

ONESOURCE TRUST TAX

RELEASE NOTES

VERSION 18.05

Document Version 1

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DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	August 22, 2018	Initial publication.

TABLE OF CONTENTS

ONESOURCE Trust Tax 18.05 Release Notes	1
Release Highlights	1
New Features	1
Bulk Print Shipping Selections	1
Prepare OSMI Report	2
Tax Review-Deductions	3
Massachusetts-990	4
Fixes	4
Known Issues	4
ONESOURCE Trust Tax Administrator Workstation 18.05 Release Notes	1
Release Highlights	1
New Features	1
Tax Years 2011 and 2012 Removed	1
Version Number Change	2
Fixes	2
Known Issues	2

ONESOURCE TRUST TAX 18.05 RELEASE NOTES

For documentation and other product information, access [Customer Community](#) then search Knowledge Center. To read a digital version of Release Notes, click [here](#).

RELEASE HIGHLIGHTS

ONESOURCE Trust Tax version 18.05 includes bug fixes and introduces the following features:

- OSMI reporting changes
- Removal of DPAD Form 8903
- New field for Massachusetts 990

NEW FEATURES

The topics below describe features added with this release.

Bulk Print Shipping Selections

The following shipping selections for bulk print are no longer available:

- 60-Hold for Pickup
- 88-Priority International Mail

Prepare OSMI Report

Beginning with tax year 2017, Montana and North Carolina no longer have an Out of State Municipal Interest (OSMI) reporting requirement. Those states were removed from the Prepare Out of State Municipal Income Report page. To access the page, click the **Admin** main topic then click the **Prepare OSMI Report** subtopic.

Admin Request Status and History BarCode Tracking EFTPS Enrollment Estimate Payments Balance Due Payments Extension Payments Documents and Data Files Prepare 1042-S Prepare 1099 Data Prepare OSMI Report Security Type Mapping Download Archive Data	Prepare Out of State Municipal Income Report Prepare OSMI report for state taxing authority ☒ Prepare OSMI report for all states ☐ Prepare OSMI report for selected states only: ☒ California ☒ Connecticut ☒ Massachusetts ☒ Minnesota ☒ New York ☒ Rhode Island (paper only) Submit Request
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Tax Review-Deductions

The Tax Cuts and Jobs Act repealed the Domestic Production Activities Deduction (DPAD) beginning with tax year 2018. In the account binder, the subtopic for Form 8903 is no longer available under the **Tax Review-Deductions** main topic.

Tax Review–Deductions
Interest Expense
Taxes
Fiduciary Fees
Attorney, Accountant & Preparer Fees
Other Deductions
Estate Tax Deductions
Charitable Deduction - 1041
Trust Accumulation of Charitable Amounts (Form 1041A)
Form 4952
Account
Recipients
Additional Information and Tax Forms
Transactions and Funds
Sales
Tax Review-Income
Tax Review–Deductions

Massachusetts-990

Beginning with tax year 2017, the **Electronic Payment Confirmation** field was added for 990 accounts. The field is in the **Heading Information** group box under the **Massachusetts General Information** collapsible section. To access the collapsible section, click the link in the **Income Tax Return** column on the States Summary page in the account binder.

▼ Massachusetts General Information- L599 - 2017 - 990PF1 - 990 Test SP 11/18 change

Heading Information

☐ Check if filing Schedule A-2, Solicitation Activities During Fiscal Year Covered by this report

☐ Check if final return prior to dissolution

When did the organization first engage in charitable work in Massahcusetts?

Has the organization applied for or been granted IRS tax exempt status? Required ▼

Date of application or determination letter

Attorney General's account number

If exempt under 501 (c), are contributions to the organization tax deductible as charitable contributions? ▼

Organization fax number

Electronic Payment Confirmation

FIXES

For a complete list of ONESOURCE Trust Tax fixes (closed issues), search [Trust Tax Known Issues](#).

KNOWN ISSUES

For a complete list of ONESOURCE Trust Tax known (open) issues, search [Trust Tax Known Issues](#).

ONESOURCE TRUST TAX ADMINISTRATOR WORKSTATION 18.05 RELEASE NOTES

For documentation and other product information, access [Customer Community](#) then search Knowledge Center. To read a digital version of Release Notes, click [here](#).

RELEASE HIGHLIGHTS

ONESOURCE Trust Tax Administrator Workstation (referred to as Administrator Workstation) version 18.05 includes bug fixes and introduces the following features:

- Removal of tax years 2011 and 2012
- Updated the version number to 18.05

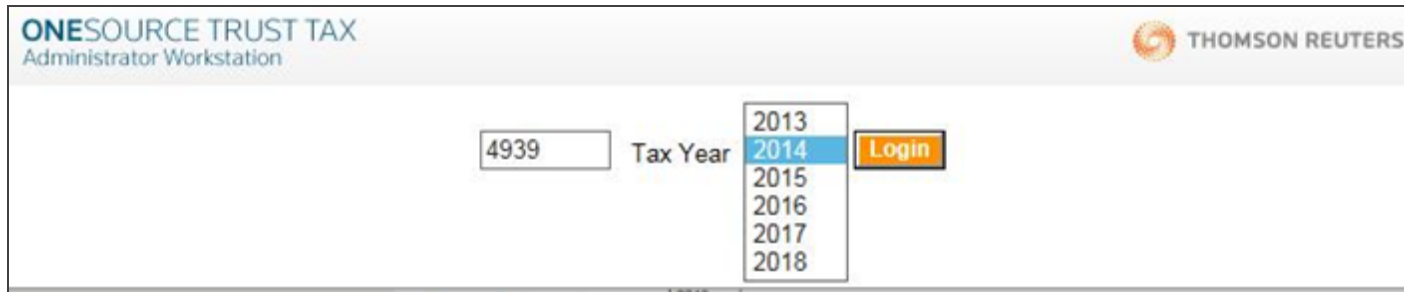
NEW FEATURES

The topics below describe features added with this release.

Tax Years 2011 and 2012 Removed

As shown in the following graphics, the available tax years in the **Tax Year** drop-down list on the Login page and in the Main Navigation Area no longer include 2011 and 2012:





ONSOURCE TRUST TAX
Administrator Workstation

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4939 Tax Year 2013 2014 2015 2016 2017 2018 Login

Version Number Change

The version number was updated to 18.05.

FIXES

For a complete list of Administrator Workstation fixes (closed issues), search [Trust Tax Known Issues](#).

KNOWN ISSUES

For a complete list of Administrator Workstation known (open) issues, search [Trust Tax Known Issues](#).