Montana Annual W-2 1099 Withholding Tax Reconciliation

File and pay online.

TransAction Por

TransAction Portal | https://tap.dor.mt.gov

General Information

The tax year is no longer printed on Form MW-3. You can use this form beginning in 2016 (and following years). **Important:** Enter the tax year that you are filing in the box at the top of the form.

Important! Do not truncate identification numbers on W-2s and 1099s. Provide all the numbers of the ID.

This: 555-55-5555; Not this: XXX-XX-5555

- We can only accept the Montana MW-3, not the federal W-3.
- All W-2s with or without withholding and all 1099s with Montana withholding must be submitted with the MW-3.
- Do not submit 1099s without withholding with this form.
- Employers who are in a Not Required pay frequency still need to submit an MW-3 and W-2s, even if Montana income taxes have not been withheld from their employees' wages.
- The due date for the MW-3, W-2s and 1099s is January 31 (both electronic and paper filing).
- You cannot use this form solely to <u>change your address</u>. To change your address, log into TransAction Portal (TAP) or write to us.
- If this return reflects adjustments to and replaces the original return, mark the amended box. You must also provide corresponding W-2Cs.
- If you would like to close your account, mark the account closed box and enter closed date. You cannot use this form solely to <u>close your account</u>. You must write to us to request that we close your account.

Line by Line Instructions

- Line 1 Enter the total number of W-2s with or without Montana wage withholding submitted to support the MW-3 reconciliation. Mark the appropriate box for the filing method you are using for the W-2s.
- Line 2 Enter the total number of 1099s with Montana withholding submitted to support the MW-3. Mark the appropriate box for the filing method you are using for the 1099s.
- **Line 3** Enter the total Montana income paid.
- Line 4 Enter the total Montana withholding tax withheld per W-2s and 1099s.
- **Line 5** Enter the total amount of Montana withholding tax paid to the Department of Revenue.
- **Line 6** Enter the difference between line 4 and line 5 (4 minus 5). If the difference is negative, use a minus sign.

Important! All payment records must be recorded on the Department of Revenue form. We do not accept other paper formats.

Column A Deposit period end date is based on your filing frequency.

<u>Accelerated filers</u>: Deposit period is the same as reported on your vouchers.

Monthly filers: Deposit period end date is the last day of each month.

Annual filers: Deposit period end date for all deposits is December 31.

Not Required filers: Have no withholding requirement. However, you must file the MW-3 and W-2s.

- **Column B** Enter the date payment was made to the Department of Revenue.
- **Column C** Enter the total Montana tax withheld for each deposit period end date. The total of this column should match the amount on line 4.
- **Column D** Enter the total Montana tax paid for each deposit period end date. The total of this column should match the amount on line 5.
- **Column E** Enter any difference between columns C and D (column C minus column D). The total of this column should match the amount on line 6. If the difference is negative, use a minus sign.

Note: We will refund credit amounts unless you write us to request otherwise.

Sign up to access your Montana tax information, file your MW-3, pay your tax, and much more at TransAction Portal (TAP) https://tap.dor.mt.gov. For more information about online services, as well as electronic filing of W-2s and 1099s, visit revenue.mt.gov.

If you choose not to file electronically, send the MW-3, W-2s, 1099s and applicable payment to:

Montana Department of Revenue PO Box 5835 Helena, MT 59604-5835

Questions? Call us at (406) 444-6900.

Montana Annual W-2 1099 Withholding Tax Reconciliation

MONTANA

MW-3 Rev 03 17

	Ta	ax Year 20 Y		Rev 03 17
ame		FEIN		
ddress		Account ID		WTH
ity		Pay Frequency		
tateZip		ldress nange Due Date	January 31	
If this is an amended	d return, mark this box.			
If your business or p	ayroll has ceased and you	would like to close your acco	ount, mark this box and indic	ate date //
. Number of W-2s subi	mitted to Montana		Pape	er Electronic
 Number of Forms 109 reported and submitted 	99 with Montana withholdin ed to Montana	9	Pape	r Electronic
Total Montana income	e paid per W-2s and Forms	1099		
Total Montana withho per W-2s and Forms	lding tax withheld			
 Total Montana withhol 				
Difference (line 4 min)				
	Please complete or	olumns below as describ	and in instructions	
A Deposit Period End Date(s)	B Date(s) Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
No slashes or dashe	_			
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	MMDDYYYY			
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Please complete columns below as described in instructions.

A Deposit Period End Date(s)	B Date(s) Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
No slashes or dashe	es in dates please.			
MMDDYYYY	MMDDYYYY			

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Please complete columns below as described in instructions.

A Deposit Period End Date(s)	B Date(s) Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
No slashes or dashe	es in dates please.			
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Please complete columns below as described in instructions.

A Deposit Period End Date(s)	B Date(s) Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
No slashes or dashe	es in dates please.			
MMDDYYYY	MMDDYYYY			

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