

Oregon TY2018 ATS Testing
Oregon Composite Return

After each submission has passed the initial testing, a PDF of the printed return must be submitted. The printed version will be compared to the e-filed version. You do not need to submit a PDF with each version.

Each PDF should be named with the Test Scenario number. We cannot accept zipped files and have a size limitation of 20 MB for attachments, so it might be necessary to send more than one email with the PDFs.

Please let us know your system limitations when you submit your returns.

Test Scenario 1 – Form OR-OC

- Tax Period Begins 6/1/18
- Tax Period Ends 5/31/19
- Name of PTE – Number 1 PTE
- FEIN – 110000011
- Address – 955 Center St NE, Salem, Oregon 97301
- PTE contact name , contact phone, email
 - ReturnHeaderState/Business Representative
- Type of PTE – S Corporation
- Extension was filed. Enter the extension due date.
- Number of owners included in this composite return:
 - Individuals – 3, Estates – 4, Trusts – 5
- License number of preparer – 123XYZ
- Signature Checkbox
- Direct debit authorization box checked

Form OR-OC:

- Lines - 1a, 3a, 4a, 6a, 8a, 9a, 10a, 12, 14

Schedule OR-OC-1:

- Lines - Line 1 (entire row), Line 2 (entire row), and all other applicable lines
- Tax year end date for the majority of owners included in the composite return
 - If there is a date in the ReturnHeaderState/TaxPeriodEndDt, it must match ReturnDataState/FormOC/Header/OwnerMajorityTaxYearEndDate.

Financial Transaction:

- Complete with payment and requested payment date

Test Scenario 2 – Form OR-OC

- FEIN – 110000012
- Type of PTE – Partnership

Form OR-OC:

- Lines - 1a, 3a, 4a, 5a, 7a, 8a, 9a, 11a, 13, 15, 16, 17

Schedule OR-OC-1:

- All applicable lines

Test Scenario 3 – Form OR-OC

- FEIN – 110000013
- Type of PTE – Trust (if not supported, populate this field with a different type of PTE)
- Number of owners included in this composite return:
 - C Corporations – 3

Form OR-OC:

- Lines 1b, 3b, 4b, 6b, 7b, 8b, 9b, 10b, 12, 14

Schedule OR-OC-2:

- Total number of owner type included on this return
- Line 1 (entire row), Line 2 (entire row), and all other applicable lines

Test Scenario 4 – Form OR-OC

- FEIN – 110000014
- Type of PTE – LLC

Form OR-OC:

- Lines 1b, 3b, 4b, 5b, 11b, 13, 15

Schedule OR-OC-2:

- All applicable lines
- Tax year end date for the majority of owners included in the composite return
 - If there is a date in the ReturnHeaderState/TaxPeriodEndDt, it must match ReturnDataState/FormOC/Header/OwnerMajorityTaxYearEndDate.

Test Scenario 5 – Form OR-OC

- FEIN – 110000015
- Type of PTE – LLP
- Form OR-OC-TR is submitted (checkbox)

Test Scenario 6 – Form OR-OC

- FEIN – 110000016
- Type of PTE – LP
- Amended