

Oregon Resident Checklist (Page 1 of 1)

Check each item that applies to the taxpayer. Page numbers refer to the instructions.

INCOME SECTION (all automatic – part of AGI)

() OR Income Tax Refund (if taxed on federal return)	Page 1
() Wages, Salaries & Tips from W-2	Page 1
() Self-Employment/Business Income	Page 1
() US Savings Bonds & T-bill Interest	Page 1
() Other Interest & Dividends	Page 1
() Regular Pension Income	Page 1
() Social Security Income	Page 1
() RRB Retirement Income (Tiers 1 & 2)	Page 1
() IRA Distributions	Page 2
() Federal Pension Income	Page 2
() Capital Gains & Losses	Page 2
() Unemployment Income	Page 2
() Gambling Winnings	Page 2
() American Indian Income	Page 2

ADJUSTMENTS SECTION: Student loan interest, Alimony, Educator expenses,
SE tax paid, IRA contributions; all flow automatically to the OR40 from the federal AGI. Page 2

SUBTRACTIONS

() OR Income Tax Refund if taxable on 1040 (code 325) _____	Page 3
() Federal Pension Income Subtraction(code 307) Oregon calculator _____	Page 3
() Federal Income Tax Liability (automatic)	Page 3
() Foreign Taxes (code 311) _____	Page 3
() Social Security/RR Retirement Tier 1(automatic)	Page 1
() RR Retirement Tier 2 (automatic) (code 330)	Page 1
() Scholarship Awards Used for Housing Expenses (code 333)	Page 4
() Special OR Medical Subtraction (SOMS) TP(s) 66+(code 351) TP _____ Sp _____	Page 4
() US Bonds & T-bill Interest (code 315) _____	Page 4
() OR Lottery Winnings of \$600 or less on a Single Ticket or Play (code 322) _____	Page 4
() American Indian (code 300)	Page 5

DEDUCTIONS: OR Sch. A (OR Itemized deduction) (automatic) Page 5

ADDITIONS

() Gambling Losses Claimed as an Itemized Deduction (code 134) _____	Page 5
() Tax-Free State /Muni Bond Interest from states other than OR (code 158) _____	Page 5
() OR 529 Savings Plan nonqualified withdrawals (123) _____	Page 5
() Federal Income Tax Refund (audit or amended) (code 109) _____	Page 6

CREDITS

() Earned Income Tax Credit (automatic)	Page 6
() Earned Income Tax Credit –ITIN (automatic) (Code 898)	Page 6
() Exemption Credit (automatic)	Page 6
() Political Contribution Credit (code 809) _____	Page 6
() Retirement Income Credit (code 811)	Page 6
() Working Family Household Dependent Care Credit (code 895)	Page 7
() Surplus Credit (Kicker) TY2021 and TY2019 only	

