

2020 Form OR-W-4

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(Rev. 11-01-19, ver. 01)

Oregon Department of Revenue



Office use only

Oregon Withholding

Important information

Complete Form OR-W-4 if:

- You filed a federal Form W-4 with your employer after December 31, 2017 and you didn't file Form OR-W-4 or specify a different number of allowances for Oregon.
- You weren't satisfied with your prior year Oregon tax-to-pay or refund amount.
- You've had a recent personal or financial change that may affect your tax situation, such as a change in your income, filing status, or number of dependents.

- Are you making **mid-year changes** to your withholding?
- Do you receive **pension or annuity payments**?
- Are you a **part-year resident, nonresident, or nonresident alien**?



If you answered **yes** to **any** of these questions, read the "Specific information" section in the instructions before filling out the corresponding worksheets or Form OR-W-4. The online **Oregon Withholding Calculator** at www.oregon.gov/dor may provide more accurate results. If you use the online calculator, you don't need to complete the corresponding worksheets.

Specific information to consider:

- Do you (including your spouse) **have more than one job**?
- Do you expect your wages or adjusted gross income (AGI) on your 2020 return to be **more than \$100,000** (or **\$200,000** if filing using the married filing jointly or qualified widow(er) filing status)?

Otherwise, read the instructions and complete all applicable worksheets **before** filling out the Form OR-W-4 and giving it to your employer.

Separate here and **give Form OR-W-4 to your employer**. Keep the worksheets for your records.

Form OR-W-4

Oregon Employee's Withholding Statement and Exemption Certificate

2020

First name	Initial	Last name	Social Security number (SSN)	<input type="checkbox"/>	Redetermination
Address			City	State	ZIP code

Note: Your eligibility to claim a certain number of allowances or an exemption from withholding may be subject to review by the Oregon Department of Revenue. Your employer may be required to send a copy of this form to the department for review.

1. **Select one:** Single Married Married, but withholding at the higher single rate.

Note: Check the "Single" box if you're married and you're legally separated or if your spouse is a nonresident alien.

2. **Allowances.** Total number of allowances you're claiming on line **A4, B15, or C5**. If you meet a qualification to skip the worksheets and you aren't exempt, **enter -0-**.....2.

3. **Additional amount**, if any, you want withheld from each paycheck..... 3.

4. **Exemption from withholding.** I certify that my wages are exempt from withholding and I meet the conditions for exemption as stated on page 2 of the instructions. Complete **both** lines below:
- Enter the corresponding exemption code. (See instructions)..... 4a.
 - Write "Exempt"..... 4b.

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

Employee's signature (This form isn't valid unless signed.)	Date
	/ /

Employer use only.

Employer's name University of Oregon	Federal employer identification number (FEIN) 46 - 4727800		
Employer's address P.O. Box 3237	City Eugene	State OR	ZIP code 97403-0237

—Provide this form to your employer—

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Worksheet A—Personal allowances

Worksheet A—Personal allowances

- A1. Enter "1" for **yourself** if no one else can claim you as a dependent. Otherwise, enter -0-..... A1.
- A2. Enter "1" for your **spouse** if your spouse **doesn't work**. Otherwise, enter -0-..... A2.
- A3. Enter the number of **dependents** you will claim on your Oregon tax return A3.
- A4. Add lines A1 through A3. Enter the result here and follow the instructions below A4.



Complete all worksheets that apply.

- **Worksheet B**—Use this worksheet if you plan to do **any** of the following on your 2020 Oregon return:
 - o Itemize your Oregon deductions or claim additional standard deduction amounts.
 - o Claim federal adjustments to income or Oregon additions, subtractions, or credits (other than personal exemption credits).
 - o Report nonwage income (such as dividends, interest, or self-employment income).
- **Worksheet C**—Use this worksheet if you (including your spouse) have more than one job **and** the combined earnings from **all** jobs exceed \$20,000.

If neither of the above worksheets apply, stop here and enter the number from line A4 on Form OR-W-4, line 2.

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Worksheet B—Deductions, adjustments, credits, and nonwage income

Worksheet B—Deductions, adjustments, credits, and nonwage income



Use this worksheet if you plan to do any of the following on your 2020 Oregon return:

- Itemize your Oregon deductions or claim additional standard deduction amounts.
• Claim federal adjustments to income or Oregon additions, subtractions, or credits (other than personal exemption credits).
• Report nonwage income (such as dividends, interest, or self-employment income).

Having your prior year's Oregon tax return on hand may help you when completing this worksheet.

Don't list numbers as negative unless instructed. For example, write a \$1,000 Oregon subtraction as "\$1,000", not "(\$1,000)".

B1. Enter your estimated 2020 nonwage income (such as dividends or interest)B1. [] .00
B2. Enter your estimated 2020 Oregon additionsB2. [] .00
B3. Add lines B1 and B2B3. [] .00
B4. Enter your estimated 2020 Oregon deductions. (See instructions).....B4. [] .00
B5. Enter the standard deduction based on your anticipated 2020 filing status:.....B5. [] .00
• Single or Married Filing Separately: \$2,315.
• Head of Household: \$3,725.
• Married Filing Jointly or Qualifying Widow(er): \$4,630.
B6. Line B4 minus line B5. If the result is zero or less, enter -0-B6. [] .00
B7. Enter your estimated 2020 federal adjustments to income and Oregon subtractions (exception—don't include the federal tax subtraction).....B7. [] .00
B8. Add lines B6 and B7B8. [] .00
B9. Line B8 minus line B3. If less than zero, enter as a negative amountB9. [] .00
B10. Line B9 divided by \$2,800. Round to one decimal place. If less than zero, enter as a negative amount.....B10. [] .
B11. Enter your estimated 2020 Oregon standard, carryforward, or refundable credits (exception—don't include personal exemption credits).....B11. [] .00
B12. Divide line B11 by \$210. Round to one decimal place.....B12. [] .
B13. Add lines B10 and B12. If less than zero, enter as a negative amount. Round to the whole number closest to zero by eliminating the decimal valueB13. []
B14. Enter the number from Worksheet A, line A4B14. []
B15. Add lines B13 and B14. If zero or less, enter -0-. (See instructions).....B15. []

If you plan to use Worksheet C, also enter the result from line B15 on Worksheet C, line C1. Otherwise, stop here and enter the result from line B15 on Form OR-W-4, line 2.

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Worksheet C—Two-earners / multiple jobs

Worksheet C—Two-earners / multiple jobs



If you (including your spouse) have three or more jobs, consider using the Oregon Withholding Calculator at www.oregon.gov/dor for a more accurate calculation of allowances.

If you don't use the online calculator, use this worksheet to estimate the number of allowances to claim on your highest paying job. Allowances should only be claimed for your highest paying job. Claim zero allowances on Form OR-W-4, line 2 for all of your (or your spouse's) other jobs to prevent underwithholding.

Only complete this worksheet if you (including your spouse) have more than one job and the combined earnings from all jobs exceed \$20,000.

C1. Enter the number from Worksheet B, line B15, if used. Otherwise, enter the number from Worksheet A, line A4..... C1. []

C2. Enter the number below based on your 2020 anticipated filing status C2. []

- Single, Head of Household, or Married Filing Separately: Enter "2"; however, if two of your jobs individually exceed \$40,000, enter "4".
• Married Filing Jointly or Qualifying Widow(er): Enter "3"; however, if two of your jobs individually exceed \$50,000, enter "6".

C3. If you (including your spouse) will have three or more jobs at any point during the year, enter the number below based on your 2020 anticipated filing status. Otherwise, enter -0-..... C3. []

- Single, Head of Household, or Married Filing Separately: Enter "2".
• Married Filing Jointly or Qualifying Widow(er): Enter "3".

C4. Add lines C2 and C3C4. []

C5. Is line C1 less than line C4?
• Yes. Enter -0- on line C5 and on Form OR-W-4, line 2. Complete lines C6 through C8 below to figure the additional withholding amount necessary to avoid a year-end tax bill.
• No. Line C1 minus line C4. Enter the result on line C5 (if zero, enter -0-) and on Form OR-W-4, line 2. Don't complete the rest of this worksheet.....C5. []

C6. Line C4 minus line C1C6. []

C7. Line C6 multiplied by \$210C7. [.00]

C8. Line C7 divided by the number of paychecks remaining in 2020 for the highest paying job and rounded to the nearest dollar. Enter the result here and on Form OR-W-4, line 3. This is the additional amount to be withheld from each paycheck..... C8. [.00]