

2020 Form OR-W-4

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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

Form fields: First name, Initial, Last name, Social Security number (SSN), 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-
3. Additional amount, if any, you want withheld from each paycheck
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)
Write "Exempt"

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. Fields: Employer's name, Federal employer identification number (FEIN), Employer's address, City, State, ZIP code

- 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.