Self Service: W-4 Tax Information

Navigation: Self Service> Payroll and Compensation> W-4 Tax Information:

Topics Covered:
- View and Edit W-4 Tax Information (pg. 1)
- View and Edit Exemption Claiming Information (pg. 3)

View and Edit W-4 Tax Information

⚠ Note: Certain Harvard employees will not be able to use Self Service to update their W-4 tax information, such as Non-Resident Alien employees. These employees should contact University Financial Services to update this information.

![W-4 Tax Information form](image)

**Section** | **Field/Table** | **Data Req.** | **Description/Additional Information**
--- | --- | --- | ---
A | Home Address | Auto-fill | Tip: Change your address at Self Service> Personal Information> Home & University Mail Address.
B | W-4 Tax Data: Allowances | Yes | Enter the total number of allowances that you are claiming.
| | | | Note: If you exceed 10 allowances, you will be prompted to confirm you are eligible to take them.
C | W-4 Tax Data: Additional Withholding Amount | No | If you want to withhold an additional amount, enter the amount you want withheld from each paycheck.
<table>
<thead>
<tr>
<th>Section</th>
<th>Field/Table</th>
<th>Data Req.</th>
<th>Description/Additional Information</th>
</tr>
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</table>
| D       | Marital Status | Yes       | Select the appropriate radio button.  
**Note:** If you select "...married, but withholding at single rate " also click the "Single" radio button. If you do not select "Single" and then elect to have your federal changes apply to Massachusetts, the state elections will default to "Married." |
| E       | Name Differing from Social Security Card | No        | If you obtain a card with a new name, provide a copy to Central Payroll. |
| F       | Write Change to MA | No        | Check this box if you want your Federal elections to mirror your state (MA only) elections.  
**Note:** If you want to make changes to your state (MA only) elections, but the changes are not the same as your Federal, you must submit and send a completed hard copy of the MA M4 to Central Payroll.  
**Note:** Your federal withholding changes will be saved only if you select "Yes" when prompted. |

**Note:** If you choose to have your Federal Withholding changes written to your Massachusetts tax record, but you do not have one, you will see the message below. Your federal withholding changes will be saved only if you select "Yes."

```
Mass Tax Error (282200,7) 
You have chosen to have your Federal Withholding Changes written to your Massachusetts Tax Record. 
You do not currently have a Massachusetts Tax Record, NO CHANGES TO STATE TAX RECORDS will be made. 
Please contact your local HR/Payroll office or Central Payroll for further assistance. 
Click Yes to Continue
[Yes] [No]
```
**Note – Special State (MA) Withholding Status:** If you have a special state (MA) withholding status, and you attempt to have your Federal withholding changes written to your MA tax record, you will receive the error message below. Click “Yes” to save your Federal withholding changes.

![Mass Tax Warning](image1)

You have chosen to have your Federal Withholding Changes written to your Massachusetts Tax Record.

You are ineligible to modify your STATE tax category via Employee Self Service due to your Non-Resident Alien status or IRS limitations. If your status has changed, or you need further assistance in this matter, please contact Central Payroll or Tax Services.

NO CHANGES TO STATE TAX RECORDS will be made.

Click Yes to Continue.

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**View and Edit Exemption Claiming Information**

**A**

I claim exemption from withholding for 2011 and I certify that I meet BOTH of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

If you meet both conditions, check “Exempt” here: ☐

Claiming exemption here will not update your State Tax Record. You must complete a state form and submit to Central Payroll. If you are currently claiming exemption and enter changes in the W-4 Tax Information Form, those changes will not be saved if the exempt box remains checked.

**B**

Submit Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

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**Note:** You cannot use Self Service to claim exemption from State (MA) withholdings. Submit a state form to Central Payroll to claim MA exemptions. Find this form on ABLE ([www.able.harvard.edu](http://www.able.harvard.edu); click the forms link to search) or at [www.dor.state.ma.us](http://www.dor.state.ma.us).

<table>
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<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>You are set up to be exempt from Federal withholding but no longer qualify as exempt</td>
<td>Remove the check from the exempt checkbox. The system will update your Federal exemption status Federal to subject to withholding taxes.</td>
</tr>
<tr>
<td>A</td>
<td>You are making a change in your Federal elections from subject to exempt</td>
<td>Click the checkbox and your Federal status will be changed from subject to exempt from withholding taxes.</td>
</tr>
<tr>
<td>B</td>
<td>You have completed editing the W-4 Tax Information Form</td>
<td>Click “Submit.” Clicking this button bears the same weight as if you have physically signed a paper W-4.</td>
</tr>
</tbody>
</table>