



## A step-by-step guide to the Oklahoma Film Enhancement Rebate Program's online application portal

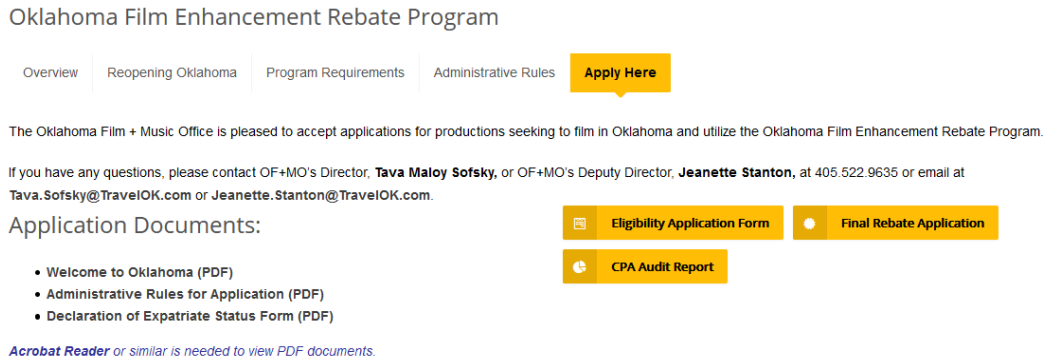
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**Note:** This document is meant to provide an overview of our online application system. For a more detailed guide to the entire rebate program, please see our [Administrative Rules](#).

## Step 1.

Visit our website. You can find both the Eligibility Application (for applying to the program) and the Final Application (for submitting a final rebate claim) on our [website](#). From there, you can select the correct application and enter the application portal.



Oklahoma Film Enhancement Rebate Program

Overview Reopening Oklahoma Program Requirements Administrative Rules **Apply Here**

The Oklahoma Film + Music Office is pleased to accept applications for productions seeking to film in Oklahoma and utilize the Oklahoma Film Enhancement Rebate Program.

If you have any questions, please contact OF+MO's Director, **Tava Maloy Sofsky**, or OF+MO's Deputy Director, **Jeanette Stanton**, at 405.522.9635 or email at [Tava.Sofsky@TravelOK.com](mailto:Tava.Sofsky@TravelOK.com) or [Jeanette.Stanton@TravelOK.com](mailto:Jeanette.Stanton@TravelOK.com).

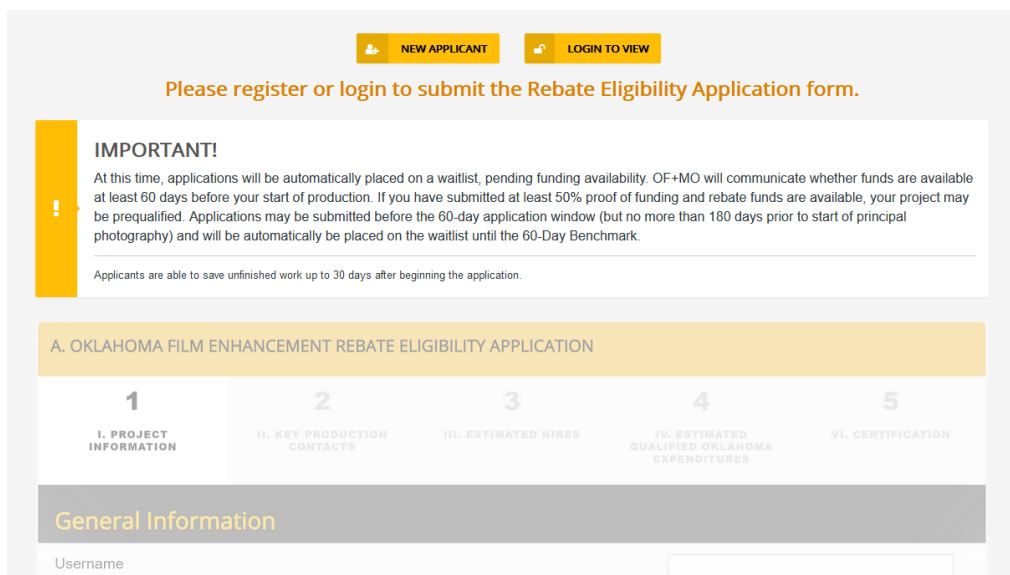
Application Documents:

- Welcome to Oklahoma (PDF)
- Administrative Rules for Application (PDF)
- Declaration of Expatriate Status Form (PDF)

*Acrobat Reader or similar is needed to view PDF documents.*

## Step 2.

Create an account. In order to begin filling out the application, you will need to create an account. If you have already created an account in the application portal, but have not started filling out an application, you may log-in to view. At the top of the application, you will find important information or notices. Please read this section before beginning your application.



**NEW APPLICANT** **LOGIN TO VIEW**

Please register or login to submit the Rebate Eligibility Application form.

**IMPORTANT!**

At this time, applications will be automatically placed on a waitlist, pending funding availability. OF+MO will communicate whether funds are available at least 60 days before your start of production. If you have submitted at least 50% proof of funding and rebate funds are available, your project may be prequalified. Applications may be submitted before the 60-day application window (but no more than 180 days prior to start of principal photography) and will be automatically be placed on the waitlist until the 60-Day Benchmark.

Applicants are able to save unfinished work up to 30 days after beginning the application.

**A. OKLAHOMA FILM ENHANCEMENT REBATE ELIGIBILITY APPLICATION**

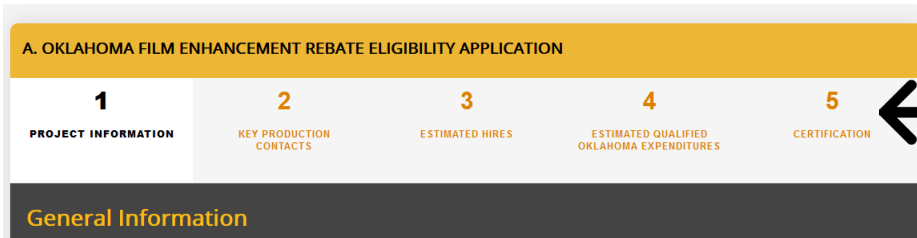
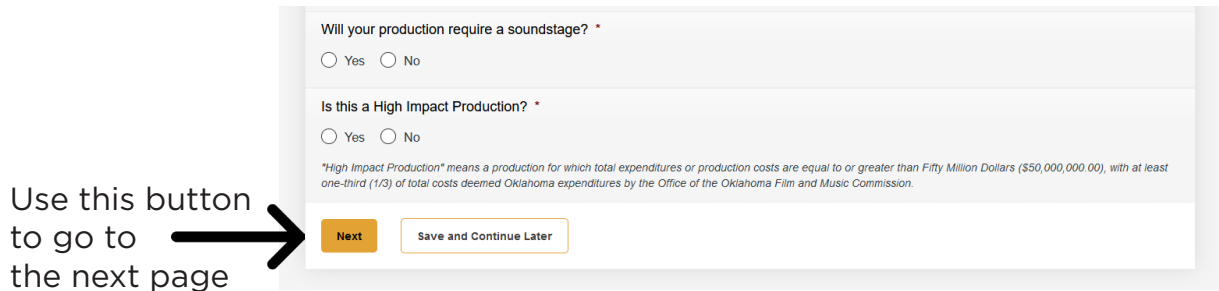
- 1**  
I. PROJECT INFORMATION
- 2**  
II. KEY PRODUCTION CONTACTS
- 3**  
III. ESTIMATED HIRES
- 4**  
IV. ESTIMATED QUALIFIED OKLAHOMA EXPENDITURES
- 5**  
VI. CERTIFICATION

**General Information**

Username

### Step 3.

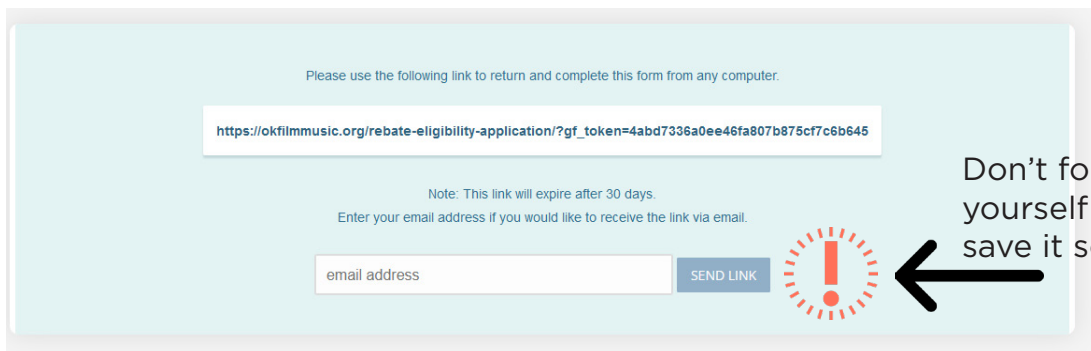
Fill out the application. If you would like to preview upcoming sections of the application, you may click the the section numbers at the top of the page to skip ahead. However, if you have finished filling out one section and wish to move on to the next section, we recommend using the “Next” button at the bottom of the page. Using the “Next” button will let you know if any required fields (marked with a red asterisk) have been skipped, or if any fields have been filled out incorrectly.



The section numbers at the top can be used to preview sections, but will not tell you if any errors were made on a previous page

### Step 4.

Using Save and Continue. If you are filling out the application and need to take a break, you have the option to save and continue later. The “Save and Continue” button is located at the bottom of each page by the “Next” button. When you hit “Save and Continue”, the following blue box will appear.



A unique link will be created to access your saved application. **Your application will not be saved on the website database, it will only exist in this link. The link will not automatically be emailed to you, you must type in your email address and hit “Send Link.”** If the link is lost, we cannot access or retrieve your lost information, so make sure you email the link to yourself and save it!

## Step 5.

Submit. If you click submit and nothing happens, that means a field in the application was filled out incorrectly or a required field was skipped. If you used the section numbers at the top of the page to move from section to section, you'll have to go back to each section and click "Next" at the bottom of the page to see which page has errors. Once your application has been successfully submitted, you will see a confirmation screen.

**Success! Your submission has been submitted for review.**

Thank you for submitting your application to the Oklahoma Film Enhancement Rebate Program.

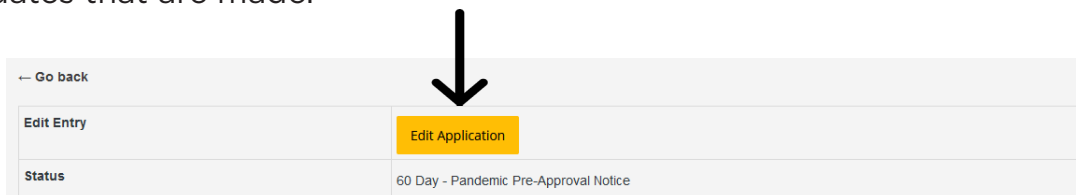
**Our office has 14 days to review each submission**, and we will contact you if we have any questions regarding your application. If you have any questions in the meantime, please contact **Jeanette Stanton** or call (405) 522-9635 or toll-free: (800) 766-3456.

A copy of your rebate application will also be sent by email. *Remember to check your junk mail just in case it does not arrive in your inbox.*

You will also receive a confirmation of your submission and a copy of your application via email.

## Step 6.

View or make changes to your application. In the confirmation of submission email, there is a link that says "[Login to check the status or pending tasks.](#)" If you click this link, it will take you to your application (or multiple applications, if you have several applications under the same user account). From there, you can click your application to view it or edit it. While viewing your application, there will be a button at the top of your application that says "Edit Application." Not everything will be available for changes, but fields such as your dates of principal photography can be changed. Our office will receive a notification of any updates that are made.



## Step 7.

Benchmarks. 24 hours after your application has been submitted, you will receive another email requesting you to upload documents for your 50% proof of funding benchmark (60 Days before the start of principal photography). If your 60-Day Benchmark has not passed, you do not have to submit these documents yet. However, if these documents are ready, we encourage productions to submit their funding early.

You can upload your documents here: [Benchmark - 60 Day: Upload 50% Proof of Funding Documents.](#)

You will also receive emails requesting your 30-Day and 10-Day documents at 30 and 10 days from your start of principal photography. If your film has not yet been prequalified, these benchmarks are not required; however, we recommend submitting the documents if you have them available. In the event that we are able to prequalify your film, all benchmark documents up to your current status will need to be submitted before prequalification.

### **Step 8.**

Prequalification. If your film is prequalified, you will receive an official letter via email from our office, as well as an email notification when your application's status has changed in the online portal. If all of your benchmarks have been met, your production only needs to update our office of any changes in the shooting schedule and include members of our team on your daily callsheet distribution list during principal photography.

### **Step 9.**

Final Application. Within 90 days of the completion of production or the last qualified Oklahoma expenditure (whichever comes later), the Final Rebate Application must be submitted. The link to this application can be found [online](#), and you will also receive a reminder to fill out this application 90 days after your submitted wrap date. You will fill out this application using the same log-in information that was used to fill out the Eligibility Application.

Our office recommends viewing the Final Application well before you are ready submit, as this application process is much more extensive than the Eligibility Application. We ask productions questions regarding locations used, spend breakdowns by location, crew information, and more. Additionally, the following are required uploads:

- Oklahoma Crew List
- Oklahoma Expatriate List
- Oklahoma Vendor List
- CPA Report
- Link to digital images or press kit

While this process may seem daunting, you always have the option to Save and Continue at any point. Please refer to [Step 4](#) for more information on using this feature, as we know that this application process takes a significant amount of time, and we do not want you to lose any of your work. Additionally, logging in to view the application before you are ready to submit can help you get a better idea of what will be required. This way, when you are ready to submit you can have all the information on hand for a smoother experience.

## Step 10.

CPA Form. In addition to the production's Final Application, your final rebate claim is not considered complete until your CPA has submitted a separate application with their name and final report. The production is required to upload the CPA report with their application as well, so our office will receive the report twice. The CPA Form is located on our [website](#) next to the Eligibility and Final Rebate Applications.

## Step 11.

Vendor Forms. While our office is reviewing your final rebate claim (per our Administrative Rules, we have 60 days to review all claims), we will submit your OMES Vendor Forms to the Oklahoma Tax Commission (OTC). Unless you are a repeat vendor and your company has previously registered with the OTC, you should have filled out and submitted three OMES Vendor Forms with your Final Rebate Application.

Have you previously submitted the OMES/OTC required vendor forms for payment? *	<a href="#">Download Vendor Forms</a>
<input type="radio"/> No	<a href="#">Vendor Payee</a>
<input type="radio"/> Yes	<a href="#">Verification of Disregarded Entity</a>
	<a href="#">IRS W-9 NOV 2017 DE Example</a>
	<a href="#">EFT Help Sheet</a>

Productions have the option of being paid one of two ways: physical check or Electronic Funds Transfer (EFT). If the production would like to be paid via check, the check is mailed to the address listed on the Vendor Payee form. It is also possible to pick up the check in-person. If the production would like to be paid via EFT, we recommend thoroughly reviewing our EFT Help Sheet (available on the next page). The EFT registration process can take 2-3 weeks to set up, but our Help Sheet outlines the process in detail.

## Step 12.

Our Review. As mentioned above, our office has 60 days to review all claims. If we finish early, we will let your production know. When we have finished reviewing your claim, we will notify you by email of any possible deductions that we found or if the claim is approved as-is. Once both the production and our office have approved a final amount, we will request the rebate payment from the tax commission, and funds should be received within 10 business days, depending on which method the production has chosen to receive the payment. Additionally, you will receive an email notifying you that your online Final Application's status has been changed to "approved."



## **ELECTRONIC FUNDS TRANSFER REGISTRATION PROCESS**

*\*Please note, the OF+MO does not have access to the EFT registration process. The timing of your registration is up to OMES and the State Treasury Office; however, we are happy to answer any questions you may have.*

1. When filling out the OMES Vendor Payee Form, list an email address *only* if you would like to receive payment via EFT (Electronic Funds Transfer). The email address listed will receive instructions to complete the EFT set-up. Please keep in mind the entire EFT registration process will take 10 - 14 business days to complete, and this process can be delayed longer if proper instructions are not followed. At each step in the process, please take your time and read all instructions thoroughly and carefully.
2. The email address listed on the Vendor Payee form will receive an email from OMES with further instructions and the payee's registered State Vendor ID and Pin Number (a sample email is included on the next page). The payee must use this information to register in the online vendor portal. The link to the vendor portal will be included in the email.
3. The email will also include an attached Vendor EFT Enrollment Request Form which must be filled out by both the payee and their financial institution. Once this form is filled out, the form must be faxed or mailed to the Oklahoma State Treasury's office.
4. Once the treasury's office has received and processed the EFT Enrollment Request Form *and* the payee has registered in the online portal, the treasury will deposit \$0.01 into the bank account to validate the banking information. The bank has five business days to approve or deny the transaction.
5. If the transaction is approved, the treasury has one business day to let OMES know that the process was approved.
6. Once the OMES has been notified of an approval, they have one business day to add the EFT confirmation to the payee's vendor file. Once the payee's file is updated, they will receive an email letting them know that the process is complete.

## SAMPLE EFT REGISTRATION EMAIL

### Notice to Persons and Companies Receiving Payments from the State of Oklahoma

All payees of State of Oklahoma agencies are instructed to complete the vendor financial registration process needed to enroll for direct deposit/electronic funds transfer (EFT). House Bill 1086 was passed in May 2011 and requires that "*Payments disbursed from the State Treasury shall be conveyed solely through an electronic payment mechanism*". To view a copy of the signed legislation go to <http://webserver1.lsb.state.ok.us/cf/2011-12%20ENR/hB/HB1086%20ENR.DOC>

To comply with the law, the state must collect the information necessary to pay you electronically. **Please do not send any information about your bank account in response to this email.** Specific procedures are provided below that enable us to collect this information in a secure manner.

To complete the registration process, payees must:

Login to the State of Oklahoma secure Online Vendor Registration portal and complete 'Financial Registration' to provide banking information.

To access the vendor portal go to <https://www.ok.gov/dcs/vendors2/app/index.php>

To login, you will need: The email address to which this notification was sent; the payee's FEIN/SSN registered with the State;

State Vendor ID: 0000XXXXXX

PIN: XXXX

Fill out the attached VENDOR EFT ENROLLMENT REQUEST FORM 2016 and submit it to your bank for processing.

The payee must fill out Section I, II & III and submit the form to the payee's financial institution. The payee's financial institution must fill out Section IV.

The payee or the financial institution must submit the form via fax or mail to the Oklahoma Office of the State Treasurer (OST) using the provided instructions. **Please do not email form.**

**If this email did not contain an attachment, you may access the form within the online registration 'Financial Information' step. Your registration will not be complete until this form is received by OST and processed.**

\*\*Please note, as part of the registration process, the Office of State Treasurer will deposit a \$0.01 transaction into the account to validate the banking information. Once verified and approved, an automated approval email will be sent via your online registration account. Please allow 10-14 days for processing.

**Again, please do not respond to this email with your personal information. The State of Oklahoma will never request financial information be provided through email. Please utilize the secure website listed above and instructions to provide the necessary information.**