

# Instructions for Electronic Filing



## General Information

E-filing your return will electronically send your state tax return to the Oregon Department of Revenue. Your tax return will then be either "Accepted" or "Rejected". If your tax return is accepted it has been filed. If your tax return is rejected it has not been filed. If rejected, the issues in the tax return which caused the reject should be addressed and the tax return should be E-filed again or filed by mail.

## Required Information

**To activate the "E-File Now" Button** on Step 2. E-File Your Tax Forms you must complete the following:

**A.** Make sure the following personal information is complete on your main form:

- Name
- Address
- Social Security Number
- Exemptions
- Standard or itemized deductions
- Calculated and entered your tax amount
- State withholding amount from all form W-2s and 1099s received

**B.** Sections 1-3 of Step 2 listed below, by entering any data that applies to you:

### Section 1: Information Needed for Oregon Return

In this section you are required to enter forms or check the box stating that you have none to enter.

**a.** Add any W-2s, 1099-Rs, W-2Gs, 1099-G or 1099-MISC you received. Select the "Add" button next to the items you have to enter. Enter each item separately and be sure to include the employee's name (this is **mandatory** to activate the 'E-File Now' button). For instance, if you received two W-2s select the "Add" button for W-2s and enter in the information exactly as it appears on your first W-2. Then select the "Add" button again and enter the information from your second W-2, exactly as shown on the second W-2. Do this for each W-2, 1099-R, W-2G, 1099-G, and 1099-MISC that you received.

**b.** If you don't have any of the above forms to include then check the box

## Section 2: Signing Your Return

You must agree to the Disclosure Statement.

## Section 3: Additional Information Needed to E-file Your Oregon Return

You are required to have a valid email address in order to e-file your return. To ensure accuracy enter it twice. Both email addresses must match exactly.

## Section 4: Refund/Payment Options

- **Refund** - You can select to receive your refund by Direct Deposit. Make your selection on Form 40. Enter your banking information directly on Form 40. If this information is not entered you will receive your refund by check.
- **Balance Due Paid by Check** - If paying by check, print form 40-V and mail it with your check to the Oregon Department of Revenue.
- **Electronic Funds Withdrawal** - If paying by electronic funds withdrawal go to <https://secure.dor.state.or.us/directdebit/index.faces> to pay electronically. If paying electronically you do not need to mail in a payment voucher.