ONESOURCE
TRUST TAX

RELEASE NOTES

VERSION 23.05

Document Version 1

THOMSON REUTERS®

DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	November 15, 2023	Initial publication.

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ONESOURCE TRUST TAX 23.05 RELEASE NOTES

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RELEASE HIGHLIGHTS

ONESOURCE Trust Tax version 23.05 includes bug fixes and introduces the following features:

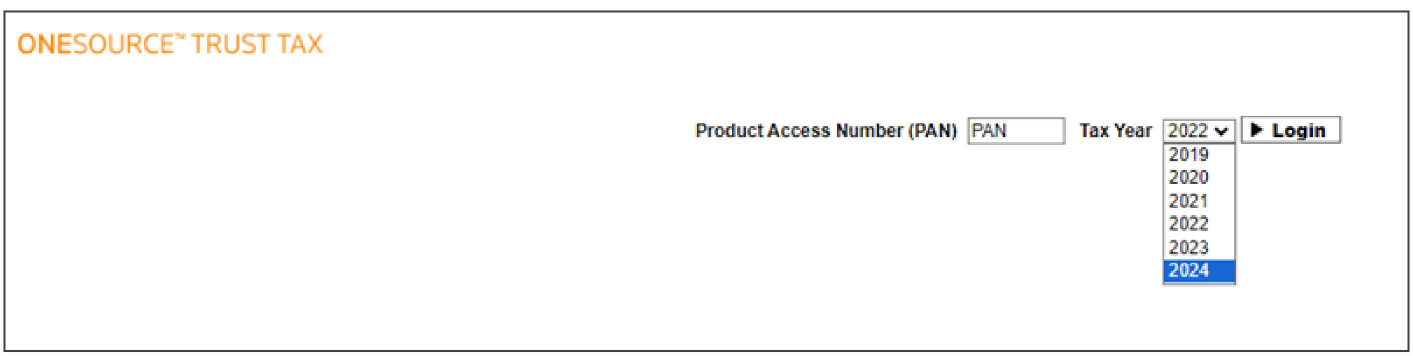
- Independent state return processing
- WSC Income Reallocation factor calculation changes
- Account type default setting update for Tracking

NEW FEATURES

The topics below describe features added with this release.

Tax Year 2024 Added

Tax year 2024 was added as a selection in the **Tax Year** drop-down list on the Login page and in the Main Navigation Area. The following graphic shows the tax year selections on the Login page:



WSC Income Reallocation Factor Calculation Changes

Beginning with tax year 2023, the following changes will be made to the Income Reallocation factor calculations:

- The USGI % from supplemental (secondary) factor file provided by WSC will be applied to short-term capital gain dividends and other dividends reported in box 1a of Form 1099-DIV, with any excess against qualified dividends.

  The following examples show the logic in prior tax years and for tax years beginning in 2023:

  Example 1: CUSIP 024525669

  Factor breakout in prior years:

Factors from 12/21/2022 through 12/23/2022 will be factored in the following proportions:

	Tax Code	Description	Origin	Percent of Distribution	Return of Capital Per Share
	Click here to add new Factor				
X	1	U.S. Government Interest Reported as N...		0.03197328	
X	502	Nonqualified Domestic Dividends		0.25136096	
X	507	Long-Term Capital Gain Dividends/Distrib...		0.47334894	
X	517	Nonqualified Short-Term Capital Gain Div...		0.24331682	
	Total Rows: 4			Total Distribution: 1.00000000	

Factor breakout beginning with tax year 2023:

Factors for tax codes 1 and 517 are different.

	Tax Code	Description	Origin	Percent of Distribution	Return of Capital Per Share
	Click here to add new Factor				
X	1	U.S. Government Interest Reported as N...		0.05943073	
X	502	Nonqualified Domestic Dividends		0.25136096	
X	507	Long-Term Capital Gain Dividends/Distrib...		0.47334894	
X	517	Nonqualified Short-Term Capital Gain Div...		0.21585937	

Example 2: CUSIP 74316J532

Factor breakout in prior years:

↓	12/30/2022	12/30/2022	01/03/2023	126...Short-Term Capital Gain Dividends 507...Long-Term Capital Gain Dividends/Distributions	12/30/2022	PANs with postings PANs without posti

Total Rows: 4

This cell is read only.

actors from 12/30/2022 through 01/03/2023 will be factored in the following proportions:

	Tax Code	Description	Origin	Percent of Distribution
Click here to add new Factor				
✗	507	Long-Term Capital Gain Dividends/Distrib...		0.81202333
✗	517	Nonqualified Short-Term Capital Gain Div...		0.18797667

Factor breakout beginning tax year 2023:

Factors for tax codes 1 and 517 are different.

	Tax Code	Description	Origin	Percent of Distribution	Return of Capital Per Share
Click here to add new Factor					
✗	1	U.S. Government Interest Reported as N...		0.03082817	
✗	507	Long-Term Capital Gain Dividends/Distrib...		0.81202333	
✗	517	Nonqualified Short-Term Capital Gain Div...		0.15714850	

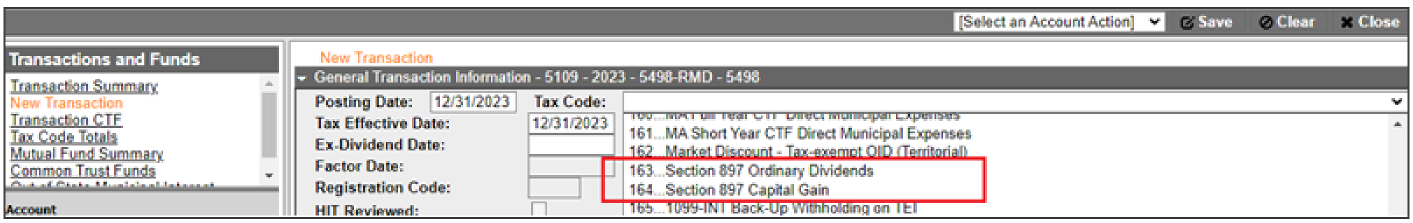
- The supplemental (secondary) factor file provided by WSC will no longer be applied to the NRA primary factors.
- Factors for each payment date loaded into ONESOURCE Trust Tax will be rounded to exactly 1.00000.
- A change related to Section 897 long-term gains will be included in the 24.00 release, which is scheduled for availability at 12 A.M. (CT) on December 28, 2023. The change will be detailed in the respective release notes.

Section 897 Tax Codes

The tax codes listed below were added in conjunction with the WSC factor changes detailed in the WSC Income Reallocation Factor Calculation Changes (page 2) feature. The tax codes will not be available for processing until the 24.00 release.

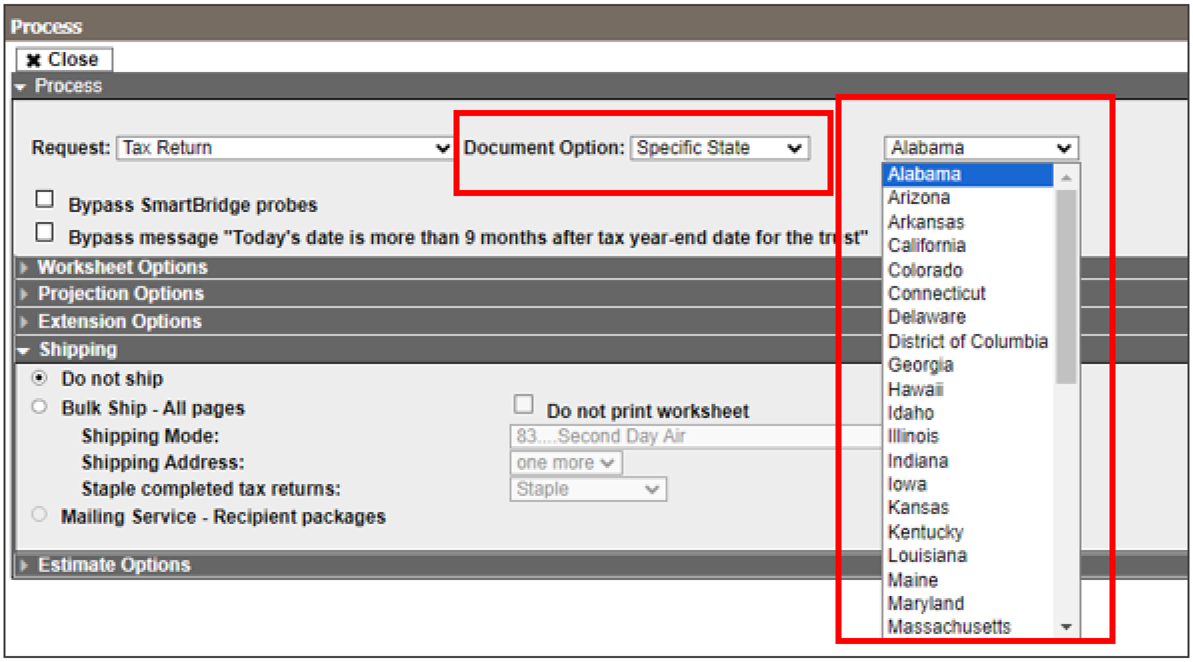
TAX CODE	DESCRIPTION
163	Section 897 Ordinary Dividends
164	Section 897 Capital Gain

The following graphic shows the new tax codes:

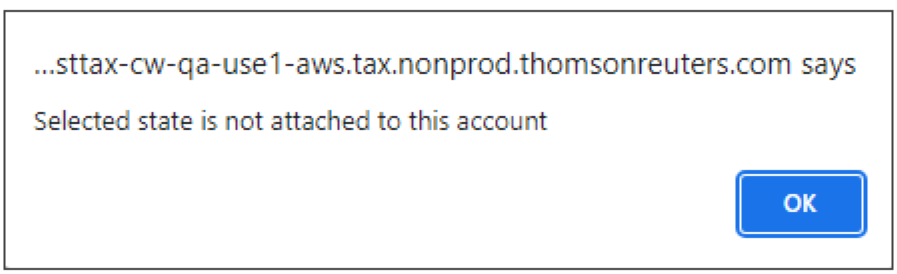


Independent State Processing

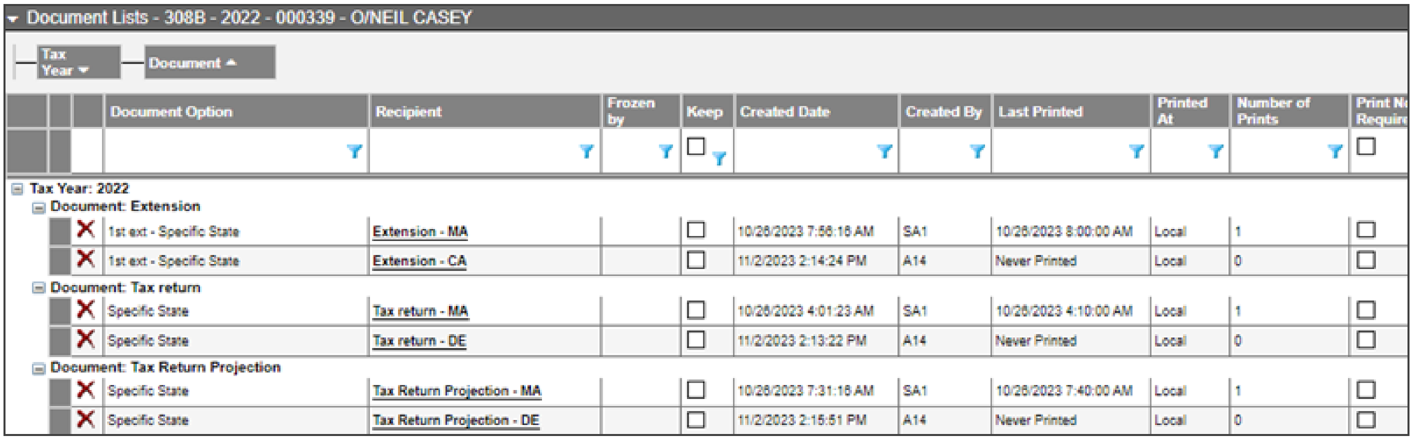
Beginning with this release, the **Specific State** selection was added to the **Document Option** drop-down list on the Process page and pop-up window for tax returns, extensions, and projections. This selection allows you to select a specific state to process rather than processing all attached states for an account. Specific state processing is available for all tax years and is applicable to only 1041 returns.



If the selected state is not attached to the account, the "Selected state is not attached to this account" message displays after the **Process** button is selected.



On the account's Documents page, the specific state documents include the state abbreviation appended to the name. For example, a Massachusetts return processed using the **Specific State** option displays on the Documents page as **Tax Return - MA**. This applies to projections and extensions as well.



Document Lists - 308B - 2022 - 000339 - O/NEIL CASEY

Tax Year — Document

Document Option	Recipient	Frozen by	Keep	Created Date	Created By	Last Printed	Printed At	Number of Prints	Print N Requir
Tax Year: 2022									
Document: Extension									
1st ext - Specific State	Extension - MA		☐	10/26/2023 7:56:16 AM	SA1	10/26/2023 8:00:00 AM	Local	1	☐
1st ext - Specific State	Extension - CA		☐	11/2/2023 2:14:24 PM	A14	Never Printed	Local	0	☐
Document: Tax return									
Specific State	Tax return - MA		☐	10/26/2023 4:01:23 AM	SA1	10/26/2023 4:10:00 AM	Local	1	☐
Specific State	Tax return - DE		☐	11/2/2023 2:13:22 PM	A14	Never Printed	Local	0	☐
Document: Tax Return Projection									
Specific State	Tax Return Projection - MA		☐	10/26/2023 7:31:16 AM	SA1	10/26/2023 7:40:00 AM	Local	1	☐
Specific State	Tax Return Projection - DE		☐	11/2/2023 2:15:51 PM	A14	Never Printed	Local	0	☐

An account can have multiple specific state documents of each type (returns, extensions and projections). The **Keep** flag is available for specific state documents so you can freeze those documents like all other documents.

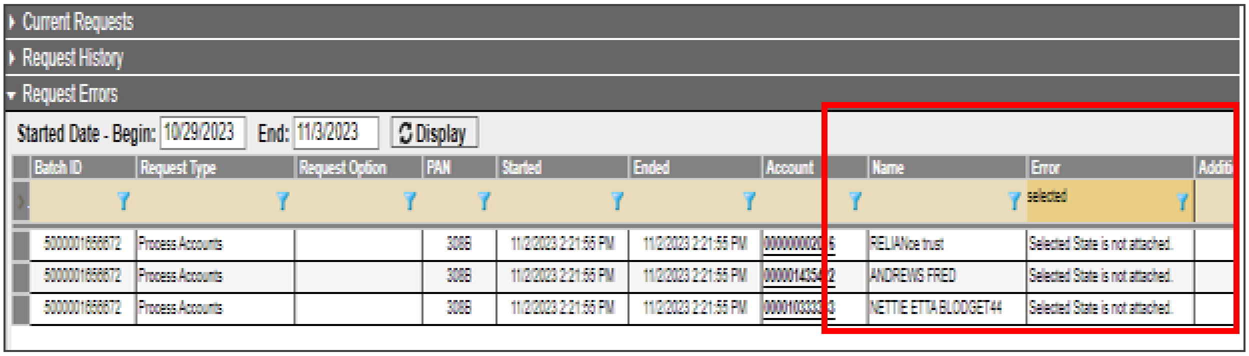
Tracking will be updated when a specific state is processed if the PAN is set up to update status and milestones by return processing.

State returns processed using the **Specific State** option can be e-filed and its tax due can be paid using any of the existing options. The information from the most recent return processed is used for e-filing, balance due payments and carryover information. For example:

- If a New York specific state request is processed, the return is frozen, and a New York state return is subsequently processed, then only the most recent New York return is considered for e-filing.

- If a return is processed using either the **State only** or **Federal and state** option, the return frozen, and a subsequent New York state return is processed using the **Specific State** option then, when e-filing the New York return, the most recently processed return is the New York state return generated using **State Specific** option. Also the tax due calculated from the **Specific State** compute is shown as the New York balance due payment. Any other states attached to the account would have been processed by the **State only** or **Federal** option and the state processing option and those returns would be available for e-filing, if qualified.

Specific state returns, extensions and projections can also be processed from a register. If the specific state selected is not attached to all accounts in the register, the “Selected state is not attached to this account” message displays in the **Request Errors** collapsible section of the Request Status and History page.

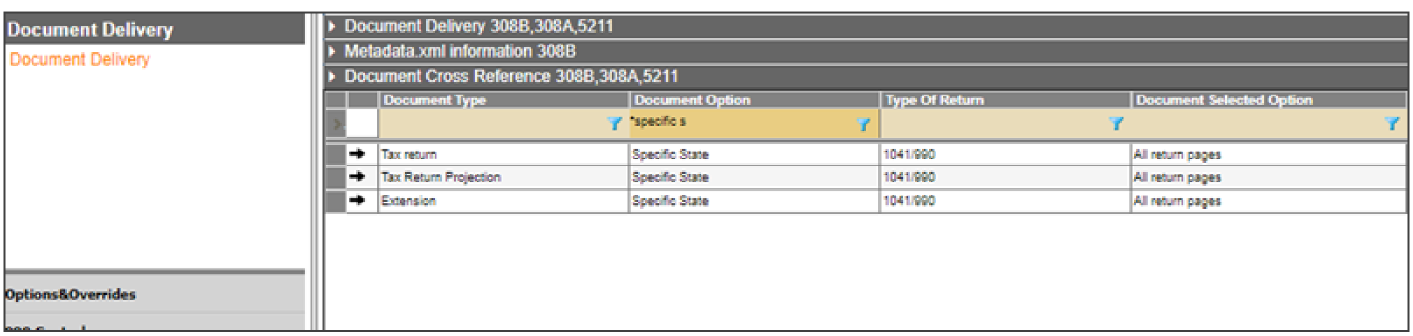


If multiple states are attached to the account and there is a possibility of a credit for taxes paid to another state, the **Specific State** option is not able to determine the credit. All states need to be processed as one request (**Federal and State** or **State Only**) for the credit to be properly calculated.

The ability to print via register documents processed using the **Specific State** option will be available with 24.00 release.

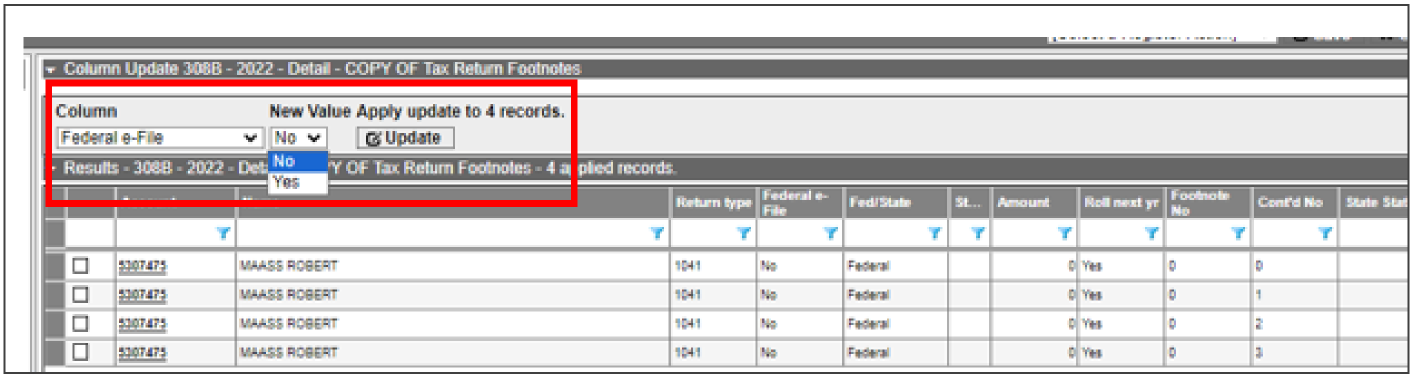
Document Delivery

If you license Document Delivery, **Specific State** options for tax returns, projections and extensions were added to the **Document Cross Reference** collapsible section on the Document Delivery page (select **SETUP** then **Document Delivery** to access). These new options must be set for documents created from specific state processing requests to be delivered. A user right controls access to the Document Delivery setup feature.



Federal e-File Field

The **Federal e-File** field, which is in the Footnotes category on the Register Properties page, can now be updated using the Column Update feature after the field is added to custom registers created from the **Tax Return Footnotes** and **Beneficiaries with Footnotes** base registers.



Error Message for Estimated Tax Payment Transactions

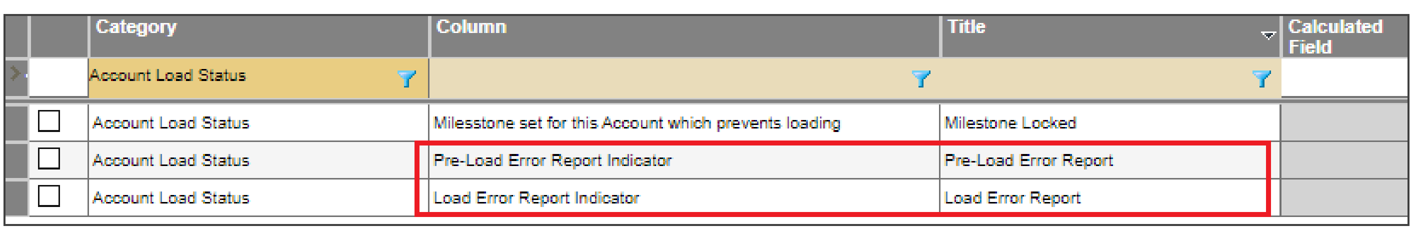
Effective with this release, a specific processing error message generates when too many estimated tax payment transactions are found for the tax year. The error message is: "Too many Federal or State estimate payment transactions." Prior to this release, a generic error code generated for this situation, which was difficult to interpret.

If the error message displays, review the transactions in tax codes 79, 80, 81, and 82. Correcting the error depends upon the situation. The issue may be that a state payment transaction is not assigned to the correct state. Or, it may be that the account made extra payments, in which case the tax effective date should be modified to match another transaction. Generally, ONESOURCE Trust Tax allows up to five estimated tax payment transactions for federal and California and up to four payment transactions for all other states.

Load Status Error Reporting

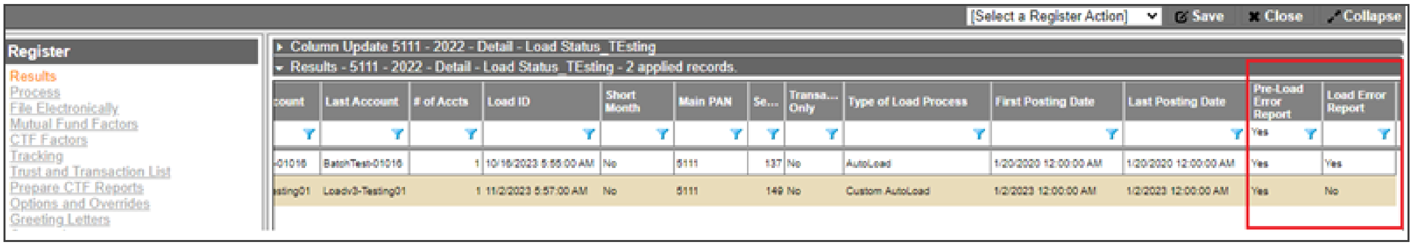
Beginning with this release, the **Pre-Load Error Report Indicator** and **Load Error Report Indicator** columns are available for adding to custom registers created from the following base registers:

- Load Status
- Account Load Status by Tax year
- Account Load Status - Last load



Category	Column	Title	Calculated Field
Account Load Status			
Account Load Status	Milesstone set for this Account which prevents loading	Milestone Locked	
Account Load Status	Pre-Load Error Report Indicator	Pre-Load Error Report	
Account Load Status	Load Error Report Indicator	Load Error Report	

As shown in the following graphic, a data file that encounters an error during either the pre-load or load stages of the load process is identified with **Yes** in the corresponding column:



Manual Load

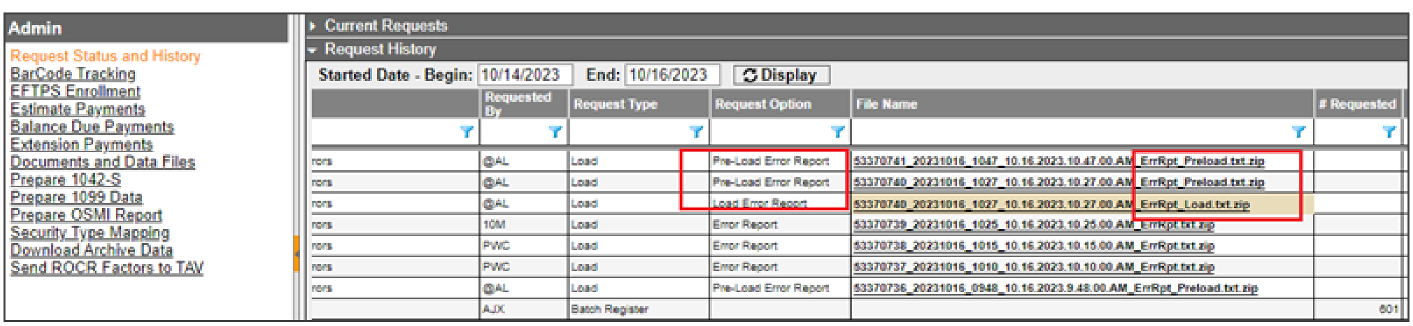
Users whose data files are manually loaded by our Production team can contact our Support team for details of any errors generated.

AutoLoad

For users whose data files are loaded via the AutoLoad process, an additional change was made to differentiate the error reports found in the **Request History** collapsible section on the Request Status and History page. Prior to this release the **Request Option** column for the **Load** request type displayed **Error Report**. As of this release, the **Request Option** displays either **Load Error Report** or **Pre-Load Error Report** and the respective file names end with ErrRpt_Load.txt.zip or ErrRpt_Preload.txt.zip to correspond with the column in the register that includes the **Yes**.

Also, the way in which PAN error reports can be accessed varies by report type:

- Pre-Load Error reports are obtained in the Main PAN (if data files are split into multiple PANs).
- Load Error reports are obtained in the PAN the error pertains to (if data files are split into multiple PANs, there could be error reports for more than one PAN).



Options and Overrides

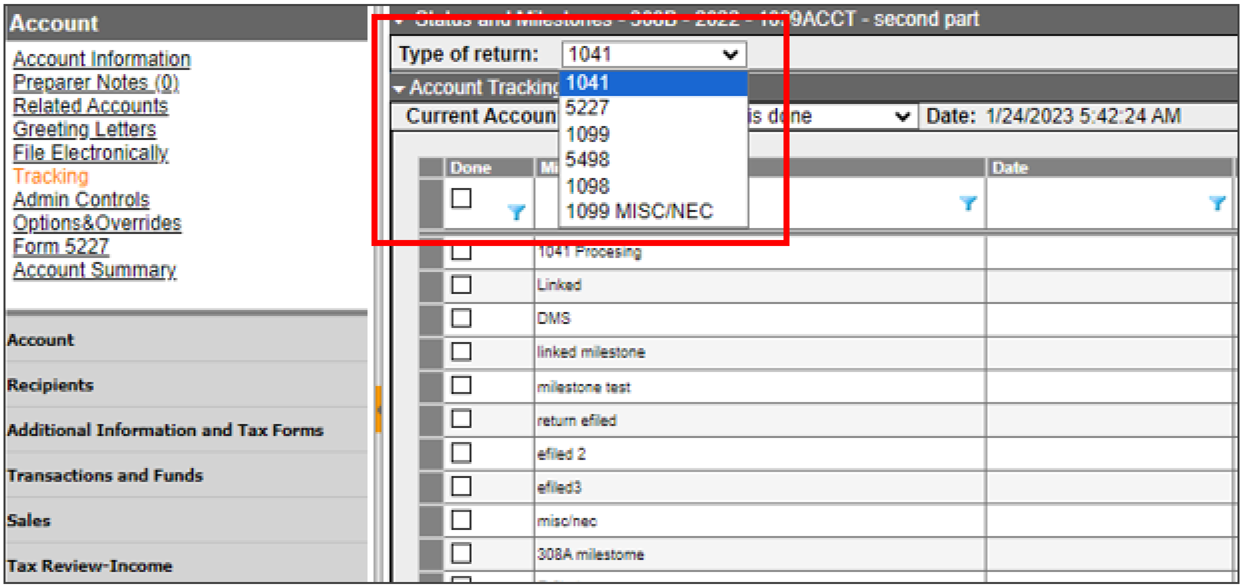
Year **2023** was added to the **Elect out of additional first-year depreciation deduction on qualified property for post 9/10/2001 assets placed in service in the following years** heading in the **Compute - Federal** category:

Options and Overrides - L605 - 2022 - NCNRESBT - Nonresident North Carolina ESBT

Category	Description	Override	Text Value	Drop Down Value	Updated By
Compute - Federal					
	amount and the total of tax code 149				
	Elect out of additional first-year depreciation deduction on qualified property for post 09/10/2001 assets placed in service in the following years:				
Compute - Fe...	2001	No		No	
Compute - Fe...	2002	No		No	
Compute - Fe...	2003	No		No	
Compute - Fe...	2004	No		No	
Compute - Fe...	2008	No		No	
Compute - Fe...	2009	No		No	
Compute - Fe...	2010	No		No	
Compute - Fe...	2011	No		No	
Compute - Fe...	2012	No		No	
Compute - Fe...	2013	No		No	
Compute - Fe...	2014	No		No	
Compute - Fe...	2015	No		No	
Compute - Fe...	2016	No		No	
Compute - Fe...	2017	No		No	
Compute - Fe...	2018	No		No	
Compute - Fe...	2019	No		No	
Compute - Fe...	2020	No		No	
Compute - Fe...	2021	No		No	
Compute - Fe...	2022	No		No	
Compute - Fe...	2023	No		No	
Compute - Fe...	Treat Foreign taxes as a deduction against income in lieu of a foreign tax credit (Does not impact revocable accounts)	No		No	

Account Tracking

Beginning with this release, the **Type of Return** default on the Tracking page in the account binder is now based on a combination of the account's entity type, 5227 setting, and information return check boxes.



This change is applicable for all tax years. The **Type of Return** default is determined as follows:

- For non-990 entity type accounts with a 5227 type of **N/A** and no information return check boxes selected, the default is **1041**.
- For 990 entity type accounts, the default is **990 (2021 forward)**.
- For accounts where the 5227 type is not **N/A**, the default is **5227**.
- For Tax Deferred, N/A and Agent/Custodian entity type accounts with a 1099 service level and at least one information return check box selected, the default is based on which information return check boxes are selected. If the account has more than one type of information return check box selected, then 1099DIOB takes precedence over the other 1099 types, followed by 5498, then 1099MISC/NEC, then 1098.
- For tax years prior to 2021, any account with a 5227 type of **N/A** and no information return check boxes selected, the default is **1041/990**.

The following table provides examples of various combinations of entity type, 5227 type, and information return check boxes as well as the respective **Type of Return** default on the Tracking page:

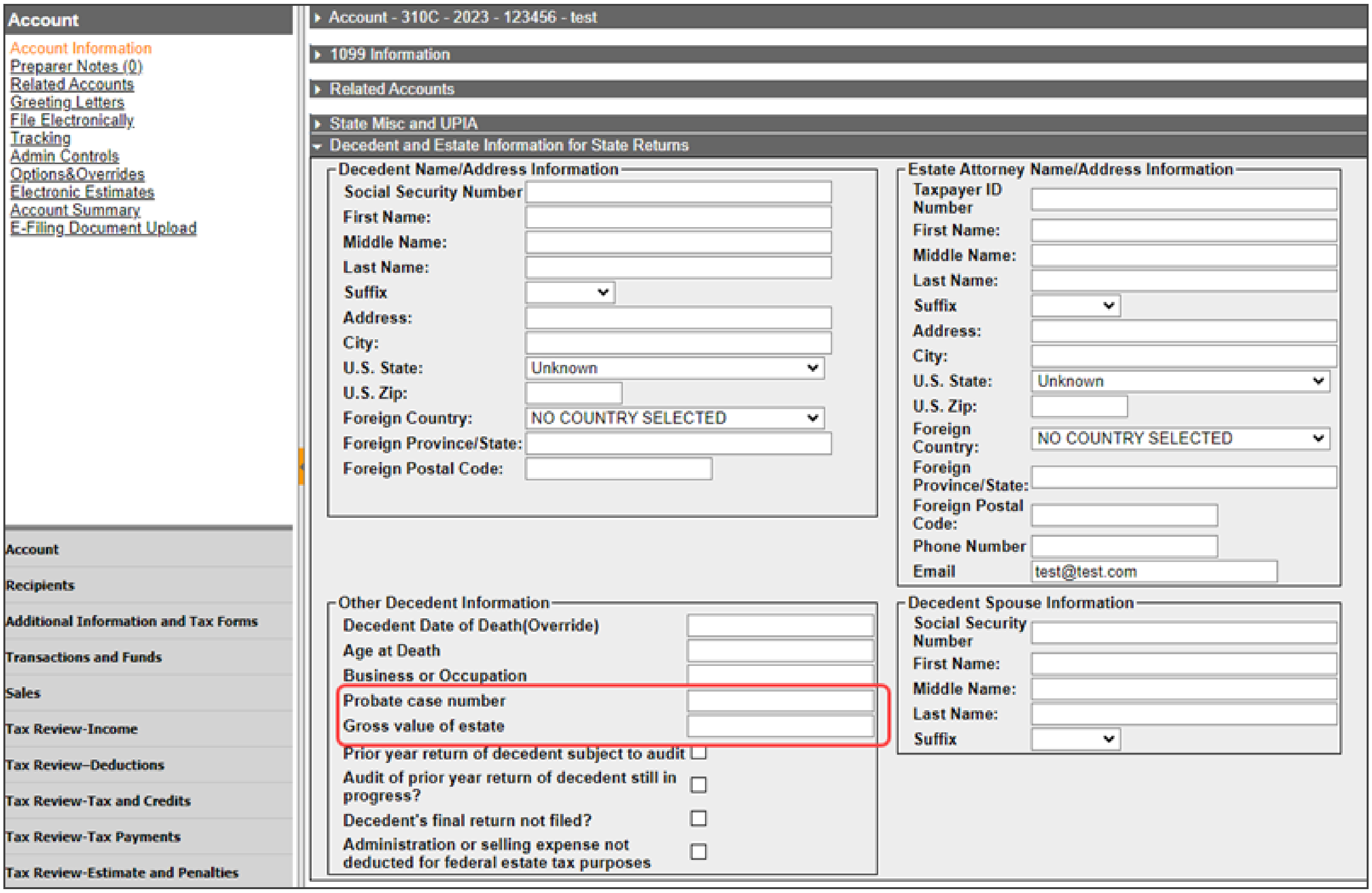
ENTITY TYPE	5227 TYPE IS N/A	1099, 5498, 1098 CHECK BOXES SELECTED	TYPE OF RETURN DEFAULT ON TRACKING PAGE
Simple	No	1099 DIOB, MISC	5227
Decedents Estate	Yes	1099 NEC, 1098	1041

ENTITY TYPE	5227 TYPE IS N/A	1099, 5498, 1098 CHECK BOXES SELECTED	TYPE OF RETURN DEFAULT ON TRACKING PAGE
Tax Deferred	Yes	1099R, 5498	1099
Tax Deferred	Yes	5498, 1098, 1099Q	5498
Complex	Yes	1099 DIOB, NEC, 1098	1041
990	Yes	1099 MISC	990 (2021 & forward)
N/A	No	1098	5227
N/A	Yes	1099NEC, 1098	1099 MISC/NEC
Agent/Custodian	Yes	1099 DIOB, MISC	1099
Agent/Custodian	Yes	None	1041

Decedent and Estate Information for State Returns

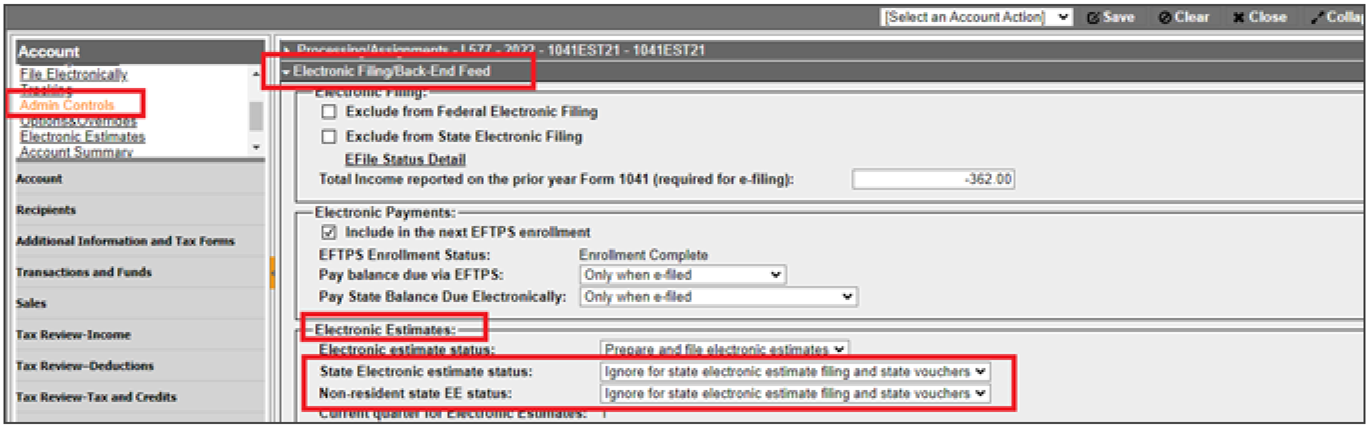
Beginning with tax year 2023, the following fields were added to the **Other Decedent Information** group box in the **Decedent and Estate Information for State Returns** collapsible section on the Account Information page:

- Probate case number
- Gross value of estate



Electronic Estimates Option

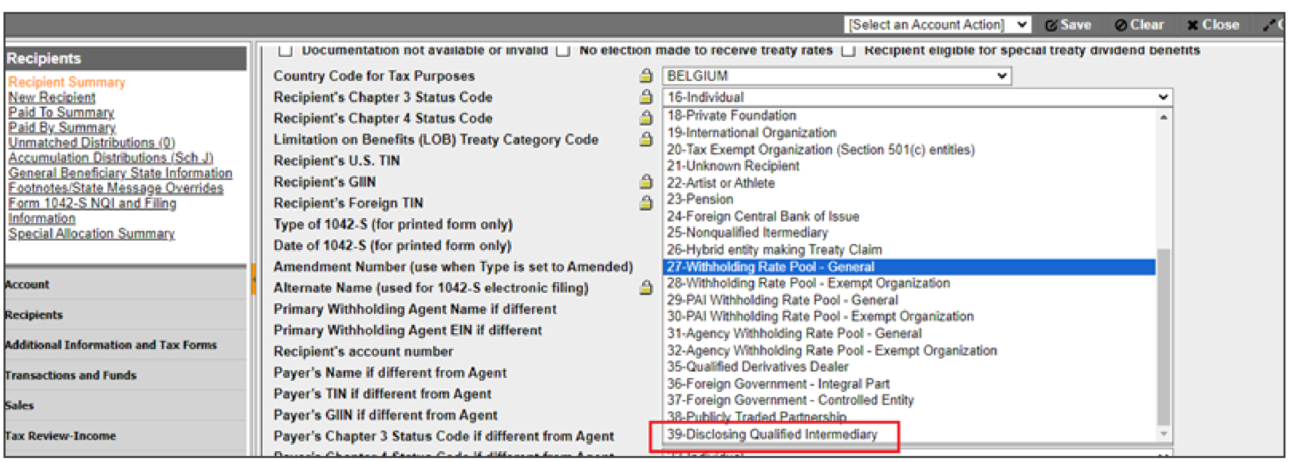
Within the **Electronic Estimates** group box in the **Electronic Filing/Bank-End Feed** collapsible section of the Admin Controls page, the **Ignore for state electronic estimate processing** selection in the **State Electronic estimate status** and **Non-resident state EE status** drop-down lists was revised for clarity to **Ignore for state electronic estimate filing and state vouchers**. There is no change to the functionality of this selection.



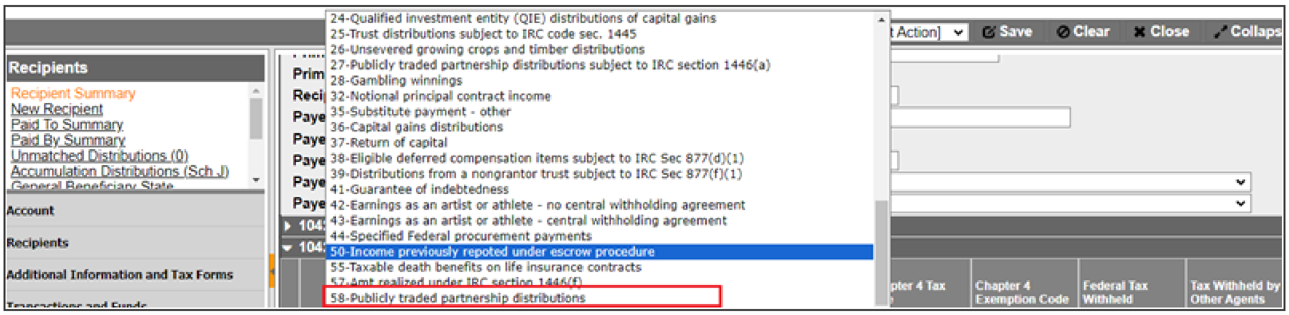
1042-S

Beginning with tax year 2023, the following changes (in compliance with IRS changes) related to 1042-S reporting were made to the **Recipients** topic in the account binder and to registers related to NRA reporting:

- For the **Recipient's Chapter 3 Status Code** and **Payer's Chapter 3 Status Code if different from Agent** drop-down lists:
  - **03 - Territory FI - treated as U.S. Person** was removed.
  - **04 - Territory FI - not treated as U.S. Person** was removed.
  - **39 - Disclosing Qualified Intermediary** was added.



- For the **Chapter 3 Exemption Code** drop-down list in the **1042-S Income Overrides** and **1042-S Additional Income** collapsible sections:
    - **09 - Territory FI treated as U.S. person** was removed.
- For the **Income Code** drop-down list in the **1042-S Additional Income** collapsible section:
    - **58 - Publicly traded partnership distributions** was added.



Required Minimum Distribution Statement

Beginning with tax year 2023, the RMD message on Form 5498 and the Fair Market Value (FMV) Statement was updated and is applicable to recipients 73 or older as of December 31, 2023.

The following graphic shows the RMD text on Form 5498:

If you have attained the age of 73 or older, you are required to take a minimum distribution (RMD) from your IRA account(s) no later than December 31 of each calendar year. If you reached 73 in 2023, you have until April 1, 2024 to take your first RMD. RMDs for all subsequent calendar years must be satisfied by December 31. We are required to report to the IRS that you are subject to RMD. Please contact your financial advisor if you require assistance in calculating the RMD for your IRA accounts held with us.

The following graphic shows the RMD text on a FMV statement:

2023 FMV Statement

FAIR MARKET VALUE STATEMENT

Per the Internal Revenue Service Regulations, trustees or issuers of IRA's or SEP's must forward a statement of the year end market value of the account.

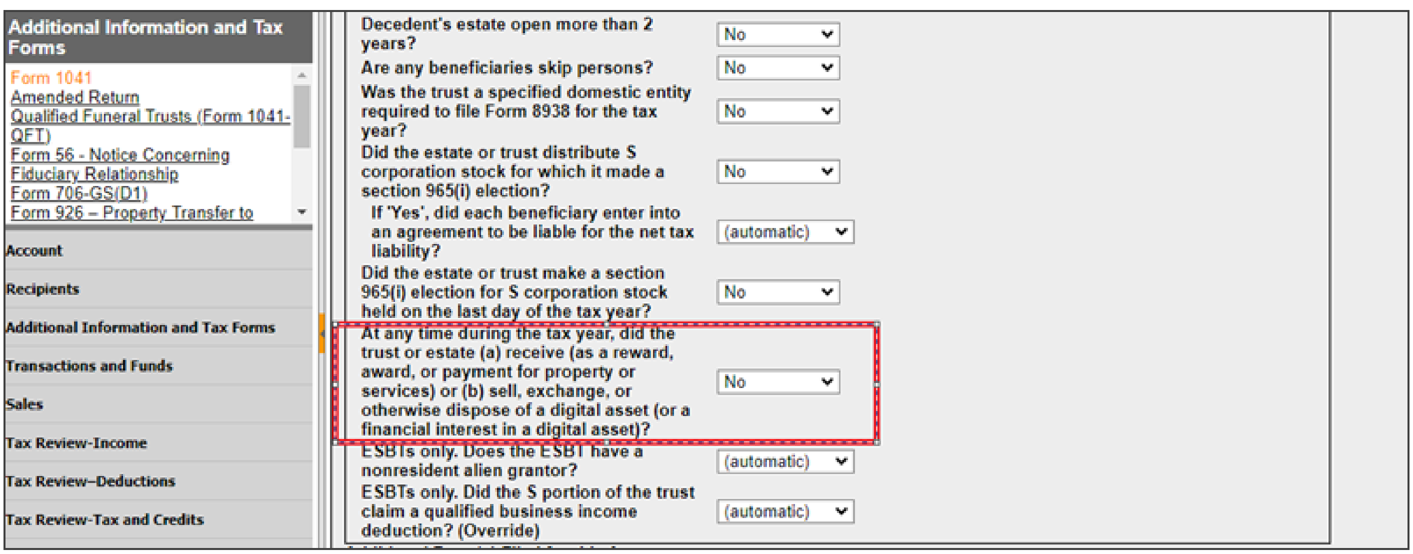
The account listed above had a year end market value of $67,898.00 .

The fair market value information above will be furnished to the Internal Revenue Service.

If you have attained the age of 73 or older, you are required to take a minimum distribution (RMD) from your IRA account(s) no later than December 31 of each calendar year. If you reached 73 in 2023, you have until April 1, 2024 to take your first RMD. RMDs for all subsequent calendar years must be satisfied by December 31. We are required to report to the IRS that you are subject to RMD. Please contact your financial advisor if you require assistance in calculating the RMD for your IRA accounts held with us.

Form 1041

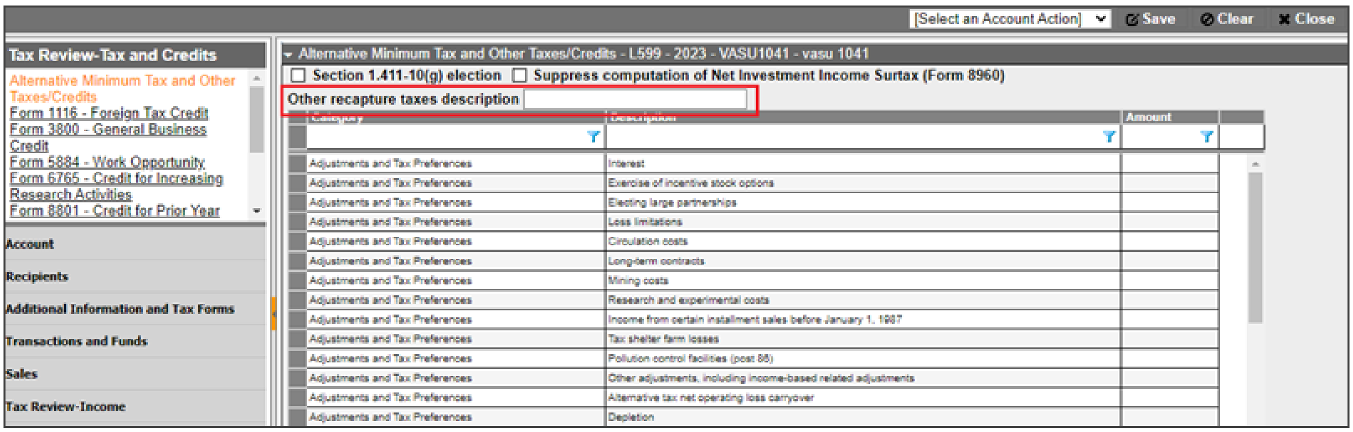
Beginning with tax year 2023, the **At any time during the tax year, did the trust or estate (a) receive (as a reward, award, or payment for property or services) or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?** question was added to the Form 1041, Page 3 group box in the **Miscellaneous Questions - Form 1041 - Page 1 and 3** collapsible section of the Form 1041 page. (Select the **Additional Information and Tax Forms** topic in the account binder to access this page). The default selection is **No**. If **Yes** is selected in a particular tax year, the selection does not roll to the subsequent year.



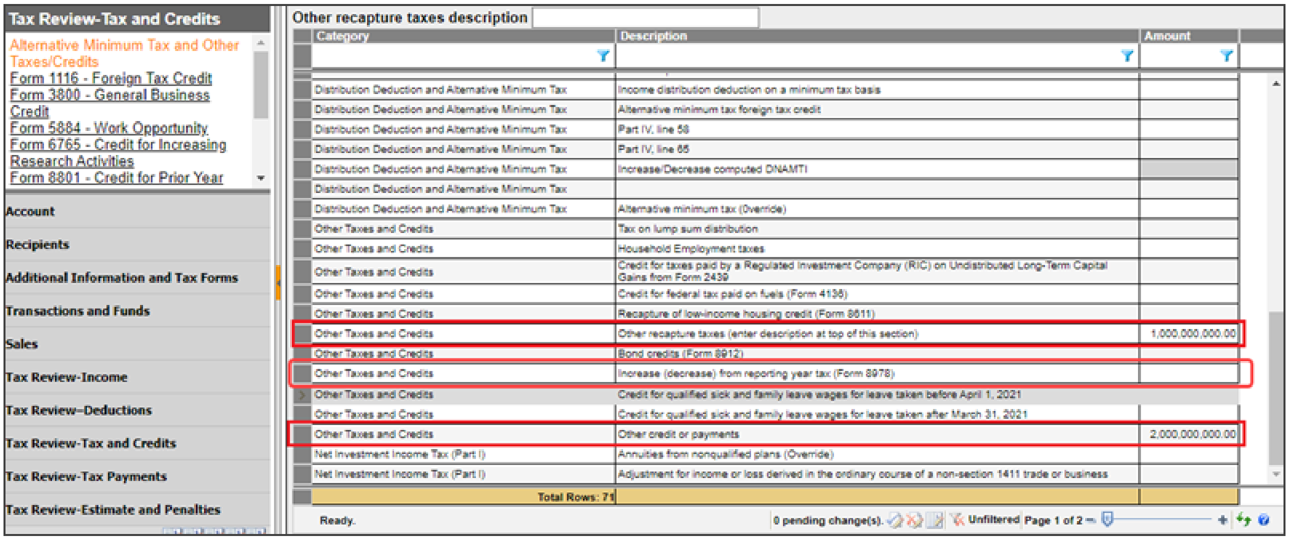
Alternative Minimum Tax and Other Taxes/Credits Changes

Beginning with tax year 2023, the following changes were made to the Alternative Minimum Tax and Other Taxes/Credits page (select the **Tax Review-Tax and Credits** topic in the account binder to access this page):

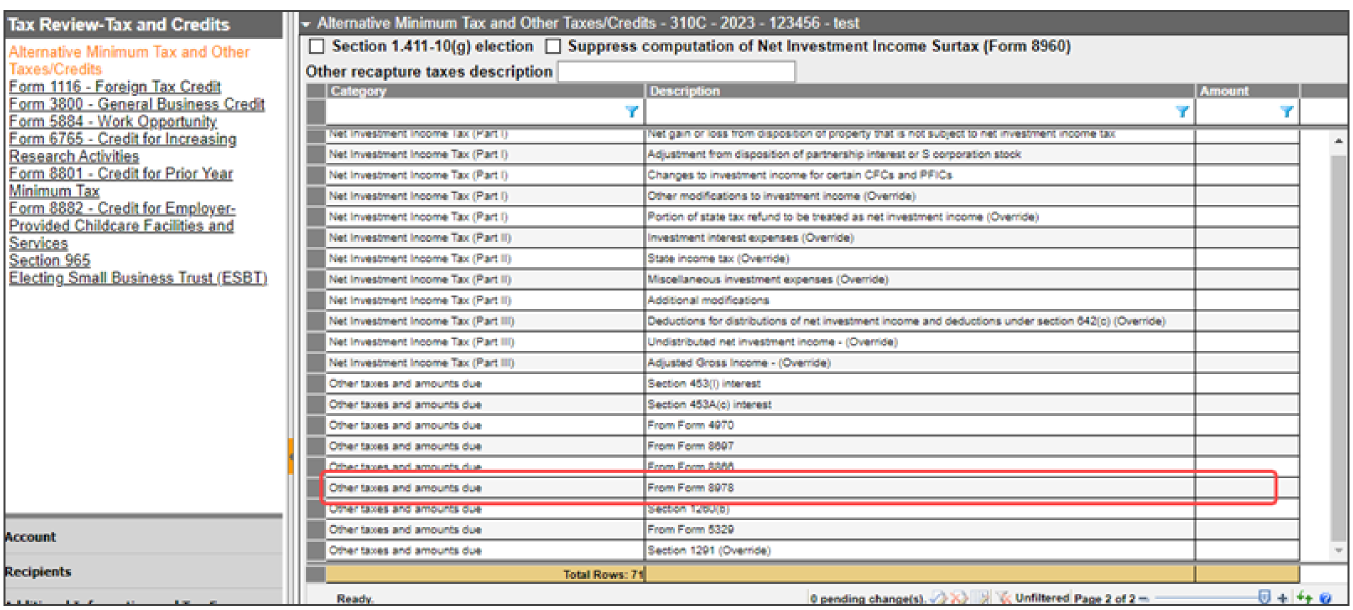
- The **Other recapture taxes description** field was added above the grid. This field allows a maximum of 30 characters.



- The following fields were added to the **Other Taxes and Credits** category in the grid:
  - **Other recapture taxes** (enter description at top of this section)
  - **Increase (Decrease) from reporting tax year (Form 8978)**
  - **Other credit or payments**



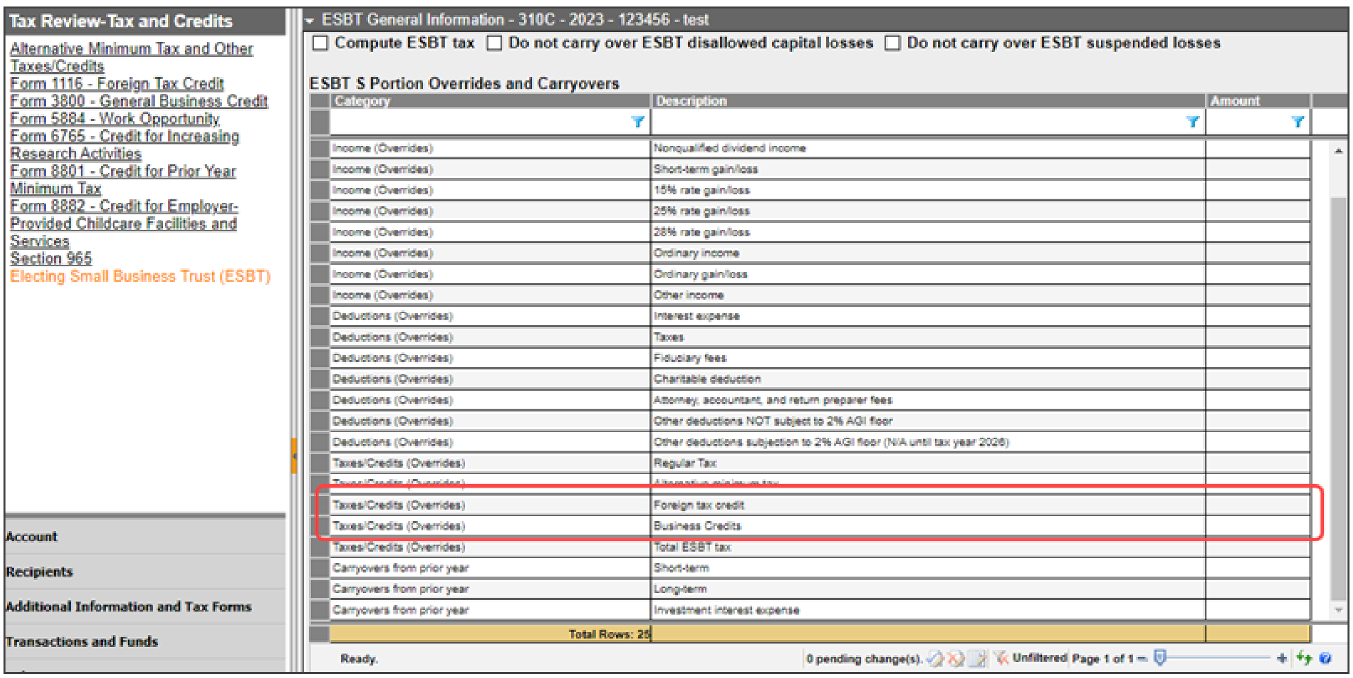
- The **From Form 8978** field was added to the **Other taxes and amounts due category** in the grid (page 2 of the grid):



Electing Small Business Trust (ESBT)

Beginning with tax year 2023, the following changes were made to the Taxes/Credits (Overrides) category in the **ESBT S Portion Overrides and Carryovers** grid under the ESTP General Information collapsible section on the Electing Small Business Trust (ESBT) page (select the **Tax Review-Tax and Credits** topic then the **Electing Small Business Trust (ESBT)** subtopic in the account binder to access this page):

- The **Foreign tax credit** field was added.
- The description of the **Credits** field was revised to **Business Credits**.

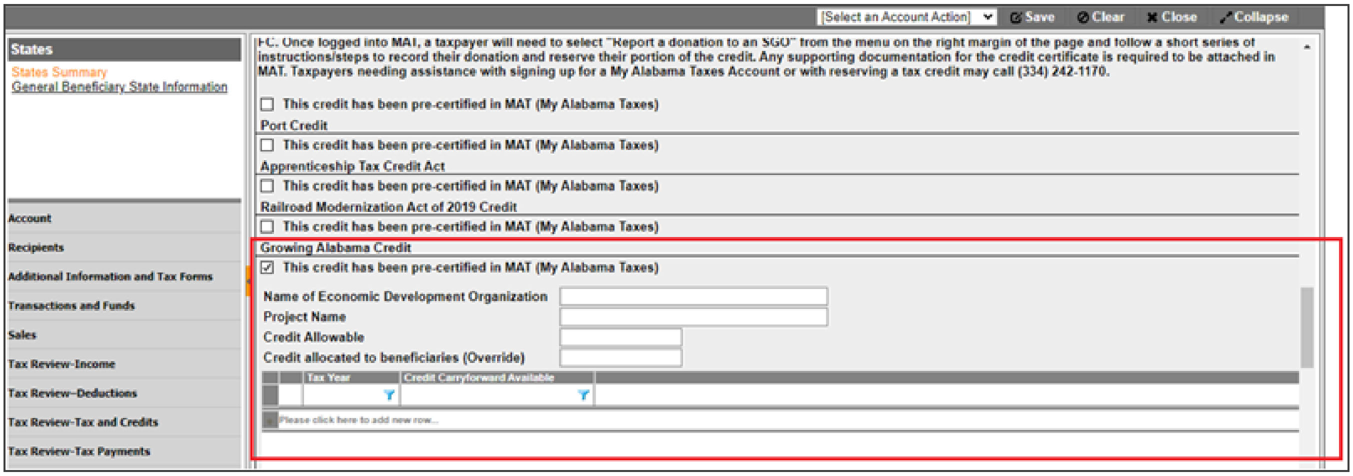


Alabama

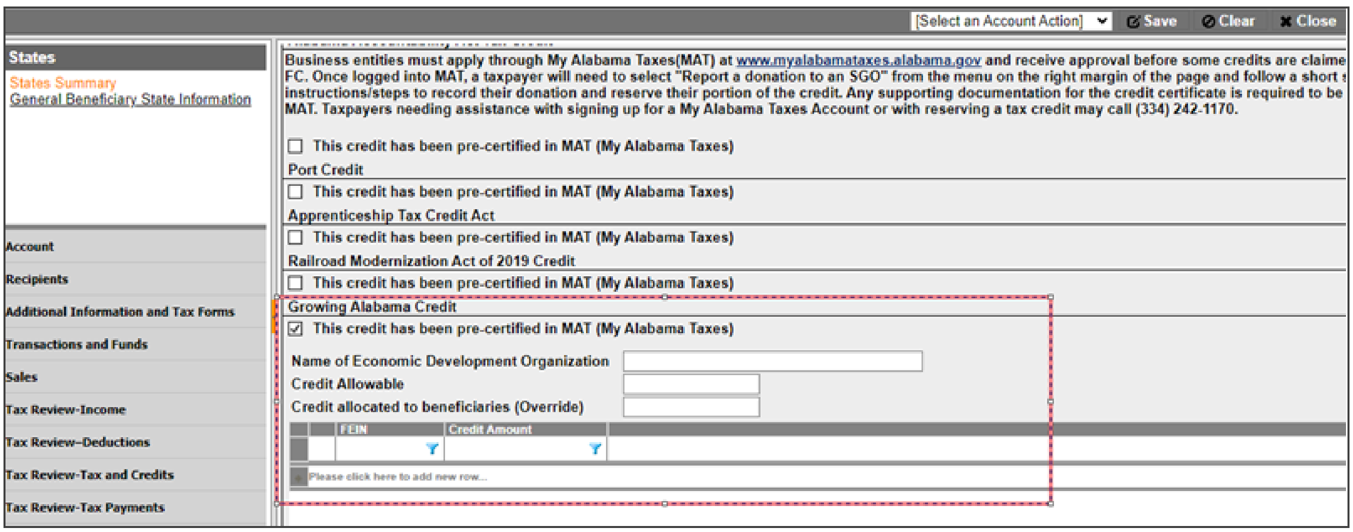
Beginning with tax year 2023, the following changes were made to the **Payments and Credits** collapsible section:

- The **Project Name** field was removed from the **Growing Alabama Credit** group box, and the grid fields were replaced with **FEIN** and **Credit Amount** columns.

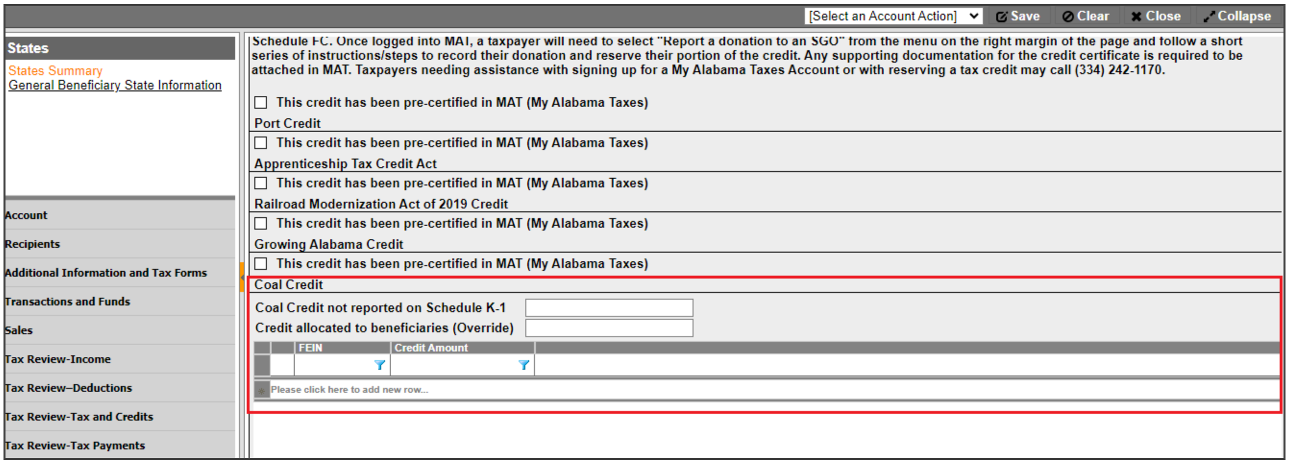
  The following graphic shows the **Growing Alabama Credit** group box in tax years 2022 and prior:



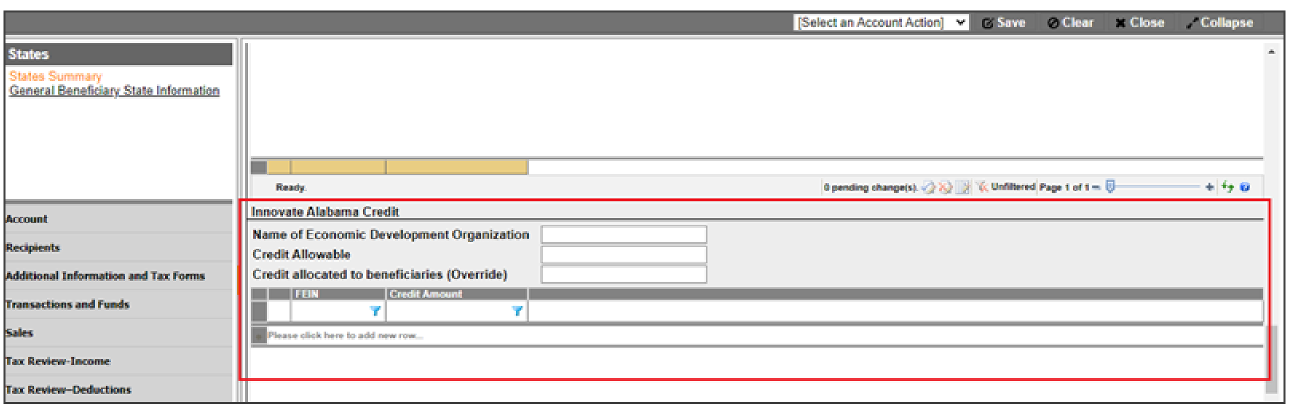
The following graphic shows the **Growing Alabama Credit** group box beginning in tax year 2023:



- The **Coal Credit** group box was added and includes the following:
  - The **Coal Credit not reported on Schedule K-1** field.
  - The **Credit allocated to beneficiaries (Override)** field.
  - A grid for entering the FEIN and credit amount.



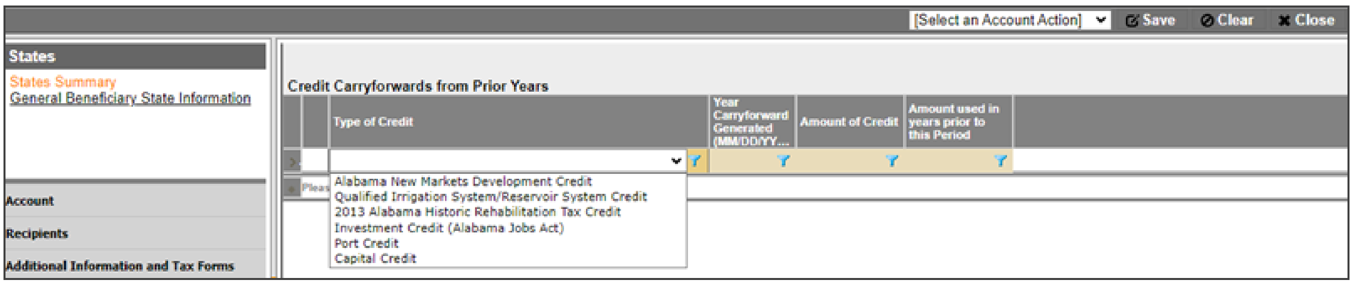
- The **Innovate Alabama Credit** group box was added and includes the following:
  - The **Name of Economic Development Organization** field.
  - The **Credit Allowable** field.
  - The **Credit allocated to beneficiaries (Override)** field.
  - A grid for entering the FEIN and credit amount.



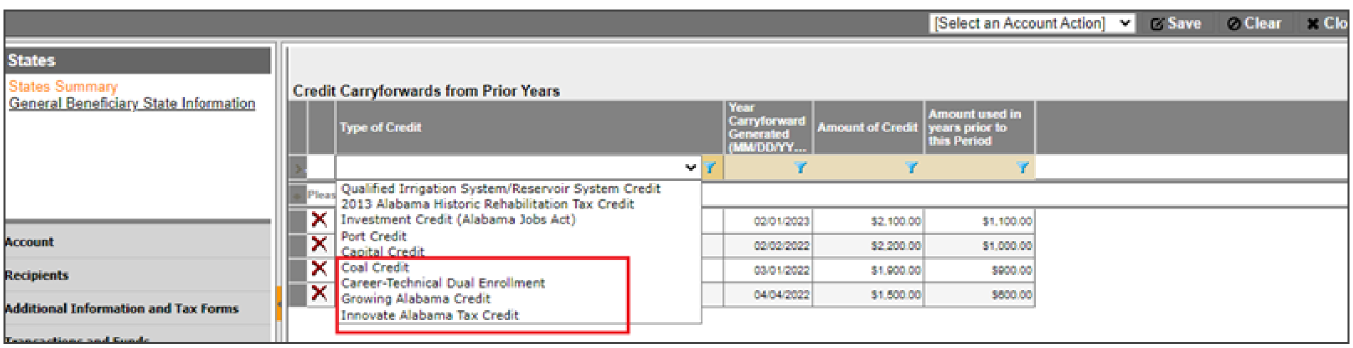
- **Alabama New Markets Development Credit** selection was removed, and the following selections were added to the **Type of Credit** drop-down list in the **Credit Carryforwards from Prior Years** grid in the **Payments and Credits** collapsible section:

- Coal Credit
- Career-Technical Dual Enrollment
- Growing Alabama Credit
- Innovate Alabama Tax Credit

The following graphic shows the **Credit Carryforwards from Prior Years** section in tax years 2022 and prior:

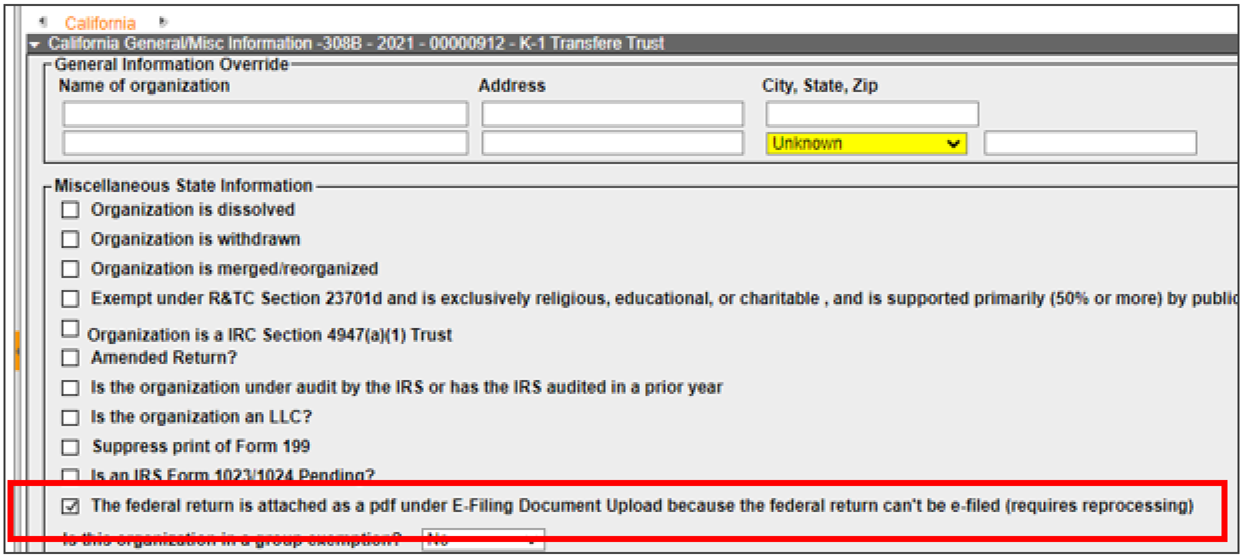


The following graphic illustrates the **Credit Carryforwards from Prior Years** section beginning in tax year 2023:



California (990 Accounts)

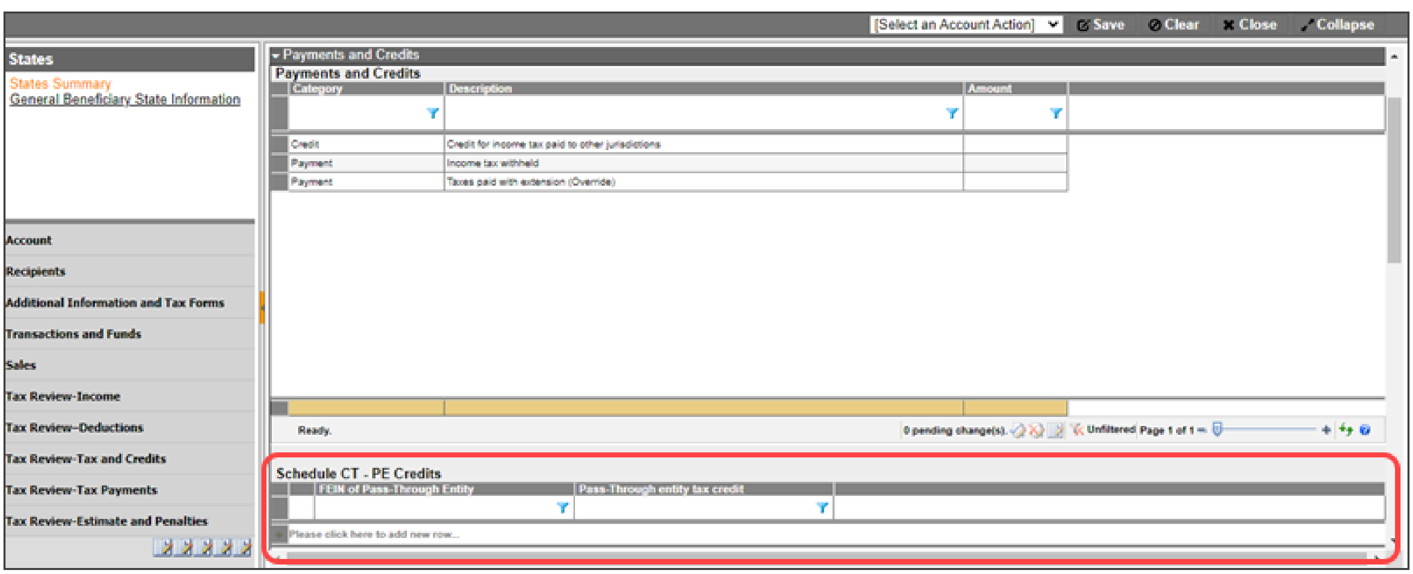
Beginning with this release, the **Federal return is attached as a pdf under E-Filing Document Upload because the federal return can't be e-filed (requires reprocessing)** check box in the **California General/Misc Information** collapsible section is available for tax year 2021. Prior to this release, the check box was available beginning in tax year 2022 only.



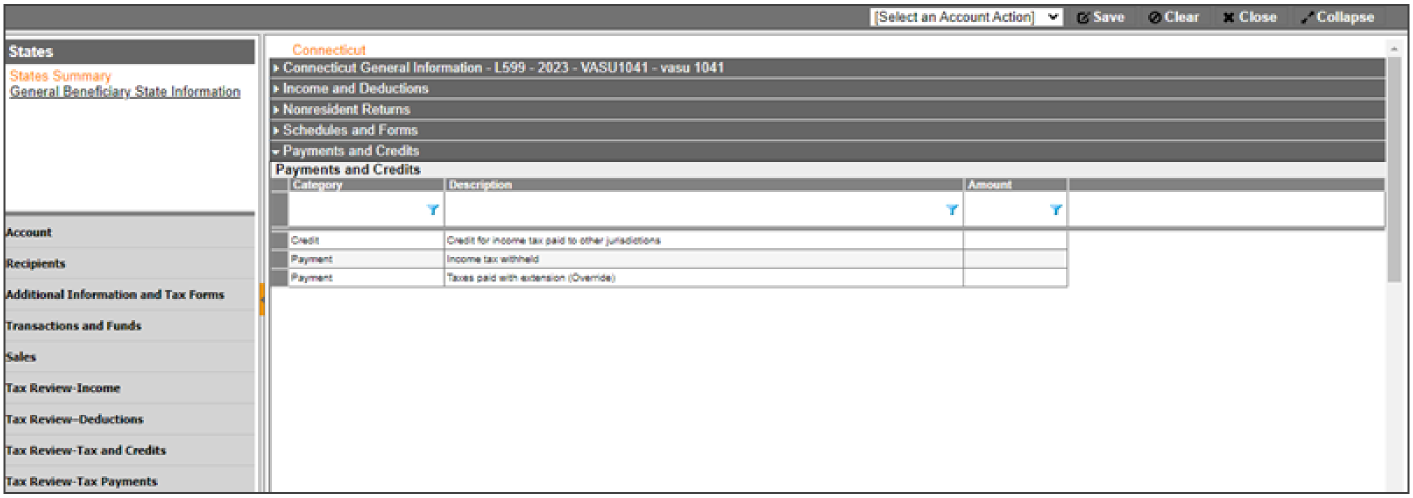
Connecticut

Beginning with tax year 2023, the **Schedule CT - PE Credits** grid in the **Payments and Credits** collapsible section was removed.

The following graphic shows the **Payments and Credits** collapsible section in tax years 2022 and prior:

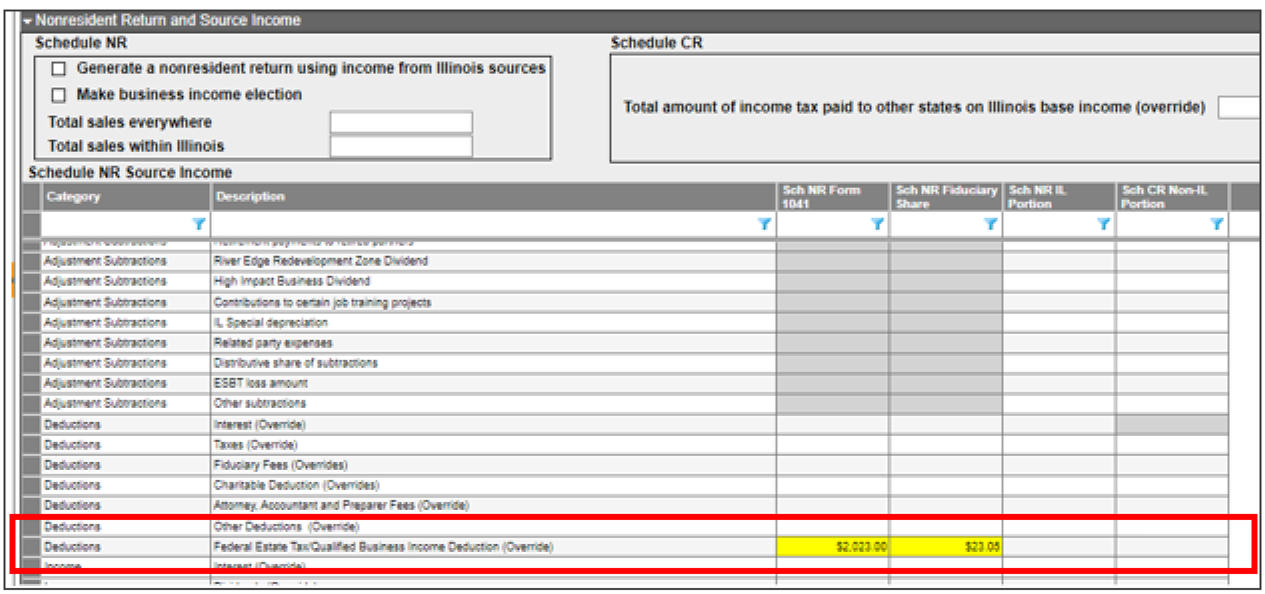


The following graphic shows the **Payments and Credits** collapsible section beginning in tax year 2023:



Illinois

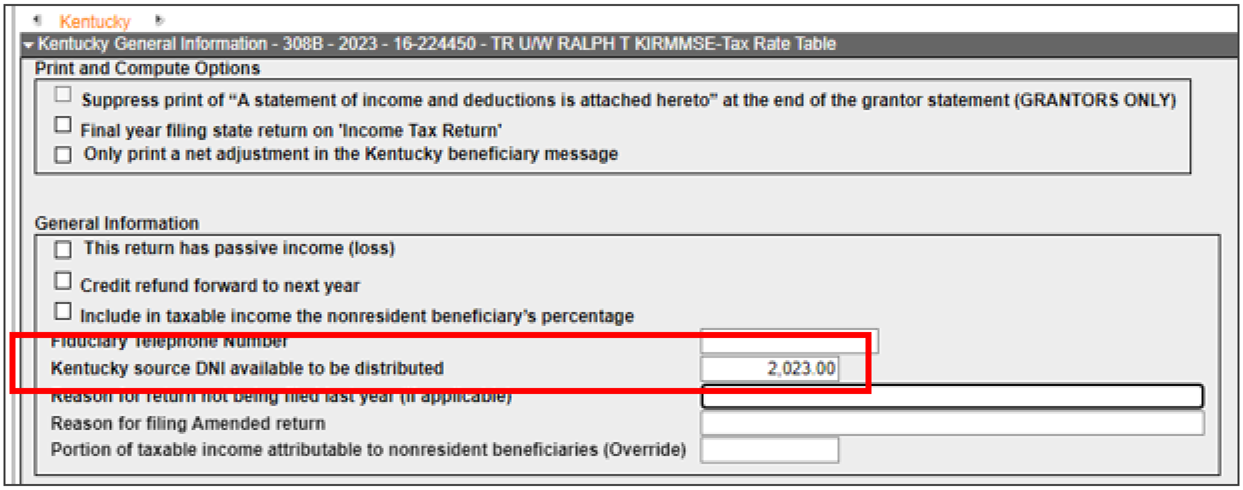
Beginning with this release, the **Estate Tax Deductions (Override)** field was revised to **Federal Estate Tax /Qualified Business Income Deduction (Override)** for all tax years. This field is in the Deductions category of the **Schedule NR Source Income** grid in the **Nonresident Return and Source Income** collapsible section.



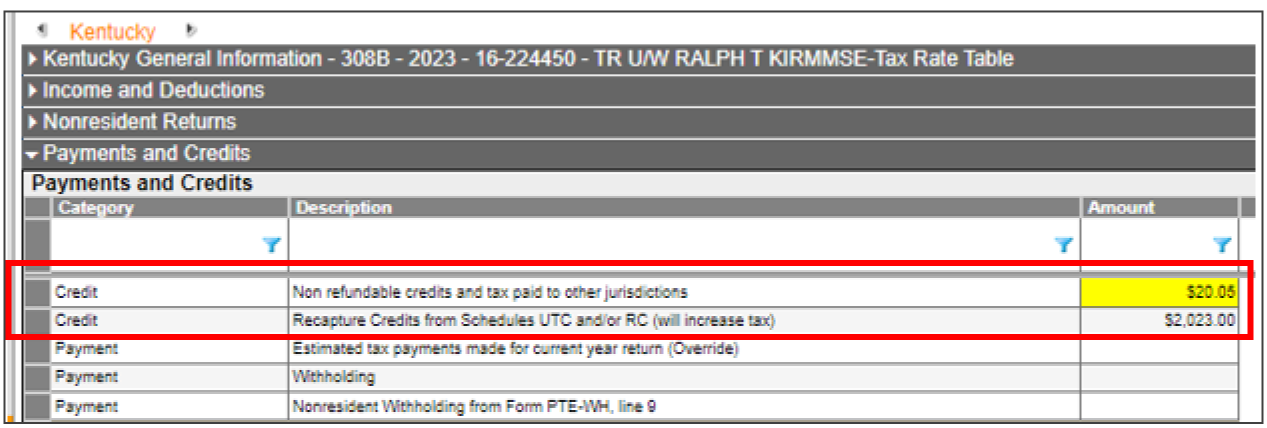
Kentucky

Beginning with tax year 2022, the following changes were made:

- In the **General Information** collapsible section, the **Nonresident estates and trusts: Net income from property located in Kentucky** field was revised to **Kentucky source DNI available to be distributed**.



- In the **Payments and Credits** collapsible section:
  - The **Credit for income tax paid to other jurisdictions** field was revised to **Non refundable credits and tax paid to other jurisdictions**.
  - The **Credit from Schedules UTC and/or RC** field was revised to **Recapture Credits from Schedules UTC and/or RC (will increase tax)**.



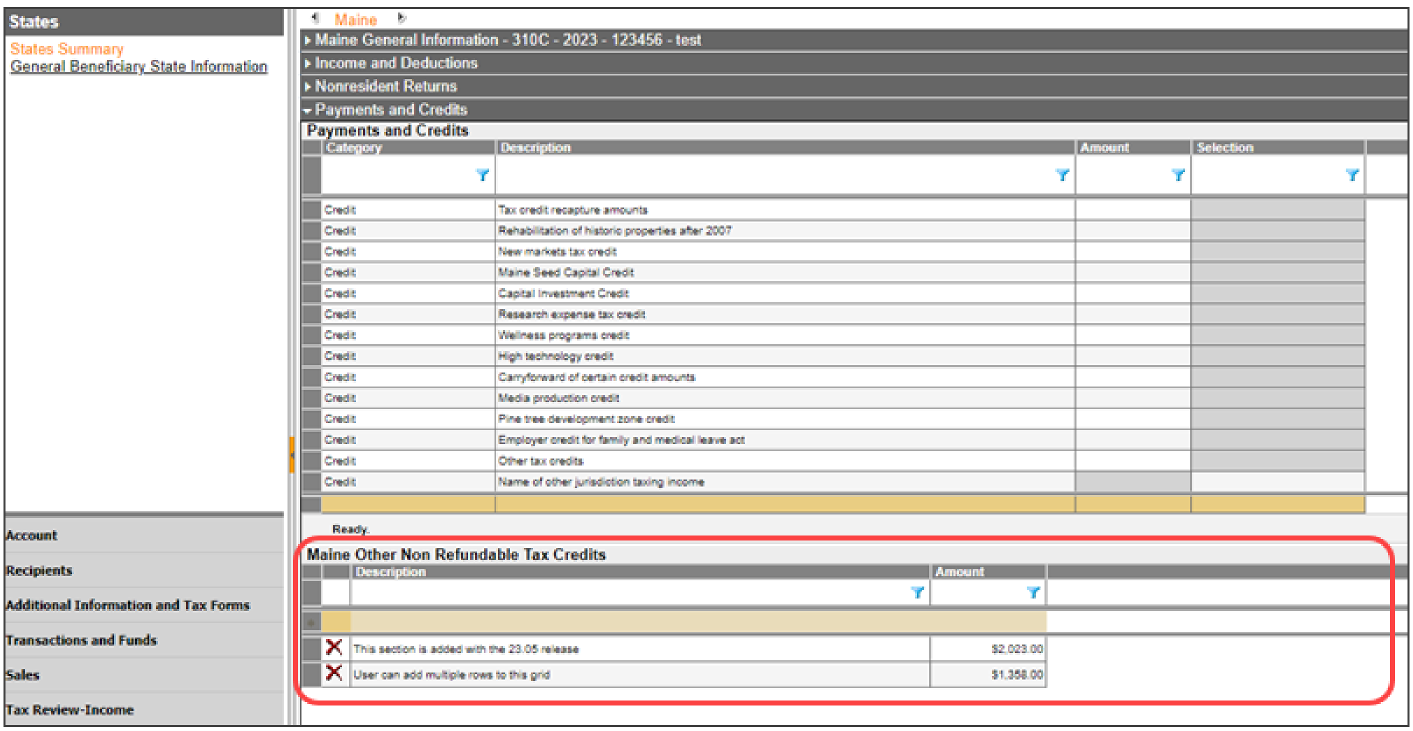
Louisiana

Beginning with tax year 2023, the following fields were removed from the **Payments and Credits** collapsible section:

- The **Biomed/University Research** field was removed from the **Schedule NRC-P3 Nonrefundable Priority 3 Credits** group box.
- The **Digital Interactive Media** field was removed from the **Schedule NRC-P3 Transferable, Nonrefundable Priority 3 Credits** group box.

Maine

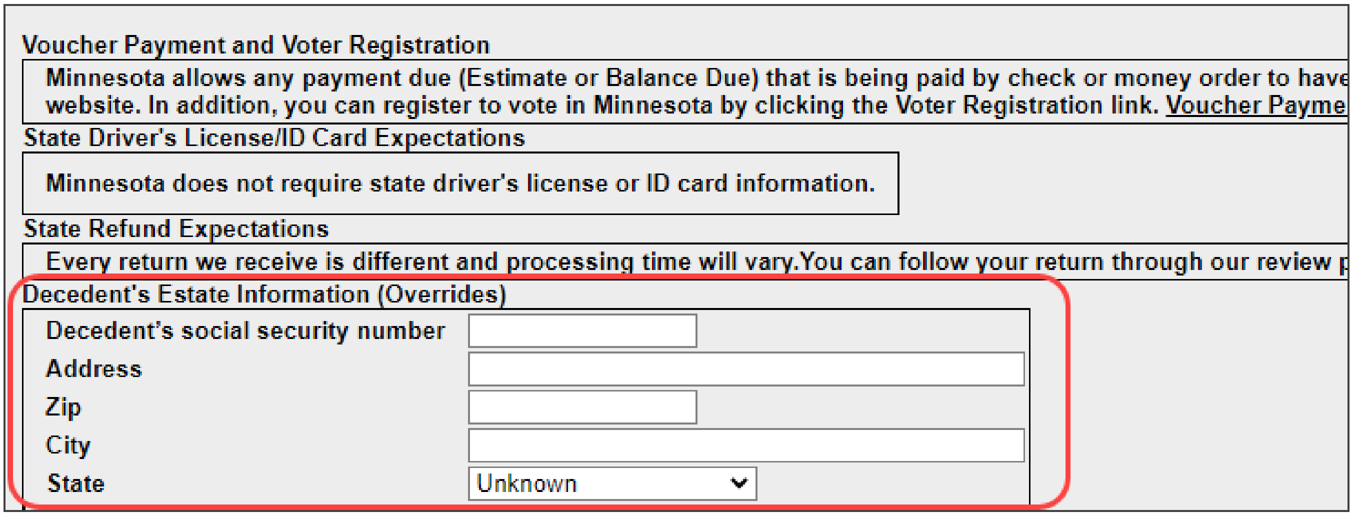
Beginning with tax year 2023, the **Maine Other Non Refundable Tax Credits** grid was added to the **Payments and Credit** collapsible section under the **Payment and Credits** grid, as shown the in following graphic:



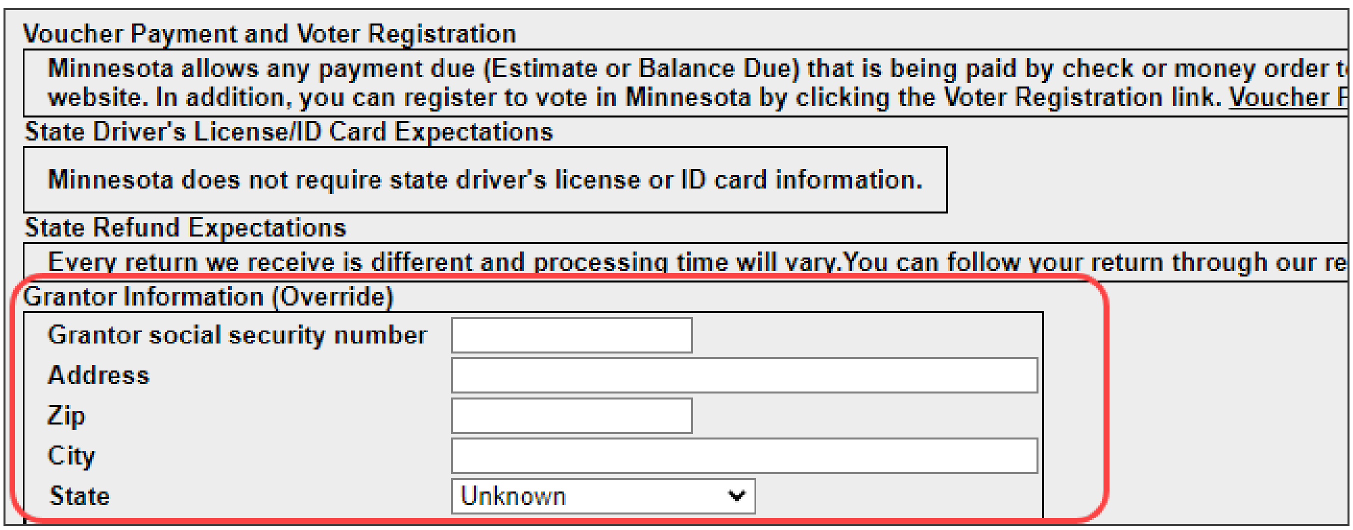
Minnesota

Beginning with tax year 2023, the following changes were made:

- In the **General Information** collapsible section, the **Decedent's Estate Information** group box was revised to **Decedent's Estate Information (Overrides)** for Decedents Estate entity type accounts. The following graphic shows the revised group box:



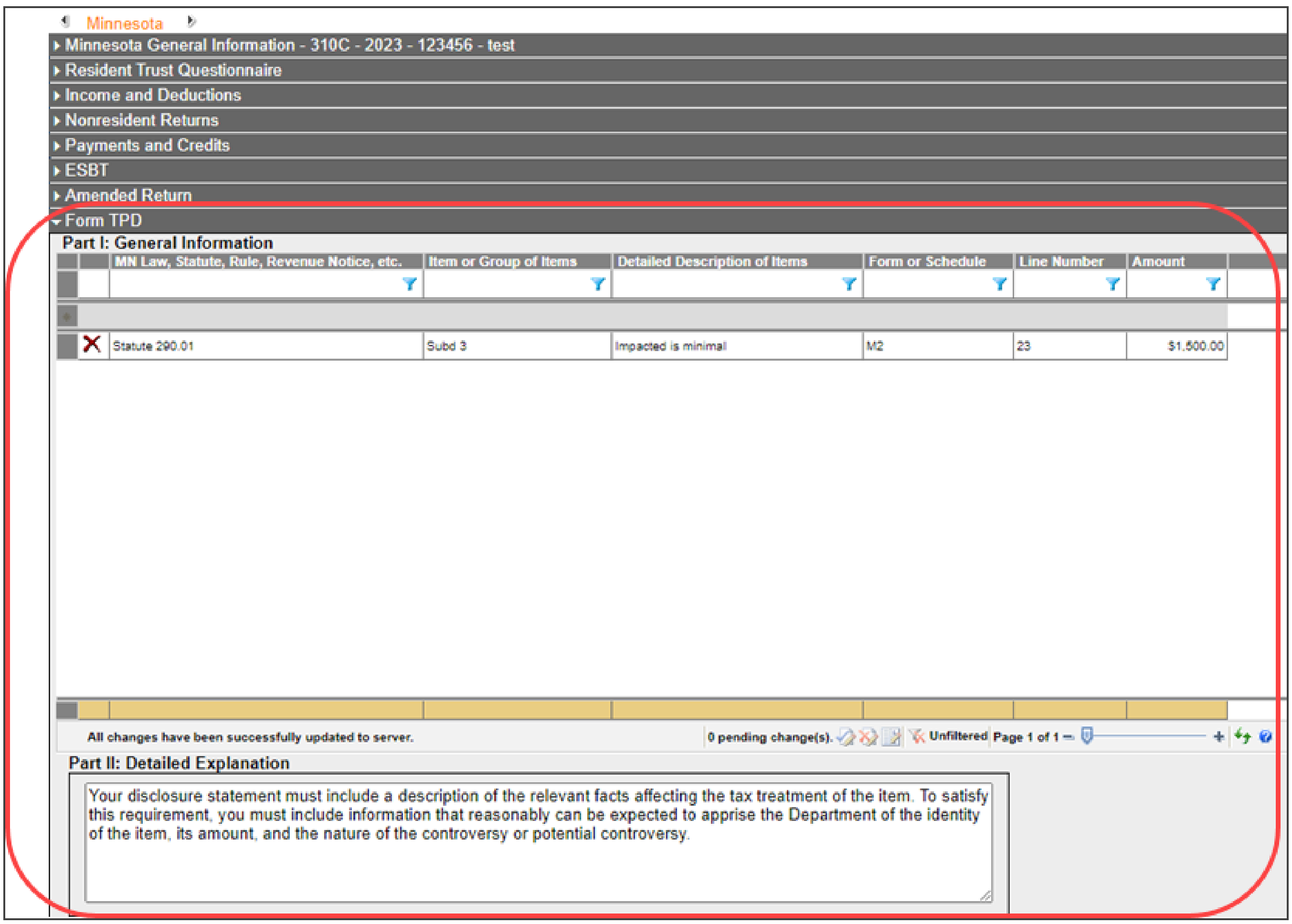
For Simple trust, Complex ($100), Complex ($300) and 1041-QFT entity type accounts, the **Grantor Information (Override)** group box was added, as shown in the following graphic:



The group box will not display for other entity types.

- The **Form TPD** collapsible section was added and is used to disclose items or positions that are not otherwise adequately disclosed on the Minnesota tax return. There are two parts to this section:

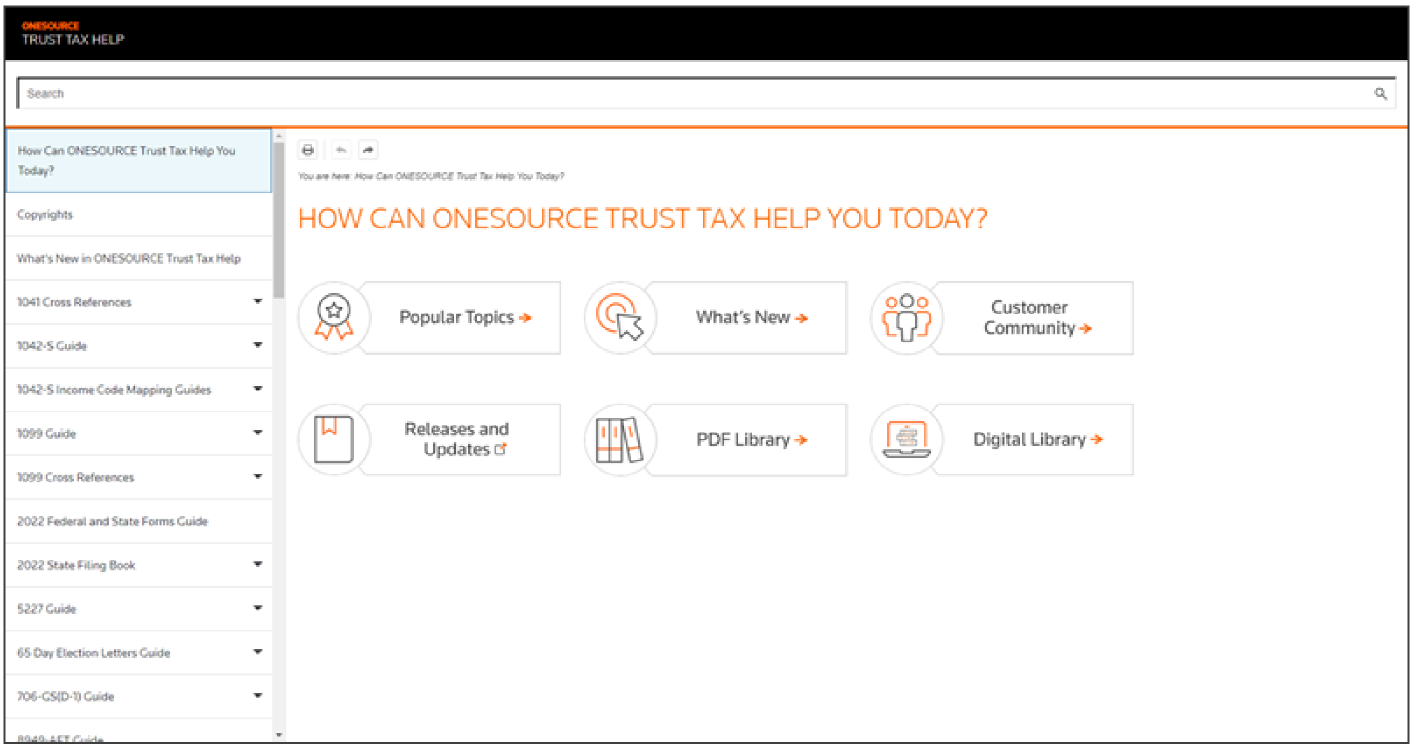
- **Part I: General Information** - Includes a grid with the following columns:
  - **MN Law, Statue, Rule, Revenue Notice, etc** - You can enter a maximum of 20 characters.
  - **Item or Group of Items** – You can enter a maximum of 12 characters.
  - **Detailed Description of Items** - You can enter a maximum of 20 characters.
  - **Form or Schedule** - You can enter a maximum of 15 characters.
  - **Line Number** - You can enter a maximum of three characters.
  - **Amount** - You can enter a maximum of 10 digits.
- **Part II: Detailed Explanation** - Includes a text box for entering up to 70 characters.



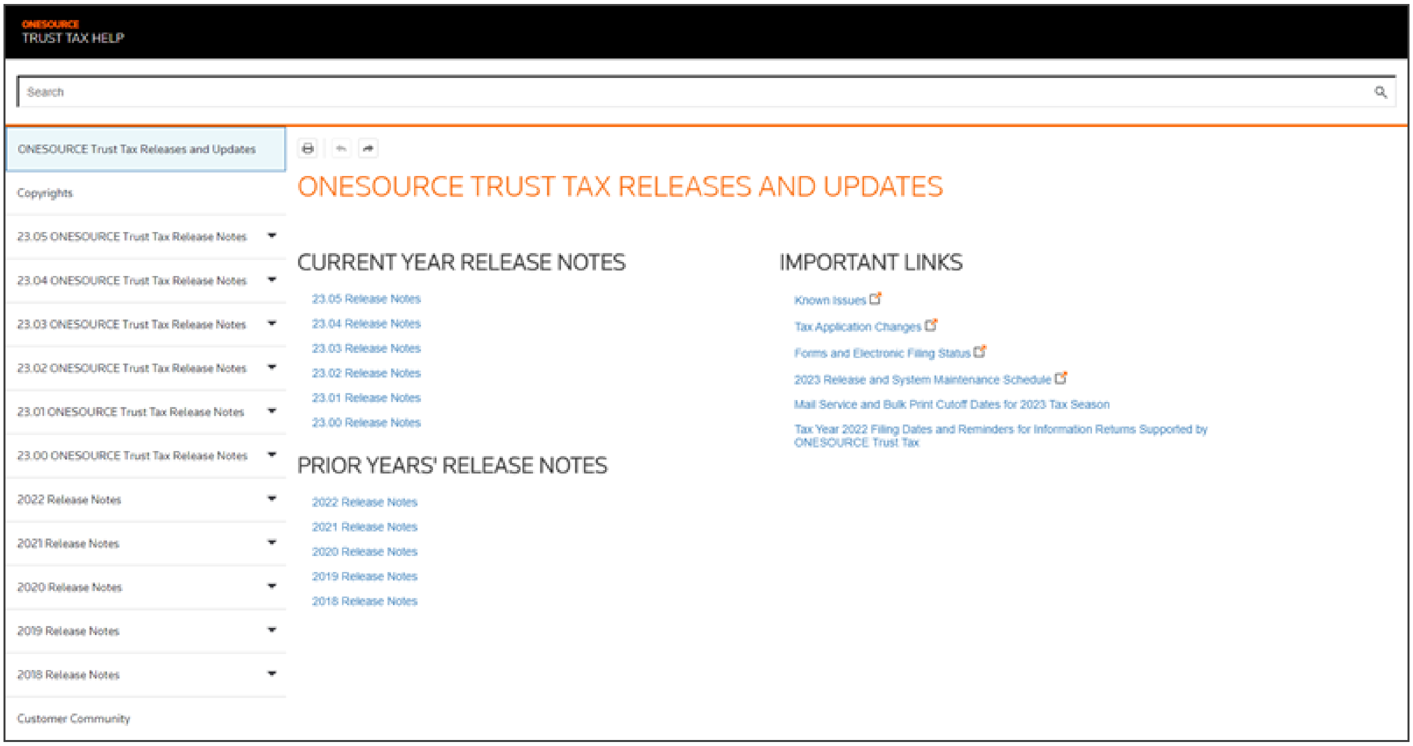
ONESOURCE Trust Tax Help

Based on data gathered from analytics and user feedback at SYNERGY 2023, the tiles displayed in the ONESOURCE Trust Tax help were streamlined. Additionally, the ONESOURCE Trust Tax Releases and Updates tile was revised to provide quick access to additional items of interest, such as Mail Service cutoff dates. All of the content you've come to rely on is still included without the need to scroll through multiple rows of tiles or paragraphs of information.

The following graphic shows the streamlined tiles in the ONESOURCE Trust Tax help:



The following graphic shows the revised ONESOURCE Trust Tax Releases and Updates:



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 23.05 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

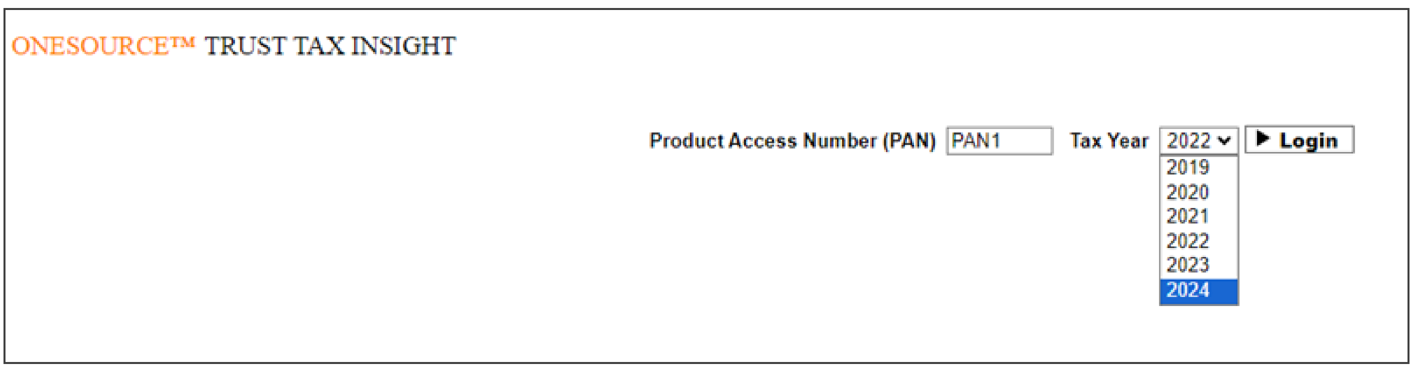
ONESOURCE Trust Tax Insight version 23.05 includes an update to the version number and introduces the new features listed below.

NEW FEATURES

The topics below describe features added with this release.

Tax Year 2024 Added

Tax year 2024 was added as a selection in the **Tax Year** drop-down list on the Login page and in the Main Navigation Area. The following graphic shows the tax year selections on the Login page:



FIXES

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KNOWN ISSUES

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