Access Tax

Release Update 2026.8

Released August 2026

New Features

2026 Individual Tax Return (IITR) Support in the Bulk Import API: The bulk import API now accepts 2026 individual tax return (IITR) submissions, alongside the existing 2025 support.

- **Same Integration, New Year:** Practices and integration partners can submit 2026 individual returns through the existing bulk import endpoints, with no new integration required.

- **Consistent Field Mapping:** The 2026 schema carries across the same field structure as 2025. Two fields no longer applicable for 2026 (exploration credits, and interest charged by the ATO under cost of managing tax affairs) are safely dropped with a validation warning if submitted, rather than causing the import to fail.

Issues Resolved

- Fixed an issue with determining taxpayer preservation age, resulting in the ETP tax offset values being understated.

- Fixed an issue where the estimate and taxable income shown on the front screen, Tax Returns grid, and Edit Tax Form Details dialog could differ from the Edit Tax Form window and PDF when a Partnership or Trust beneficiary distribution flowed into Item 13 of an Individual return.

- Fixed an issue on 2026 Part-Year Resident and Working Holiday Maker returns where the tax-free threshold and refund shown on the Estimate screen could differ from the PDF when the A2 Number of Months field was auto-populated from the residency period.

- Fixed a rare rounding issue where the PAYG instalment estimate shown on-screen could differ from the PDF by $1–2 when the calculated figure landed exactly on a whole dollar.

- Updated the exempt foreign employment income calculation so a negative result is floored at $0, in line with the ATO's updated validation rules for IT4 and 20N.

- Fixed an issue on 2026 returns where a description entered against Item D5 Other work-related expenses was not appearing on the exported worksheet.

- Removed the obsolete "FIDs" option from the Other Work-Related Expenses (D5) schedule category list, while preserving correct display for any existing returns that had previously selected it.

- Fixed an issue on 2026 Trust returns where a superannuation fund's incorporated date was incorrectly carried into the beneficiary's date of birth on Item 58, causing an XBRL02 error at lodgment.

- Fixed an issue where exporting worksheets to PDF could fail with a "Failed to convert to PDF" error when a web address was entered as plain text in a note or description field.

- Fixed an issue in the 2025 individual tax return import API where an ATO interest cost of managing tax affairs amount could be recorded in the item description instead of being included in the claimed deduction.

- Fixed an issue where managed fund distribution data (including associated trust income, capital gains, foreign income, franking credits, and AMIT adjustments) received from the ATO was not appearing in Access Tax Prefill reports for the 2019–20 income year.

Security

Ongoing security and performance updates have been applied.