

Washington District 22 is requesting approval to prepare Oregon State returns in 2026 for tax year 2025. The following information is submitted per your instructions.

- Washington District 22 includes Walla Walla County and several other counties, with no sites, in Washington. Walla Walla and College Place, about 10 miles north of the Oregon Washington border.
- We plan to prepare Oregon State returns for non-resident, part-year resident, and resident.
- We plan to prepare Oregon State returns at the Center at the Park site.
- All Oregon returns are quality reviewed by certified counselors who have demonstrated knowledge of the Oregon return process and tax law.
- Washington District 22 has been preparing Oregon State returns for many years and has a comprehensive training program that is required of all our counselors. Stan Heller, George Veighey, and Bob Fontenot are experienced counselors and have each prepared Oregon returns for more than 7 years. Bob will be the primary instructor for Oregon returns.
- We will be using the training and reference materials for Oregon prepared by the WA State Oregon Task Force. Bob and Stan are members of the task force.
- The Oregon reference materials will be available for all counselors at the site on the desktop as well as in written form.

Every counselor, new and returning, is required to complete a minimum of 6 hours training for Oregon returns. The training includes practice using current year TaxSlayer software. As a part of the training, students complete problems that include the most common situations we encounter on Oregon returns and a few of the more complex situations we may encounter occasionally.

At the end of training, students must complete 2 comprehensive problems (resident and non-resident) that require them to prepare an Oregon tax return. Our instructors assure the counselors arrive at the correct solutions using the proper techniques. Counselors who are unable to complete the federal advanced test and 5 assigned federal return problems are not certified by the district. Counselors who are unable to complete the Oregon problems are not certified to do Oregon returns.

The district maintains a list of counselors and their certification levels including Oregon certification. The list is kept at the site to assure counselors who did not certify in Oregon are not assigned tax returns with an Oregon component.