

# Oklahoma Resident Income Tax Return

Form 511  
2020



Your Social Security Number  Place an 'X' in this box if this taxpayer is deceased →

Spouse's Social Security Number (joint return only)  Place an 'X' in this box if this taxpayer is deceased →

**AMENDED RETURN!**  
Place an 'X' in this box if this is an amended 511. See Schedule 511-I. →

**Name and Address - Please Print or Type**

Your first name	Middle initial	Last name	If a joint return, spouse's first name	Middle initial	Last name
Mailing address (number and street, including apartment number, rural route or PO Box)			City	State	ZIP

**Filing Status**

1  Single

2  Married filing joint return (even if only one had income)

3  Married filing separate  
*(If spouse is also filing, list name and SSN in the boxes)*

Name	SSN
<input type="text"/>	<input type="text"/>

4  Head of household with qualifying person

5  Qualifying widow(er) with dependent child  
• Please list the year spouse died in box at right:

\* Note: If claiming **Special Exemption**, see instructions on page 9 of 511 Packet.

<b>Exemptions</b>	Regular	* Special	Blind	=	<input type="text"/>	(a)				
	Yourself	+ <input type="text"/>	+ <input type="text"/>				+ <input type="text"/>	=	<input type="text"/>	(b)
	Spouse	+ <input type="text"/>	+ <input type="text"/>				+ <input type="text"/>			
<b>Number of dependents</b>				=	<input type="text"/>	(c)				
Add the Totals from boxes (a), (b) and (c). Enter the TOTAL here:				=	<input type="text"/>					

Note: If you may be claimed as a dependent on another return, enter "0" in the Total box for your regular exemption.

Age 65 or Older? (Please see instructions)  Yourself  Spouse

**PART ONE: TO ARRIVE AT OKLAHOMA ADJUSTED GROSS INCOME**

1	Federal adjusted gross income (from Federal 1040 or 1040-SR).....
2	Oklahoma Subtractions (provide Schedule 511-A).....
3	Line 1 minus line 2.....
4	Out-of-state income, except wages. Describe (4a) (Provide Federal schedule with detailed description; see instructions).....
5	Line 3 minus line 4b.....
6	Oklahoma Additions (provide Schedule 511-B).....
7	<b>Oklahoma adjusted gross income</b> (line 5 plus line 6)..... (If line 7 is different than line 1, provide a copy of your Federal return.)

Round to Nearest Whole Dollar

1	<input type="text"/>	00
2	<input type="text"/>	00
3	<input type="text"/>	00
4b	<input type="text"/>	00
5	<input type="text"/>	00
6	<input type="text"/>	00
7	<input type="text"/>	00

**PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS**

8	Oklahoma Adjustments (provide Schedule 511-C).....
9	Oklahoma income after adjustments (line 7 minus line 8).....
<b>STOP AND READ:</b> If line 4b is zero, complete lines 10-11. If line 4b is more than zero, see Schedule 511-E and do not complete lines 10-11.	
10	Oklahoma itemized deductions (from Schedule 511-D, line 11) or Oklahoma standard deduction ( <b>Single or Married Filing Separate: \$6,350 • Married Filing Joint or Qualifying Widow(er): \$12,700 • Head of Household: \$9,350</b> ).....
11	Exemptions: Enter the total number of exemptions claimed above <input type="text"/> X \$1,000.....
12	Total deductions and exemptions (add lines 10 and 11 or amount from Sch. 511-E, line 5).....
13	Oklahoma Taxable Income (line 9 minus line 12).....
14	(a) Oklahoma Income Tax from Tax Table (see pages 27-38 of instructions) or if using Farm Income Averaging, enter tax from Form 573, line 22 and enter a "1" in box on line 14..... <input type="text"/> 00
	(b) If paying the Health Savings Account additional 10% tax, add additional tax here and enter a "2" in box on line 14. If recapturing the Oklahoma Affordable Housing Tax Credit, add recaptured credit here and enter a "3" in box on line 14. If making an Oklahoma installment payment pursuant to IRC Section 965(h) and 68 O.S. Sec. 2368(K), add the installment payment here and enter a "4" in the box on line 14..... <input type="text"/> 00
	Oklahoma Income Tax (line 14a plus line 14b)..... <input type="text"/> 00
<b>STOP AND READ:</b> If line 7 is equal to or larger than line 1, complete lines 15 and 16. If line 7 is smaller than line 1, complete Schedules 511-F and 511-G.	
15	Oklahoma child care/child tax credit (see instructions).....
16	Oklahoma earned income credit (see instructions).....
17	Credit for taxes paid to another state (provide Form 511TX).....
18	Form 511CR - Other Credits Form. List 511CR line number claimed here: <input type="text"/>
19	<b>Income Tax</b> (line 14 minus lines 15-18) Do not enter less than zero.....

8	<input type="text"/>	00
9	<input type="text"/>	00
10	<input type="text"/>	00
11	<input type="text"/>	00
12	<input type="text"/>	00
13	<input type="text"/>	00
14a	<input type="text"/>	00
14b	<input type="text"/>	00
14	<input type="text"/>	00
15	<input type="text"/>	00
16	<input type="text"/>	00
17	<input type="text"/>	00
18	<input type="text"/>	00
19	<input type="text"/>	00

**DO NOT PAY THIS AMOUNT. PAYMENT IS FIGURED ON LINE 43.**

The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.



Name(s) shown on Form 511:

Your Social Security Number:

**PART THREE: TAX, CREDITS AND PAYMENTS**

20	Total from line 19.....	20		00
21	Use tax due on Internet, mail order, or other out-of-state purchases..... (For use tax table, see page 14 of the Packet) If you certify that no use tax is due, place an 'X' here: <input type="checkbox"/>	21		00
22	Balance (add lines 20 and 21).....	22		00
23	Oklahoma withholding (provide all W-2s, 1099s or other withholding statements) ..	23		00
24	2020 estimated tax payments ..... (qualified farmer <input type="checkbox"/> ).....	24		00
25	2020 payment with extension .....	25		00
26	Low Income Property Tax Credit (provide Form 538-H).....	26		00
27	Sales Tax Relief Credit (provide Form 538-S).....	27		00
28	Natural Disaster Tax Credit (provide Form 576).....	28		00
29	Credits from Form ..... a) <input type="checkbox"/> 577 ..... b) <input type="checkbox"/> 578	29		00
30	Amount paid with original return plus additional paid after it was filed (amended return only).....	30		00
31	<b>Payments and credits</b> (add lines 23-30).....	31		00
32	Overpayment, if any, as shown on original return and/or prior amended return(s) or as previously adjusted by Oklahoma (amended return only).....	32		00
33	<b>Total payments and credits</b> (line 31 minus 32).....	33		00

**PART FOUR: REFUND**

34	If line 33 is more than line 22, subtract line 22 from line 33. This is your overpayment.....	34		00
35	Amount of line 34 to be applied to 2021 estimated tax (original return only) (For further information regarding estimated tax, see page 5 of the 511 Packet.)	35		00
<p><b>Schedule 511-H provides you with the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Please place the line number of the organization from Schedule 511-H in the box below. If you give to more than one organization, put a "99" in the box. Provide Schedule 511-H ..</b> <input type="checkbox"/></p>				
36	Donations from your refund (total from Schedule 511-H).....	36		00
37	Total deductions from refund (add lines 35 and 36).....	37		00
38	Amount to be refunded to you (line 34 minus line 37).....	38		00

**Direct Deposit Note:**  
Verify your account and routing numbers are correct. If your direct deposit fails to process or you do not choose direct deposit, you will receive a **debit card**. See the 511 Packet for direct deposit and debit card information.

Is this refund going to or through an account that is located outside of the United States?  Yes  No

**Deposit my refund in my:**

**checking account** Routing Number:

**savings account** Account Number:

**PART FIVE: AMOUNT YOU OWE**

39	If line 22 is more than line 33, subtract line 33 from line 22. This is your tax due.....	39		00
40	a) Donation: Support the Oklahoma General Revenue Fund ( <b>original return only</b> ).....	40a		00
	b) Donation: Public School Classroom Support Fund ( <b>original return only</b> ).....	40b		00
41	Underpayment of estimated tax interest (annualized installment method ..... <input type="checkbox"/> ) .. (If you have an underpayment of estimated tax (line 41) & overpayment (line 34), see instructions.)	41		00
42	For delinquent payment add penalty of 5% ..... \$ ..... plus interest of 1.25% per month ..... \$ .....	42		00
43	<b>Total tax, donation, penalty and interest</b> (add lines 39-42).....	43		00

Under penalty of perjury, I declare the information contained in this document, and all attachments and schedules, is true and correct to the best of my knowledge and belief. Place an 'X' in this box if the Oklahoma Tax Commission may discuss this return with your tax preparer.....

Taxpayer's signature	Date	Spouse's signature	Date	Paid Preparer's signature	Date
Taxpayer's occupation		Spouse's occupation		Paid Preparer's address and phone number	
Daytime Phone (optional)		Daytime Phone (optional)		Paid Preparer's PTIN	



Name(s) shown on Form 511:

Your Social Security Number:

### Schedule 511-A: Oklahoma Subtractions

See instructions for details on qualifications and required documents.

1	Interest on U.S. government obligations .....	1		00
2	Social Security benefits taxed on your Federal Form 1040 or 1040-SR .....	2		00
3	Federal civil service retirement in lieu of social security .....	3		00
	Retirement Claim Number: Taxpayer <input type="text"/> Spouse <input type="text"/>			
4	Military Retirement (see instructions for limitation) .....	4		00
5	Oklahoma government or Federal civil service retirement (see instructions for limitation) .....	5		00
6	Other retirement income (see instructions for limitation) .....	6		00
7	U.S. Railroad Retirement Board benefits .....	7		00
8	Oklahoma depletion .....	8		00
9	Oklahoma net operating loss (provide schedules)..... Loss Year(s) <input type="text"/>	9		00
10	Exempt tribal income (see instructions for qualifications) .....	10		00
11	Gains from the sale of exempt government obligations .....	11		00
12	Oklahoma Capital Gain Deduction (provide Form 561) .....	12		00
13	Income Tax Refund (Federal Form 1040 or 1040-SR, Schedule 1, line 1) .....	13		00
14	Oklahoma income distributed by an electing PTE .....	14		00
15	Miscellaneous: Other subtractions (enter number in box for type of deduction)..... <input type="text"/>	15		00
16	<b>Total subtractions</b> (add lines 1-15, enter total here and on line 2 of Form 511) .....	16		00

### Schedule 511-B: Oklahoma Additions

See instructions for details on qualifications and required documents.

1	State and municipal bond interest.....	1		00
2	Out-of-state losses (describe _____ ) Enter as a positive number	2		00
3	Lump sum distributions (not included in your Federal Adjusted Gross Income) .....	3		00
4	Federal net operating loss - Enter as a positive number .....	4		00
5	Recapture of depletion claimed on a lease bonus or add back of excess Federal depletion .....	5		00
6	Recapture of Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s)	6		00
7	Oklahoma loss distributed by an electing PTE .....	7		00
8	Miscellaneous: Other additions (enter number in box for type of addition)..... <input type="text"/>	8		00
9	<b>Total additions</b> (add lines 1-8, enter total here and on line 6 of Form 511).....	9		00

### Schedule 511-C: Oklahoma Adjustments

See instructions for details on qualifications and required documents.

1	Military pay exclusion - Active Duty, Reserve and National Guard (not retirement income) .....	1		00
2	Qualifying disability deduction .....	2		00
3	Qualified adoption expense .....	3		00
4	Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) .....	4		00
5	Deduction for providing foster care .....	5		00
6	Miscellaneous: Other adjustments (enter number in box for type of deduction)..... <input type="text"/>	6		00
7	<b>Total adjustments</b> (add lines 1-6, enter total here and on line 8 of Form 511).....	7		00



**2020 Form 511 - Resident Income Tax Return - Page 4**  
**Note: Provide this page ONLY if you have an amount shown on a schedule.**

Name(s) shown on Form 511:

Your Social Security Number:

**Schedule 511-D: Oklahoma Itemized Deductions** See instructions for details on qualifications and required documents.

If you claimed itemized deductions on your Federal return, you must claim Oklahoma Itemized Deductions.

1	Federal itemized deductions from Federal Sch. A, line 17.....	1		00
2	State and local sales or income taxes from Federal Sch. A, line 5a (If Federal Sch A, line 5e is limited, enter that portion of Federal Sch A, line 5a included in line 5e) .....	2		00
3	Line 1 minus line 2 .....	3		00
4	Medical and Dental expenses from Federal Sch. A, line 4 .....	4		00
5	Gifts to Charity from Federal Sch. A, line 14.....	5		00
6	Line 3 minus lines 4 and 5 .....	6		00
7	Is line 6 more than \$17,000? <input type="checkbox"/> YES. Your itemized deductions are limited. Complete lines 9-11. <input type="checkbox"/> NO. Your itemized deductions are not limited. Skip lines 9 & 10. Go to line 11.			
8	Maximum amount allowed for itemized deductions. (exception, lines 9 & 10).....	8	17,000	00
9	Medical and Dental expenses from Federal Sch. A, line 4 .....	9		00
10	Gifts to Charity from Federal Sch. A, line 14.....	10		00
11	<b>Oklahoma Itemized Deductions</b> If you responded YES on line 7: Add lines 8, 9 and 10 If you responded NO on line 7: enter the amount from line 3 .....	11		00

Enter your Oklahoma Itemized Deductions on line 10 of Form 511 unless you have income from out-of-state on line 4 of Form 511. If you have an amount on line 4 of Form 511, complete Schedule 511-E "Deductions and Exemptions" to determine the amount to enter on line 12 of Form 511.

**Schedule 511-E: Deductions and Exemptions** See instructions for details on qualifications and required documents.

Use this schedule if you have income from out-of-state (Form 511, line 4). Your exemptions and deductions must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income reduced by allowable adjustments except out-of-state income. If you claimed itemized deductions on your federal return, complete Schedule 511-D before completing this schedule.

1	Oklahoma itemized deductions (Schedule 511-D, line 11) or Oklahoma standard deduction.....	1		00
2	Exemptions (\$1,000 x number of exemptions claimed at top of Form 511).....	2		00
3	Total (add lines 1 and 2).....	3		00
4	Divide the amount on line 7 of Form 511 by the amount on line 3 of Form 511  <div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; width: 150px; height: 20px; margin-right: 10px;"></div> <div style="font-size: 24px; margin: 0 10px;">÷</div> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 10px;"></div> </div> Enter the percentage from the above calculation here (do not enter more than 100%) .....	4		%
5	<b>Total allowable deductions and exemptions</b> (multiply line 3 by percentage on line 4, enter total here and on line 12 of Form 511) (Leave lines 10 - 11 of Form 511 blank).....	5		00



Name(s) shown on Form 511:

Your Social Security Number:

**Schedule 511-F: Child Care/Child Tax Credit** See instructions for details on qualifications and required documents.

If your Federal Adjusted Gross Income is \$100,000 or less and you are allowed either a credit for child care expenses or the child tax credit on your Federal return, you are allowed a credit against your Oklahoma tax. Your Oklahoma credit is the **greater** of:

- 20% of the credit for child care expenses allowed by the IRS Code.  
Your allowed Federal credit cannot exceed the amount of your Federal tax reported on your Federal return.
- or**
- 5% of the child tax credit allowed by the IRS Code.  
This includes both the nonrefundable child tax credit and the refundable additional child tax credit.

The credit must be prorated based on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income. If your Federal Adjusted Gross Income is greater than \$100,000, no credit is allowed. Provide a copy of your Federal return and, if applicable, the Federal child care credit schedule.

1	Enter your Federal child <b>care</b> credit.....	1	<input type="text"/>	00
2	Multiply line 1 by 20% .....	2	<input type="text"/>	00
3	Enter your Federal child <b>tax</b> credit (total of child tax credit & additional child tax credit) .....	3	<input type="text"/>	00
4	Multiply line 3 by 5% .....	4	<input type="text"/>	00
5	Enter the larger of line 2 or line 4 .....	5	<input type="text"/>	00
6	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511 <input type="text"/> ÷ <input type="text"/> Enter the percentage from the above calculation here ( <b>do not enter more than 100%</b> ).....	6	<input type="text"/>	%
7	Multiply line 5 by line 6. This is your Oklahoma child care/child tax credit. Enter total here and on line 15 of Form 511 .....	7	<input type="text"/>	00

**Schedule 511-G: Earned Income Credit** See instructions for details on qualifications and required documents.

You are allowed a credit equal to 5% of the Earned Income Credit allowed on your Federal return. The credit must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income. Provide a copy of your Federal return.

1	Federal earned income credit .....	1	<input type="text"/>	00
2	Multiply line 1 by 5% .....	2	<input type="text"/>	00
3	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511 <input type="text"/> ÷ <input type="text"/> Enter the percentage from the above calculation here ( <b>do not enter more than 100%</b> ).....	3	<input type="text"/>	%
4	Oklahoma earned income credit (multiply line 2 by line 3, enter total here and on line 16 of Form 511).....	4	<input type="text"/>	00



2020 Form 511 - Resident Income Tax Return - Page 6 - Note: Provide this page ONLY if you have an amount shown on a schedule or are filing an amended return.

Name(s) shown on Form 511:

Your Social Security Number:

Schedule 511-H: Donations from Refund (Original return only)

This schedule allows you to make a donation from your refund to a variety of Oklahoma organizations. Information regarding each program, its mission, how funds are utilized, and mailing addresses are shown in Schedule 511-H Information. If you are not receiving a refund, but would like to make a donation to one of these organizations, Schedule 511-H Information lists the mailing address to mail your donation to the organization. If you are not receiving a refund and wish to donate to Support the Oklahoma General Revenue Fund or Public School Classroom Support Fund, see line 40a or 40b of Form 511.

Place an 'X' in the box associated with the dollar amount you wish to have deducted from your refund and donated to that organization. Then carry that figure over into the column at the right. When you carry your figure back to line 36 of Form 511, please list the line number of the organization to which you donated. If you donate to more than one organization, please write a "99" in the box at line 36 of Form 511.

See Packet 511, pages 25 and 26 for Schedule 511-H Information.

Table with 12 rows and 5 columns. Rows 1-11 list various Oklahoma organizations with checkboxes for \$2 and \$5 amounts and a column for the amount to be deducted. Row 12 is for 'Total donations'.

Schedule 511-I: Amended Return Information

Did you file an amended Federal return? Yes [ ] No [ ]

If Yes, provide a copy of the IRS Form 1040X or 1045 AND proof of IRS acceptance, such as a copy of the IRS "Statement of Adjustment," IRS check or deposit slip. IRS documents submitted after filing this Oklahoma amended return may delay processing.

Explain the changes to income, deductions, and/or credits below. Enter the line reference number for which you are reporting a change and give the reason. If more space is needed, provide a separate schedule.

Horizontal lines for providing explanation of changes to income, deductions, and/or credits.