

## Self Service: W-4 Tax Information

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### 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

John Harvard Social Security #: xxx-xx-3920  
Harvard University

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

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.

**A** Home Address

72 Central Street  
Rowley MA 01969

**B** W-4 Tax Data

Enter total number of Allowances you are claiming

Enter Additional Amount, if any, you want withheld from each paycheck

Indicate Marital Status:  Single  Married

Check here and select Single status if married but withholding at single rate.

Check here if your last name differs from that shown on your social security card.   
You must call 1-800-772-1213 for a new card.

Do you want to write above changes to your MASSACHUSETTS State Tax Record?

Section	Field/Table	Data Req.	Description/Additional Information
<b>A</b>	Home Address	Auto-fill	 <b>Tip:</b> Change your address at <a href="#">Self Service</a> > <a href="#">Personal Information</a> > <b>Home &amp; University Mail Address</b> .
<b>B</b>	W-4 Tax Data: Allowances	Yes	Enter the total number of allowances that you are claiming.  <b>Note:</b> If you exceed 10 allowances, you will be prompted to confirm you are eligible to take them.
<b>C</b>	W-4 Tax Data: Additional Withholding Amount	No	If you want to withhold an additional amount, enter the amount <u>you want withheld from each paycheck</u> .

W-4 Tax Data

Enter total number of Allowances you are claiming

Enter Additional Amount, if any, you want withheld from each paycheck

**(D)** Indicate Marital Status:  Single    Check here and select Single status if married but withholding at single rate.

Married

**(E)** Check here if your last name differs from that shown on your social security card.   
You must call 1-800-772-1213 for a new card.

**(F)** Do you want to write above changes to your MASSACHUSETTS State Tax Record?

Section	Field/Table	Data Req.	Description/Additional Information
D	Marital Status	Yes	Select the appropriate radio button.  <b>Note:</b> 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.  <b>Note:</b> If you want to make changes to your state (MA only) elections, <u>but the changes are not the same as your Federal</u> , you must submit and send a completed hard copy of the MA M4 to Central Payroll.  <b>Note:</b> Your federal withholding changes will be saved <u>only</u> 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 (28200,7)

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.

**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. (28200,18)

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

You are ineligible to modify your STATE tax setup 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.

**View and Edit Exemption Claiming Information**

Claim Exemption

**A** I claim exemption from withholding for  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 exempt here will not update your State Tax Record. You must complete a state form and submit to Central Payroll. If you are currently claiming exempt and enter changes in the W-4 Tax Data section, those changes will not be saved if the exempt box remains checked.

**B**  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.

**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 ABLÉ ([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).

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