

2018 Form OR-40



Office use only

Oregon Individual Income Tax Return for Full-year Residents

Submit original form—do not submit photocopy

Fiscal year ending: / /

Space for 2-D barcode—do not write in box below

- Amended return. If amending for an NOL, tax year the NOL was generated:
Calculated using "as if" federal return.
Short-year tax election. Federal disaster relief.
Extension filed. Federal Form 8886.
Form OR-24.

First name and initial, Last name, Social Security no. (SSN), Spouse's first name and initial, Spouse's last name, Spouse's SSN, Current mailing address, Date of birth, Spouse's date of birth, City, State, ZIP code, Country, Phone

Filing status (check only one box)

- 1. Single.
2. Married filing jointly.
3. Married filing separately (enter spouse's information above).
4. Head of household (with qualifying dependent).
5. Qualifying widow(er) with dependent child.

Exemptions

- 6a. Credits for yourself: Regular, Severely disabled ... Total
6b. Credits for spouse: Regular, Severely disabled ... Total

Dependents. List your dependents in order from youngest to oldest. If more than four, check this box and include Schedule OR-ADD-DEP with your return.

Table with columns: First name, Last name, Code*, Dependent's SSN, Dependent's date of birth (mm/dd/yyyy), Check if child with qualifying disability

*Dependent relationship code—Please see instructions to determine the appropriate code.

- 6c. Total number of dependents.
6d. Total number of dependent children with a qualifying disability (see instructions).
6e. Total exemptions. Add 6a through 6d. Total.

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Name SSN

Taxable income

Table with 3 columns: Description, Line Number, Amount. Rows include Federal adjusted gross income, Total additions from Schedule OR-ASC, and Income after additions.

Subtractions

Table with 3 columns: Description, Line Number, Amount. Rows include 2018 federal tax liability, Social Security included, Oregon income tax refund, Total subtractions from Schedule OR-ASC, Total subtractions, and Income after subtractions.

Deductions

Table with 3 columns: Description, Line Number, Amount. Rows include Oregon itemized deductions, Standard deduction, and Oregon taxable income.

Oregon tax

Table with 3 columns: Description, Line Number, Amount. Rows include Tax calculation and Total tax before credits.

Standard and carryforward credits

Table with 3 columns: Description, Line Number, Amount. Rows include Exemption credit, Political contribution credit, Total standard credits, Tax minus standard credits, Total carryforward credits, and Tax after standard and carryforward credits.

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Name SSN

Payments and refundable credits

Table with 2 columns: Description and Amount. Rows include Oregon income tax withheld, tax refund, estimated tax payments, earned income credit, and total refundable credits.

Tax to pay or refund

Table with 2 columns: Description and Amount. Rows include overpayment of tax, net tax, penalty and interest, interest on underpayment, total penalty, net tax including penalty, overpayment less penalty, estimated tax, charitable checkoff, political party checkoff, 529 deposits, and net refund.

Direct deposit

Form for direct deposit including a checkbox for refund outside the US, and fields for account type (Checking/Savings), routing number, and account number.

Reserved.

49. Oregon surplus credit (kicker) donation. If you elect to donate your kicker to the State School Fund, check the box: 49a.

Write the amount from line 7 of the surplus credit worksheet here. This election is irrevocable.....49b.

