OKCares

9th Annual

OKLAHOMA CAREGIVER CONFERENCE

November 5, 2026 • 10 AM - 3 PM

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AARP® Oklahoma

CARING FOR CAREGIVERS TAX CREDIT

Changes coming Nov. 1, 2026!

Help is available for Oklahoma caregivers and the parents, spouses, and other loved ones they care for with a tax credit provided by the Caring for Caregivers Act.

The Caring for Caregivers tax credit is for out-of-pocket costs incurred by the unpaid family caregiver. The expenses must be directly related to assisting the family caregiver in providing care to an eligible family member. Currently, the tax credit is capped at $2,000 per year for most participants. Individuals caring for veterans or those with a dementia-related diagnosis will receive up to $3,000 in tax credit.

Effective Nov. 1, 2026, the tax credit will change with the following updates:

- Sets the maximum allowable credit at $3,000 for all eligible caregivers, not just those caring for a veteran or an individual with a dementia-related diagnosis.
- Includes mileage for transporting an eligible family member to medical appointments using the IRS medical mileage rate.
- Removes the age requirement so eligibility is based on functional need rather than age.
- Updates the caregiver income cap to $75,000 for an individual /$150,000 for a couple filing jointly.

FREQUENTLY ASKED QUESTIONS

What are the current qualifications to receive the tax credit?

- Oklahomans receiving care from a family caregiver must be 62 years of age or older and require assistance with at least two activities of daily living (ADLs), as outlined in the qualifications section. The ADLs must be certified by a licensed health care provider.
- Family caregivers, or those providing care and support for an eligible family member, must have a federally adjusted gross income of less than $50,000 (individual) or less than $100,000 for a couple filing jointly to receive the tax credit. They must also personally incur uncompensated expenses directly related to the care of an eligible family member.
- Individuals must qualify as a dependent, spouse, parent or other relation by blood or marriage to the family caregiver.
- Individuals must live in a private residential home, not an assisted living center, nursing facility, or residential care home.

What type of care qualifies as an eligible out-of-pocket expense?

- Hiring a home care aide, respite care, adult day care, personal care attendants, health care equipment and technology are types of eligible expenditures paid or incurred by the family caregiver providing care to an eligible family member.

What purchased or leased equipment qualifies for the tax credit?

- The purchase or lease of equipment to assist an eligible family member in carrying out one or more activities of adult daily living (ADL) qualify for the tax credit.

What are considered approved ADL activities?
Approved ADLs include:

- The individual's ability to move from one position to another and walk independently.
- The ability of an individual to feed oneself.
- The ability to select appropriate clothes and to put the clothes on without aid.
- The ability to bathe, groom oneself, and maintain dental hygiene and nail and hair care.
- The ability to control bladder and bowel function, and the ability to get to and from the toilet without aid, using it appropriately, and cleaning oneself.

Does the Caring for Caregivers tax credit cover diabetic supplies and/or insulin pumps?

- No, many supplies are considered either medications (insulin) or medical devices (pumps/glucose monitors, etc.)

Does the Caring for Caregivers tax credit cover costs like wheelchairs, walkers, lift chairs and adult diapers?

- Yes, the Caring for Caregivers tax credit covers the cost of durable medical equipment.

Does the Caring for Caregivers tax credit cover prescription drugs?

- The Caring for Caregivers tax credit does not cover prescription or over-the-counter drugs. Many individuals being cared for are Medicare recipients and will already have at least a portion of their medications covered.

What is considered a private residential home?

- A private residential home is a personal dwelling not licensed as an assisted living center, nursing facility or residential care home.

Are home improvements to the caregiver's home considered eligible expenses?

- The improvement to the family caregiver's or eligible family member's primary residence qualifies if it allows the eligible family member to live in the residence and remain mobile, safe and independent.

Does this tax credit cover general household maintenance activities?

- No, the tax credit does not cover expenditures of general household maintenance activities such as painting, plumbing, electrical repairs or exterior maintenance.

Does the Caring for Caregivers tax credit apply to people living in long-term care facilities?

- No, an individual in a nursing or assisted living facility is not eligible for the tax credit since they are receiving care through that facility.

Can two or more family caregivers claim the tax credit for the same family member?

- Two or more family caregivers may claim the tax credit for the same eligible family member. However, the maximum allowable credit shall be allocated equally between each family caregiver.

Is there a limit to the annual allocation of state funds available for the Caring for Caregivers tax credit?

- Yes. The Oklahoma Legislature capped the amount of annual tax credit expenditure at $1,500,000.

How do I claim the Caring for Caregivers tax credit?

- The Oklahoma Tax Commission (OTC) form 592 must be filed with each claimant's tax return, along with any other information or documentation the OTC may require, such as receipts to support the claimed expenses, proof of veteran status and/or documentation to support a diagnosis of dementia for the eligible family member.
- Form 592 is available on the OTC website, or talk with your tax preparer to ensure they are aware of the credit.

REMINDER: THE TAX CREDIT WILL HAVE NEW CHANGES NOV. 1!
Watch for more updates at www.aarp.org/OKCaregiverTaxCredit.

OKLAHOMA

OK Mobility Plan

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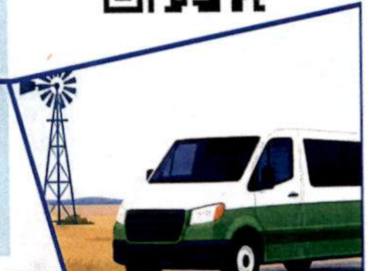

Oklahoma Department of Transportation Multi-Modal & Planning Division