



Montana Annual W-2 1099 Withholding Tax Reconciliation

File and pay online on our TransAction Portal at https://tap.dor.mt.gov.

Montana Annual W-2 1099 Withholding Tax Reconciliation Instructions

General Information

Important: Enter the tax year for which you are filing in the box at the top of the form.

Important: Do not truncate identification numbers on W-2s and 1099s. Provide <u>all</u> 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 our TransAction Portal (TAP) or write to us.
- If this return reflects adjustments 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 the date the account is closed.
 You cannot use this form solely to close your account.
 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 our TransAction Portal (TAP) at https://tap.dor.mt.gov. For more information about online services, as well as electronic filing of W-2s and 1099s, visit MTRevenue.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, or Montana Relay at 711 for the hearing impaired.



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Form MW-3 V3 11/2023

MONTANA	•	ax itooonomatio	•	_
REVENUE	T	ax Year 20 Y		
Name		FEIN		
Address		Account ID		W T H
City		Pay Frequency	,	
State Zip		ldress nange Due Date	January 31	
If this is an amended	I return, mark this box.			
If your business or pa your account closed,	ayroll has ceased and you w mark this box and indicate o	vould like cease date.		
1. Number of W-2s subr	mitted to Montana		P	aper Electronic
Number of Forms 109 reported and submitted	99 with Montana withholdin ed to Montana	g	Pa	aper Electronic
Total Montana income	e paid per W-2s and Forms	1099		
 Total Montana withhol per W-2s and Forms ? 	lding tax withheld 1099			
5. Total Montana withhol	ding tax paid			
6. Difference (line 4 minu	us line 5)			
May we discuss this return	with your preparer?	Yes No If yes, p	provide preparer name an	nd telephone number below
	Please complete complete	olumns below as describ	ed in instructions.	
A Deposit Period End Date	B Date Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference



FEIN				Account ID					W	Т	Н

Please complete columns below as described in instructions.

A Deposit Period End Date	B Date Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
MMDDYYYY				

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FEIN				Account ID					W	Т	Н

Please complete columns below as described in instructions.

A Deposit Period End Date	B Date Paid to MT DOR	C Montana Tax Withheld	D Montana Tax Paid	E Difference
MMDDYYYY				

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FEIN				Account ID					W	Т	Н

Please complete columns below as described in instructions.

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MMDDYYYY				

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