

Oklahoma Tax Commission • Claim for Refund

FORM

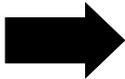
511-RF

For Resident taxpayers who are NOT required to file a Federal Return

Filing Status (same as Federal) <input type="checkbox"/> Enter number from list at right which shows your filing status. (1) Single (2) Married filing jointly (3) Married filing separately (4) Head of household (5) Qualifying Widow(er)	If married filing jointly/separately enter spouse's social security number here:	Yours	SOCIAL SECURITY NUMBERS				
		Spouse's					
First name and initial (if joint return, give first names and initials of both) Last Name		NOTE: If you may be claimed as a dependent on another return, enter 0 exemptions for yourself.		EXEMPTIONS Yourself <input type="checkbox"/>	Regular <input type="checkbox"/>	65 or Over <input type="checkbox"/>	Blind <input type="checkbox"/>
Present home address (number and street, including apartment number, or rural route)		Occupation Yourself _____ Spouse _____		Number of dependent children		Number of other dependents	
City, town or post office, State and ZIP		Total Exemptions Write the number of allowable exemptions		<input type="checkbox"/>		<input type="checkbox"/>	

caution:

NOTICE



- This form shall be used **ONLY** if:
- (1) You are a resident of Oklahoma for the full year.
  - (2) You do not have sufficient gross income to **REQUIRE** you to file a Federal return.  
**(For federal filing requirements see chart A or B on the back of this form)**
  - (3) You had Oklahoma income tax withheld from your wages or retirement income or you have paid Estimated Tax.

----- DOLLARS ----- CENTS

Enclose Copies of Form(s) W-2 and 1099R	1. a. Total gross income from all sources (taxable and non-taxable) .. 1a. _____	
	b. Less non-taxable income (i.e. Social Security benefits received) .. 1b. _____	
	c. Income subject to Federal filing requirements (Line 1a minus line 1b) ..... 1c.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	2. Oklahoma Income Tax Withheld (enclose W-2) ..... 2	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	3. 1998 Oklahoma Estimated Tax Payments ... 3	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	4. 1998 Payment With Extension ..... 4	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	5. Total lines 3 and 4 ..... 5	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	6. Low Income Property Tax Credit (enclose Form 538-H) ..... 6	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	7. Sales Tax Credit (enclose Form 538-S) ..... 7	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	8. Total (Add lines 2, 5, 6, and 7) ..... 8	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00
	9. DEDUCTIONS FROM REFUND: If you wish to donate from your tax refund, check and enter amount:	
A. Okla. Wildlife Diversity Program. <input type="checkbox"/> \$2, <input type="checkbox"/> \$5, or <input type="checkbox"/> \$_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	
B. Low Income Health Care Fund. <input type="checkbox"/> \$2, <input type="checkbox"/> \$5, or <input type="checkbox"/> \$_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	
C. Veterans Affairs Capital Improvement Program. <input type="checkbox"/> \$2, <input type="checkbox"/> \$5, or <input type="checkbox"/> \$_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	
D. Oklahoma Breast Cancer Research Program. <input type="checkbox"/> \$2, <input type="checkbox"/> \$5, or <input type="checkbox"/> \$_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	
10. Total: Add lines A, B, C, and D, and enter amount ..... 10	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	
11. Amount to be refunded to you (line 8 minus line 10) ..... Refund 11	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> :00	

Under penalty of perjury I declare that the information contained in this document and any attachments is true and correct to the best of my knowledge and belief.

Taxpayer's signature	Date	Spouse's signature	Date	<b>Oklahoma Tax Commission          Income Tax          P.O. Box 26800          Oklahoma City, OK 73126-0800</b>
Paid Preparer's signature	Date	Paid Preparer's Address		

# FEDERAL FILING REQUIREMENTS

**If you are required to file a federal return, then you are required to file on Form 511 or 511EZ and do not qualify to file this form.**

## Chart A - For Most People

To use this chart, first find your filing status. Then, read across to find your age at the end of 1998, you must file a return if your **gross income\*\*** was at least the amount shown in the last column.

Filing status	Age*	Gross income**
Single	under 65	6,950
	65 or older	8,000
Married, filing jointly	under 65 (both spouses)	12,500
	65 or older (one spouse)	13,350
	65 or older (both spouses)	14,200
Married, filing separately	any age	2,700
Head of household	under 65	8,950
	65 or older	10,000
Qualifying widow(er) with dependent child	under 65	9,800
	65 or older	10,650

\* If you turned age 65 on January 1, 1999, you are considered to be age 65 at the end of 1998.

\*\* **Gross income** means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any gain on the sale of your home (even if you may exclude or postpone part or all of the gain). **Do not** include social security benefits unless you are married filing a separate return and you lived with your spouse at anytime in 1998.

## Chart B - For Children and Other Dependents

If your parent (or someone else) can claim you as a dependent, use this chart to see if you must file a Federal return.

In this chart, **unearned income** includes taxable interest and dividends. **Earned income** includes wages, tips, and taxable scholarship and fellowship grants.

### Single

If you are:	AND	Your unearned income was:	AND	Earned income was:	AND	Gross income was:
under 65		\$1 or more		\$0		more than \$ 700
		\$1 or more		\$1 but not more than \$4,000		more than your earned income plus \$250
		\$0		\$1 or more		more than \$4,250
65 or blind		\$1 or more		\$0		more than \$1,750
		\$1 or more		\$1 but not more than \$4,000		more than your earned income plus \$1,300
		\$0		\$1 or more		more than \$5,300
65 and blind		\$1 or more		\$0		more than \$2,800
		\$1 or more		\$1 but not more than \$4,000		more than your earned income plus \$2,350
		\$0		\$1 or more		more than \$6,350

### Married

If you are:	AND	Your unearned income was:	AND	Earned income was:	AND	Gross income was:
under 65		\$1 or more		\$0		more than \$ 700
		\$1 or more		\$1 but not more than \$3,300		more than your earned income plus \$250
		\$0		\$1 or more		more than \$3,550
65 or blind		\$1 or more		\$0		more than \$1,550
		\$1 or more		\$1 but not more than \$3,300		more than your earned income plus \$1,100
		\$0		\$1 or more		more than \$4,400
65 and blind		\$1 or more		\$0		more than \$2,400
		\$1 or more		\$1 but not more than \$3,300		more than your earned income plus \$1,950
		\$0		\$1 or more		more than \$5,250

**Married dependents any age:** Your gross income was at least \$5 and your spouse files a separate return on Form 1040 and itemizes.