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# **OKLAHOMA TAX COMMISSION**

## **INDIVIDUAL INCOME TAX ELECTRONIC FILERS HANDBOOK FOR TAX YEAR 2001**



**INCOME TAX**

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# TABLE OF CONTENTS

CHAPTER	TOPIC	PAGE
	OKLAHOMA ELECTRONIC FILING CALENDAR .....	4
	INTRODUCTION .....	5
	PUBLICATIONS .....	6
1	<b>CHANGES FOR TAX YEAR 2001</b> .....	7
2	<b>GENERAL INFORMATION</b> .....	8
	• Test Year	
	• How Federal/State Electronic Return	
	• Who May Participate	
3	<b>FILING AN ELECTRONIC RETURN</b> .....	9
	• Composition of an Electronic Return	
	• Electronic Portion of Returns	
	• Non-Electronic Portion of Returns	
	• Exclusions from Electronic Filing	
4	<b>TRANSMITTING THE OKLAHOMA ELECTRONIC RETURN</b> .....	12
5	<b>REJECTED RETURNS</b> .....	13

## TABLE OF CONTENTS

CHAPTER	TOPIC	PAGE
6	<b>FORM 511EF</b> .....	14
7	<b>REFUNDS</b> .....	15
8	<b>PAYMENT OF BALANCE DUE AMOUNTS</b> .....	16
9	<b>INFORMATION ELECTRONIC FILERS MUST PROVIDE TO THE TAXPAYER</b> .....	17
10	<b>RESPONSIBILITIES OF ELECTRONIC FILERS</b> ..... <ul style="list-style-type: none"><li>• Penalties</li><li>• Advertising Standards</li><li>• Monitoring and Suspension of an Electronic Filer</li></ul>	18
11	<b>E-FILE SOFTWARE LIST</b> .....	20
12	<b>FORMS</b> <ul style="list-style-type: none"><li>• 511</li><li>• 511EF</li><li>• 511EFV</li></ul>	

# OKLAHOMA ELECTRONIC FILING CALENDAR

For Tax Period January 1, 2001 to December 31, 2001

Begin Federal/State Software Testing.....November 8, 2001  
End Federal/State Software Testing..... January 10, 2002  
Begin Transmitting Returns to Internal Revenue Service/OTC ..... January 11, 2002  
Last Date to Transmit Oklahoma Returns Electronically .....October 15, 2002

<p><b>Note:</b> Federal/State software testing will begin in November of 2001 and will end January 2002. Oklahoma conforms to the dates established by the IRS and are subject to any changes the IRS may make.</p>
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## INTRODUCTION

The Oklahoma Tax Commission (OTC) has joined with the Internal Revenue Service (IRS) to provide for the electronic filing of state individual income tax returns in conjunction with the federal income tax return. The Federal/State Electronic Filing program (ELF) will enable taxpayers to file both returns electronically through their tax preparer.

- This program is an effort to provide a "one-stop-shop" for tax preparation and filing.
- This program was a pilot program for two tax (2) seasons, 1993 and 1994, and was limited to Oklahoma Tax Commission and Internal Revenue Service employees.

The Oklahoma Tax Commission opened up the program statewide during 1995 (tax year 1994). This program was available for all participants that were accepted into the federal electronic filing program, and were using accepted Federal/State Electronic Filing software, subject to minimal suitability checks.

The Oklahoma Tax Commission Individual Income Tax Electronic Filers Handbook For Tax Year 2001 (hereinafter referred to as the Oklahoma Handbook) follows the same chapter format and content as Internal Revenue Service Publication 1345, Handbook for Electronic Filers of Individual Income Tax Returns (Tax Year 2001). Since most functions in the Federal/State Electronic Filing program are the same, the Oklahoma Handbook highlights the special features unique to Oklahoma.

The Oklahoma Handbook is to be used in conjunction with the Internal Revenue Service Publication 1345. All rules, regulations, and requirements governing tax preparers, transmitters, and originators of returns put forth by the Internal Revenue Service are in effect for the Oklahoma Tax Commission. Note that Publication 1345, Chapter 17, Federal/State Electronic Filing, identifies the Internal Revenue Service's procedures and requirements for Federal/State Electronic Filing (ELF).

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Your comments on this handbook are greatly appreciated.

Suggestions may be directed to:

Oklahoma Tax Commission  
Taxpayer Assistance Division  
P.O. Box 26890  
Oklahoma City, Oklahoma 73126-0890

## **PUBLICATIONS**

The following publications describe the process of electronic filing and joint electronic filing:

### **INTERNAL REVENUE SERVICE PUBLICATIONS**

- Publication 1345 - Handbook for Electronic Filers of Individual Income Tax Returns (Tax Year 2001)
- Publication 1346 - Electronic Return File Specifications and Record Layouts for Individual Income Tax Returns (Tax Year 2001)
- Publication 1436 - Test Package for Electronic Filing of Individual Income Tax Returns (Tax Year 2001)
- Publication 1545 - The Electronic Filing Logo Guidelines for Effective Use

### **OKLAHOMA TAX COMMISSION PUBLICATIONS**

- Oklahoma Individual Income Tax Electronic Filers Handbook (Tax Year 2001)
- Oklahoma Tax Commission Electronic Return Filing Guide (for Software Developers) Tax Year 2001
- Oklahoma Test Package for Electronic Filing of Individual Income Tax Returns (Tax Year 2001)

## CHAPTER 1

### **Oklahoma Changes for Tax Year 2001**

1. The 511 form has been re-designed. The 511EZ and 511RF forms have been incorporated into this form.
2. Retirement income for individuals who are age 65 and older and not an Oklahoma government or Federal government retiree will increase to \$5,500.
3. 538-S credit limits for household income are \$20,000 for single and for taxpayers that claim an exemption for a dependent or over age 65 or have a physical disability the household income limit is \$50,000.
4. New contribution – Oklahoma Organ Donor Education Fund – This fund will allow for statewide education programs to make Oklahomans aware of the importance of organ and tissue donations.
5. Signature requirements for Oklahoma are fulfilled through Fed/State E-file procedures.

**Form 511-EF does not need to be mailed to OTC. The preparer will retain this form with all attachments for 3 years.**

# **FEDERAL/STATE ELECTRONIC FILING**

## **CHAPTER 2**

### **GENERAL INFORMATION**

#### **TEST YEAR**

In 1994, the Oklahoma Tax Commission joined with the Internal Revenue Service in a pilot program to transmit federal and state data electronically. The Oklahoma Tax Commission and Internal Revenue Service employees were invited to file their income tax returns as part of the program's joint effort. The Pilot proved successful with participants filing both the federal and state income tax returns. The returns were transmitted to the Austin Service Center where the state portion of the return was extracted and retrieved by the Oklahoma Tax Commission, herein referred to as the OTC, for processing.

#### **2000 TAX YEAR**

E-file was very successful during the 2000 filing season. Participation increased over 30%. There were 347,000 taxpayers who filed E-file during this filing season. Direct deposit refunds were issued in approximately 48 hours and paper refunds in 6-8 days. The Tax Commission would like to thank all preparers and software developers for their participation.

#### **HOW FEDERAL/STATE ELECTRONIC FILING WORKS**

Tax preparers and transmitters accepted in the Internal Revenue Service electronic filing program will be able to participate in Federal/State Electronic Filing and be able to file both the federal return and the state return in one transmission to the Internal Revenue Service's Austin Service Center. The Internal Revenue Service will acknowledge to the transmitter the acceptance of the federal return and receipt of state data. The state data will then be made available for retrieval by the OTC where it will be entered and processed in the state Income Tax system.

The OTC will acknowledge receipt of the Oklahoma data to the transmitter through an electronic bulletin board. The transmitter's acknowledgement should be available within three (3) days from the time the return data is received from the Austin Service Center.

#### **WHO MAY PARTICIPATE**

Federal/State Electronic Filing for Oklahoma returns is available to all interested parties who have been accepted in the federal electronic filing program and transmit returns to the Internal Revenue Service's Austin Service Center.

**You do not need to register with OTC. When IRS approves you for the electronic filing of tax returns, Oklahoma automatically accepts you.**



## **CHAPTER 3**

### **FILING AN ELECTRONIC RETURN**

#### **COMPOSITION OF AN ELECTRONIC RETURN**

In total, an Oklahoma electronic return contains the same information as a comparable return filed entirely on paper documents. An electronic return consists of:

- Data transmitted electronically to OTC, using the Internal Revenue Service as a conduit; and
- Paper documents (sent directly to OTC) which contain information which cannot be electronically transmitted, such as taxpayer signatures, documents prepared by third parties, etc. This does not include forms or schedules which are not accepted by the electronic filing system.

**Note:** The Oklahoma 511 Form requires an accompanying copy of the taxpayer's federal return. The vendor's software will fulfill his/her requirement by copying the federal data into the unformatted records of the state packet before the returns are transmitted to the IRS.

#### **ELECTRONIC PORTION OF RETURNS**

The following forms and schedules can be transmitted electronically and are considered the electronic portion of the return:

- All federal individual income tax forms and schedules allowed by Internal Revenue Service Publication 1345, Chapter 4
- Oklahoma Resident Individual Income Tax Return & Schedules (OTC Form 511)
- Oklahoma Income Tax Other Credit Form (OTC Form 511-TX) for credit for tax paid to another state
- Refund of Sales Tax (OTC Form 538-S) when attached to Form 511

## NON-ELECTRONIC PORTION OF RETURNS

The non-electronic portion of the return consists of the following:

- Oklahoma Individual Income Tax Declaration for Electronic Filing (OTC Form 511-EF), required for all electronic returns is to be retained by the ERO for 3 years.
- The ERO may be subject to inspection of records by OTC during the filing season.
- A check or money order for balance due returns is required to be submitted with the 511-EFV (payment voucher) by April 15, 2002. ONLY SEND IN 511EFV WITH A PAYMENT. BE SURE TO INCLUDE THE DCN ON THE PAYMENT VOUCHER.
- If the individual wishes to pay by credit card they can call 1-800-2-PayTax (1-800-272-9829) for information or through the OTC website at [www.oktax.state.ok.us](http://www.oktax.state.ok.us).
- Copies of Forms W-2, W-2G or 1099-R, which would normally be attached to a paper return, must be attached to the 511-EF and retained by the preparer.
- If the taxpayer chooses to pay at the time the return is being transmitted, the 511-EFV should be sent immediately with the payment, to ensure the payment is properly posted to the taxpayer's income tax account. DO NOT SEND MORE THAN ONE 511EFV. If the taxpayer does not pay at the time the return is transmitted, give the completed, signed 511EFV to the taxpayer and instruct them to mail it in by April 15, 2002. IF THE TAXPAYER SENDS A PARTIAL PAYMENT WITH THE ORIGINAL 511EFV, THEY SHOULD NOT SEND ANOTHER 511EF WITH NEXT PAYMENT. A BILLING COUPON WILL BE SENT TO THE TAXPAYER FOR THE BALANCE DUE AND THE NEXT PAYMENT CAN BE SUBMITTED WITH THE COUPON.

The 511-EFV for a payment should be mailed to:

Oklahoma Tax Commission  
Electronic Filing  
P.O. Box 26890  
Oklahoma City, OK 73126-0890

## **EXCLUSIONS FROM ELECTRONIC FILING**

The following types of returns are excluded from electronic filing for tax year 2001 (2002 filing season):

- All returns and schedules excluded by the Internal Revenue Service in Publication 1345, Chapter 4
- Returns from preparers, originators or transmitters who have not been accepted into the Electronic Filing Program
- Non-residents or Part Year Residents
- Amended returns or corrected returns (OTC form 511-X)
- Returns for any tax year other than calendar year 2001
- Returns with dollars and cents entries  

Note: Only returns with whole dollar amount entries will be accepted.
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- Decedent returns, including joint returns filed by surviving spouses
- Returns containing more than one (1) Oklahoma Income Tax Other Credit Form (OTC Form 511-TX)
- Returns transmitted after October 15, 2002

## **CHAPTER 4**

### **TRANSMITTING THE OKLAHOMA ELECTRONIC RETURN**

Oklahoma returns included in the Federal/State ELF Program will be transmitted to the Internal Revenue Service Austin Service Center, Austin, Texas, along with the federal return. Transmissions shall be accomplished according to Internal Revenue Service procedures. All Oklahoma returns must include a corresponding federal return in the unformatted records.

<p>Note: An Oklahoma return cannot be transmitted without an accompanying federal return.</p>
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Once the Internal Revenue Service has provided an acknowledgment to the ERO, the state data segment will be made available to the OTC for retrieval within 24 hours. The OTC will not receive any state data associated with a rejected federal return.

<p>Note: The Internal Revenue Service acknowledges only that they received the state data. Their acknowledgement is not an indication that the OTC has "accepted" the state return. An Oklahoma return is not accepted until you receive an acknowledgement from StAck or your third party provider.</p>
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### **ACKNOWLEDGMENT OF THE OKLAHOMA ELECTRONIC RETURN**

In 2001 our service provider will again be the Centralized State Acknowledgment System (StAck). Program participants that are required to access the centralized state acknowledgment system to retrieve their state acknowledgments will be required to register with the service provider. You should be aware that there will be a nominal fee (\$50) charged by the service provider for use of the Centralized State Acknowledgment System.

If, in 2000, you had previously registered and used StAck, you will be required to register with them for the current year. If your software provider accesses this system on your behalf, you will not be required to register with the new service provider. You should refer to your software provider's instructions for additional information regarding your responsibilities for accessing and retrieving state acknowledgments.

To check on the status of your acknowledgement record contact StAck or your third party provider.

### **HOW TO REGISTER -**

You can call the Centralized State Acknowledgment System (StAck) Help Desk at 828-349-5750 to request an application. You may also register with (StAck) through [www.state-ack-net](http://www.state-ack-net).



## **CHAPTER 5**

### **REJECTED RETURNS**

Paper returns, to replace electronic returns that were rejected by Internal Revenue Service and not resubmitted, are to be mailed to the OTC. The following information is required:

- A printout of the return; and
- The original, signed, form 511-EF; and
- State copies of all W-2's, W-2G's and 1099-R's; and
- A cover note giving the date the return was rejected by the Internal Revenue Service, e.g., rejected 01/30/99.

Mail paper returns to:

Oklahoma Tax Commission  
Electronic Filing  
P.O. Box 26890  
Oklahoma City, Oklahoma 73126-0890

When the paper replacement return is received by the OTC at the specified address, it will be given priority processing status.

Note: If non-qualifying returns (e.g., decedent returns) are filed electronically, the replacement returns will not be given priority by the Oklahoma Tax Commission.
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The OTC will monitor receipt of replacement returns. If replacements are not submitted in a timely manner, you will be contacted by the OTC.

Note: Failure to submit paper returns in a timely manner may adversely affect your authorization to file Oklahoma electronic returns.
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### **CHANGES TO ELECTRONIC RETURNS**

After electronic returns are transmitted, they cannot be recalled or intercepted in process. If the electronic filer or taxpayer wishes to change any entries after a return has been accepted:

- An Amended Oklahoma Individual Income Tax Return (OTC Form 511-X) must be filed through the normal paper filing process.
- No action should be taken to change the computation between the date transmitted and the date the OTC acknowledges the return.
- If an Oklahoma return is transmitted in error, please contact OTC immediately at (405) 521-3124 or by faxing a request to delete the electronic file to (405) 522-1006 Attn: Darla Young.

## CHAPTER 6

### FORM 511-EF: OKLAHOMA INDIVIDUAL INCOME TAX DECLARATION FOR ELECTRONIC FILING

Form 511-EF is the signature portion of the return. It must be completed and signed by all appropriate parties before the return is transmitted electronically. The preparer is to keep the 511EF as documentation and not mail to OTC.

Form 511-EF:

- Authenticates the return; and
- Authorizes the ERO to file the return electronically on behalf of the taxpayer; and

Form 511-EF does not serve as a power of attorney or as a substitute for the information required to be provided on the electronic tax return.

**Note:** Use only the official Form 511-EF or an approved substitute form which duplicates the official form in format, language, content and size. Photocopies are acceptable as long as they are completely legible.

The following is the sequence of events in the handling of Form 511-EF:

1. An ERO prepares the return and computes the taxes based on the information the taxpayer provides, or accepts an already prepared tax return for the purpose of transmitting it electronically.
2. After the return has been prepared and before it is transmitted, the taxpayer must verify the information on the return and sign the Form 511-EF prior to the electronic transmission of the tax return. Both signatures are required on a joint return.
3. A copy of the prepared return must be provided to the taxpayer.
4. Form 511-EF will be retained by the ERO for 3 years. All ERO's will be subject to periodic reviews by OTC to assure the paperwork is being retained. Do not mail to OTC.
5. Form 511-EFV is a payment voucher form to be given to the taxpayer to submit a check or money order to OTC. If the taxpayer wishes to pay by credit card they can call 1-800-2-PayTax (1-800-272-9829) or visit the OTC website at [www.oktax.state.ok.us](http://www.oktax.state.ok.us).

Form 511-EF is part of the electronic tax return for the purposes of taxpayer verification and signature. A blank Form 511-EF is the same as a blank tax return.

- Practitioners are prohibited from allowing taxpayers to sign a blank tax return.
- It is permissible to have the taxpayer review the completed tax return on the display terminal.

## **CHAPTER 7**

### **REFUNDS**

Taxpayers have three options when their return shows an overpayment of their tax. They may elect to have their overpayment:

- Applied to the next year's estimated tax,
- Refunded to them in the form of a paper refund check, OR
- Refunded directly into their financial institution account by electronic transfer (Direct Deposit)

Direct deposit offers taxpayers a quicker and more convenient way to receive their refunds. It reduces the risk of loss, and allows immediate use of the funds upon deposit.

The Oklahoma refund has to be directly deposited into the same financial institution as the federal refund. The software program should allow for the same federal and state direct deposit requests.

Direct deposit of a refund is not guaranteed. A direct deposit may be denied due to:

- Incorrect banking data
- Oklahoma income tax due from a previous year
- Fines or debts owed to state agencies or IRS (i.e. child support, student loans, etc.)
- The estimated tax payments claimed on the return do not match the estimated tax payments recorded by OTC.
- Adjustment is made to disallow a credit when the taxpayer was not eligible for it.

Although we do not anticipate problems with the Federal/State Electronic Filing Program, a refund may be delayed. If a taxpayer owes Oklahoma taxes, fines or a debt to a state agency, the Oklahoma Tax Commission is required by state law to apply (set-off) the income tax refund to these balances.

Taxpayers should first confirm acknowledgement of their Oklahoma return with their practitioner or transmitter. Tax Preparers should wait at least 14 days from the date of acknowledgement for a paper refund or 10 days for a direct deposit before contacting OTC about their refund.

Inquiries may be directed to the Taxpayer's Assistance Division at (405) 521-3160 or 1-800-522-8165 ext. 1-3160.

## **CHAPTER 8**

### **PAYMENT OF BALANCE DUE AMOUNTS**

**\*\*New Form\*\***



## 511-EFV

The taxpayer is responsible for paying the amount due to the OTC when the return is filed or no later than April 15, 2002.

- Payment may be made by check, money order or by credit card.

Note: The only credit cards accepted are Discover, MasterCard and American Express. Credit card payments can be made by calling 1-800-2PAYTAX (1-800-272-9829) or accessed via the OTC website at [www.oktax.state.ok.us](http://www.oktax.state.ok.us).

- The check or money order should be attached to the 511-EFV when the return is filed or no later than April 15, 2002 and mailed to:

Oklahoma Tax Commission  
Electronic Filing  
PO Box 26890  
Oklahoma City, OK 73126-0890

- If the taxpayer is not paying at the time of transmission, give the completed, signed 511EFV to taxpayer to be mailed in by April 15. If the taxpayer is making a partial payment, the 511EFV should be mailed to OTC by April 15, 2002. A billing coupon will be sent to the taxpayer for the balance due at which time the taxpayer will have the option of paying the remaining balance in full or make monthly payments until the balance is paid off.

## CHAPTER 9

### INFORMATION ELECTRONIC FILERS MUST PROVIDE TO THE TAXPAYER

The ERO must furnish the taxpayer with documentation of all completed Oklahoma forms and schedules filed for the taxpayer. This documentation may be furnished on official Oklahoma forms, on copies of official forms or on ERO-designed forms that have data entries cross-referenced to the line numbers on the official forms. This material should be provided to taxpayers at the time they sign Form 511-EF.

- The completed Oklahoma Individual Income Tax Declaration for Electronic Filing (OTC Form 511-EF).
- Other documents containing required signatures.
- Any other documents which are not Oklahoma forms or schedules.

The ERO should advise the taxpayer to retain copies of:

- Forms W-2, W-2G or 1099-R.
- Any other documents, not required by the OTC, which the taxpayer voluntarily includes with the 511-EF as supporting material.
- The signed Form 511-EF.

The ERO will also retain the 511-EF and copies of the W-2's for 3 years.

Immediately upon learning that a return has not been accepted by the OTC, the ERO should notify the taxpayer that the return was not accepted and that a paper return must be filed.

<p>Note: The taxpayer should allow up to four (4) weeks after the paper return is filed for an Oklahoma income tax refund to be issued.</p>
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If an electronically filed return was acknowledged as accepted by the OTC, the ERO should advise the taxpayer to wait one (1) week from the acknowledgment date before making an inquiry about his/her refund.

If an individual should find it necessary to contact the OTC regarding his/her Oklahoma income tax refund, he/she may do so by calling the Taxpayer Assistance Division at (405) 521-3160 or 1-800-522-8165 ext 1-3160.

- The taxpayer will be required to furnish his/her (and spouse's, if applicable) social security number(s).
- The taxpayer should be prepared to provide bank info if direct deposit was requested.

## **CHAPTER 10**

### **RESPONSIBILITIES OF ELECTRONIC FILERS**

The guidelines in Internal Revenue Service Publication 1345, Chapter 11 must be followed for Oklahoma Electronic Filing.

#### **I. PENALTIES**

##### **PENALTIES FOR DISCLOSURE OR USE OF INFORMATION**

Guidelines outlined in Section 6, Internal Revenue Service Procedure 91-69, should be followed, as well as Title 68, Section 205, Oklahoma Statutes.

##### **PENALTIES FOR LATE FILING, LATE PAYMENT AND FRAUDULENT RETURNS**

This provision provides due notice that all penalties, interest and criminal provisions which are applicable for paper returns are also applicable to electronic returns. Specifically, penalty and interest on tax for late filing and/or late payment will be assessed.

Penalties will be assessed for any person filing a fraudulent misleading return. Additionally, any person who willfully subscribes or presents a fraudulent return will be subject to prosecution and the penalties.

- Other criminal provisions will be applicable to the extent that a person attempts to commit forgery and falsify signatures on any electronic filing form or check.
- Any attempt to pass bad checks for payment of taxes will be prosecuted.

#### **II. ADVERTISING STANDARDS**

Guidelines in Internal Revenue Service Publication 1345, Chapter 13 and Revenue Procedure 91-69, Sec. 12, .01 through .03 and .05 through .09 must be followed for Oklahoma Federal/State ELF, as though references to the Internal Revenue Service or Service were references to the OTC, State of Oklahoma, or the State and references to the FMS or Treasury Seals were references to the State of Oklahoma Seal.

#### **III. MONITORING AND SUSPENSION OF AN ELECTRONIC FILER**

The OTC will monitor electronic filers for conformity to this publication. Under the Federal/State ELF Program, the OTC can recommend suspension of an electronic filer for due cause through the local Internal Revenue Service District Office Coordinator.

<p>Note: Warning letters, suspension and rejection from electronic filing will be administered by the local Internal Revenue Service District Director.</p>
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## CHAPTER 11

### FED/STATE E-FILE SOFTWARE LIST FOR THE 2001 TAX YEAR

The following is a list of software companies approved for Oklahoma for tax year 2000. If your current software provider is not listed, contact them to determine if they support Oklahoma. Vendors are listed in alphabetical order and are provided to you in order to facilitate communications. **This is not an endorsement of any software by the OTC, nor a commitment on the part of any company to participate in the Fed/State E-File Program.**

ATX Forms, Inc.  
7305 Commercial Circle  
Ft Pierce FL 34951  
1-800-944-8883

CCH Incorporated  
Attn: Sales Dept  
555 N Woodlawn Bldg 4  
Wichita KS 67208  
1-800-739-9998

Creative Solutions  
Attn: Gene Salo  
7233 Newman Blvd  
Dexter MI 48130  
734-426-5860

Drake Software  
Attn: Sales  
235 E Palmer St  
Franklin NC 28734  
1-800-890-9500

H & R Block  
4400 Main St  
Kansas City MO 64111  
1-800-869-9220

Jackson Hewitt  
300 Centre Pointe Dr  
Virginia Beach VA 23462  
757-473-3300 x222

Intuit  
Attn: Mary Jo Campbell  
9807 Greenwich Dr Ste 10  
San Diego CA 92122  
1-800-934-1040

Lacerte Software Corp  
Attn: January Kinkade/Seth Baker  
13155 Noel Road 20<sup>th</sup> Floor  
Dallas TX 75240-5088

Orrtax Software Inc  
Attn: Sales  
13208 NE 20<sup>th</sup> St  
Bellevue WA 98005  
1-800-377-3337

Petz Enterprises  
Attn: Alan Sordello  
PO Box 611  
Tracy CA 95378  
1-800-345-4337

Stallion Software  
PO Box 50357  
Amarillo TX 79159  
806-467-9580

Tax & Accounting Software Co  
6914 S Yorktown Ave  
Tulsa OK 74136  
1-800-998-9990

Tax Link  
Attn: April Silk  
PO Box 20272  
Columbus OH 43220  
1-800-240-5903

Tax Works By Laser Systems  
Attn: Alan Haacke  
350 North 400 West  
Kaysville UT 84037  
1-800-230-2322

Xpress Software Inc  
Attn: Ron Wyche  
PO Box 280760  
Columbia SC 29228-0760  
1-800-285-1065

For questions or inquiries please contact:

Darla Young at (405) 521-3124

In State Toll Free: 1-800-522-8165 ext.1-3124

FAX: (405) 522-1006

E-Mail: [efile@oktax.state.ok.us](mailto:efile@oktax.state.ok.us)