

# Oklahoma Individual Income Tax Declaration for Electronic Filing

**2020**  
**Form 511EF**
**NOTE: Do not mail Oklahoma Tax Return - Form 511 or Form 511NR.**
**See instructions on Page 2 to determine if you are required to send Form 511EF to the OTC.**

Your first name and middle initial	Last name	Your social security number	<input style="width: 95%;" type="text"/>
If a joint return, spouse's first name and middle initial	Last name	Spouse's social security number	<input style="width: 95%;" type="text"/>
Mailing address (number and street, including apartment number, rural route or PO Box)		Filing status <input style="width: 30px; height: 20px;" type="text"/>	
City, State, ZIP		Total number of exemptions <input style="width: 30px; height: 20px;" type="text"/>	

## Part One - Tax Return Information (whole dollars only)

1	Oklahoma Adjusted Gross Income (511, Line 7) or Adjusted Gross Income: All Sources (511NR, Line 7) .....	1		00
2	Oklahoma Income Tax and Use Tax (511, Line 22 or 511NR, Line 26) .....	2		00
3	Oklahoma Income Tax Payments and Credits (511, Line 33 or 511NR, Line 34) .....	3		00
4	Refund (511, Line 38 or 511NR, Line 39) .....	4		00
5	Balance Due (511, Line 43 or 511NR, Line 44) .....	5		00

**For a balance due return with an electronic payment complete line 6b below. The due date for an electronic payment is April 20th. For a balance due return with a non-electronic payment enclose a payment with the 511-V and submit on or before the due date of April 15th. If the Internal Revenue Code (IRC) of the IRS provides for a later due date, your payment may be made by the later due date and will be considered timely. If the due date falls on a weekend or legal holiday when OTC offices are closed, your payment is due the next business day.**

## Part Two - Declaration of Taxpayer

6a  I consent that my refund be directly deposited as designated in the electronic portion of my 2020 Oklahoma income tax return. If I have filed a joint return, this is an irrevocable appointment of the other spouse as an agent to receive the refund.

6b  I authorize the Oklahoma State Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Oklahoma taxes owed on this return and/or a payment of estimated tax. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

If I have filed a balance due return, I understand that if the Oklahoma Tax Commission (OTC) does not receive full and timely payment of my tax liability, I will remain liable for the tax liability and all applicable interest and penalties.

Under penalties of perjury, I declare I have compared the information contained on my return, with information I have provided to my Electronic Return Originator (ERO), and the amounts described in Part One above, agree with the amounts shown on the corresponding lines of my 2020 Oklahoma income tax return. To the best of my knowledge and belief, my return is true, correct, and complete. I consent that my return, including this declaration and accompanying schedules and statements, be sent to the OTC by my ERO.

In addition, by using a computer system and software to prepare and transmit my return electronically, I consent to the disclosure to the Oklahoma Tax Commission of all information pertaining to my use of the system and software and to the transmission of my tax return electronically.

Sign

Here:

Your Signature \_\_\_\_\_

Date \_\_\_\_\_

Spouse's Signature (If joint return, both must sign) \_\_\_\_\_

Date \_\_\_\_\_

## Part Three - Declaration of Electronic Return Originator (ERO) and Paid Preparer

I declare I have reviewed the above taxpayer's return and the entries on Form 511EF are complete and correct to the best of my knowledge. (EROs who are collectors are not responsible for reviewing the taxpayer's return; however, they must ensure Form 511EF accurately reflects the data on the return.) I have obtained the taxpayer's signature on Form 511EF and I have provided the taxpayer with a copy of all forms and information to be filed with the OTC, and have followed all other requirements described in Pub. 1345, Handbook for Electronic Filers of Individual Income Tax Returns (Tax Year 2020). If I am also a Paid Preparer, under penalties of perjury I declare I have examined the above taxpayer's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. This Paid Preparer declaration is based on all information of which I have any knowledge.

ERO Use  
Only

ERO or Paid Preparer's Signature \_\_\_\_\_

Date \_\_\_\_\_

PTIN \_\_\_\_\_

Paid Preparer  
Use Only

Paid Preparer Signature \_\_\_\_\_

Date \_\_\_\_\_

PTIN \_\_\_\_\_

Firm name (or yours if self-employed), \_\_\_\_\_

address and ZIP \_\_\_\_\_

Phone number ( \_\_\_\_\_ ) \_\_\_\_\_

## Instructions on Requirement to Mail or Retain this Form

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Most people do not mail Form 511EF or any documentation to the Oklahoma Tax Commission (OTC). For most taxpayers, electronic filing is a completely paperless process.

However, if your return contains any of the forms or supporting schedules shown in the table below, you are required to either mail the documentation to the OTC or send the documentation as a PDF attachment with your electronically filed return. If your software does not support PDF attachments, mail any items shown in the table below along with the Form 511EF to the address shown at the bottom of this form.

If you are mailing the documentation, mail with Form 511EF as a cover page. **Do not mail** your Oklahoma tax return (Form 511 or 511NR), your Federal return (Form 1040) or withholding statements (W-2, W-2G or 1099s).

Form	Description
Form OW-8-P-SUP-I	Annualized Income Installment Method for Individuals
Form 511-NOL or 511NR-NOL	Oklahoma Net Operating Loss
Form 573	Farm Income Averaging
FTAC's Form	Oklahoma Volunteer Firefighter Tax Credit
	Include a copy of other state's income tax return if Form 511TX is filed.
	Include any Oklahoma statements containing additional information as required by the instructions in the 511 or 511NR Packet.

**NOTE: Do not enclose a payment with this form.** If you need to make a payment, use Form 511-V "Oklahoma Income Tax Payment Voucher" and mail to the address on the payment voucher or make your payment electronically. For electronic payment options visit our website ([tax.ok.gov](http://tax.ok.gov)).

**Do not mail your Oklahoma tax return (Form 511 or 511NR), your Federal return (Form 1040), or withholding statements (W-2, W-2G or 1099s).**

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If no additional forms or documentation are required for your electronically filed return, do not mail Form 511EF. Retain for your records.

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If you are required to mail documentation and Form 511EF to the OTC, mail to:

**Oklahoma Tax Commission**  
**Income Tax**  
**PO Box 26800**  
**Oklahoma City, OK 73126-0800**