

Worksheet OR-FW, Oregon Personal Income Tax Federal Worksheet

2022

Your first name and initial	Last name	Your Social Security number (SSN)
If a joint return, spouse's first name and initial	Last name	Spouse's SSN

Oregon 1040

Filing Status

- Single
 Married filing jointly
 Married filing separately
 Head of household
 Qualifying surviving spouse

At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes No

Dependents

- (4)a. Child tax credit
 (4)b. Credit for other dependents
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1a. Total amount from Form(s) W-2, box 1	1a.	.00
1b. Household employee wages not reported on Form(s) W-2	1b.	.00
1c. Tip income not reported on line 1a	1c.	.00
1d. Medicaid waiver payments not reported on Form(s) W-2	1d.	.00
1e. Taxable dependent care benefits from Form 2441, line 26	1e.	.00
1f. Employer-provided adoption benefits from Form 8839, line 29	1f.	.00
1g. Wages from Form 8919, line 6	1g.	.00
1h. Other earned income.....	1h.	.00
1i. Nontaxable combat pay election.....	1i.	.00
1z. Add lines 1a through 1h	1z.	.00
2a. Tax-exempt interest.....	2a.	.00
2b. Taxable interest.....	2b.	.00
3a. Qualified dividends.....	3a.	.00
3b. Ordinary dividends	3b.	.00
4b. IRAs distributions—Taxable amount	4b.	.00
5b. Pensions and annuities—Taxable amount	5b.	.00
6a. Social security benefits	6a.	.00
6b. Social security benefits—Taxable amount	6b.	.00

6c. If you elect to use the lump-sum election method, check here.

7. Capital gain or (loss).....	7.	.00
8. Other income from Schedule 1, line 10.....	8.	.00
9. Total income.	9.	.00
10. Adjustments to income from Schedule 1, line 26.....	10.	.00
11. Adjusted gross income.....	11.	.00
12. Standard deduction or itemized deductions	12.	.00
13. Qualified business income deduction.	13.	.00
14. Add lines 12 and 13.....	14.	.00

15. Taxable income..... 15.
 16. Tax..... 16.

16 (1). 8814 16 (2). 4972 16 (3). Other

17. Amount from Schedule 2, line 3 17.
 18. Add lines 16 and 17..... 18.
 19. Child tax credit or credit for other dependents from Schedule 8812 19.
 20. Amount from Schedule 3, line 8 20.
 21. Add lines 19 and 20..... 21.
 22. Subtract line 21 from line 18 22.
 27. Earned income credit (EIC)..... 27.
 29. American opportunity credit from Form 8863, line 8..... 29.
 30. Reserved for future use 30.

PTIN

Oregon 1040-SR

Filing Status

Single Married filing jointly Married filing separately
 Head of household Qualifying surviving spouse

At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services);
 or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes No

Dependents

(4)a. Child tax credit (4)b. Credit for other dependents
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1a. Total amount from Form(s) W-2, box 1 1a.
 1b. Household employee wages not reported on Form(s) W-2 1b.
 1c. Tip income not reported on line 1a 1c.
 1d. Medicaid waiver payments not reported on Form(s) W-2 1d.
 1e. Taxable dependent care benefits from Form 2441, line 26 1e.
 1f. Employer-provided adoption benefits from Form 8839, line 29 1f.
 1g. Wages from Form 8919, line 6 1g.
 1h. Other earned income..... 1h.
 1i. Nontaxable combat pay election..... 1i.
 1z. Add lines 1a through 1h 1z.
 2a. Tax-exempt interest..... 2a.
 2b. Taxable interest..... 2b.
 3a. Qualified dividends..... 3a.
 3b. Ordinary dividends 3b.
 4b. IRAs distributions—Taxable amount 4b.
 5b. Pensions and annuities—Taxable amount 5b.
 6a. Social security benefits 6a.
 6b. Social security benefits—Taxable amount 6b.

6c. If you elect to use the lump-sum election method, check here.

7.	Capital gain or (loss)	7.	.00
8.	Other income from Schedule 1, line 10	8.	.00
9.	Total income	9.	.00
10.	Adjustments to income from Schedule 1, line 26	10.	.00
11.	Adjusted gross income	11.	.00
12.	Standard deduction or itemized deductions	12.	.00
13.	Qualified business income deduction	13.	.00
14.	Add lines 12 and 13	14.	.00
15.	Taxable income	15.	.00
16.	Tax	16.	.00

16 (1). 8814 16 (2). 4972 16 (3). Other

17.	Amount from Schedule 2, line 3	17.	.00
18.	Add lines 16 and 17	18.	.00
19.	Child tax credit or credit for other dependents from Schedule 8812	19.	.00
20.	Amount from Schedule 3, line 8	20.	.00
21.	Add lines 19 and 20	21.	.00
22.	Subtract line 21 from line 18	22.	.00
27.	Earned income credit (EIC)	27.	.00
29.	American opportunity credit from Form 8863, line 8	29.	.00
30.	Reserved for future use	30.	

PTIN

Schedule 1—Additional Income and Adjustments to Income

1.	Taxable refunds, credits, or offsets of state and local income taxes	1.	.00
2a.	Alimony received	2a.	.00
2b.	Date of original divorce or separation agreement _____		
3.	Business income or (loss)	3.	.00
4.	Other gains or (losses)	4.	.00
5.	Rental real estate, royalties, partnerships, S corporations, trusts, etc.	5.	.00
6.	Farm income or (loss)	6.	.00
7.	Unemployment compensation	7.	.00
8a.	Net operating loss	8a.	.00
8b.	Gambling	8b.	.00
8c.	Cancellation of debt	8c.	.00
8d.	Foreign earned income exclusion from Form 2555	8d.	.00
8e.	Income from Form 8853	8e.	.00
8f.	Income from Form 8889	8f.	.00
8g.	Alaska Permanent Fund dividends	8g.	.00
8h.	Jury duty pay	8h.	.00
8i.	Prizes and awards	8i.	.00
8j.	Activity not engaged in for profit income	8j.	.00
8k.	Stock options	8k.	.00
8l.	Income from the rental of personal property	8l.	.00
8m.	Olympic and Paralympic medals and USOC prize money	8m.	.00
8n.	Section 951(a) inclusion	8n.	.00
8o.	Section 951A(a) inclusion	8o.	.00
8p.	Section 461(l) excess business loss adjustment	8p.	.00
8q.	Taxable distributions from an ABLE account	8q.	.00
8r.	Scholarship and fellowship grants not reported on Form W-2	8r.	.00
8s.	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s.	.00
8t.	Pension or annuity from a nonqualified deferred compensation plan or nongovernmental section 457 plan	8t.	.00
8u.	Wages earned while incarcerated	8u.	.00

8z. Other income.....	8z.	.00
9. Total other income.....	9.	.00
10. Combine lines 1 through 7 and 9.....	10.	.00
11. Educator expenses.....	11.	.00
12. Certain business expenses of reservists, performing artists, and fee-basis government officials.....	12.	.00
13. Health savings account deduction.....	13.	.00
14. Moving expenses for members of the Armed Forces.....	14.	.00
15. Deductible part of self-employment tax.....	15.	.00
16. Self-employed SEP, SIMPLE, and qualified plans.....	16.	.00
17. Self-employed health insurance deduction.....	17.	.00
18. Penalty on early withdrawal of savings.....	18.	.00
19a. Alimony paid.....	19a.	.00
19c. Date of original divorce or separation agreement _____		
20. IRA deduction.....	20.	.00
21. Student loan interest deduction.....	21.	.00
22. Reserved for future use.....	22.	
23. Archer MSA deduction.....	23.	.00
24a. Jury duty pay.....	24a.	.00
24b. Deductible expenses related to income.....	24b.	.00
24c. Nontaxable amount of the value of Olympic and Paralympic medals.....	24c.	.00
24d. Reforestation amortization and expenses.....	24d.	.00
24e. Repayment of supplemental unemployment benefits.....	24e.	.00
24f. Contributions to section 501(c)(18)(D) pension plans.....	24f.	.00
24g. Contributions by certain chaplains to section 403(b) plans.....	24g.	.00
24h. Attorney fees and court costs for actions involving certain unlawful discrimination claims.....	24h.	.00
24i. Attorney fees and court costs you paid.....	24i.	.00
24j. Housing deductions from Form 2555.....	24j.	.00
24k. Excess deductions of section 67(e) expenses from Schedule K-1.....	24k.	.00
24z. Other adjustments.....	24z.	.00
25. Total other adjustments.....	25.	.00
26. Adjustments to income.....	26.	.00

Schedule 2—Additional Taxes

1. Alternative minimum tax.....	1.	.00
2. Excess advance premium tax credit repayment.....	2.	.00
3. Add lines 1 and 2.....	3.	.00
4. Self-employment tax.....	4.	.00
5. Social security and Medicare tax on unreported tip income.....	5.	.00
6. Uncollected social security and Medicare tax on wages.....	6.	.00
7. Total additional social security and Medicare tax.....	7.	.00
8. Additional tax on IRAs or other tax-favored accounts.....	8.	.00

If not required, check here.

9. Household employment taxes.....	9.	.00
10. Repayment of first-time homebuyer credit.....	10.	.00
11. Additional Medicare Tax.....	11.	.00
12. Net investment income tax.....	12.	.00
13. Uncollected social security and Medicare or RRTA tax.....	13.	.00
14. Interest on tax due on installment income.....	14.	.00
15. Interest on the deferred tax on gain from certain installment sales.....	15.	.00
16. Recapture of low-income housing credit.....	16.	.00
17a. Recapture of other credits.....	17a.	.00
17b. Recapture of federal mortgage subsidy.....	17b.	.00
17c. Additional tax on HSA distributions.....	17c.	.00
17d. Additional tax on an HSA because you didn't remain an eligible individual.....	17d.	.00

17e. Additional tax on Archer MSA distributions	17e.	.00
17f. Additional tax on Medicare Advantage MSA distributions.....	17f.	.00
17g. Recapture of charitable contribution deduction.....	17g.	.00
17h. Income you received from a nonqualified deferred compensation plan	17h.	.00
17i. Compensation you received from a nonqualified deferred compensation plan.....	17i.	.00
17j. Section 72(m)(5) excess benefits tax.....	17j.	.00
17k. Golden parachute payments.....	17k.	.00
17l. Tax on accumulation distribution of trusts	17l.	.00
17m. Excise tax on insider stock compensation.....	17m.	.00
17n. Look-back interest under section 167(g) or 460(b)	17n.	.00
17o. Tax on non-effectively connected income.....	17o.	.00
17p. Any interest from Form 8621, line 16f	17p.	.00
17q. Any interest from Form 8621, line 24	17q.	.00
17z. Any other taxes.....	17z.	.00
18. Total additional taxes.....	18.	.00
19. Reserved for future use	19.	
20. Section 965 net tax liability installment from Form 965-A.....	20.	.00
21. Total other taxes.....	21.	.00

Schedule 3—Additional Credits and Payments

1. Foreign tax credit.....	1.	.00
2. Credit for child and dependent care expenses from Form 2441, line 11.....	2.	.00
3. Education credits from Form 8863, line 19.	3.	.00
4. Retirement savings contributions credit	4.	.00
5. Residential energy credits	5.	.00
6a. General business credit.....	6a.	.00
6b. Credit for prior year minimum tax.....	6b.	.00
6c. Adoption credit	6c.	.00
6d. Credit for the elderly or disabled.....	6d.	.00
6e. Alternative motor vehicle credit.....	6e.	.00
6f. Qualified plug-in motor vehicle credit	6f.	.00
6g. Mortgage interest credit	6g.	.00
6h. District of Columbia first-time homebuyer credit	6h.	.00
6i. Qualified electric vehicle credit.....	6i.	.00
6j. Alternative fuel vehicle refueling property credit	6j.	.00
6k. Credit to holders of tax credit bonds.....	6k.	.00
6l. Amount on Form 8978, line 14	6l.	.00
6z. Other nonrefundable credits.....	6z.	.00
7. Total other nonrefundable credits.....	7.	.00
8. Add lines 1 through 5 and 7	8.	.00
9. Net premium tax credit.....	9.	.00
10. Amount paid with request for extension to file.....	10.	.00
11. Excess social security and tier 1 RRTA tax withheld.....	11.	.00
12. Credit for federal tax on fuels	12.	.00
13a. Form 2439	13a.	.00
13b. Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b.	.00
13c. Reserved for future use	13c.	
13d. Credit for repayment of amounts included in income from earlier years	13d.	.00
13e. Reserved for future use	13e.	
13f. Deferred amount of net 965 tax liability	13f.	.00
13g. Reserved for future use	13g.	
13h. Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h.	.00
13z. Other payments or refundable credits.....	13z.	.00
14. Total other payments or refundable credits.....	14.	.00
15. Add lines 9 through 12 and 14	15.	.00