

# State of Oklahoma Claim for Credit/Refund of Sales Tax

Barcode Placeholder

Taxpayer's Social Security Number:

If died in 2023 or 2024, enter date of death:

Instructions on page 3. Please read carefully as an incomplete form may delay your refund.

FORM

**538-S**

2023

Spouse's Social Security Number:

If died in 2023 or 2024, enter date of death:

Taxpayer's First Name	Middle Initial	Last Name	Spouse's First Name (If a Joint Return)	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mailing Address (Number and street, including apartment number, or rural route)			City	State	ZIP
<input type="text"/>			<input type="text"/>	<input type="text"/>	<input type="text"/>

## PART 1: TAXPAYER INFORMATION

Physical Address in 2023 (If different than shown in mailing address section):

Place an 'X' if you or your spouse have a physical disability constituting a substantial handicap to employment (submit proof)

Place an 'X' if you or your spouse are 65 years of age or over      Oklahoma resident for the entire year?     yes     no

## PART 2: DEPENDENT Note: Do not enter the taxpayer or spouse as a dependent.

1. Dependents <small>(first name, middle initial, last name) If you have additional dependents, provide schedule.</small>	See Instructions			5. Yearly Income
	2. Age	3. Social Security Number	4. Relationship	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## EXEMPTION INFORMATION QUALIFIED EXEMPTIONS...

A. Yourself.....	<input type="text"/>
B. Spouse .....	<input type="text"/>
C. Number of dependents.....	<input type="text"/>
D. Total exemptions claimed (add A-C).....	<input type="text"/>

## PART 3: GROSS INCOME: Enter taxable and nontaxable gross income and assistance received by ALL members of your household in the year 2023.

See "Total gross household income" definition on page 3 for examples of income.

1	Enter total wages, salaries, fees, commissions, bonuses, and tips (including <b>nontaxable</b> income from your W-2s) .....
2	Enter total interest and dividend income received .....
3	Total of all dependents' income (from Part 2, column 5).....
4	Social Security payments (total including Medicare) .....
5	Railroad Retirement benefits .....
6	Other pensions, annuities and IRAs .....
7	Alimony .....
8	Unemployment benefits .....

YEARLY INCOME	
YOU MAY NOT ENTER NEGATIVE AMOUNTS.	
1	<input type="text"/> 00
2	<input type="text"/> 00
3	<input type="text"/> 00
4	<input type="text"/> 00
5	<input type="text"/> 00
6	<input type="text"/> 00
7	<input type="text"/> 00
8	<input type="text"/> 00



Name(s) Shown on Form 538-S:

Your Social Security Number:

**PART 3: GROSS INCOME:** Enter taxable and nontaxable gross income and assistance received by ALL members of your household in the year 2023.

See "Total gross household income" definition on page 3 for examples of income.

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 (taxable & nontaxable) (provide Federal return including schedules)....
12 Enter gross (positive) income from business and farm (provide Federal return including schedules).....
13 Other income-including income of others living in your household (specify).....
14 Total gross household income (Add lines 1-13).....

YEARLY INCOME
YOU MAY NOT ENTER NEGATIVE AMOUNTS.
Table with 2 columns: Line number, Amount. Rows 9-14.

If line 14 is over income limits shown in steps 2 and 3 on page 3, no credit is allowed.

**PART 4: SALES TAX CREDIT COMPUTATION** (For households with gross income below allowable limits, see steps 2 and 3 on page 3.)

15 Total qualified exemptions claimed in Box D on page 1 [ ] x \$40 (credit claimed)..... 15 [ ] 00

**DIRECT DEPOSIT OPTION:** For those NOT filing a Form 511. See page 3 for Refund Information.

If you are filing a Form 511, carry the credit to Form 511, line 25.

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. You can also choose to receive either a debit card or a paper check by placing an 'X' in the appropriate box below. Note: A minimum refund of \$10.00 is required to receive a paper check. If you request a paper check for an amount less than \$10.00, a debit card will be issued. If no options are selected, you will receive a debit card. Due to electronic banking rules, the Oklahoma Tax Commission (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.

Send my refund as a:
[ ] Debit Card
[ ] Paper Check

Is this refund going to or through an account that is located outside of the United States? [ ] Yes [ ] No
Direct Deposit my refund in my:
[ ] Checking Account Routing Number: [ ]
[ ] Savings Account Account Number: [ ]

If the OTC may discuss this return with your tax preparer, place an 'X' here: [ ]

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.
Taxpayer's Signature and Date Spouse's Signature and Date
Occupation Occupation

Preparer's Signature and Date