

2020 Form OR-40

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Oregon Department of Revenue



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, Initial, Last name, Social Security no. (SSN), Deceased, First time using this SSN, Applied for ITIN. Spouse's first name, Initial, Spouse's last name, Spouse's SSN, Deceased, First time using this SSN, Applied for ITIN. Current mailing address, Date of birth (mm/dd/yyyy), 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 (see instructions).

- 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

Note: Reprint page 1 if you make changes to this page.

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 2020 federal tax liability, Social Security included, Oregon income tax refund, Total subtractions, and Income after subtractions.

Deductions

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

You were: 17a. [] 65 or older 17b. [] Blind Your spouse was: 17c. [] 65 or older 17d. [] Blind

Table with 3 columns: Description, Line Number, Amount. Rows include larger of line 16 or 17, and Oregon taxable income.

Oregon tax

Table with 3 columns: Description, Line Number, Amount. Rows include Tax calculation, Interest on certain installment sales, 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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00462001030000

Name SSN

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Payments and refundable credits

Table with 3 columns: Line number, Description, 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 3 columns: Line number, Description, Amount. Rows include overpayment of tax, net tax, penalty and interest, and interest on underpayment.

Exception number from Form OR-10, line 1: 40a [] Check box if you annualized: 40b. []

Table with 3 columns: Line number, Description, Amount. Rows include total penalty and interest due, net tax including penalty and interest, overpayment less penalty and interest, estimated tax, charitable checkoff donations, political party checkoff, and net refund.

Direct deposit

50. For direct deposit of your refund, see instructions. Check the box if the final deposit destination is outside the United States: []

Type of account: [] Checking or [] Savings

Routing number: []

Account number: []

Reserved

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00462001040000

Name	SSN
	- -

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Sign here. Under penalty of false swearing, I declare that the information in this return is true, correct, and complete.

Your signature	Date		
X	/ /		
Spouse's signature (if filing jointly, both must sign)	Date		
X	/ /		
Signature of preparer other than taxpayer	Preparer phone	Preparer license number, if professionally prepared	
X	() -		
Preparer address	City	State	ZIP code

Signing this return does not grant your preparer the right to represent you or make decisions on your behalf. For more information, see the instructions for the *Tax Information Authorization and Power of Attorney for Representation* form on our website.

Important: Include a copy of your federal Form 1040, 1040-SR, 1040-X, 1040-NR, or 1040-NR-EZ. **Without this information, we may adjust your return.**

Make your payment (if you have an amount due on line 42)

- **Online payments:** Visit our website at www.oregon.gov/dor.
- **Mailing your payment:** Make your check or money order payable to the **Oregon Department of Revenue**. Write **"2020 Oregon Form OR-40"** and the last four digits of your SSN or ITIN on your check or money order. Include your payment with this return. **Don't** use the Form OR-40-V payment voucher if you're mailing your payment with your return.

Send in your return

- **Non-2-D barcode.** If the 2-D barcode area on the front of this return is blank:
 - Mail **tax-due** returns to: Oregon Department of Revenue, PO Box 14555, Salem OR 97309-0940.
 - Mail **refund and no-tax-due** returns to: Oregon Department of Revenue, PO Box 14700, Salem OR 97309-0930.
- **2-D barcode.** If the 2-D barcode area on the front of this return is filled in:
 - Mail **tax-due** returns to: Oregon Department of Revenue, PO Box 14720, Salem OR 97309-0463.
 - Mail **refund and no-tax-due** returns to: Oregon Department of Revenue, PO Box 14710, Salem OR 97309-0460.

Amended statement. Complete this section only if you're amending your 2020 return or filing with a new SSN.

If filing an amended return, use this space to explain what you're changing. Include the return line numbers and the reason for each change. If your filing status has changed, explain why. Include all supporting forms and schedules when you file your amended return, even if you haven't changed anything on them.

If filing with a new SSN, enter your former identification number.
