

Oklahoma Resident Income Tax Return

**Form 511
2020**

Barcode
Placeholder

Your Social Security Number		Spouse's Social Security Number (joint return only)		AMENDED RETURN!
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Place an 'X' in this box if this taxpayer is deceased →		Place an 'X' in this box if this taxpayer is deceased →		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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mailing address (number and street, including apartment number, rural route or PO Box)			City	State	ZIP
<input type="text"/>			<input type="text"/>	<input type="text"/>	<input type="text"/>

Filing Status	<input type="checkbox"/> 1	Single
	<input type="checkbox"/> 2	Married filing joint return (even if only one had income)
	<input type="checkbox"/> 3	Married filing separate <i>(If spouse is also filing, list name and SSN in the boxes below)</i>
	Name <input type="text"/> SSN <input type="text"/>	
	<input type="checkbox"/> 4	Head of household with qualifying person
<input type="checkbox"/> 5	Qualifying widow(er) with dependent child	
• Please list the year spouse died in box at right: <input type="text"/>		

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

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

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

		Round to Nearest Whole Dollar	
<input type="checkbox"/> 1	Federal adjusted gross income (from Federal 1040 or 1040-SR).....	1	<input type="text"/> 00
<input type="checkbox"/> 2	Oklahoma Subtractions (provide Schedule 511-A).....	2	<input type="text"/> 00
<input type="checkbox"/> 3	Line 1 minus line 2.....	3	<input type="text"/> 00
<input type="checkbox"/> 4	Out-of-state income, except wages. Describe (4a) (Provide Federal schedule with detailed description; see instructions).....	4b	<input type="text"/> 00
<input type="checkbox"/> 5	Line 3 minus line 4b.....	5	<input type="text"/> 00
<input type="checkbox"/> 6	Oklahoma Additions (provide Schedule 511-B).....	6	<input type="text"/> 00
<input type="checkbox"/> 7	Oklahoma adjusted gross income (line 5 plus line 6)..... (If line 7 is different than line 1, provide a copy of your Federal return.)	7	<input type="text"/> 00

PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS

<input type="checkbox"/> 8	Oklahoma Adjustments (provide Schedule 511-C).....	8	<input type="text"/> 00
<input type="checkbox"/> 9	Oklahoma income after adjustments (line 7 minus line 8).....	9	<input type="text"/> 00
STOP AND READ: 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.			
<input type="checkbox"/> 10	Oklahoma itemized deductions (from Schedule 511-D, line 11) or Oklahoma standard deduction (Single or Married Filing Separate: \$6,350 • Married Filing Joint or Qualifying Widow(er): \$12,700 • Head of Household: \$9,350).....	10	<input type="text"/> 00
<input type="checkbox"/> 11	Exemptions: Enter the total number of exemptions claimed above..... <input type="text"/> X \$1,000.....	11	<input type="text"/> 00
<input type="checkbox"/> 12	Total deductions and exemptions (add lines 10 and 11 or amount from Sch. 511-E, line 5).....	12	<input type="text"/> 00
<input type="checkbox"/> 13	Oklahoma Taxable Income (line 9 minus line 12).....	13	<input type="text"/> 00
<input type="checkbox"/> 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.....	14a	<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.....	14b	<input type="text"/> 00
<input type="checkbox"/> 14	Oklahoma Income Tax (line 14a plus line 14b).....	14	<input type="text"/> 00
STOP AND READ: 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.			
<input type="checkbox"/> 15	Oklahoma child care/child tax credit (see instructions).....	15	<input type="text"/> 00
<input type="checkbox"/> 16	Oklahoma earned income credit (see instructions).....	16	<input type="text"/> 00
<input type="checkbox"/> 17	Credit for taxes paid to another state (provide Form 511TX).....	17	<input type="text"/> 00
<input type="checkbox"/> 18	Form 511CR - Other Credits Form. List 511CR line number claimed here:..... <input type="text"/>	18	<input type="text"/> 00
<input type="checkbox"/> 19	Income Tax (line 14 minus lines 15-18) Do not enter less than zero.....	19	<input type="text"/> 00

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

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

Barcode Placeholder

Name(s) shown on Form 511:	Your Social Security Number:
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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	Payments and credits (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	Total payments and credits (line 31 minus line 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

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 ..

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:

<input type="checkbox"/> checking account	Routing Number: <input type="text"/>
<input type="checkbox"/> savings account	Account Number: <input type="text"/>

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 (original return only).....	40a	00
	b) Donation: Public School Classroom Support Fund (original return only).....	40b	00
41	Underpayment of estimated tax interest (annualized installment method) ..	41	00
	(If you have an underpayment of estimated tax (line 41) & overpayment (line 34), see instructions.)		
42	For delinquent payment add penalty of 5% \$ _____ plus interest of 1.25% per month \$ _____	42	00
43	Total tax, donation, penalty and interest (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	

Do not staple documentation to this form. To attach items, please use a paper clip.
Mailing Address for this form: P.O. Box 26800, Oklahoma City, OK 73126-0800

2020 Form 511 - Resident Income Tax Return - Page 3
Note: Provide this page ONLY if you have an amount shown on a schedule.

Barcode
Placeholder

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

Schedule 511-B: Oklahoma Additions

See instructions for details on qualifications and required documents.

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

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Note: Provide this page ONLY if you have an amount shown on a schedule.

Barcode Placeholder

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	Oklahoma Itemized Deductions 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: 2em; 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	Total allowable deductions and exemptions (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

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Note: Provide this page ONLY if you have an amount shown on a schedule.

Barcode Placeholder

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.

Form with 7 numbered lines for calculating the Oklahoma child care/child tax credit. Line 1: Enter your Federal child care credit. Line 2: Multiply line 1 by 20%. Line 3: Enter your Federal child tax credit. Line 4: Multiply line 3 by 5%. Line 5: Enter the larger of line 2 or line 4. Line 6: Division calculation for proration. Line 7: Multiply line 5 by line 6. Total credit entered on line 7.

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.

Form with 4 numbered lines for calculating the Oklahoma earned income credit. Line 1: Federal earned income credit. Line 2: Multiply line 1 by 5%. Line 3: Division calculation for proration. Line 4: Oklahoma earned income credit (multiply line 2 by line 3).

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.

Barcode Placeholder

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.

1	Support of Programs for Volunteers to Act as Court Appointed Special Advocates for Abused or Neglected Children.....	\$2	\$5	\$		1		00
2	Indigent Veteran Burial Program	\$2	\$5	\$		2		00
3	Support the Oklahoma General Revenue Fund	\$2	\$5	\$		3		00
4	Oklahoma Emergency Responders Assistance Program.....	\$2	\$5	\$		4		00
5	Support of Folds of Honor Scholarship Program	\$2	\$5	\$		5		00
6	Support Wildlife Diversity Fund	\$2	\$5	\$		6		00
7	Support of Programs for Regional Food Banks in Oklahoma	\$2	\$5	\$		7		00
8	Public School Classroom Support Fund.....	\$2	\$5	\$		8		00
9	Oklahoma Pet Overpopulation Fund	\$2	\$5	\$		9		00
10	Support the Oklahoma AIDS Care Fund	\$2	\$5	\$		10		00
11	Support Oklahoma Silver Haired Legislature and Alumni Association Program	\$2	\$5	\$		11		00
12	Total donations (add lines 1-11, enter total here and on line 36 of Form 511)					12		00

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.
