

# Total IFTA Compliance Platform

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## Oregon WMT Exception Engine

### Weight Mile Tax — Technical Specification

Version 1.0 | April 2026

**Confidential — Internal Use Only**

#### Purpose of This Document

This document defines the complete technical specification for the Oregon Weight Mile Tax (WMT) Exception Engine within the Total IFTA Compliance Platform. It covers all Oregon WMT-specific exception types, detection logic, severity classifications, threshold values, user interface behavior, resolution paths, and escalation rules.

Oregon is unique among all weight-mile tax states in that it operates an entirely separate road-use tax system instead of a traditional per-gallon fuel tax for commercial vehicles. Oregon does not participate in IFTA in the same way other states do — Oregon miles are reported on the IFTA return but carry a \$0.00 IFTA tax rate because Oregon collects its road-use revenue through the Weight Mile Tax system instead. This means carriers operating in Oregon face two parallel compliance obligations: quarterly IFTA reporting (with Oregon at \$0) and a separate monthly Oregon WMT filing through Oregon Trucking Online. The monthly filing frequency, the highway use tax bond requirement, the declared weight system, and the IFTA \$0 interaction make Oregon the single most complex weight-mile tax state for platform implementation.

The Oregon WMT exception engine must handle all of these unique characteristics and ensure carriers never confuse their Oregon WMT obligation with their IFTA obligation, never miss a monthly filing deadline, and maintain a valid highway use tax bond at all times.

# 1. Oregon WMT Background & Program Rules

## 1.1 Weight Threshold & Applicability

**Weight threshold:** Vehicles with a combined weight over 26,000 pounds operating on Oregon public highways.

**Administering authority:** Oregon Department of Transportation (ODOT), Motor Carrier Transportation Division.

**Oregon Carrier Account Number:** Assigned through the OWRATI (Oregon Weight Receipt And Tax Identifier) application. Primary identifier for all WMT filings and correspondence.

**Filing frequency:** MONTHLY — the only weight-mile tax state that requires monthly rather than quarterly filing. Due by the last day of the month following the reporting month.

**Filing portal:** Oregon Trucking Online (oregontruckingonline.com).

**Zero returns:** Required even in months where the carrier had zero Oregon miles.

**Highway Use Tax Bond:** Required before carriers can operate. Minimum \$2,000 per vehicle. Bond must remain active at all times.

**Temporary passes:** Available for carriers making fewer than 5 trips per year. Up to 5 passes per 12-month period.

## 1.2 Oregon WMT and IFTA — The Critical Interaction

This is the most important and most misunderstood aspect of Oregon WMT for platform users. Oregon is an IFTA member jurisdiction but does NOT collect fuel tax through the IFTA system. Instead:

- Oregon miles MUST be reported on the carrier's IFTA quarterly return
- Oregon miles carry a \$0.00 tax rate on the IFTA return — no IFTA tax is owed to Oregon
- Oregon fuel purchases DO generate IFTA fuel tax credits that can offset tax owed to other IFTA states
- Oregon road-use tax is collected SEPARATELY through the monthly WMT filing
- Carriers who think their IFTA filing covers Oregon are incorrect and are accumulating unreported WMT liability every month

The platform must clearly communicate this distinction on every Oregon-related screen and flag any carrier with Oregon IFTA miles who does not have an active Oregon WMT account.

## 1.3 Monthly Filing Schedule

Unlike all other weight-mile tax states which file quarterly, Oregon WMT requires a monthly return. This creates 12 filing deadlines per year, each due by the last day of the month following the reporting month.

- January miles — due February 28/29
- February miles — due March 31

- March miles — due April 30
- April miles — due May 31
- May miles — due June 30
- June miles — due July 31
- July miles — due August 31
- August miles — due September 30
- September miles — due October 31
- October miles — due November 30
- November miles — due December 31
- December miles — due January 31

## 1.4 Tax Rates by Declared Weight

Oregon WMT rates are set by ODOT and applied per mile based on the vehicle's declared operating weight. The declared weight must be recorded per vehicle and drives the applicable tax rate. Rates shown are representative and subject to change.

Declared Operating Weight	Rate Per Mile
26,001 – 32,000 lbs	\$0.0791
32,001 – 40,000 lbs	\$0.1128
40,001 – 50,000 lbs	\$0.1536
50,001 – 60,000 lbs	\$0.1937
60,001 – 70,000 lbs	\$0.2339
70,001 – 80,000 lbs	\$0.2755
80,001 – 90,000 lbs	\$0.3179
90,001 – 98,000 lbs	\$0.3559
98,001 – 105,500 lbs	\$0.4011

Note: Oregon WMT rates are among the highest per-mile rates of any weight-mile tax state. The platform must maintain a current rate table updated whenever ODOT publishes rate changes.

## 1.5 Highway Use Tax Bond

Before a carrier can begin operations under Oregon WMT, they must file a Highway Use Tax Bond with ODOT. The bond amount is a minimum of \$2,000 per vehicle, with the total bond amount based on the carrier's fleet size and estimated annual tax liability. The bond must remain active and in good standing at all times. A lapsed bond constitutes a compliance failure and can result in permit suspension.

**Minimum bond:** \$2,000 per vehicle.

**Bond type:** Surety bond filed with ODOT.

**Renewal:** Bond renewal dates vary by carrier and surety provider. Platform must track bond expiry per carrier.

**Consequence of lapse:** Permit suspension and prohibition from Oregon operations.

## 1.6 Temporary Pass Rules

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Carriers making fewer than 5 trips per year into Oregon may purchase temporary passes instead of obtaining a full WMT account. The platform must track temporary pass usage and alert carriers when annual registration becomes required.





**Maximum passes:** 5 per carrier per 12-month rolling period.

**Purchase method:** Oregon Trucking Online portal or at Oregon ports of entry.

**Platform tracking:** Rolling 12-month pass count per carrier with escalation at count 4 and CRITICAL at count 5.

## 2. Severity Level Definitions

All Oregon WMT exceptions follow the same four-level severity framework used across the compliance platform. The monthly filing frequency means CRITICAL exceptions can fire every month for non-compliant carriers.

 <b>CRITICAL</b>	Action is blocked. Monthly return is overdue, permit has expired, or bond has lapsed. Oregon operations are out of compliance and carrier is accumulating unreported WMT liability every day.
 <b>HIGH</b>	Monthly filing deadline is approaching, bond is expiring, or a significant data or eligibility issue requires immediate attention. Acknowledgment and written confirmation required.
 <b>MEDIUM</b>	Data quality warning or informational flag requiring attention but not immediately threatening compliance. No acknowledgment required.
 <b>INFO</b>	Background compliance awareness displayed in the carrier dashboard. Does not interrupt any workflow.

### 3. Critical Exceptions — Action Blocked

The following exceptions indicate an immediate compliance failure for Oregon operations. Given the monthly filing frequency, overdue returns can accumulate quickly. The system blocks compliance certification and displays prominent alerts.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>Monthly Return Overdue — Past Due Date</b>	monthly_due_date, return_status, current_date	current_date > monthly_due_date AND return_status != 'filed'	Full red banner on dashboard. Message: 'Your Oregon WMT return for [month] is OVERDUE as of [date]. File immediately through Oregon Trucking Online at oregontruckingonline.com.' Compliance certificate blocked.	Carrier files overdue return through Oregon Trucking Online. Platform records confirmation and clears exception.
<b>Multiple Monthly Returns Overdue</b>	overdue_return_count	overdue_return_count >= 2	Full red banner with count. Message: 'You have [X] overdue Oregon WMT returns. Oregon monthly WMT liability is accumulating. File all overdue returns immediately.' All compliance certificates blocked.	Carrier files all overdue returns. Platform records each confirmation in sequence.
<b>Highway Use Tax Bond Expired</b>	bond_expiry_date, current_date, bond_status	current_date > bond_expiry_date OR bond_status = 'lapsed'	Full red banner. Message: 'Your Oregon Highway Use Tax Bond has expired. Oregon WMT operations are suspended until the bond is renewed and confirmed with ODOT. Renew through your surety provider immediately.' Compliance certificate blocked.	Carrier renews bond. Provides new bond confirmation to platform. System re-validates and clears exception.
<b>Oregon Carrier Account Not on File</b>	oregon_carrier_account, oregon_miles	oregon_carrier_account = null AND oregon_miles > 0	Red alert on company profile. Message: 'No Oregon WMT carrier account number on file. Oregon WMT compliance cannot be tracked without this field. Add your Oregon carrier account number.' WMT module blocked.	Carrier enters Oregon carrier account number. System enables WMT tracking.
<b>Vehicle Operating in OR — No WMT Account</b>	vehicle_or_miles, wmt_account_status, temp_pass_status	or_miles > 0 AND wmt_account_status = null AND temp_pass_status = null	Red alert on dashboard. Message: 'Vehicle [VIN] has recorded Oregon miles but has no WMT account or temporary pass	Carrier obtains temporary pass or registers for

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>and No Pass</b>			on file. Operating without authorization is a violation.' Compliance certificate blocked.	WMT account immediately.
<b>Declared Weight Not on File for OR-Operating Vehicle</b>	vehicle_declared_weight, or_miles	or_miles > 0 AND vehicle_declared_weight = null	Red alert on vehicle record. Message: 'No declared operating weight on file for vehicle [VIN]. Oregon WMT rate cannot be calculated without this field.' WMT tracking blocked for this vehicle.	Carrier enters declared operating weight. System applies correct rate.
<b>Temporary Pass Limit Exceeded</b>	temp_pass_count_rolling_12mo	temp_pass_count > 5 in rolling 12-month window	Red alert. Message: 'Vehicle [VIN] has used [X] temporary passes in the past 12 months, exceeding the 5-pass limit. A full Oregon WMT account registration is now required.' Compliance certificate blocked.	Carrier registers for Oregon WMT account through OWRATI application. Platform transitions to account-based tracking.
<b>Oregon Miles on IFTA Return at Non-Zero Tax Rate</b>	ifta_or_tax_rate	ifta_or_tax_rate != \$0.00 for Oregon	Red alert. Message: 'Oregon miles on the IFTA return are showing a non-zero tax rate. Oregon WMT is paid separately — Oregon miles must carry a \$0.00 IFTA rate. This will produce an incorrect IFTA return.' IFTA filing blocked.	System auto-corrects Oregon IFTA rate to \$0.00. Carrier reviews and confirms.

## 4. High Exceptions — Acknowledgment Required

The following exceptions require the carrier or administrator to explicitly review, acknowledge, and provide written confirmation before the exception clears. Given the monthly filing schedule, HIGH escalation for upcoming deadlines fires 10 days before the due date — tighter than quarterly-filing modules. All acknowledgments are logged with timestamp, user ID, and entered reason.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>Monthly Return Due Within 10 Days</b>	monthly_due_date, current_date, return_status	current_date >= (monthly_due_date - 10 days) AND return_status != 'filed'	Orange banner on dashboard. Message: 'Oregon WMT return for [month] is due on [date] — [X] days from today. File through Oregon Trucking Online at oregontruckingonline.com.' Acknowledgment required.	Carrier files return or confirms filing is in progress. Override logged.
<b>Zero Return Month — Not Acknowledged</b>	or_miles_month, return_status, days_until_due	or_miles_month = 0 AND return_status = 'not started' AND days_until_due <= 10	Orange flag. Message: 'No Oregon WMT miles recorded for [month]. A zero return is still required and is due on [date]. Confirm you will file a zero return.' Acknowledgment required.	Carrier acknowledges zero return obligation. Platform generates zero return. Override logged.
<b>Highway Use Tax Bond Expiring Within 60 Days</b>	bond_expiry_date, current_date	current_date >= (bond_expiry_date - 60 days) AND bond_status = 'active'	Orange banner. Message: 'Your Oregon Highway Use Tax Bond expires on [date] — [X] days from today. Contact your surety provider to renew the bond before expiration. A lapsed bond suspends Oregon WMT operations.' Acknowledgment required.	Carrier initiates bond renewal. Records new expiry date when renewed. Override logged.
<b>Oregon Miles Present — No WMT Return Initiated</b>	or_miles_month, return_status, days_until_due	or_miles_month > 0 AND return_status = 'not started' AND days_until_due <= 10	Orange flag. Message: 'Oregon WMT miles recorded for [month] but no return has been initiated. Filing is due on [date].' Acknowledgment required.	Carrier initiates return preparation. Override logged.
<b>IFTA Oregon Miles vs. WMT Oregon Miles Discrepancy</b>	ifta_or_miles, wmt_or_miles	Variance > 5% between IFTA-reported OR miles and WMT-reported OR miles for same period	Orange flag. Message: 'Oregon miles on the IFTA return differ from Oregon miles on the WMT return by more than 5%. Since Oregon WMT is paid separately from IFTA, both must reflect accurate Oregon	Carrier reconciles mileage data. Corrects IFTA or WMT entry as appropriate. Override logged.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
			mileage. Verify and reconcile. Acknowledgment required.	
<b>Declared Operating Weight Changed — Rate Recalculation</b>	vehicle_declared_weight_current, vehicle_declared_weight_prior	Declared weight changes AND crosses into different WMT rate tier	Orange alert. Message: 'The declared operating weight for vehicle [VIN] has changed and crosses into a different Oregon WMT rate tier. Tax calculations for this vehicle will be updated. Verify the new weight is accurate.' Acknowledgment required.	Carrier confirms weight change. System applies new rate. Override logged.
<b>New Vehicle Added — WMT Declaration Not Filed</b>	vehicle_add_date, or_miles, wmt_declaration_status	Vehicle added AND or_miles > 0 AND wmt_declaration_status = null AND days since add > 5	Orange alert. Message: 'Vehicle [VIN] was added [X] days ago and has Oregon miles but a WMT operating weight declaration has not been filed with ODOT. Declare this vehicle through Oregon Trucking Online before operating in Oregon.' Acknowledgment required.	Carrier files weight declaration for new vehicle. Override logged.
<b>Temporary Pass Count Approaching Limit</b>	temp_pass_count_rolling_12mo	temp_pass_count = 4 in rolling 12-month window	Orange flag. Message: '[VIN] has used 4 of the allowed 5 temporary passes in the past 12 months. One more pass will trigger mandatory WMT account registration. Consider registering now.' Acknowledgment required.	Carrier acknowledges approaching limit. Plans account registration if needed. Override logged.
<b>WMT Return Amount Unusually High or Low</b>	return_tax_amount, prior_month_avg	Amount > 3x OR < 0.33x prior 3-month average AND or_miles not zero	Orange flag. Message: 'Oregon WMT tax amount for [month] differs significantly from your recent monthly average. Verify mileage and declared weight data before filing.' Acknowledgment required.	Carrier reviews mileage and weight data. Override logged.

## 5. Medium Exceptions — Informational Warning

The following exceptions display a warning in the compliance dashboard but do not require acknowledgment. They are logged automatically and visible in the carrier's compliance history.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>Monthly Return Due Within 20 Days</b>	monthly_due_date, current_date	current_date >= (monthly_due_date - 20 days) AND current_date < (monthly_due_date - 10 days)	Yellow reminder on dashboard. Message: 'Oregon WMT return for [month] is due on [date] — [X] days away.'	Carrier notes reminder. Escalates to HIGH at 10 days.
<b>Bond Expiring Within 90 Days</b>	bond_expiry_date, current_date	current_date >= (bond_expiry_date - 90 days) AND current_date < (bond_expiry_date - 60 days)	Yellow flag. Message: 'Oregon Highway Use Tax Bond expires on [date] — approximately [X] days away. Begin bond renewal process with your surety provider.'	Carrier notes reminder. Escalates to HIGH at 60 days.
<b>Oregon Miles at \$0 on IFTA — WMT Reminder</b>	ifta_or_miles, wmt_return_status	ifta_or_miles > 0 AND wmt_return_status for same period = 'not started'	Yellow flag. Message: 'Oregon miles are present on the IFTA return for this period. Remember: Oregon WMT is paid separately through a monthly filing on Oregon Trucking Online. The IFTA return does not cover Oregon road-use tax.'	Carrier notes reminder. No action required.
<b>Vehicle Weight Near 26,000 lb WMT Threshold</b>	vehicle_declared_weight	vehicle_declared_weight >= 23000 AND vehicle_declared_weight <= 26000 AND or_miles > 0	Yellow flag. Message: 'Vehicle [VIN] has a declared weight close to the 26,000 lb Oregon WMT threshold. Verify the declared weight is accurate. Crossing this threshold subjects the	Carrier verifies weight. No action required.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
			vehicle to Oregon WMT.'	
<b>Consecutive Zero Return Months</b>	zero_return_count	3 or more consecutive zero-mile months for carrier with active WMT account	Yellow flag. Message: 'Oregon WMT zero returns filed for [X] consecutive months. Verify no Oregon miles are being missed in data capture.'	Carrier confirms Oregon operations status. No action required.
<b>Round Number Mileage Entries in Oregon</b>	or_miles_entries[]	Oregon miles are round numbers (divisible by 100) for 2 or more consecutive months	Yellow flag. Message: 'Oregon WMT mileage entries appear to be estimated round numbers. Oregon WMT requires actual recorded mileage and round numbers are an audit flag.'	Carrier verifies mileage records. No action required.
<b>No WMT Filing History on File</b>	wmt_filing_history[]	Zero WMT filing records in system for carrier with active account	Yellow banner. Message: 'No Oregon WMT filing history has been entered. Upload or enter your filing history so the platform can track your compliance accurately.'	Carrier enters filing history. No action required.
<b>Bond Amount May Be Insufficient for Fleet Size</b>	bond_amount, fleet_size, estimated_annual_wmt	$bond\_amount < (fleet\_size \times \$2000)$ OR $bond\_amount < estimated\_annual\_wmt \times 0.25$	Yellow flag. Message: 'Your Oregon Highway Use Tax Bond amount may be insufficient based on your current fleet size or estimated annual WMT liability. Review with your surety provider.'	Carrier reviews bond amount with surety provider. No action required.

## 6. Informational Exceptions — Compliance Dashboard

The following conditions are displayed in the carrier's compliance dashboard for awareness and audit preparedness. They do not appear in any filing workflow and do not block any action.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>Monthly Return Filed — Confirmation Recorded</b>	return_status, return_confirmation_number	return_status = 'filed' AND confirmation_number present	Dashboard notice: 'Oregon WMT return for [month] filed on [date]. Confirmation: [number]. Tax paid: \$[amount].'	No action required.
<b>Zero Return Filed — Month Confirmed</b>	return_status, or_miles_month	return_status = 'filed' AND or_miles = 0	Dashboard notice: 'Oregon WMT zero return filed for [month]. No Oregon miles recorded for this period.'	No action required.
<b>Next Monthly Filing Due Date</b>	next_monthly_due_date	Always displayed	Dashboard display: 'Next Oregon WMT filing due: [date] ([X] days away).'	No action required. Escalation chain begins at 20 days.
<b>Bond Active — Expiry Tracked</b>	bond_expiry_date, bond_status	bond_status = 'active'	Dashboard green status: 'Oregon Highway Use Tax Bond active. Expires: [date]. [X] days until renewal.'	No action required. Escalation chain begins at 90 days.
<b>Vehicle Declared Weight and Rate on File</b>	vehicle_declared_weight, wmt_rate	Both fields present for OR-operating vehicle	Dashboard notice per vehicle: 'Vehicle [VIN] — Declared weight: [X] lbs. Oregon WMT rate: \$[X]/mile.'	No action required. Rate updates if weight changes.
<b>Temporary Pass Used — Count Updated</b>	temp_pass_count_rolling_12mo	New temporary pass recorded	Dashboard notice: 'Temporary pass recorded for vehicle [VIN]. [X] of 5 passes used in rolling 12-month window.'	No action required. Escalation fires at count = 4.

Exception Name	Field(s)	Threshold / Trigger	UI Behavior	Resolution Path
<b>Oregon IFTA Miles at \$0 — WMT Confirmed Filed</b>	ifta_or_miles, wmt_same_period_status	ifta_or_miles > 0 AND wmt return filed for same period	Dashboard green notice: 'Oregon miles on IFTA return: [X]. Oregon WMT return filed separately for this period. Both obligations satisfied.'	No action required.
<b>12-Month WMT Filing Summary</b>	wmt_filing_history_12mo	Always displayed on dashboard	Dashboard summary showing 12- month filing calendar: each month color- coded filed (green), zero return (blue), or not yet due (gray).	No action required.

## 7. Escalation Rules

Oregon WMT escalation rules are built around the unique monthly filing cadence. With 12 filing deadlines per year, the platform must maintain a continuous escalation cycle that resets at the start of each new reporting month. The bond expiry escalation runs independently on its own timeline.

### 7.1 Time-Based Escalation — Monthly Filings

The monthly escalation cycle resets on the first of each month when the new reporting month begins.

Exception	Info Fires At	Escalates to HIGH At	Escalation Condition
Monthly Return	20 days before due date	10 days before due date	Return not filed
Monthly Return	10 days before due date	Due date passes	Escalates to CRITICAL — overdue
Multiple Returns	Second overdue return	Immediately	Escalates to CRITICAL with count displayed

### 7.2 Time-Based Escalation — Highway Use Tax Bond

Exception	Info Fires At	Escalates to HIGH At	Escalation Condition
Highway Use Tax Bond	90 days before expiry	60 days before expiry	Renewal not initiated
Highway Use Tax Bond	60 days before expiry	Bond expiry date	Escalates to CRITICAL — bond lapsed

### 7.3 Temporary Pass Count Escalation

Exception	Info Fires At	Escalates to HIGH At	Escalation Condition
Temporary Pass Count	3 passes used (rolling 12mo)	4 passes used	Account registration not initiated
Temporary Pass Count	4 passes used	5 passes used	Escalates to CRITICAL — limit exceeded

## 7.4 Pattern-Based Escalation

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Any Medium exception appearing for three or more consecutive months automatically escalates to High for the following month.

**Affected exceptions:** IFTA vs. WMT Oregon Miles Discrepancy, Round Number Mileage Entries, Consecutive Zero Return Months.

**Database field:** exception\_history.consecutive\_month\_count

**Trigger:** consecutive\_month\_count >= 3

**Action:** Set exception.severity = HIGH. Log escalation event with timestamp.

## 7.5 Audit Trail Requirements

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Every exception acknowledged or overridden at the High level must generate an immutable audit log entry containing the following fields:

- exception\_id — unique identifier for the exception instance
- carrier\_id — carrier account associated with the Oregon WMT record
- oregon\_carrier\_account — the Oregon carrier account number
- user\_id — user who acknowledged the exception
- user\_name — full name of acknowledging user
- timestamp — UTC datetime of acknowledgment
- exception\_type — exception code from the master exception list
- severity\_at\_time — severity level at the time of acknowledgment
- reason\_entered — free-text explanation (required, minimum 20 characters)
- reporting\_month — the specific calendar month the exception applies to
- vehicle\_id — specific vehicle the exception applies to (where applicable)

Audit log entries are read-only once created and cannot be edited or deleted by any user role including system administrator.

## 8. Configurable Threshold Reference

The following thresholds are configurable at the platform level by a system administrator. Note that Oregon WMT uses monthly rather than quarterly thresholds throughout.

Parameter	Default Value	Allowable Range	Notes
Monthly Return — MEDIUM Reminder	20 days before due	14 – 25 days	Yellow warning fires
Monthly Return — HIGH Escalation	10 days before due	7 – 14 days	Tighter than quarterly modules
Monthly Return — CRITICAL	0 days	Non-configurable	Immediately on due date if not filed
Bond Expiry — MEDIUM Reminder	90 days	60 – 120 days	First reminder fires
Bond Expiry — HIGH Escalation	60 days	30 – 90 days	Acknowledgment required
Bond Expiry — CRITICAL	0 days	Non-configurable	Immediately on expiry
Temporary Pass INFO Threshold	3 passes	2 – 4	First count reminder
Temporary Pass HIGH Threshold	4 passes	3 – 4	Approaching limit acknowledgment
Temporary Pass CRITICAL Threshold	5 passes	Non-configurable	ODOT requires account registration
IFTA vs. WMT Mileage Variance	5%	2% – 10%	Triggers HIGH discrepancy flag
Tax Amount Variance vs. Prior 3 Months	3x or 0.33x	Non-configurable	Triggers HIGH acknowledgment
Vehicle Weight Near Threshold	23,000 lbs	20,000 – 25,999	Triggers MEDIUM flag
Consecutive Zero Month Threshold	3 months	2 – 5 months	Triggers MEDIUM flag
Round Number Mileage — Consecutive	2 months	2 – 4 months	Triggers MEDIUM flag
Pattern Escalation — MEDIUM to HIGH	3 months	2 – 5 months	Consecutive occurrence escalation
Bond Sufficiency Check	\$2,000/vehicle	Non-configurable	ODOT minimum — triggers MEDIUM if below
Reason Text Minimum Length	20 chars	10 – 100 chars	Required for HIGH acknowledgment

## 9. UI Behavior Summary

### 9.1 Carrier Oregon WMT Compliance Dashboard Card

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- A dedicated Oregon WMT compliance card is displayed on every carrier dashboard with Oregon miles or an active WMT account. It shows: Oregon carrier account number, bond status and expiry, current month return status, the last 12 months of filing history as a color-coded calendar, and temporary pass count (if applicable).
- The 12-month filing calendar is the centerpiece of the Oregon WMT dashboard card because of the monthly filing cadence. Each month is shown as a tile: green (filed on time), orange (filed late), red (overdue/not filed), blue (zero return filed), gray (not yet due).
- CRITICAL exceptions display as a full-width red banner with direct link to Oregon Trucking Online.
- HIGH exceptions display as orange banners with the specific month, due date, and days remaining.
- MEDIUM exceptions display as yellow inline flags.

### 9.2 IFTA / WMT Interaction Display

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- Every IFTA quarterly return screen that includes Oregon miles displays a prominent informational banner: 'Oregon miles carry a \$0.00 IFTA tax rate. Oregon road-use tax is collected separately through your monthly Oregon WMT filing on Oregon Trucking Online. Verify your Oregon WMT returns are current for this period.'
- The Oregon IFTA rate is locked to \$0.00 in the platform and cannot be manually changed. If a non-zero rate is detected on any Oregon IFTA entry the platform triggers a CRITICAL exception.
- A cross-reference summary is displayed showing: Oregon miles on IFTA return for the quarter, Oregon WMT returns filed for the same months, and a confirmation status for each month within the IFTA quarter.

### 9.3 Monthly Return Preparation

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- The platform pre-populates the monthly WMT return with Oregon miles pulled from ELD or IFTA data for each qualifying vehicle for the reporting month.
- The platform cross-references Oregon miles on the WMT return against Oregon miles on the IFTA return for the same period and flags any variance above the configurable threshold.
- For zero-mile months, the platform auto-generates a zero return and prompts the carrier to review and file it.
- All WMT returns are filed through Oregon Trucking Online. The platform provides pre-populated data and a direct link.
- The platform records the filing confirmation number and tax amount for each monthly return, maintaining a complete 12-month filing record.

### 9.4 Highway Use Tax Bond Management

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- The platform stores bond details for each carrier: surety provider name, bond number, bond amount, and expiry date.
- Bond sufficiency is checked at registration and when fleet size changes. If the bond amount falls below \$2,000 per vehicle a MEDIUM flag is triggered.
- When a bond is renewed the carrier enters the new bond number and expiry date. The platform validates the new expiry is in the future and resets the escalation schedule.
- Bond history is retained for audit reference.

## 9.5 Declared Weight Management

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- Oregon WMT uses declared operating weight per vehicle, not the same as gross vehicle weight or unloaded weight used in other states.
- Each vehicle has a declared weight that must be filed with ODOT and recorded in the platform. The declared weight determines the per-mile tax rate from the rate table.
- When a vehicle's declared weight changes the carrier must file an amended weight declaration with ODOT and update the platform. The platform flags the change and applies the new rate from the next reporting month forward.
- Historical rate calculations are preserved for prior months based on the declared weight in effect for each period.

## 9.6 Cross-Module Integration

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- IFTA Module: Oregon miles from IFTA are used to pre-populate monthly WMT returns and cross-reference mileage. Oregon IFTA rate is locked at \$0.00. Any non-zero Oregon IFTA rate triggers CRITICAL.
- Oregon fuel purchases in IFTA generate credits against other IFTA states but create no Oregon tax obligation through IFTA. The platform must correctly handle this credit without creating a false Oregon IFTA tax.
- Vehicle Profile: Any change to a vehicle's declared operating weight triggers an immediate rate recalculation for Oregon WMT and a HIGH acknowledgment requirement if the weight crosses a rate tier boundary.
- Bond module cross-reference: if the fleet grows significantly (more than 20% vehicle count increase) the platform prompts the carrier to verify bond sufficiency.

## 9.7 Notification Delivery

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- CRITICAL exceptions: immediate in-app full-page alert + email with direct link to Oregon Trucking Online.
- HIGH exceptions: in-app notification + email at each monthly escalation threshold (20 days, 10 days, due date).
- Because Oregon WMT fires 12 monthly escalation cycles per year, the platform allows carriers to configure a monthly compliance digest email summarizing all upcoming Oregon WMT obligations for the next 30 days rather than receiving individual alerts for each month.
- Bond expiry alerts: separate email thread from filing alerts, clearly labeled as bond-related.
- MEDIUM and INFO: in-app dashboard only. No email unless carrier opts into all compliance notifications.

- Cross-module IFTA interaction reminder: an automated monthly email is sent to all carriers with active Oregon WMT accounts reminding them that the Oregon IFTA entry for the current quarter should show \$0 and that WMT is filed separately.