**DO NOT MAIL OKLAHOMA TAX RETURN - FORM 511 OR FORM 511NR**

**Please see instructions on Page 2 to see if you are required to send Form 511EF to the OTC.**

**2012 Form 511EF**

# OKLAHOMA INDIVIDUAL INCOME TAX DECLARATION FOR ELECTRONIC FILING

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

**Your social security number** | | | | | | | | | |

**Spouse's social security number** | | | | | | | | | |

**Filing status** | |

**Total number of exemptions** | | |

**Submission ID Number** | | | | | | | | | | | | | | | | | | | | |

## PART ONE TAX RETURN INFORMATION (WHOLE DOLLARS ONLY)

| | | | | |
|---|---|---|---|---|
| 1 | Oklahoma Adjusted Gross Income (511, Line 7) **or** Adjusted Gross Income: All Sources (511NR, Line 24) | 1 | | 00 |
| 2 | Oklahoma Income Tax, Use Tax and Business Activity Tax (511, Line 22 or 511NR, Line 42) | 2 | | 00 |
| 3 | Oklahoma Income Tax Payments and Credits (511, Line 29 or 511NR, Line 47) | 3 | | 00 |
| 4 | Refund (511, Line 34 or 511NR, Line 52) | 4 | | 00 |
| 5 | Balance Due (511, Line 40 or 511NR, Line 58) | 5 | | 00 |

**For a balance due return with an electronic payment complete line 6b below. The due date for an electronic payment is 4-22-13. 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 4-15-13.**

## PART TWO DECLARATION OF TAXPAYER

6a ☐ I consent that my refund be directly deposited as designated in the electronic portion of my 2012 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. 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 2012 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.

**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. (ERO's 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 2012). 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 code**

**Phone number** ( _____ )

# Instructions on Requirement to Mail or Retain this Form

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

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

| **Form Number** | **Form Title** |
|---|---|
| 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 |
| COFT'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. |

**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 (**www.tax.ok.gov**).

**Do not mail your Oklahoma tax return (Form 511 or 511NR), your Federal return (Form 1040, 1040A or 1040EZ) 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 the Form 511EF to the OTC, mail to:

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