

# Oklahoma Nonresident/Part-Year Income Tax Return

**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 511NR. See Schedule 511NR-H. →

**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: \_\_\_\_\_  
name and SSN in the boxes: SSN: \_\_\_\_\_

4  Head of household with qualifying person

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

**Residency Status**

Nonresident(s) State of Residence: \_\_\_\_\_

Part-Year Resident(s) From \_\_\_\_\_ to \_\_\_\_\_

Resident/Part-Year Resident/Nonresident  
State of Residence: Yourself \_\_\_\_\_ Spouse \_\_\_\_\_

**Not Required to File**

Place an 'X' in this box if you are a nonresident whose gross income from Oklahoma sources is less than \$1,000. (see instructions)..... →

\* Note: If claiming Special Exemption, see instructions on page 10 of 511NR Packet.

<b>Exemptions</b>	Regular	* Special	Blind	E	Total	(a)
	Yourselves	+				
	Spouse	+			(b)	
<b>Number of dependents</b>				E	Total	(c)
Add the Totals from boxes (a), (b) and (c). Enter the TOTAL here:				E	Total	

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

**Complete Schedule 511NR-1 "Income Allocation for Nonresidents and Part-Year Residents" to arrive at Oklahoma Source Income (line 1) and Federal adjusted gross income (line 2).**

Please Round to Nearest Whole Dollar

	Federal Amount	Oklahoma Amount
1 Oklahoma source income (Schedule 511NR-1, line 18).....		00
2 Federal adjusted gross income (Schedule 511NR-1, line 19).....	00	
3 Oklahoma additions: Schedule 511NR-A, line 8.....	00	00
4 Add lines (Federal 2 and 3) and then (Oklahoma 1 and 3).....	00	00
5 Oklahoma subtractions: Schedule 511NR-B, line 17.....	00	00
6 Adjusted gross income: <b>Oklahoma Source</b> (line 4 minus line 5).....		00
7 Adjusted gross income: <b>All Sources</b> (line 4 minus line 5) Also enter on line 8.....	00	
8 Adjusted gross income: <b>All Sources</b> (from line 7).....		00
9 Oklahoma Adjustments (Schedule 511NR-C, line 7).....		00
10 Income after adjustments (line 8 minus line 9).....		00
11 Oklahoma itemized deductions (Schedule 511NR-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) ..		00
12 Exemptions: Enter the total number of exemptions claimed above <input type="text"/> X \$1,000.....		00
13 Total deductions and exemptions (add lines 11 and 12).....		00
14 <b>Oklahoma Taxable Income:</b> (line 10 minus line 13).....		00
15 (a) Oklahoma Income Tax from Tax Table or if using Farm Income Averaging, enter tax from Form 573, line 22 and enter a "1" in box on line 15.....	00	15a
(b) If paying the Health Savings Account additional 10% tax, add additional tax here and enter a "2" in box on line 15.....	00	15b
Oklahoma Income Tax (line 15a plus line 15b).....		00
16 Oklahoma child care/child tax credit (see instructions).....		00
17 Subtract line 16 from line 15 (This is your tax base) (Do not enter less than zero).....		00

**STOP AND READ:** If line 7 is equal to or larger than line 2, complete line 16. If line 7 is smaller than line 2, see Schedule 511NR-E.

Barcode Placeholder

2020 Form 511NR - Nonresident/Part-Year Income Tax Return - Page 2

Name(s) shown on Form 511NR: Your Social Security Number:

18 Amount from line 17 on page 1
19 Tax percentage: Oklahoma Amount (from line 6) a) Federal Amount (from line 7) b)
20 Oklahoma Income Tax. Multiply line 18 by line 19
21 Oklahoma earned income credit (Sch. 511NR-F, line 4)
22 Credit for taxes paid to another state (provide Form 511TX) nonresidents do not qualify
23 Form 511CR - Other Credits Form - List 511CR line number claimed here:
24 Line 20 minus lines 21, 22 and 23 (Do not enter less than zero)
25 Use tax due on Internet, mail order, or other out-of-state purchases while living in Oklahoma
26 Balance (add lines 24 and 25)
27 Oklahoma withholding (provide W-2s, 1099s or withholding statement)
28 2020 Oklahoma estimated tax payments
29 2020 payment with extension
30 Credits from Form a) 577 b) 578
31 Amount paid with original return plus additional paid after it was filed (amended return only)
32 Payments and credits (add lines 27-31)
33 Overpayment, if any, as shown on original return and/or prior amended return(s) or as previously adjusted by Oklahoma (amended return only)
34 Total payments and credits (line 32 minus line 33)
35 If line 34 is more than line 26, subtract line 26 from line 34. This is your overpayment
36 Amount of line 35 to be applied to 2021 estimated tax (original return only) (see page 4 of 511NR Packet for further information)
Schedule 511NR-G provides you with the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Place the line number of the organization from Schedule 511NR-G in the box. If you give to more than one organization, put a "99" in the box. Provide Schedule 511NR-G
37 Donations from your refund (total from Schedule 511NR-G)
38 Total deductions from refund (add lines 36 and 37)
39 Amount to be refunded (line 35 minus line 38)

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 511NR 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 Savings Account
Routing Number: Account Number:

40 If line 26 is more than line 34, subtract line 34 from line 26. This is your tax due
41 a) Donation: Support the Oklahoma General Revenue Fund (original return only)
41b) Donation: Public School Classroom Support Fund (original return only)
42 Underpayment of estimated tax interest (annualized installment method )
43 For delinquent payment add penalty of 5% plus interest of 1.25% per month
44 Total tax, donation, penalty and interest (add lines 40-43)

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 Number (optional)
A COPY OF FEDERAL RETURN MUST BE PROVIDED.
Paid Preparer's PTIN

Please remit to: Oklahoma Tax Commission, P.O. Box 26800, Oklahoma City, OK 73126-0800
The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.

Note: Provide this page with your return.

Barcode Placeholder

Name(s) shown on Form 511NR:

Your Social Security Number:

## Schedule 511NR-1: Income Allocation for Nonresidents and Part-Year Residents

Lines 1-19: In the Federal column, enter the amounts from your Federal tax return. See the instructions to figure the amounts to report in the Oklahoma column.

	Federal Amount		Oklahoma Amount
1 Wages, salaries, tips, etc.....	00	1	00
2 Taxable interest income.....	00	2	00
3 Dividend income.....	00	3	00
4 Taxable IRA distribution.....	00	4	00
5 Taxable pensions and annuities.....	00	5	00
6 Taxable Social Security benefits (also enter on line 2 of Sch. 511NR-B)...	00	6	00
7 Capital gains or losses (Federal Schedule D).....	00	7	00
8 Taxable refunds (state income tax).....	00	8	00
9 Alimony received.....	00	9	00
10 Business income or (loss) (Federal Schedule C).....	00	10	00
11 Other gains or losses (Federal Form 4797).....	00	11	00
12 Rental real estate, royalties, partnerships, etc.....	00	12	00
13 Farm income or (loss).....	00	13	00
14 Unemployment compensation.....	00	14	00
15 Other income (identify: _____ )	00	15	00
16 Add lines 1 through 15.....	00	16	00
17 Total Federal adjustments to income (identify: _____ )	00	17	00
18 <b>Oklahoma source income</b> (line 16 minus line 17) Enter here and on page 1, line 1.....		18	00
19 <b>Federal adjusted gross income</b> (line 16 minus line 17) Enter here and on page 1, line 2.....		00 19	

## Schedule 511NR-A: Oklahoma Additions See instructions for details on qualifications and required documents.

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

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

Barcode Placeholder

Name(s) shown on Form 511NR: \_\_\_\_\_

Your Social Security Number: \_\_\_\_\_

**Schedule 511NR-B: Oklahoma Subtractions** See instructions for details on qualifications and required documents.

		Federal Amount		Oklahoma Amount
1	Interest on U.S. government obligations .....	00	1	00
2	Taxable Social Security (from Schedule 511NR-1, line 6) .....	00	2	00
3	Federal civil service retirement in lieu of social security .....	00	3	00
	- Retirement Claim Number: _____			
	<u>Taxpayer Number</u> _____			
	<u>Spouse Number</u> _____			
4	Military Retirement (see instructions for limitation) .....	00	4	00
5	Oklahoma government or Federal civil service retirement .....	00	5	00
6	Other retirement income .....	00	6	00
7	U.S. Railroad Retirement Board Benefits .....	00	7	00
8	Additional depletion .....	00	8	00
9	Oklahoma net operating loss (Loss Year[s] _____ ) (Provide Schedules)	00	9	00
10	Exempt tribal income (see instructions for qualifications) .....	00	10	00
11	Gains from the sale of exempt government obligations .....	00	11	00
12	Nonresident military wages (provide W-2) .....	00	12	
13	Oklahoma Capital Gain Deduction (Provide Form 561NR) .....	00	13	00
14	Income Tax Refund (Federal Form 1040 or 1040-SR, Schedule 1, line 1) .....	00	14	00
15	Oklahoma income distributed by an electing PTE .....	00	15	00
16	Miscellaneous: Other subtractions (enter number in box for the type of deduction _____ ) .....	00	16	00
17	<b>Total subtractions</b> .....	00	17	00
	(add lines 1-16, enter total here and on line 5 of Form 511NR)			

**Schedule 511NR-C: Oklahoma Adjustments** See instructions for details on qualifications and required documents.

1	Military pay exclusion - Active Duty, Reserve and National Guard (not retirement) .....	1	00
2	Qualifying disability deduction (residents and part-year residents only) .....	2	00
3	Qualified adoption expense .....	3	00
4	Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) .....	4	00
5	Deductions for providing foster care .....	5	00
6	Miscellaneous: Other adjustments (enter number in box for the type of deduction _____ ) .....	6	00
7	<b>Total Adjustments</b> (add lines 1-6, enter total here and on line 9 of Form 511NR) .....	7	00

**2020 Form 511NR - Nonresident/Part-Year Income Tax Return - Page 5**  
**Note: Provide this page ONLY if you have an amount shown on a schedule.**

Barcode Placeholder

Name(s) shown on Form 511NR:

Your Social Security Number:

**Schedule 511NR-D: Oklahoma Itemized Deductions**

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 11 of Form 511NR.

**Schedule 511NR-E: 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, then as a resident, part-year resident or nonresident military, 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 Adjusted Gross Income: All sources 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		00
2	Multiply line 1 by 20% .....	2		00
3	Enter your Federal child <b>tax</b> credit (total of child tax credit & additional child tax credit) .....	3		00
4	Multiply line 3 by 5% .....	4		00
5	Enter the larger of line 2 or line 4 .....	5		00
6	Divide the amount on line 7 of Form 511NR by the amount on line 2 of Form 511NR  <div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; width: 150px; height: 30px; margin-right: 10px;"></div> <div style="text-align: center; margin-right: 10px;">÷</div> <div style="border: 1px solid black; width: 150px; height: 30px; margin-right: 10px;"></div> </div> Enter the percentage from the above calculation here (do not enter more than 100%) .....	6		%
7	Multiply line 5 by line 6. This is your Oklahoma child care/child tax credit. Enter total here and on line 16 of Form 511NR .....	7		00



**2020 Form 511NR - Nonresident/Part-Year Income Tax Return - Page 6**  
**Note: Provide this page ONLY if you have an amount shown on a schedule.**

Barcode Placeholder

Name(s) shown on Form 511NR:

Your Social Security Number:

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

Residents and part-year residents are allowed a credit equal to 5% of the Earned Income Credit allowed on the Federal return. The credit must be prorated on the ratio of Oklahoma source AGI to Federal AGI. Provide a copy of your Federal return.

**Nonresidents do not qualify.**

1	Federal earned income credit .....	1		00
2	Multiply line 1 by 5% .....	2		00
3	Divide the amount on line 6 of Form 511NR by the amount on line 2 of Form 511NR			
	<div style="border: 1px solid black; width: 150px; height: 20px; display: inline-block;"></div> ÷ <div style="border: 1px solid black; width: 150px; height: 20px; display: inline-block;"></div>			
	Enter the percentage from the above calculation here (do not enter more than 100%) .....	3		%
4	Oklahoma earned income credit (multiply line 2 by line 3, enter total here and on line 21 of Form 511NR) .....	4		00

**Schedule 511NR-G: 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 511NR-G Information on page 28 of the 511NR Packet. If you are not receiving a refund but would like to make a donation to one of these organizations, Schedule 511NR-G 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 Fund, see line 41a or 41b of Form 511NR.

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 37 of Form 511NR, 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 37 of Form 511NR.

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	<b>Total donations</b> (add lines 1-11, enter total here and on line 37 of Form 511NR) .....				12		00

**Schedule 511NR-H: 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.

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