and continue with step 9. • If you do not want to submit the information, return to the Self Service Home Page by doing the following: Select the [HOME] icon. 	<p>The Submit Confirmation page displays with a message indicating that your information was successfully saved.</p>
<p>9. On the Submit Confirmation page, select the [OK] button. You have completed updating your MWR information and can exit Self Service.</p>	<p>The W-4 and MWR page displays.</p>

Problems and Solutions

Use the following guide to resolve problems. For additional help, contact your agency HR/Payroll office.

PROBLEM	SOLUTION
The incorrect address displays in the Review Home Address section of the W-4 Tax Information-Federal page.	You must enter an address change via My Contact Information tile in Self Service. This home address change is not finalized until your HR/Payroll office reviews and approves it. Once approved, the new address will appear on your tax information pages.
A message indicates that state withholding allowance is greater than 10.	This is a warning message. You can leave the withholding allowances at more than 10, or you can change the number of allowances. In either event, selecting the [OK] button deletes the message and allows you to continue.
I have questions about the appropriate numbers of allowances that I should be claiming.	You should consult the Form W-4, and its instructions and worksheets provided by the Internal Revenue Service. A link to this information is available at the bottom of the W- 4 Tax Information- Federal page. It is labeled "For reference: IRS Form W-4. "
The Submit Confirmation message indicates, " The save was successful. However, due to timing, your change may not be reflected on the very next pay. " How can I tell for sure when the change will be effective?	Typically, W-4 information entered by end of day Thursday of the week you turn in your timesheet will be effective on the paycheck you receive the following Friday.
A field does not allow entry or is grayed out.	You may need to "refresh" the page by selecting the Go Back button and then selecting the link that will return to you to the Other Payroll page. Then re-access the pages by selecting W-4 .
W-4 Information that was entered has disappeared.	You may not have completed all the steps for saving and submitting information. You must always return to the W- 4 Tax Information- Federal page to select the [SUBMIT] button (only once).
I cannot determine how to enter records on these pages to establish the required withholding as a nonresident alien.	The Self Service pages cannot be used to submit W-4 information for nonresident aliens. A paper Form W-4 must be completed and submitted to agency HR/payroll staff.