ONESOURCE TRUST TAX

RELEASE NOTES

VERSION 21.01

Document Version 1

THOMSON REUTERS®

DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	February 17, 2021	Initial publication.

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ONESOURCE TRUST TAX 21.01 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 21.01 includes bug fixes and introduces the following features:

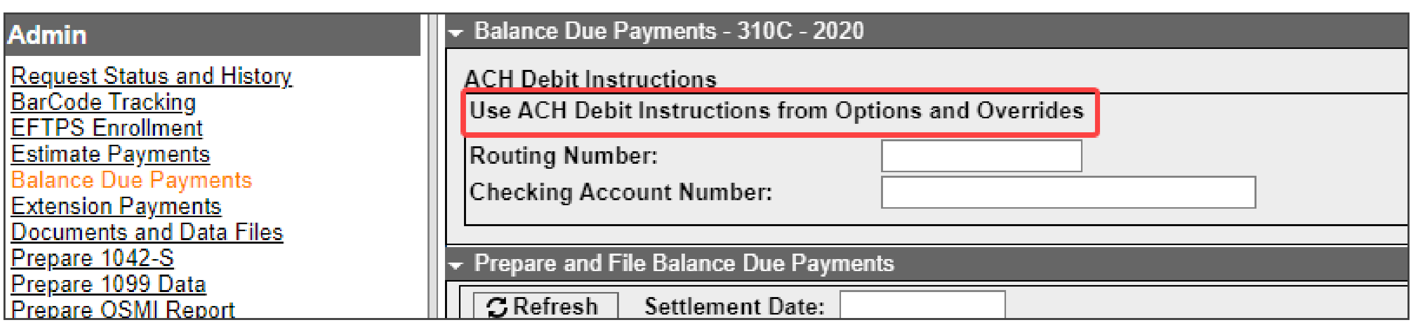
- Compare 1099 projection compute with a previous tax return compute
- State status and milestone field category in state extension registers
- Additional fields in the Computation Results register

NEW FEATURES

The topics below describe features added with this release.

ACH Debit Instructions for Balance Due and Extension Payments

The text under the **ACH Debit Instructions** group box on the Balance Due Payments and Extension Payments pages was changed from "Use ACH Debit Instructions from CIF" to "Use ACH Debit Instructions from Options and Overrides." The text displays when the **ACH Debit Instructions** Electronic Filing option on the Options and Overrides page is set to **Use ACH Debit Instructions below**. The following graphic shows the updated text on the Balance Due Payments page:



The following graphic shows the **ACH Debit Instructions** option on the Options and Overrides page is set to **Use ACH Debit Instructions below**:

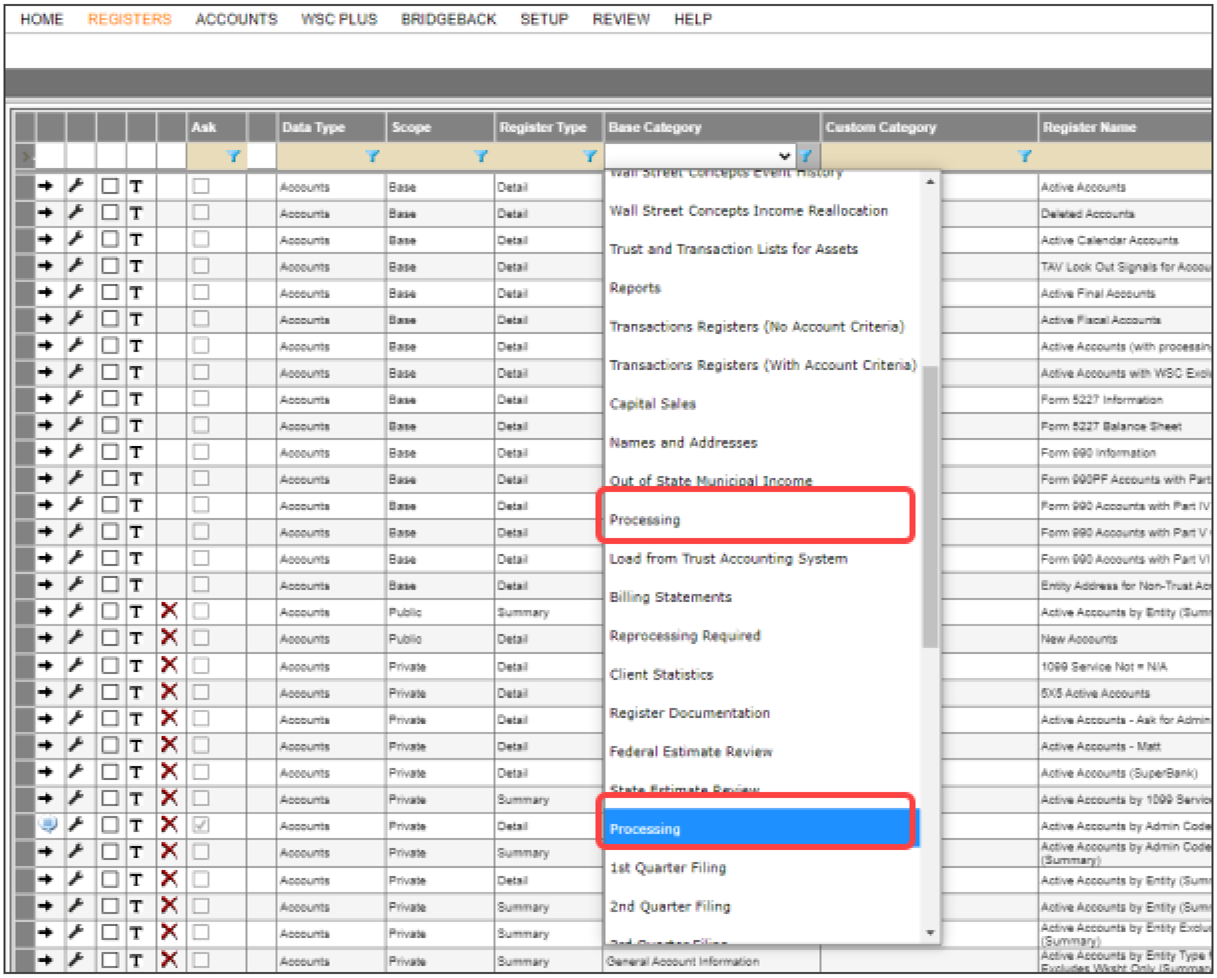
	EFTPS/ACH PAYMENT INORMATION				
Electronic Filing	ACH Debit Instructions	Yes	Use ACH Debit Instructions below	@LP	2/16/2021 3:31:00 PM
Electronic Filing	ABA Transit Routing Number (Bank ID Number)	No			
Electronic Filing	Check Digit	No			

Download Archive Data

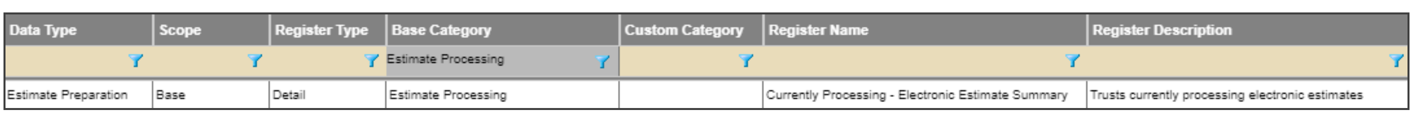
Archive data for tax years 2013, 2014, 2015 will be available for download until June 30, 2021. Ensure you download data for these tax years before June 30. After June 30, the files will be permanently deleted.

Register Category and Name Changes

Since there are two register base categories named **Processing** (one category is for return or worksheet processing and the other category is for estimate processing), the name of the category associated with estimate processing (which has a data type of **Estimate Preparation**) was changed to **Estimate Processing**. The following graphic shows the duplicate base category names before the name change:



The graphic below shows the new base category name. Additionally, the register name for the **Currently Processing** base register was renamed to **Currently Processing–Electronic Estimate Summary**.



Data Type	Scope	Register Type	Base Category	Custom Category	Register Name	Register Description
			Estimate Processing			
Estimate Preparation	Base	Detail	Estimate Processing		Currently Processing - Electronic Estimate Summary	Trusts currently processing electronic estimates

Custom Register Fields Renamed

The fields, **NM FID D WH DUE** and **NM FID D WH REFUND**, which are located in the **State Computed Amounts** category and available in custom registers, were renamed to **State WH Due** and **State WH Refund**. The reference to New Mexico was removed because a similar form for Wisconsin (Form PW-1) was added.

Account	Name	Situs	State	Fed/State	Ex... state from EF?	EF Status	St Compute Date	D S	Payment Status	Tax ID	Bus Nm Ctrl	Entity Type	Related	Tax Yr End	P C	I C C	A C	St Tax Due	State WH Due	State WH Refund
NMEFILE	NM EFILE TEST	WI	NM	New Mexico	No	Qualified	2/5/2021 10:54:20 AM		Submitted, payment accepted	45-5584710	TEST	Complex($100)	N/A	12/31/2020				315.00	500.00	0.00
NMEFILE	NM EFILE TEST	WI	NM	New Mexico	No	Waiting for Acknowledg...	2/5/2021 10:54:20 AM		Submitted, payment accepted	45-5584710	TEST	Complex($100)	N/A	12/31/2020				315.00	500.00	0.00
NMEFILE	NM EFILE TEST	WI	WI	Wisconsin	No	Qualified	2/5/2021 10:54:20 AM		Not submitted	45-5584710	TEST	Complex($100)	N/A	12/31/2020				382.00	725.00	0.00
NMEFILE	NM EFILE TEST	WI	WI	Wisconsin	No	Qualified	2/5/2021 10:54:20 AM		Not submitted	45-5584710	TEST	Complex($100)	N/A	12/31/2020				382.00	725.00	0.00

On the Register Properties page, the fields in the **State Status and Milestones** category are now available for adding to custom registers based on the following base registers:

- **State Extension Returns Qualified for Electronic Filing**
- **State extensions accepted**
- **State Extensions Rejected for Electronic Filing**

The following graphic shows the **State Status and Milestones** category:

Information - 4950 - 2020 - State Extension Returns Qualified for Electronic Filing

Detail Columns

Hide Available Detail Columns

Category	Column	Title
State Status and Milestones		
State Status and Milestones	Return type for state status (1041, 1099, 5498, 5227)	State Status Type
State Status and Milestones	State to which status applies	State
State Status and Milestones	Current state status	State Status

Tax Computation Results Register Field Categories and Names

Categories and field names associated with the registers in the **Tax Computation Results** base category were revised. Prior to this release, the field categories were:

- 1041 Pages 1 & 2 Items
- Other Computed Amounts
- Forms Prepared

The fields categories are now:

<table>
<tr><th>CATEGORY NAME</th><th>DESCRIPTION</th></tr>
<tr><td>1041/5227 Returns</td><td>Contains fields for income and deduction amounts reported on 1041 and 5227 returns. Most fields are common to both return types.
Column descriptions indicate Income or Deductions.
Added the Deductions-Net Operating Loss (1041) field.</td></tr>
<tr><td>1041 Return</td><td>Contains fields specific to 1041 returns.
Column descriptions indicate the Form 1041 section the field relates to. For example:
Tax & Payments (bottom of page 1)
1041, Sch A
1041
1041, Sch B
Tax (Schedule G, Part I) and Payments (Schedule G, Part II)).
Added several fields to capture information on Schedules A and B as well as the Tax Cuts and Jobs Act (TCJA) details.</td></tr>
<tr><td>Other Computed Amounts</td><td>Contains fields related to account-level computed amounts (for example, carryovers, gains, AMT, ESBT and gross amounts).</td></tr>
<tr><td>Income/Principal Allocation</td><td>Contains income and principal allocation breakout for current year tax liability, estimated payments made towards current year tax liability, tax due (including interest), overpayment applied, refund, and next year’s quarterly estimated voucher payments.</td></tr>
<tr><td>Forms Prepared</td><td>Contains flags to identify whether specific forms were generated with the return as well as fields that indicate the count of specific forms that may produce multiples.
Added flags for Form 1041-V and Form 8997 as well as the number of Forms 926, 1042-S, 8621, and 8886.</td></tr>
<tr><td>State Refund Recovery</td><td>Contains fields used in state refund recovery computations for the subsequent tax year.</td></tr>
<tr><td>5227 Return</td><td>Contains existing and added fields (such as Undistributed Income, Total Assets-Fair Market Value and CRUT Unitrust Amount) from 5227 returns.</td></tr>
<tr><td>990 Returns</td><td>Contains existing and added fields primarily from 990-PF returns. Also includes tax due from Forms 990-T and 4720.</td></tr>
</table>

Options and Overrides

The **Bank name(s) as it appears on the bank account (Applied to MD)** option was added to the **Compute-States** category. Maryland uses this field for direct deposit refunds. The following graphic shows the new option:

Compute - States	Bank name(s) as it appears on the bank account (Applies to MD)	No	Bank of Maryland

The description of the **Account Holder Name (Applies for Illinois E-filing Only)** Electronic Filing option was changed to **Account Holder Name (Applies for IL and NC E-filing Only)**. In the **Electronic Filing** category, this option is in the EFTPS/ACH PAYMENT INFORMATION section:

	EFTPS/ACH PAYMENT INORMATION			
Electronic Filing	ACH Debit Instructions	Yes		Use ACH Debit Instr
Electronic Filing	ABA Transit Routing Number (Bank ID Number)	No		
Electronic Filing	Check Digit	No		
Electronic Filing	Checking Account Number from which funds are to be drawn	No		
Electronic Filing	Settlement date for state balance due payments (Does not apply to MI, MO and UT) [Date entered must have a four character year, i.e., MM-DD-YYYY]	No		
Electronic Filing	Account Holder Name (Applies for IL and NC E-filing Only)	No		

Compare Projection to Return

The **Compare Projection to Return** topic was added to the **REVIEW** menu. This topic currently applies to Forms 1099-DIV, 1099-INT, 1099-OID, and 1099-B beginning with the 2020 tax year. It compares values from a tax return compute with a subsequent tax return projection compute. This is to assist in reviewing changes to recipient documents to determine whether a correction is warranted.

The amounts displayed are the amounts presented on the Consolidated Forms page, which is shown in the following graphic:

2020 Combined Year-End 1099 Forms

Form 1099-DIV Dividends and Distributions
OMB No. 1545-0110

1a	Total ordinary dividends	$4,435.60
	1b Qualified dividends	$4,351.41
2a	Total capital gain distributions	
	2b Unrecaptured Section 1250 Gain	
	2c Section 1202 gain	
	2d Collectibles (28%) gain	
3	Nondividend distributions	
4	**Federal income tax withheld**	
5	Section 199A dividends	
6	Investment expenses	
7	Foreign tax paid	
8	Foreign country or U.S. possession	
9	Cash liquidation distributions	
10	Non-cash liquidation distributions	
11	Exempt-interest dividends	$8,074.02
12	Specified private activity bond interest dividends	
13	State	MO
14	State identification number	
15	State tax withheld	

Form 1099-INT Interest Income
OMB No. 1545-0112

1	Interest income	
2	Early withdrawal penalty	
3	Interest on U.S. Savings Bonds and Treas. obligations	$629.44
4	**Federal income tax withheld**	
5	Investment expenses	
6	Foreign tax paid	
7	Foreign country or U.S. possession	
8	Tax-exempt interest	
9	Specified private activity bond interest	
10	Market discount	
11	Bond premium	
12	Bond premium on treasury obligations	
13	Bond premium on tax-exempt bond	
14	Tax-exempt and tax credit bond CUSIP no.	
15	State	MO
16	State identification no.	
17	State tax withheld	

Summary of Form 1099-B
Proceeds from Broker and Barter Exchange Transactions

1d	Proceeds	$605,835.67
1e	Cost or other basis	$532,432.87
1f	Accrued market discount	
1g	Wash sale loss disallowed	
4	**Federal income tax withheld**	
8	Profit or (loss) realized in 2020 on closed contracts	
9	Unrealized profit or (loss) on open contracts - 2019	
10	Unrealized profit or (loss) on open contracts - 2020	
11	Aggregate profit or (loss) on contracts	

Proceeds from each sales transaction are reported individually to the IRS. Refer to the 1099-B section of this Tax Information Statement.

Summary of Form 1099-OID
Original Issue Discount

1	Original issue discount for 2020	
2	Other periodic interest	
3	Early withdrawal penalty	
4	**Federal income tax withheld**	
5	Market discount	
6	Acquisition premium	
8	Original issue discount on US Treasury obligations	
9	Investment expenses	
10	Bond Premium	
11	Tax-exempt OID	

Original Issue Discount amounts are reported individually to the IRS. Refer to the 1099-OID section of this Tax Information Statement.

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a

- Only the 1099DIOB boxes with differences are displayed in the view.
- An account is not displayed in the view if no tax return projection was processed or if a tax return was processed after the tax return projection.
- A new recipient is not displayed in the compare grid if a new recipient was added between processing the tax return and the tax return projection. Only recipients existing at the time the tax return is processed are displayed.

The **Compare Projection to Return** topic includes similar features (which were described in prior Release Notes) to the other topics under the **REVIEW** menu. These features display above the grid and include:

- Full Screen
- Expand/Collapse
- Refresh

- Switch View
- Search Bar
- Hide Filters
- Export and Show/Hide Columns

The following graphic shows these features:

The following graphic shows the Page Count, Go to Next Page, Items per Page, and Item Count are located below the grid:

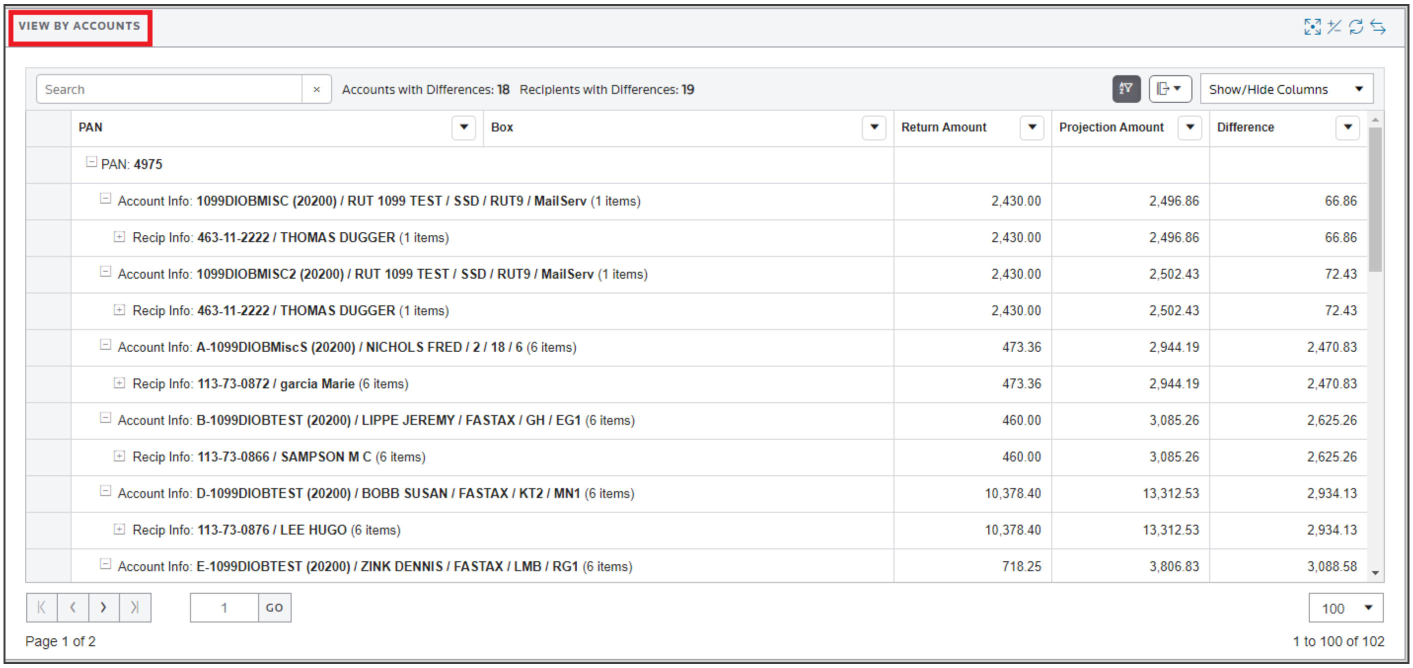
A count of the actual accounts and recipients with differences is available above the grid, to the right of the Search Bar.

There are two views:

- View by Accounts
- View by Forms

Click  to change views.

As shown in the following graphic, the View by Accounts opens collapsed to the recipient level for each account:



VIEW BY ACCOUNTS

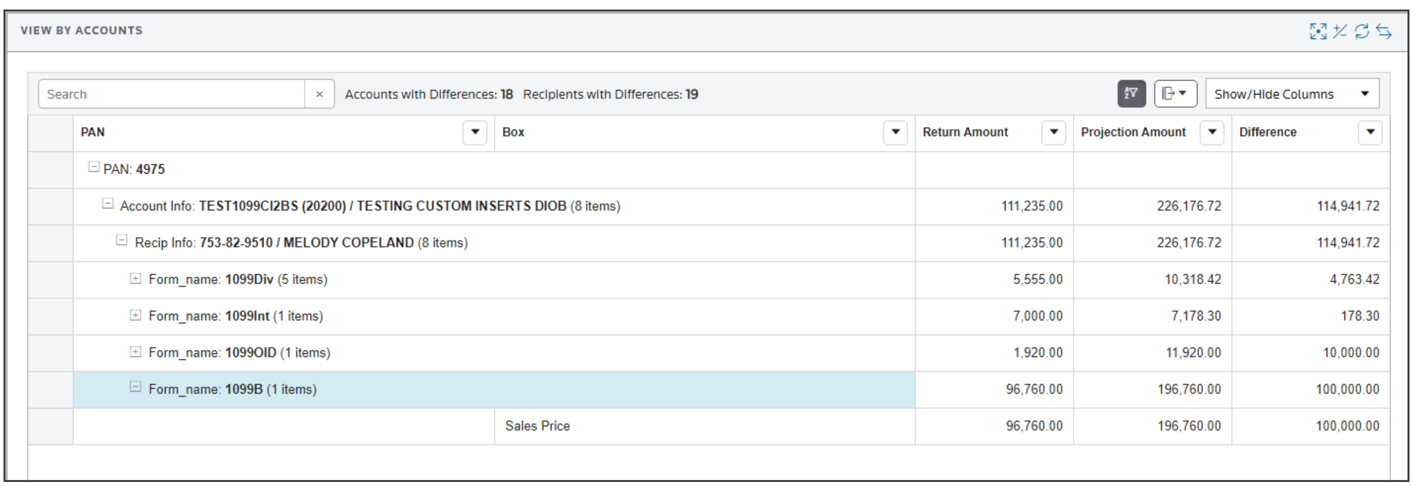
Search × Accounts with Differences: 18 Recipients with Differences: 19 Show/Hide Columns

PAN	Box	Return Amount	Projection Amount	Difference
PAN: 4975				
Account Info: 1099DIOBMISC (20200) / RUT 1099 TEST / SSD / RUT9 / MailServ (1 items)		2,430.00	2,496.86	66.86
Recip Info: 463-11-2222 / THOMAS DUGGER (1 items)		2,430.00	2,496.86	66.86
Account Info: 1099DIOBMISC2 (20200) / RUT 1099 TEST / SSD / RUT9 / MailServ (1 items)		2,430.00	2,502.43	72.43
Recip Info: 463-11-2222 / THOMAS DUGGER (1 items)		2,430.00	2,502.43	72.43
Account Info: A-1099DIOBMiscS (20200) / NICHOLS FRED / 2 / 18 / 6 (6 items)		473.36	2,944.19	2,470.83
Recip Info: 113-73-0872 / garcia Marie (6 items)		473.36	2,944.19	2,470.83
Account Info: B-1099DIOBTEST (20200) / LIPPE JEREMY / FASTAX / GH / EG1 (6 items)		460.00	3,085.26	2,625.26
Recip Info: 113-73-0866 / SAMPSON M C (6 items)		460.00	3,085.26	2,625.26
Account Info: D-1099DIOBTEST (20200) / BOBB SUSAN / FASTAX / KT2 / MN1 (6 items)		10,378.40	13,312.53	2,934.13
Recip Info: 113-73-0876 / LEE HUGO (6 items)		10,378.40	13,312.53	2,934.13
Account Info: E-1099DIOBTEST (20200) / ZINK DENNIS / FASTAX / LMB / RG1 (6 items)		718.25	3,806.83	3,088.58

1 GO 100

Page 1 of 2 1 to 100 of 102

Click to expand the detail to see the form and box detail.

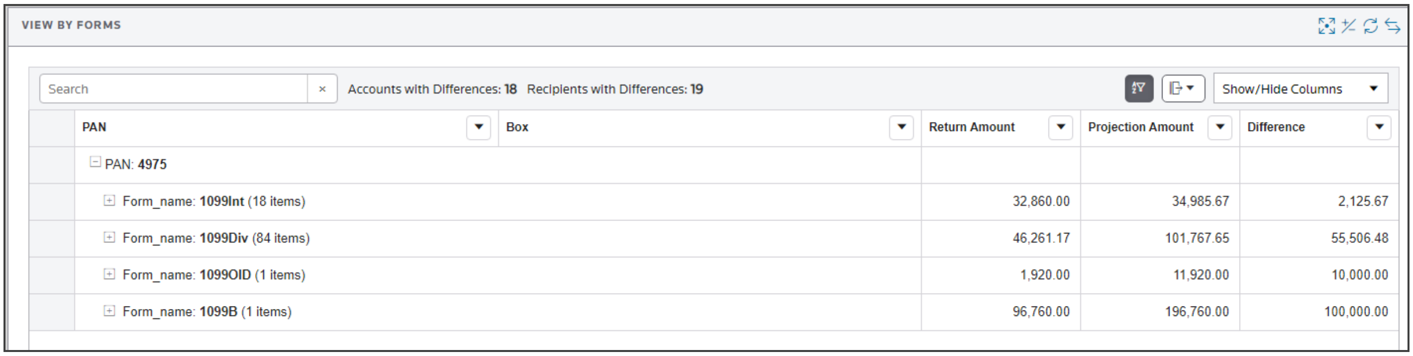


VIEW BY ACCOUNTS

Search × Accounts with Differences: 18 Recipients with Differences: 19 Show/Hide Columns

PAN	Box	Return Amount	Projection Amount	Difference
PAN: 4975				
Account Info: TEST1099CI2BS (20200) / TESTING CUSTOM INSERTS DIOB (8 items)		111,235.00	226,176.72	114,941.72
Recip Info: 753-82-9510 / MELODY COPELAND (8 items)		111,235.00	226,176.72	114,941.72
Form_name: 1099Div (5 items)		5,555.00	10,318.42	4,763.42
Form_name: 1099Int (1 items)		7,000.00	7,178.30	178.30
Form_name: 1099OID (1 items)		1,920.00	11,920.00	10,000.00
Form_name: 1099B (1 items)		96,760.00	196,760.00	100,000.00
	Sales Price	96,760.00	196,760.00	100,000.00

As shown in the following graphic, the View by Forms opens collapsed to the form level:



The collapsed view indicates the number of items that would be on the page if fully expanded. Depending upon the Items per page setting (default is 100), the forms displayed when collapsed could be different from page to page.

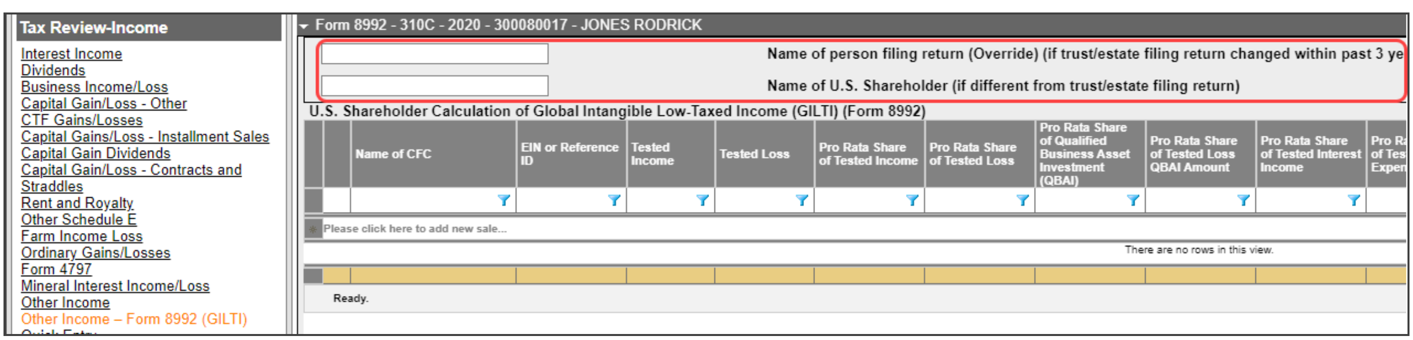
New Tax Code for Form 5498

Beginning in tax year 2020, tax code 475 (CARES Act Repayment of a qualified birth or adoption distribution (BA)), was added for 5498 processing.

Form 8992

Beginning in tax year 2020, the following fields were added to the Other Income-Form 8992 (GILTI) page, which is accessed from the **Tax Review-Income** main topic:

- **Name of person filing return (Override) (if trust/estate filing return changed within past 3 years, enter prior name in parenthesis after the current name)**
- **Name of U.S. Shareholder (if different from trust/estate filing return)**



E-Filing Document Upload

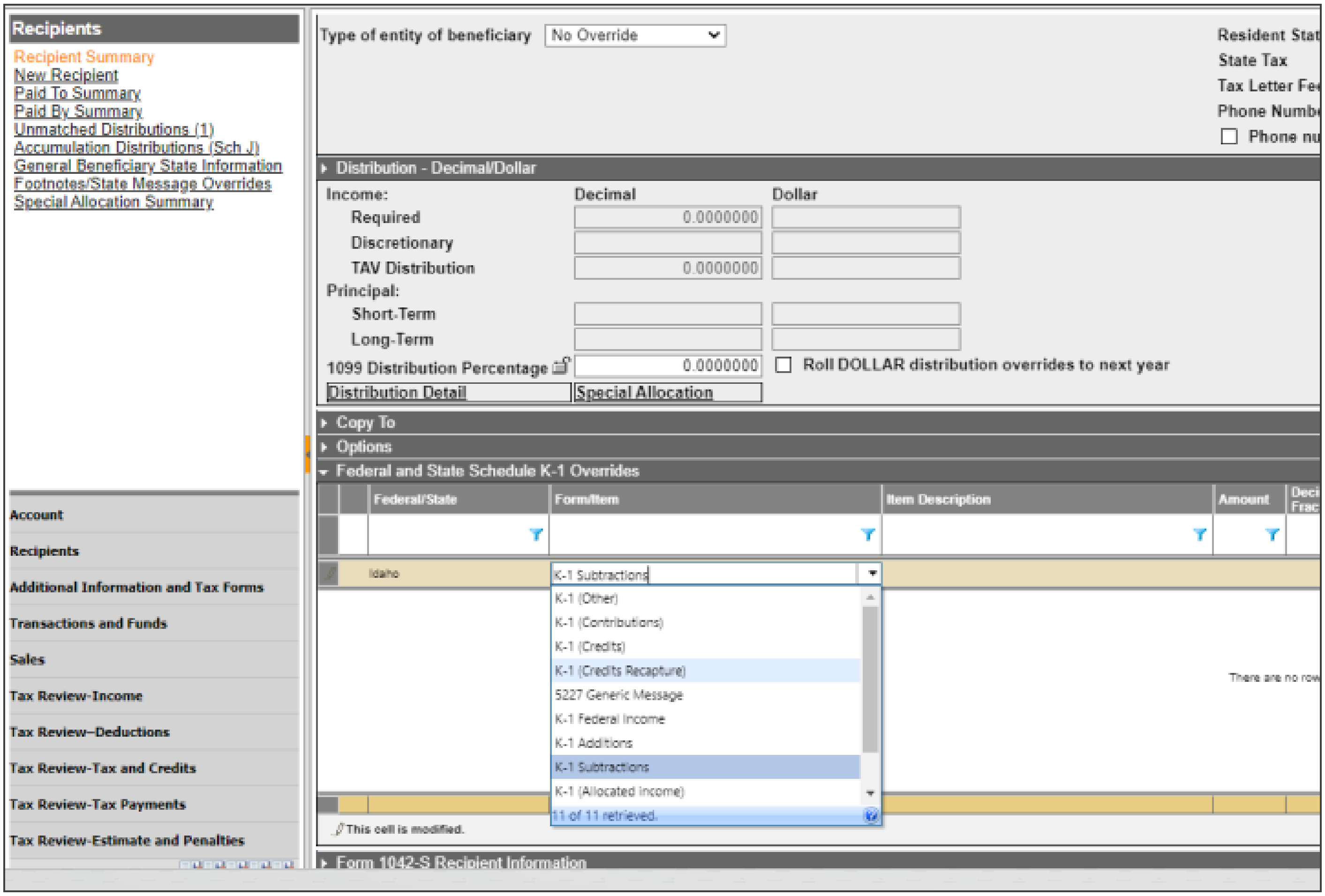
Beginning in tax year 2020, the number of PDF documents that can be uploaded to an account using the E-Filing Document Upload feature is no longer restricted. More than 300 PDF documents can now be uploaded.

Schedule K-1 Overrides

The Schedule K-1 Overrides feature was updated for federal fields and the following states:

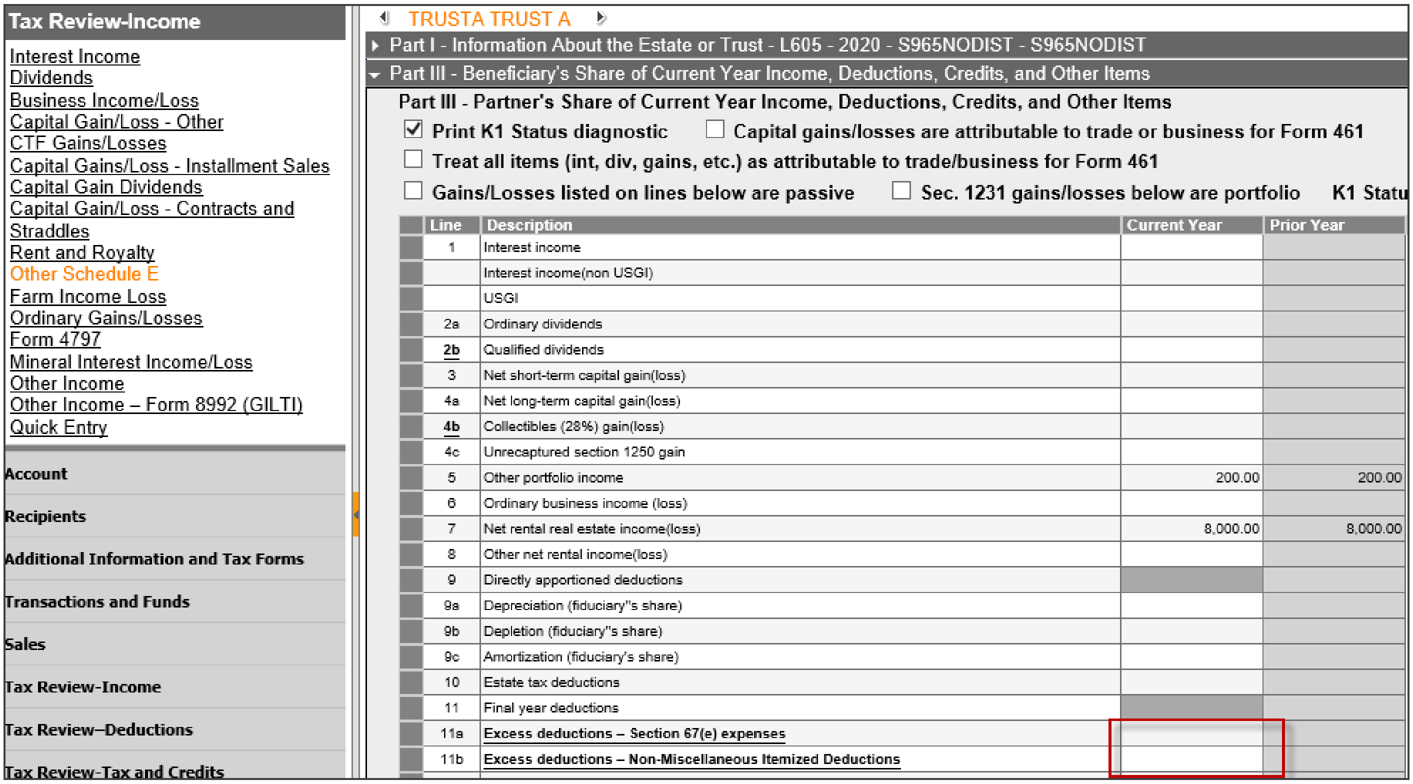
- Idaho
- Illinois
- Indiana
- Minnesota
- Montana
- New Jersey
- North Carolina
- South Carolina
- Virginia

This is shown in the following graphic:



K-1 Transfer

Excess deduction amounts are now transferred. This includes amounts reported on 2020 Schedule K-1, boxes 11a and 11b as well as the related subcomponents.



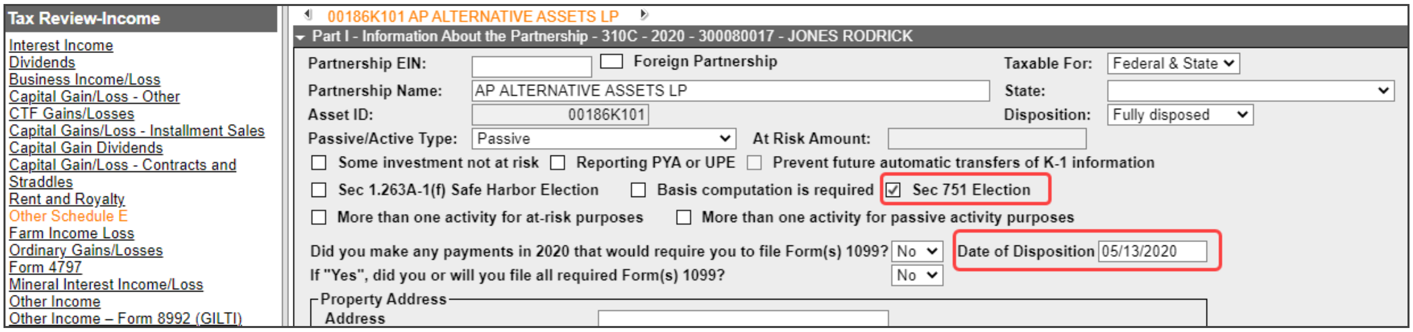
Other Schedule E

Beginning with tax year 2020, the **Sec 751 Election** check box and **Date of Disposition** field were added to the **Part I** collapsible section for Partnership K-1 activities. The **Date of Disposition** field is accessible when the **Disposition** drop-down list is set to **Partially Disposed** or **Fully Disposed**.

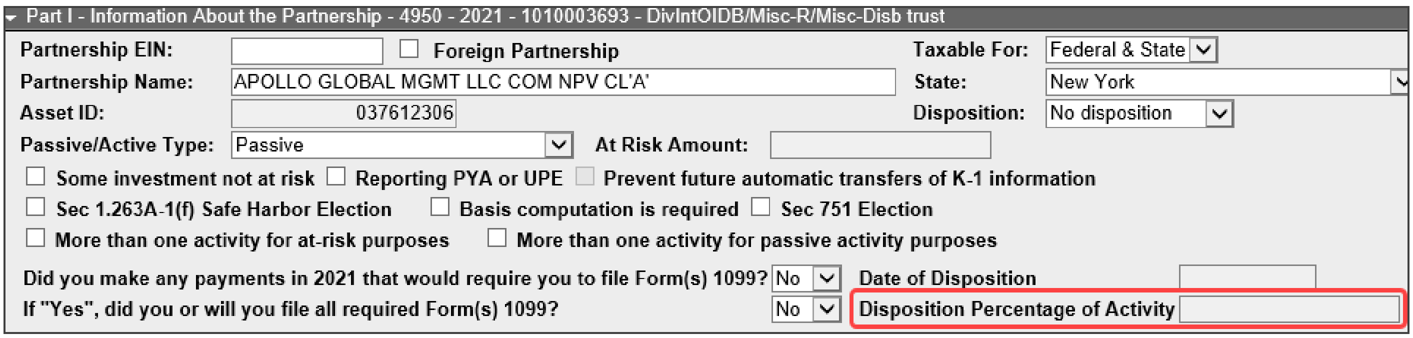
A Section 751 election statement can now be printed for publicly traded partnerships that have been partially or fully disposed. The statement prints correctly when the **Section 751** check box is selected, the **Disposition** drop-down list is set to **Partially Disposed** or **Fully Disposed**, a date is entered in the **Date of Disposition** field, and an amount is entered in at least one of the following fields in the grid under the **Part III** collapsible section:

- **20ab Section 751 gain (loss)**
- **20ac Section 1(h)(5) gain (loss)**
- **20ad Deemed section 1250 unrecaptured gain**

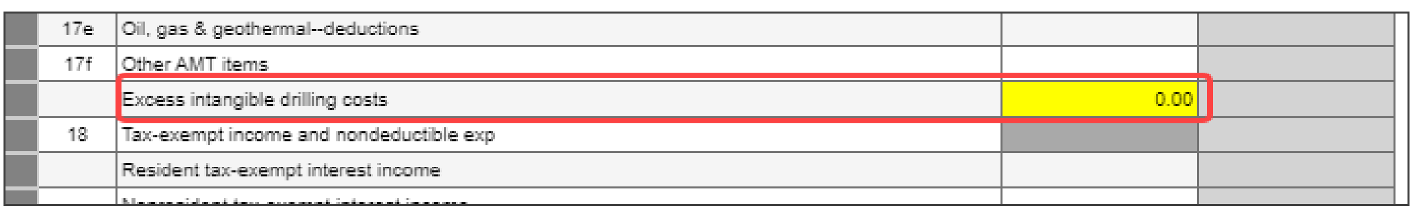
The following graphic shows the **Sec 751 Election** check box and **Date of Disposition** field:



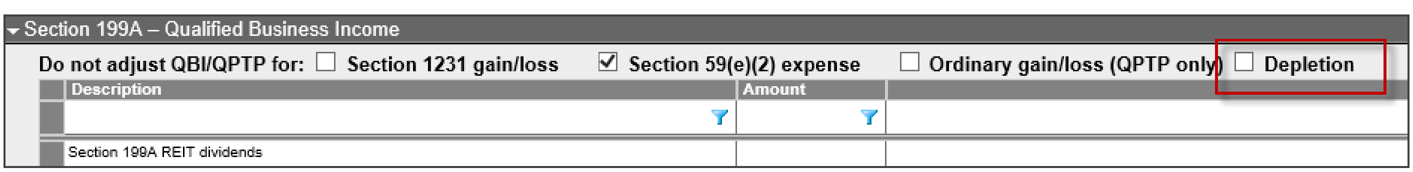
Beginning with tax year 2021, the **Disposition Percentage of Activity** field was added to the **Part I** collapsible section for Partnership K-1 activities.



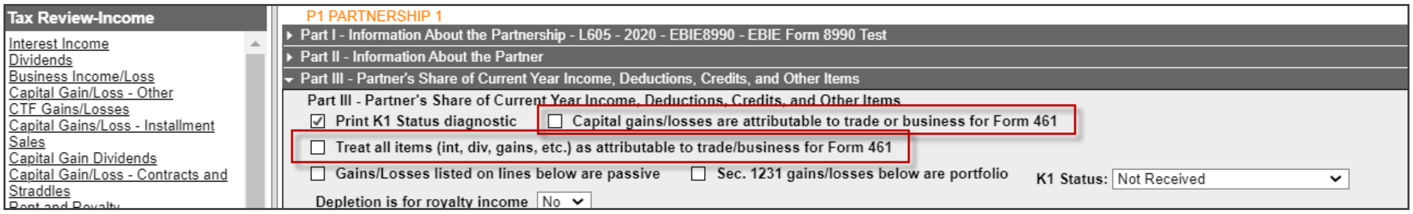
Excess intangible drilling costs (line 17f in the **Part III** collapsible section for Partnership K-1 activities and 15f in the **Part III** collapsible section for S-Corp K-1 activities) now accepts 0 as a valid entry. An entry in this field overrides any excess intangible drilling cost computation, which would flow to Schedule I, line 20 and is treated as tax preference IDC for the Partnership or S-Corporation.



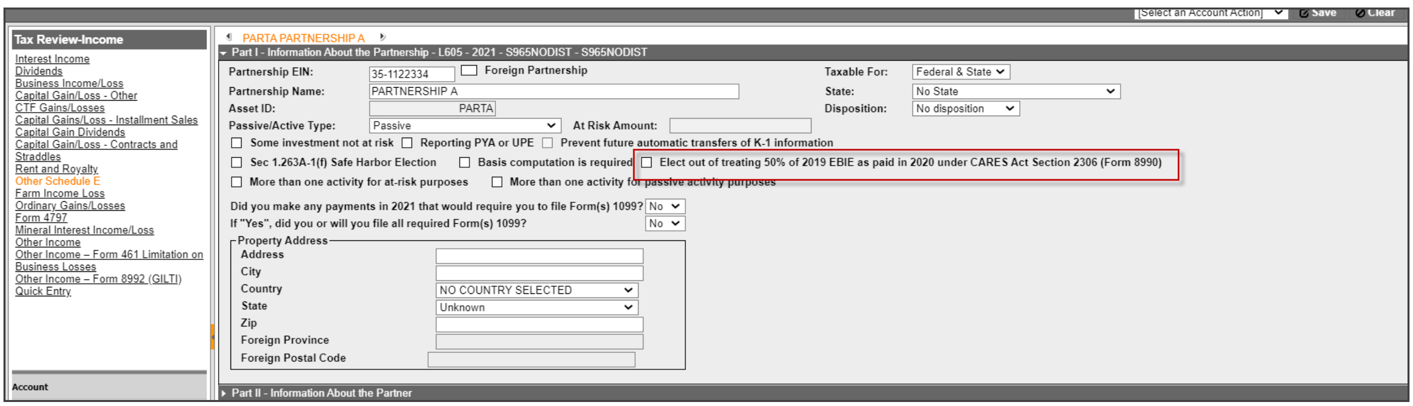
The **Depletion** check box was added to the **Section 199A-Qualified Business Income** collapsible section for Partnership and S-Corp K-1 activities. If selected, any depletion computed for the Partnership or S-Corp will not reduce QBI/QPTP.



The check boxes referencing Form 461 in the **Part I** collapsible section for Partnership K-1 activities were removed from tax years 2018, 2019, and 2020 but are available for tax years beginning 2021. The following graphic shows the check boxes referencing Form 461:

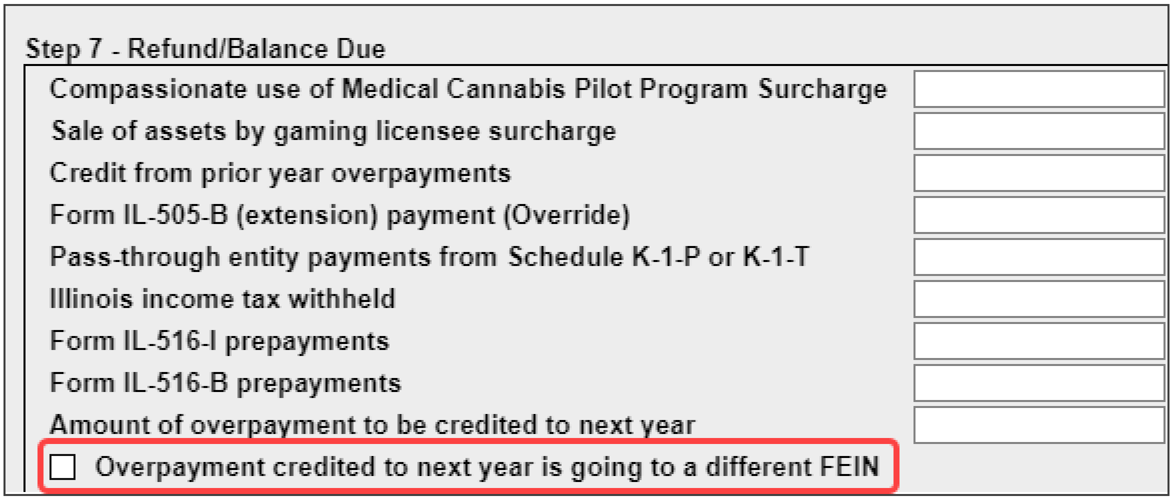


The **Elect out of treating 50% of 2019 EBIE as paid in 2020 under CARES Act Section 2306 (Form 8990)** check box in the **Part I** collapsible section for Partnership K-1 activities was removed for tax year 2020 and forward.

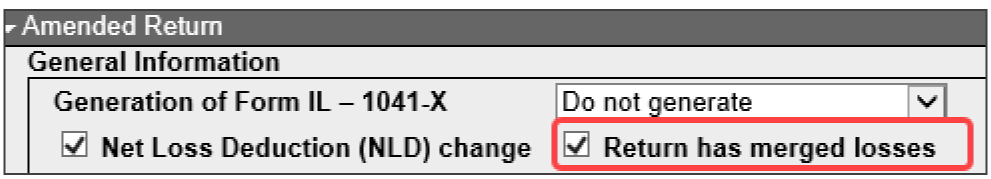


Illinois

Beginning with tax year 2020, the **Overpayment credited to next year is going to a different FEIN** check box was added to the **Step 7-Refund/Balance Due** group box in the **Payments and Credits** collapsible section.



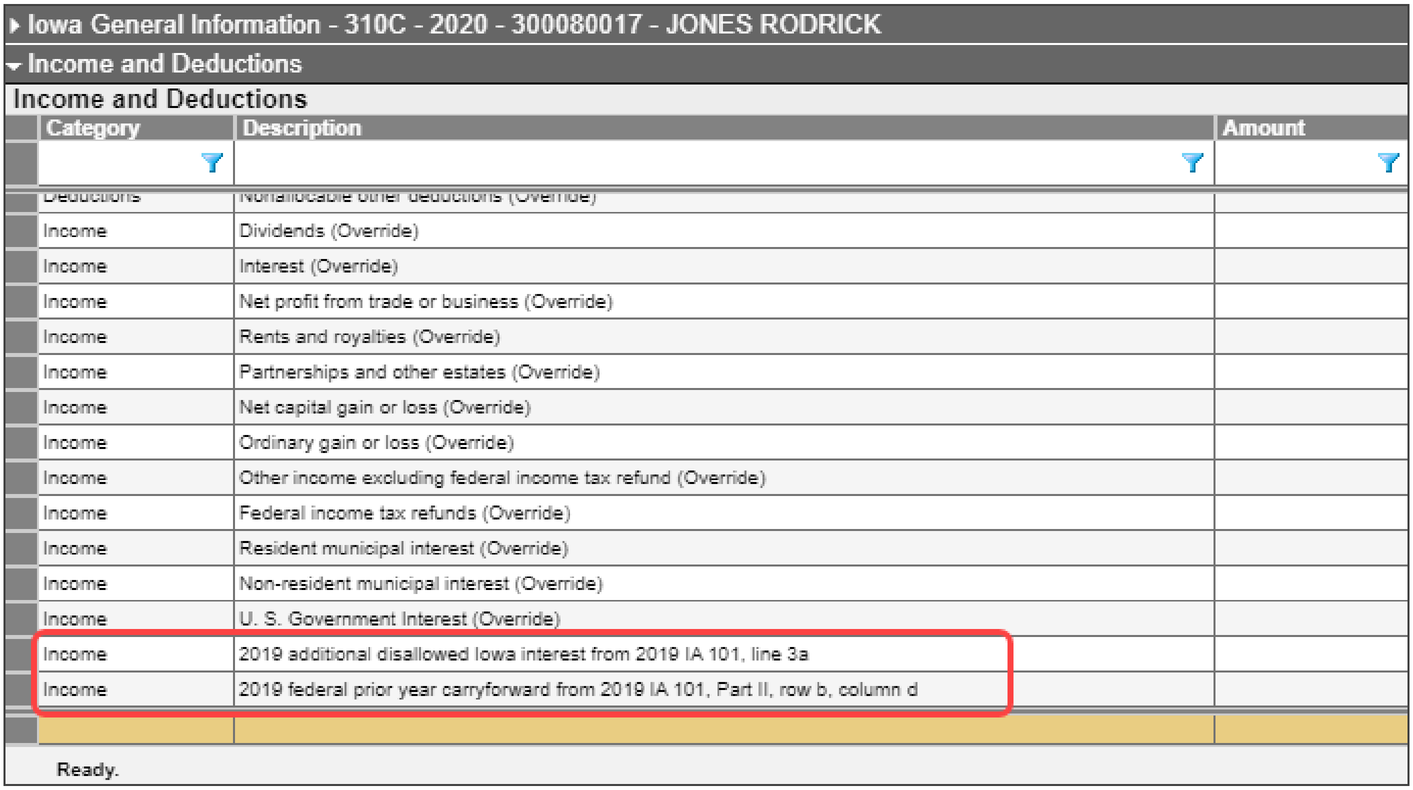
The **Return has merged losses** check box was added to the **General Information** group box in the **Amended Return** collapsible section.



Iowa

For tax year 2020 only, the following fields were added to the **Income** category in the grid in the **Income and Deductions** collapsible section:

- **2019 additional disallowed Iowa interest from 2019 IA 101, line 3a**
- **2019 federal prior year carryforward from 2019 IA 101, Part II, row b, column d**



Beginning with tax year 2020, the following changes were made:

- The following fields were removed from the drop-down list in the **Nonconformity Adjustments** grid in the **Income and Deductions** collapsible section:
  - **Limitation on Business Interest Expenses**
  - **2018-Limitation on Business Interest Expenses**
  - **Claimed in prior years-Limitation on Business Interest Expenses**
- In the **Nonconformity Adjustments** grid, the **Limitation on Excess Business** drop-down list selection was changed to **Limitation on Excess Farm Losses**.
- The following changes were made to the grid in the **Payments and Credits** collapsible section:
  - The **Payment** category was removed to be consistent with the state form(s).
  - The row order was changed.

- **Credit for income tax paid to other jurisdictions** was changed to **Out-of-state credit or nonresident tax credit (Override)**.
- **Tax credits** was changed to **Other nonrefundable credits (IA 148)**.
- **Motor vehicle fuel tax credit (IA Form 4136 must be attached to return by preparer)** was changed to **Motor fuel tax credit (IA 4136)**.

- The following items were moved from the **Payments** category to the **Credit** category:
  - **Tax withheld**
  - **Estimated tax payments made for current year return (Override)**
  - **Taxes paid with extension (Override)**
  - **Amounts paid with original filing (overpayment to be entered as negative value) (Override)**

Payments and Credits

Payments and Credits

Category	Description
Tax	Tax on lump sum distributions
Credit	Out-of-state credit or nonresident tax credit (Override)
Credit	Other nonrefundable credits (IA 148)
Credit	Tax withheld
Credit	Estimated tax payments made for current year return (Override)
Credit	Taxes paid with extension (Override)
Credit	Amounts paid with original filing (overpayment to be entered as negative value) (Override)
Credit	Motor fuel tax credit (IA 4136)
Credit	Other refundable credits (IA 148)

Massachusetts

Beginning with tax year 2020, **Taxable 5.25% income** was changed to **Taxable 5.00% income** in the **Annualized Income Installments** collapsible section on the Under Payment Penalty page.

Annualized Income Installments

Computation of Tax on 2020 Annualized Income

Description
Taxable 5.00% income
Taxable 12% income
Credits
Taxable 5.00% gains/losses

New York

Beginning with tax year 2020, the **NOL deduction limitation** field was added to the **Additions** category in **Income and Deductions** collapsible section.

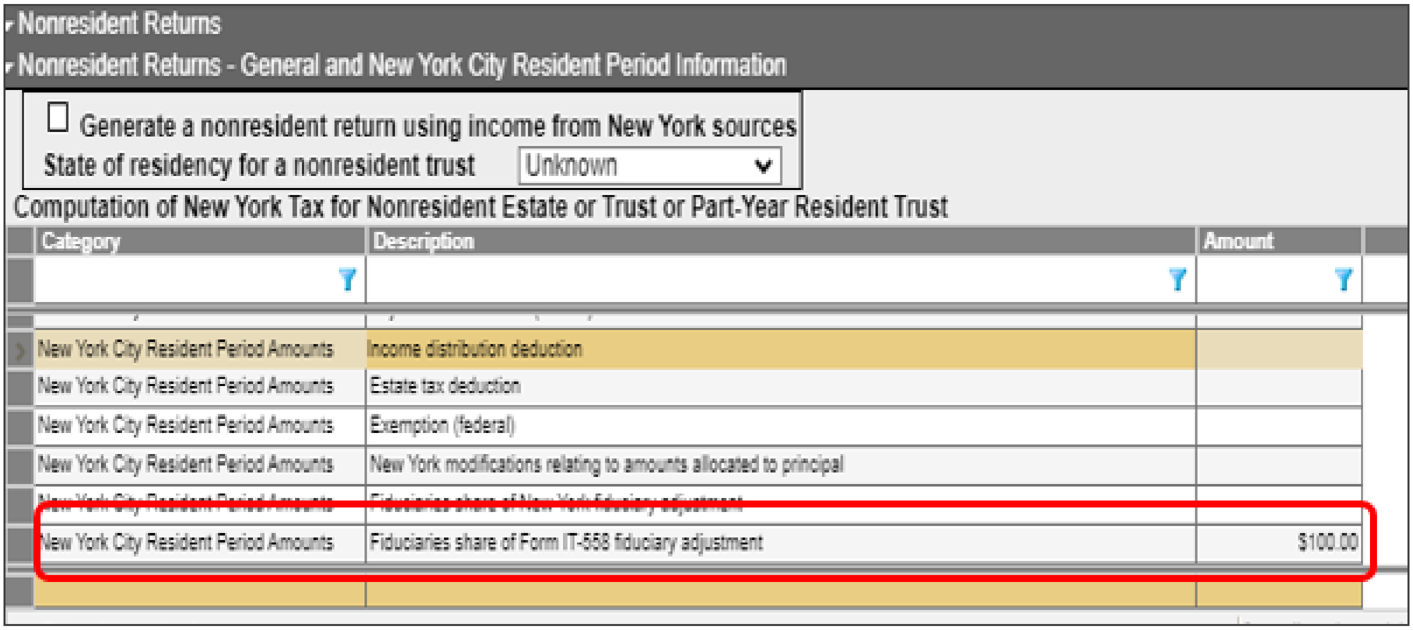
New York General Information - 310C - 2020 - 300080017 - JONES RODRICK

Income and Deductions

Income and Deductions

Category	Description	Total Amounts	New York Source Amounts
Additions	Modifications or limitations on business interest		
Additions	Deduction for charitable contributions		
Additions	Partner's distributive share of adjustments to ordinary income of a partnership		
Additions	Beneficiary's distributive share of adjustments to federal taxable income of an estate or trust		
Additions	NOL deduction limitation		
Other	Fiduciary's share of New York fiduciary adjustment (Override)		
Other	Charity's share of New York fiduciary adjustment (Override)		

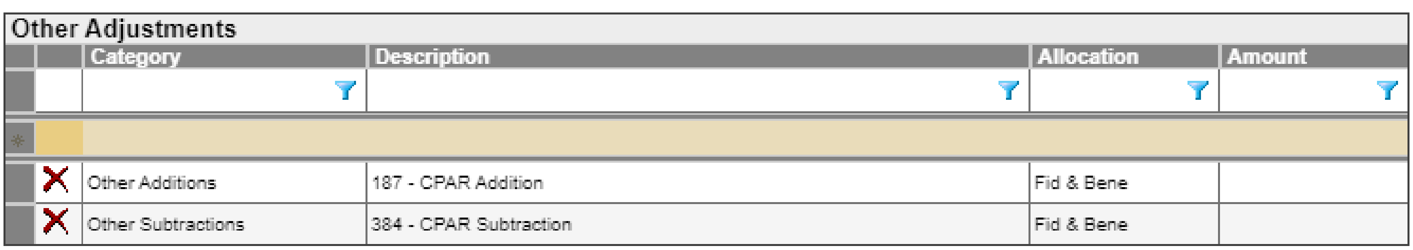
The **Fiduciaries share of Form IT-558 fiduciary adjustment** field was added to the **Computation of New York Tax for Nonresident Estate or Trust or Part-Year Resident Trust** grid in the **Nonresident Returns-General and New York City Resident Period Information** collapsible section.



Oregon

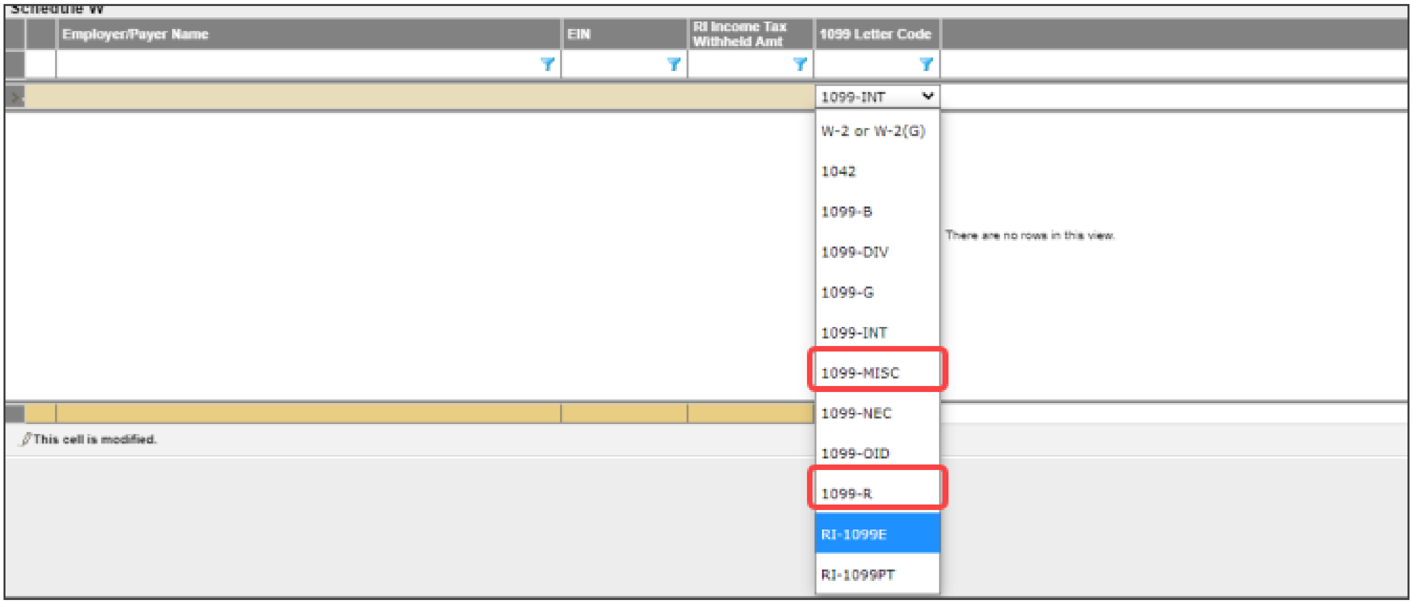
Beginning with tax year 2020, the following selections were added to the drop-down lists in the **Other Adjustments** grid in the **Income and Deductions** collapsible section:

CATEGORY	DESCRIPTION
Other Additions	**187-CPAR Addition**
Other Subtractions	**384-CPAR Subtraction**



Rhode Island

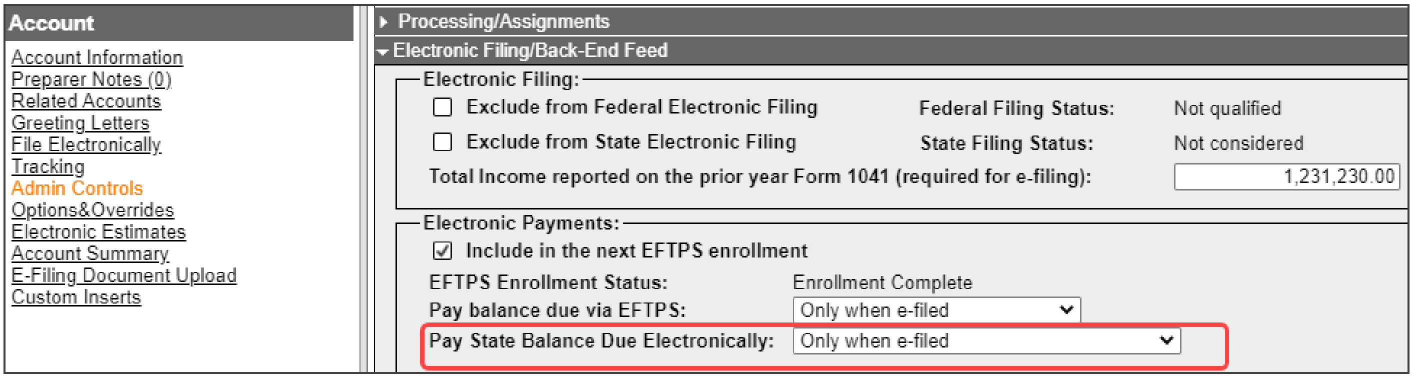
Beginning with tax year 2020, **1099-NEC** and **RI-1099E** were added to the **1099 Letter Code** drop-down list in the **Schedule W** grid in the **Payment and Credits** collapsible section:



Utah

Beginning with tax year 2020, Utah accepts electronic payment (using the Pay with e-file method) with the e-filed Form TC-41. To remit balance due payments using the Pay with e-file method, select **Only when e-filed** from the **Pay State Balance Due Electronically** drop-down list under the **Electronic Filing/Back-End Feed** collapsible section on the Admin Controls page.

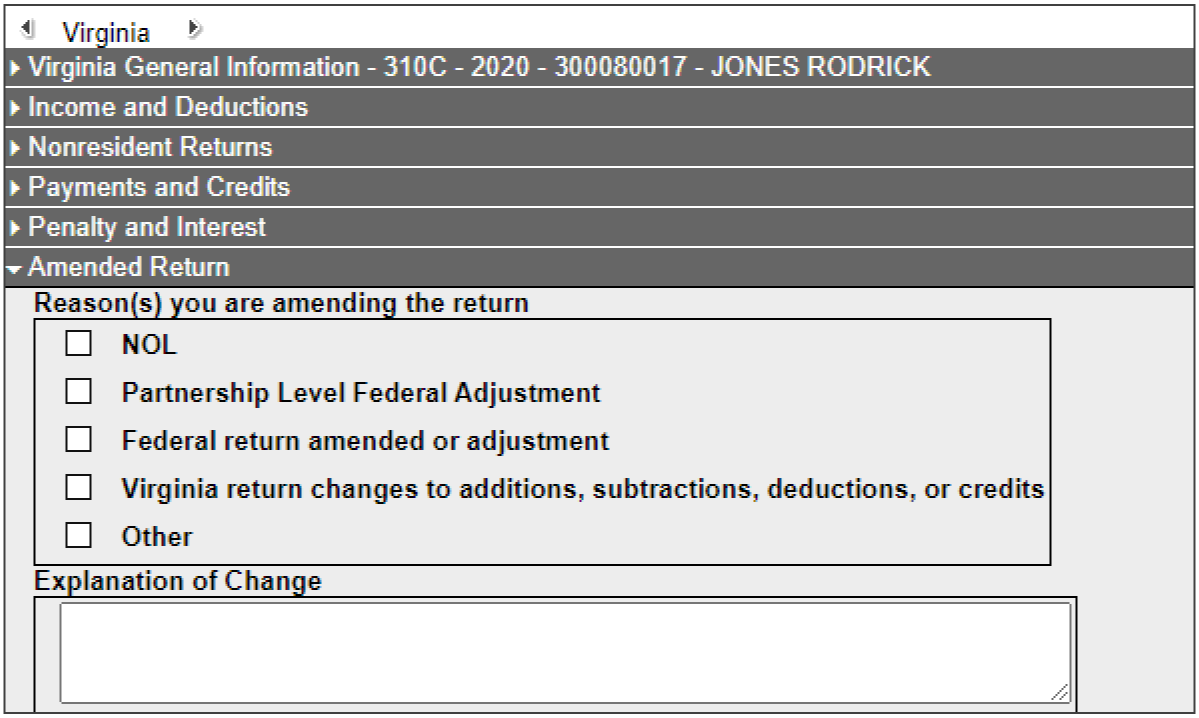
> The payment method must be set before the tax return is processed. If the payment setting is updated after tax return processing completes then the return must be reprocessed to apply the updated payment setting.



Virginia

Beginning with tax year 2020, the following changes were made:

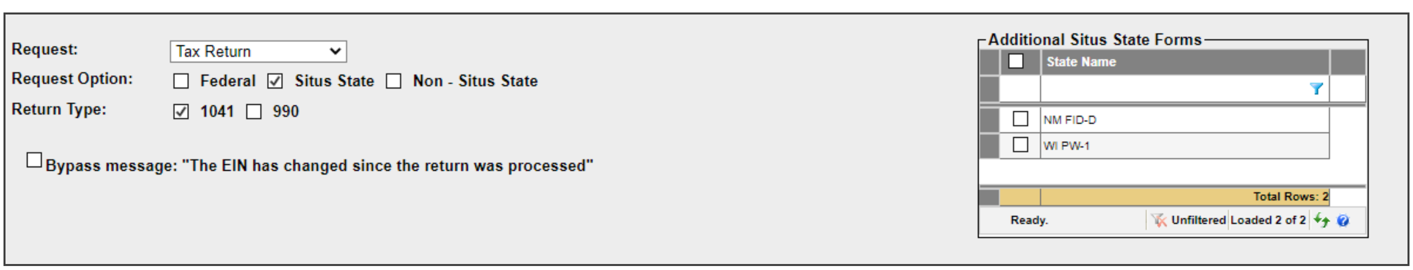
- The following fields were removed from the grid in the **Payments and Credits** collapsible section:
  - **Coalfield employment enhancement tax credit, line 12, Form 306**
  - **Coalfield employment enhancement tax credit, line 13, Form 306**
- The **Amended Return** collapsible section was added. This new section includes the **Reason(s) you are amending the return** and **Explanation of Change** group boxes.



- The **Split Year** collapsible section was removed.

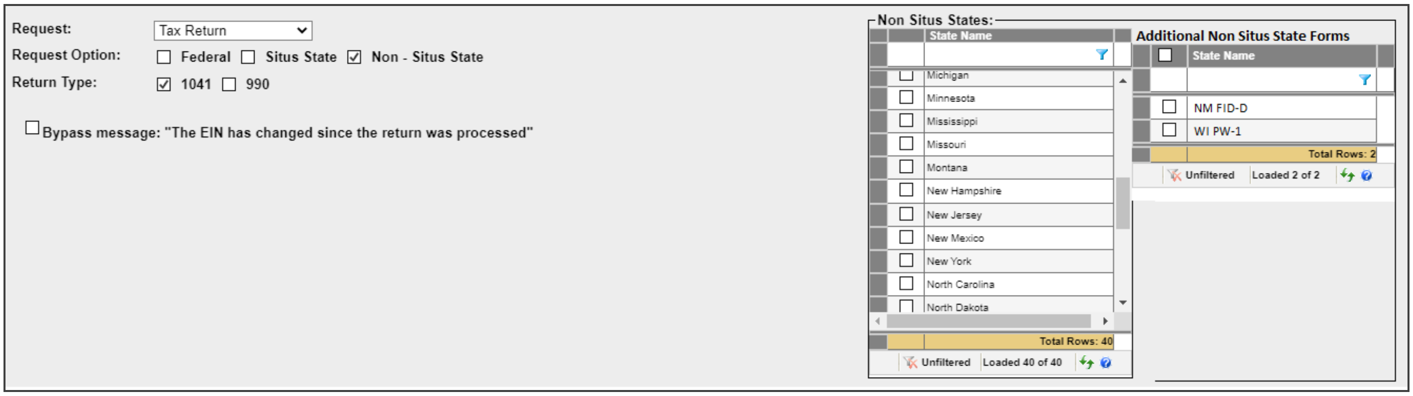
Wisconsin

E-filing is now available for Wisconsin Form PW-1. The File Electronically page was modified to allow filing of the additional Wisconsin form. When **Tax Return** is selected from the **Request** drop-down list and the **Situs State** check box is selected, the **Additional Situs State Forms** grid displays. If the situs state is Wisconsin, the check box for WI PW-1 can be selected so that the forms are e-filed along with the Wisconsin Form 2.



As referenced in the 20.05 Release Notes, New Mexico has a similar additional form that can be e-filed (FID-D).

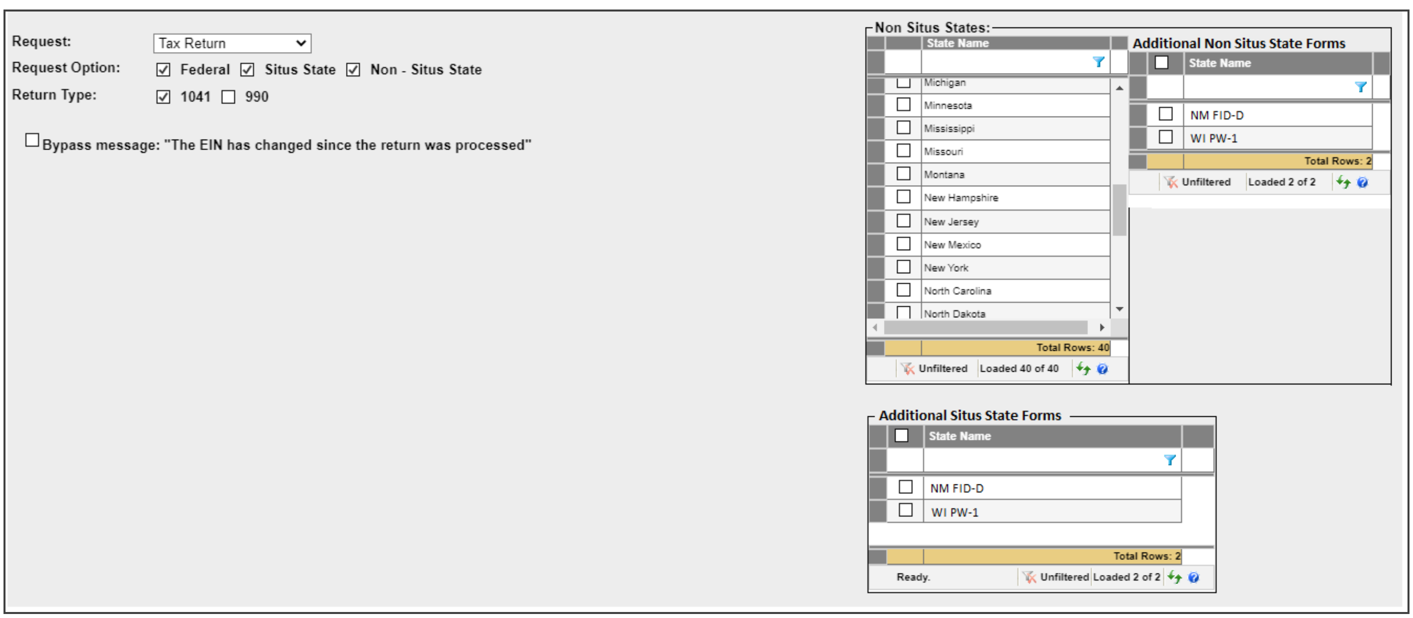
If filing non-resident Wisconsin tax returns, select the **Non-Situs State** check box. Two grids display, allowing you to choose the non-situs states to e-file as well as the additional state forms to e-file.



If both the **Situs State** and **Non-Situs State** check boxes are selected, the following three grids will display:

- **Non Situs States**
- **Additional Non Situs State Forms**
- **Additional Situs State Forms**

The situs state returns are automatically selected for e-filing.



FIXES

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

KNOWN ISSUES

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

ONESOURCE TRUST TAX INSIGHT 21.01 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 Insight version 21.01 includes only a version change.

FIXES

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