

ONESOURCE™ SALES AND USE TAX COMPLIANCE

RELEASE NOTES

23.02.1

Document Version 1

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DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	February 28, 2023	Initial release

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SALES AND USE TAX COMPLIANCE 23.02.1

RELEASE NOTES

FORMS REVISIONS

If a multiple location version of a return listed below exists in ONESOURCE Sales and Use Tax Compliance, the revisions have been applied to that return as well.

- #Kentucky Local, Bardstown Monthly Return of Restaurant Tax
- #Kentucky Local, Beaver Dam Restaurant Tax Return
- #Kentucky Local, Corbin Monthly Return of Restaurant Tax
- #Kentucky Local, Elizabethtown Monthly Return of Restaurant Tax
- Louisiana Local, Claiborne Parish, Sales & Use Tax Report
- Michigan, 5081, Sales, Use and Withholding Taxes Annual Return
- New York, ST-100, New York State and Local Quarterly Sales & Use Tax Return
- New York, ST-101, New York State and Local Annual Sales & Use Tax Return
- New York, ST-810, New York State and Local Sales & Use Tax Return for Part-Quarterly Filers
- Washington, 40-2406A, Combined Excise Tax Return

Denotes new return

SPECIAL NOTES

Next Release

ONESOURCE Sales and Use Tax Compliance Version **23.03.1** is scheduled for release on **March 31, 2023**.

EXPIRED TAX AREAS

The tax areas listed below have been expired with this release. A suggested replacement tax area may be noted below, but it may not be the best match for what you are trying to accomplish with your mapping.

Kansas

Expired Tax Area

US>KS>ALLEN>MILDRED>NO DISTRICT

Replacement Tax Area

US>KS>ALLEN>UNINCORPORATED AREAS>NO DISTRICT

Expired Tax Area

US>KS>SEDGWICK>WICHITA>WICHITA DELANO CATALYST

Replacement Tax Areas

US>KS>SEDGWICK>WICHITA>RVR DIST STAD STAR BOND AND WICHITA DELANO CATALYST CID

US>KS>SEDGWICK>WICHITA>NO DISTRICT

New Mexico

Expired Tax Area

US>NM>SAN JUAN>UNINCORPORATED AREAS>VALLEY WATER AND SANITATION DISTRICT

Replacement Tax Area

US>NM>SAN JUAN>UNINCORPORATED AREAS>NO DISTRICT

Expired Tax Area

US>NM>SAN JUAN>KIRTLAND>VALLEY WATER AND SANITATION DISTRICT

Replacement Tax Area

US>NM>SAN JUAN>KIRTLAND>NO DISTRICT

STATE NOTES

All changes noted were incorporated into the applicable returns and accompanying schedules for that state or locale. Listed changes are effective **February 1, 2023**, unless noted otherwise.

Interest Rate Changes

JURISDICTION	FROM	TO
Missouri	3.000%	6.000%
Nebraska	3.000%	5.000%
Ohio	3.000%	5.000%
West Virginia	7.750%	11.500%

Alabama

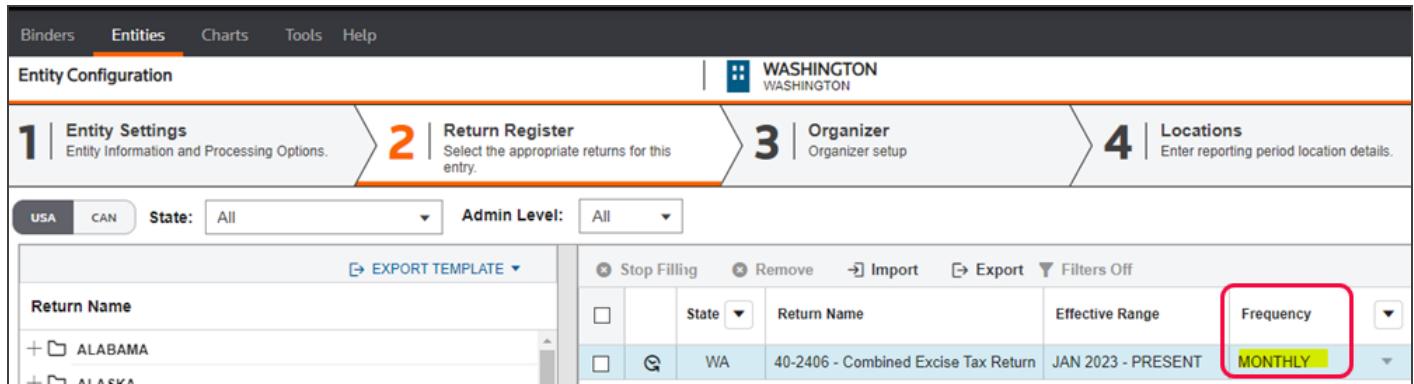
An updated version of the Alabama OneSpot electronic filing has been released with this version 23.02.1. The previous version of OneSpot was an all-or-nothing scenario, and you were not able to exclude returns from the 9501. The updated version allows you to select which returns to file in OneSpot as well as to file multiple returns. There is a one-time setup required in order to file the OneSpot return this month. (See the [online help Tips section](#) for details).

Colorado

The State of Colorado has officially designated Thomson Reuters as an approved software vendor for the new DR-100 and DR-103 form paper filings.

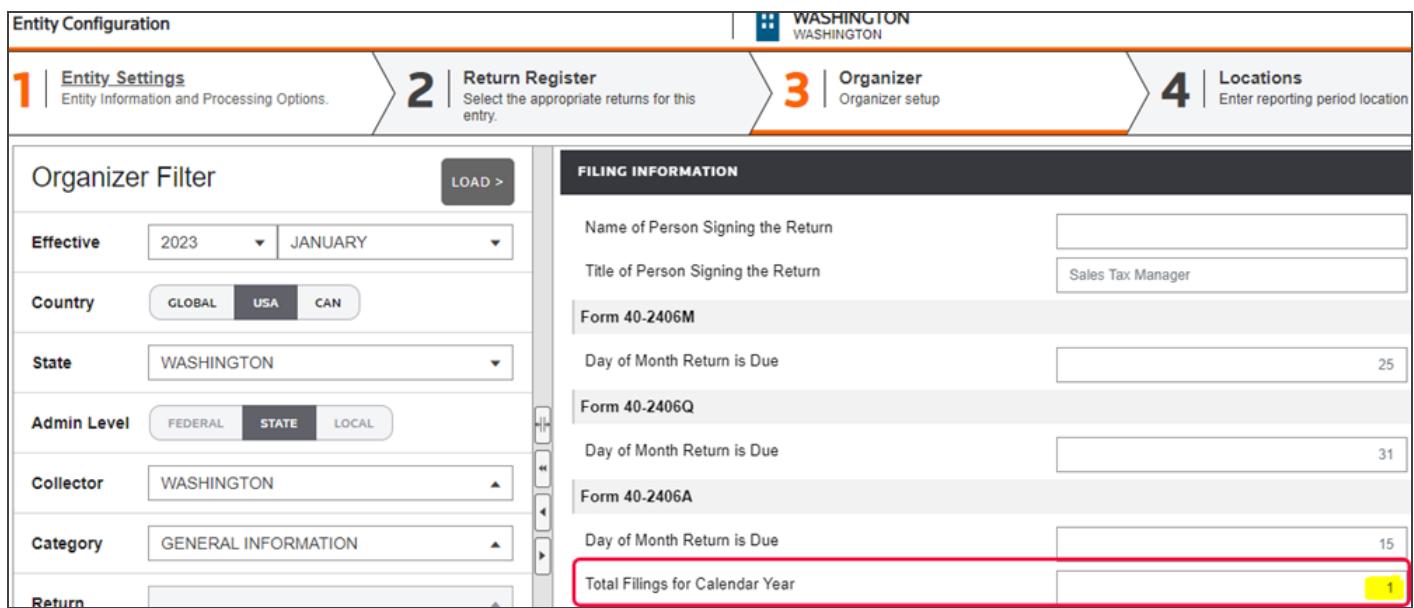
Washington

To file a 2022 Washington Annual Form, first select "Monthly" in the frequency column in the return register of your entity configuration.



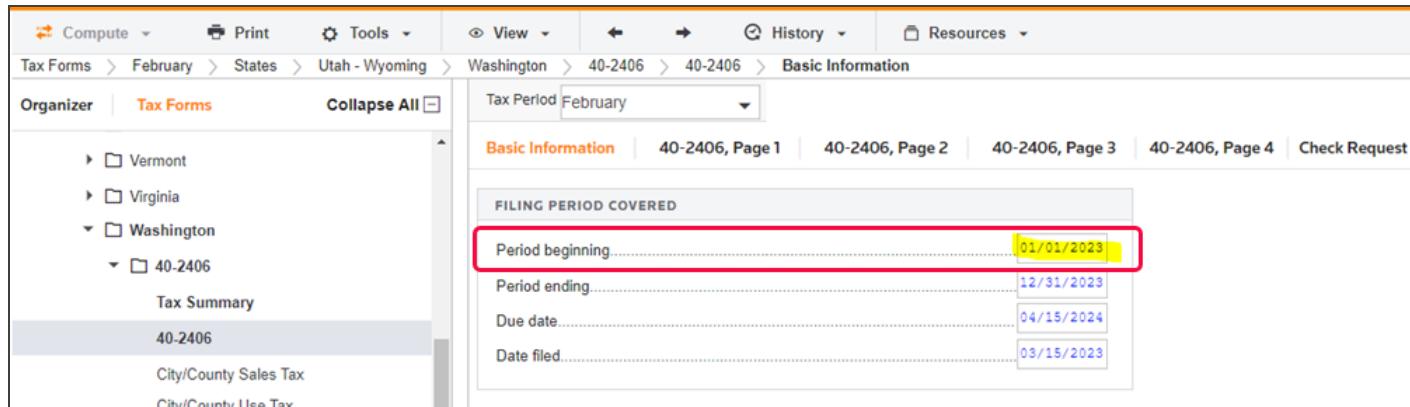
The screenshot shows the Entity Configuration screen for Washington. The top navigation bar includes Binders, Entities (selected), Charts, Tools, and Help. The main area is titled 'Entity Configuration' with the Washington state icon and name. A navigation bar at the top right shows four steps: 1 Entity Settings, 2 Return Register, 3 Organizer, and 4 Locations. Step 2, 'Return Register', is active and displays a table with columns for Stop Filing, Remove, Import, Export, Filters Off, State, Return Name, Effective Range, and Frequency. A table row is selected for 'WA' with the value '40-2406 - Combined Excise Tax Return' and 'JAN 2023 - PRESENT'. The 'Frequency' column for this row is highlighted with a red box and contains the value 'MONTHLY'.

Then change "Total Filings for Calendar Year" to 1 in the Organizer.



The screenshot shows the Organizer screen. The top navigation bar includes Entity Configuration, Entities (selected), Charts, Tools, and Help. The main area is titled 'Entity Configuration' with the Washington state icon and name. A navigation bar at the top right shows four steps: 1 Entity Settings, 2 Return Register, 3 Organizer, and 4 Locations. Step 3, 'Organizer', is active and displays a 'FILING INFORMATION' section. This section includes fields for Name of Person Signing the Return, Title of Person Signing the Return, and several Form 40 entries (40-2406M, 40-2406Q, 40-2406A) with their respective Day of Month Return is Due fields (25, 31, 15). At the bottom of the section, a field labeled 'Total Filings for Calendar Year' is highlighted with a red box and contains the value '1'.

Last, adjust the beginning date in the tax return.



Kentucky

With new local Food and Beverage Tax Returns, the option to “Compute local Food and Beverage Tax and to include Tax in Gross” has been added in **Return/Entity Organizer**.

Kentucky Department of Revenue defines the restaurant tax as a “license tax,” which enables it to be calculated on the customer’s restaurant bill before the state sales tax is applied. (103 Ky. Admin. Regs. 27:220, Section 5)

With new local Food and Beverage Tax returns (Bardstown, Beaver Dam, Corbin, Elizabethtown), it is assumed that the amounts from local food and beverage tax returns in the Journal already include the local taxes of food and beverage in Gross Sales. Therefore, the Ledger amounts are broken down to Sales and Local Tax.

If the amounts on Journal from local food and beverage do not include sales taxes, use the check box to calculate the tax and include it in State Gross Sales.

TAX RATE CHANGES

All tax rate changes noted below were incorporated into the application. Listed changes are effective **February 1, 2023**, unless noted otherwise.

Indiana Locals

The following cities have imposed a food and beverage tax:

- Attica food and beverage tax rate 1.000% effective from 11/01/2019
- Whitestown food and beverage tax rate 1.000% effective from 06/01/2021
- Fisher food and beverage tax rate 1.000% effective from 12/01/2022

OPEN ISSUES

California

California Form 401-GS, Page3, Section D, Line 3, Diesel Fuel does not print.

CLOSED ISSUES

Arizona

Annual accounting credit limit for taxpayers e-filing their returns has been corrected to \$12,000 from \$10,000.

Virginia

VA food sales/personal hygiene tax rate issue of charging 1.5% has been corrected to no tax.