

# Oklahoma Resident Income Tax Return

Form 511  
2019

Barcode  
Placeholder

**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:

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 6 of 511 Packet.**

**Exemptions**

	Regular	* Special	Blind	
Yourself	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> (a)
Spouse	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> (b)
Number of dependents				<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 Over? (Please see instructions)  Yourself  Spouse

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

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

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

8	Oklahoma Adjustments (provide Schedule 511-C).....	8 <input type="text"/> .00
9	Oklahoma income after adjustments (line 7 minus line 8).....	9 <input type="text"/> .00
<b>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.</b>		
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
11	Exemptions: Enter the total number of exemptions claimed above..... <input type="text"/> X \$1,000.....	11 <input type="text"/> .00
12	Total deductions and exemptions (add lines 10 and 11 or amount from Sch. 511-E, line 5).....	12 <input type="text"/> .00
13	Oklahoma Taxable Income (line 9 minus line 12).....	13 <input type="text"/> .00
14	(a) Oklahoma Income Tax from Tax Table (see pages 21-32 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	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..... <input type="text"/> .00	14b <input type="text"/> .00
	Oklahoma Income Tax (line 14a plus line 14b).....	14 <input type="text"/> .00
<b>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.</b>		
15	Oklahoma child care/child tax credit (see instructions).....	15 <input type="text"/> .00
16	Oklahoma earned income credit (see instructions).....	16 <input type="text"/> .00
17	Credit for taxes paid to another state (provide Form 511TX).....	17 <input type="text"/> .00
18	Form 511CR - Other Credits Form. List 511CR line number claimed here:..... <input type="text"/>	18 <input type="text"/> .00
19	<b>Income Tax</b> (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.

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

PART THREE: TAX, CREDITS AND PAYMENTS

Table with 3 columns: Line number, Description, Amount. Includes lines 20-33 for tax, credits, and payments.

PART FOUR: REFUND

Table with 3 columns: Line number, Description, Amount. Includes lines 34-35 for refund calculation.

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.

Table with 3 columns: Line number, Description, Amount. Includes lines 36-38 for refund deductions and amount.

Direct Deposit Note: Verify your account and routing numbers are correct. Is this refund going to or through an account that is located outside of the United States? Deposit my refund in my: checking account, savings account.

PART FIVE: AMOUNT YOU OWE

Table with 3 columns: Line number, Description, Amount. Includes lines 39-43 for tax due, donations, and penalties.

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.

Signature and information fields for Taxpayer, Spouse, and Paid Preparer, including occupation, phone number, and 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

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-A: Oklahoma Subtractions

See instructions for details on qualifications and required documents.

Table with 16 rows for subtractions including interest on U.S. government obligations, Social Security benefits, Federal civil service retirement, Military Retirement, Oklahoma government or Federal civil service retirement, Other retirement income, U.S. Railroad Retirement Board benefits, Oklahoma depletion, Oklahoma net operating loss, Exempt tribal income, Gains from the sale of exempt government obligations, Oklahoma Capital Gain Deduction, Income Tax Refund, Oklahoma income distributed by an electing PTE, Miscellaneous: Other subtractions, and Total subtractions.

Schedule 511-B: Oklahoma Additions

See instructions for details on qualifications and required documents.

Table with 9 rows for additions including state and municipal bond interest, Out-of-state losses, Lump sum distributions, Federal net operating loss, Recapture of depletion, Recapture of Contributions to Oklahoma 529 College Savings Plan, Oklahoma loss distributed by an electing PTE, Miscellaneous: Other additions, and Total additions.

Schedule 511-C: Oklahoma Adjustments

See instructions for details on qualifications and required documents.

Table with 7 rows for adjustments including Military pay exclusion, Qualifying disability deduction, Qualified adoption expense, Contributions to Oklahoma 529 College Savings Plan, Deduction for providing foster care, Miscellaneous: Other adjustments, and Total adjustments.



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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.

Form 511-D table with lines 1-11. Line 1: Federal itemized deductions from Federal Sch. A, line 17. Line 2: State and local sales or income taxes from Federal Sch. A, line 5a. Line 3: Line 1 minus line 2. Line 4: Medical and Dental expenses from Federal Sch. A, line 4. Line 5: Gifts to Charity from Federal Sch. A, line 14. Line 6: Line 3 minus lines 4 and 5. Line 7: Is line 6 more than \$17,000? Line 8: Maximum amount allowed for itemized deductions. Line 9: Medical and Dental expenses from Federal Sch. A, line 4. Line 10: Gifts to Charity from Federal Sch. A, line 14. Line 11: Oklahoma Itemized Deductions.

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.

Form 511-E table with lines 1-5. Line 1: Oklahoma itemized deductions (Schedule 511-D, line 11) or Oklahoma standard deduction. Line 2: Exemptions (\$1,000 x number of exemptions claimed at top of Form 511). Line 3: Total (add lines 1 and 2). Line 4: Divide the amount on line 7 of Form 511 by the amount on line 3 of Form 511. Line 5: Total allowable deductions and exemptions (multiply line 3 by percentage on line 4, enter total here and on line 12 of Form 511).

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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-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	.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 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	%
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	.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	.00
2	Multiply line 1 by 5% .....	2	.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	%
4	Oklahoma earned income credit (multiply line 2 by line 3, enter total here and on line 16 of Form 511) .....	4	.00



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 19 and 20 for Schedule 511-H Information.

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

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.

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