

State of Oklahoma

Claim for Credit or Refund of Property Tax

Barcode Placeholder

This form is due on or before June 30, 2024.

FORM 538-H 2023

Form fields for Taxpayer's Social Security Number, Spouse's Social Security Number, Taxpayer's First Name, Middle Initial, Last Name, Spouse's First Name (if a Joint Return), Middle Initial, Last Name, Present Home Address, City, State, ZIP, and Phone Number.

PART 1: QUALIFICATION QUESTIONS

- A: Were you a resident of Oklahoma for the entire year?
B: Are you or your spouse 65 or over? If no, answer question "C"
C: Were you totally disabled for the full year? If yes, please submit proof.
D: Are you required to file an Oklahoma Income Tax return this year?

PART 2: GROSS HOUSEHOLD INCOME

(Round to Nearest Dollar)

Enter TOTAL GROSS income and assistance, taxable and nontaxable, received by ALL members of your household in 2023.

- 1. Enter total wages, salaries, fees, commissions, bonuses, and tips
2. Enter total interest and dividend income received
3. Total of all dependents' income
4. Social Security payments (total including Medicare)
5. Railroad Retirement benefits
6. Other pensions, annuities and IRAs
7. Alimony
8. Unemployment benefits
9. Earned Income Credit (EIC) received in 2023
10. Nontaxable sources of income (specify)
11. Enter gross (positive) income from rentals, royalties, partnerships, estates & trusts, and gains from the sale or exchange of property
12. Enter gross (positive) business and farm income
13. Other (specify)
14. Total gross household income (Add lines 1-13)
If over \$12,000, STOP, you don't qualify for the credit or refund.

Yearly Income

YOU MAY NOT ENTER NEGATIVE AMOUNTS

Table with 14 rows for entering yearly income amounts, each with a column for the amount and a column for the dollar sign.

YOU MAY NOT ENTER NEGATIVE AMOUNTS

Table with 4 rows for entering additional yearly income amounts, each with a column for the amount and a column for the dollar sign.



Name(s) Shown on Form 538-H:

Your Social Security Number:

PART 3: GROSS HOUSEHOLD INCOME OF \$12,000 OR LESS

- 15. Enter the amount of 2023 real estate taxes paid on your homestead
A copy of your tax bill must be provided with this claim form.
16. To compute credit or refund allowable: Multiply the amount of total household income from Part 2, line 14: \$ X 1% (0.01). Enter result here
17. Amount of credit or refund, subtract line 16 from line 15 (not to exceed \$200)
18. If you are required to file an Oklahoma Income Tax return, enter the amount from line 17 here and as a credit on Form 511, line 24
19. If you are NOT required to file an Oklahoma Income Tax return, enter the amount from line 17 here. (This amount will be refunded either by direct deposit or debit card; see instructions)

Table with 2 columns: Line number, Amount. Rows 15-19.

DIRECT DEPOSIT OPTION: For those NOT filing a Form 511 (See page 3 to see if you qualify for Direct Deposit).

Refund Note: For Direct Deposit, verify your account and routing numbers are correct. If your direct deposit fails to process, you will receive a debit card. If no options are selected, you will receive a debit card. Due to electronic banking rules, the OTC will not allow direct deposits to or through foreign financial institutions. If you use a foreign financial institution you will be issued a paper check.

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 Routing Number
Savings Account Account Number

Claimant's Signature and Date Spouse's Signature and Date

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