

Access Accountants Evo combines next generation AI with proven compliance (Access Tax and Access Ledger) and practice management to solve challenges faced by accounting firms today.

Access Tax 2026.2 Release Update

Version 2026.2 released February 2026

The latest enhancements to Access Tax deliver workflow automation for multi-entity practices and targeted improvements to practitioner productivity and system reliability.

New Features

Company Dividend Distribution Linking: Access Tax now automatically links company dividend payments with recipient tax returns, eliminating duplicate data entry across entity structures. When entering distributions in the Company Tax Return Dividend and Interest Schedule (DIS), practitioners can establish links to recipient returns—whether individuals, companies, partnerships, or trusts. Once linked, **dividend** distribution amounts synchronise automatically when recipient returns are opened or calculated, ensuring consistency between company payouts and recipient receipts.

- **Streamlined Data Entry:** Dividend distributions entered once in company returns automatically populate recipient tax returns, eliminating duplicate entry across multi-entity client structures.
- **Intelligent Workflow Prompts:** System prompts for linking at the point of data entry in company dividend schedules, making automation intuitive without requiring separate setup steps.
- **Automatic Synchronisation:** Distribution values update automatically in recipient returns in Partnership, Trust or Individuals when those returns are opened or calculated.

Feature Feedback Buttons: Added feedback buttons to recently released features to help us better understand how you're using new capabilities. Simple thumbs up/down icons now appear alongside the Update Due Dates button and the Lodgable From field, allowing you to share quick feedback on these features.

Issues Resolved

- Introduced warnings for Work Related Car Expense and Work Related Self Education Expense claims when required codes in fields D1 and D4 have not been entered.
- Fixed an issue where changing the practice for a client record may not have been saved correctly.
- Fixed issue where the delete button for email addresses in client details was not functioning correctly, preventing users from removing email addresses.
- Fixed an issue where renaming default tax form statuses in Practice Settings was not being saved correctly.

- Fixed user count display on the Users screen to correctly update when users are removed from the practice.
- Fixed an intermittent issue whereby modifying custom permission group settings incorrectly cleared user role assignments and may have caused Report Builder errors.
- Updated tax form creation when utilising the Related Client functionality to display an appropriate error message when related clients are no longer available due to the two client records existing in disconnected practices.
- Fixed an issue where the Client Listing Report could fail with an error when exporting large datasets to CSV.
- Improved lodgment error messaging for 'Fault from agency' errors to include actionable guidance and support portal links.
- Improved performance and reliability of report generation when exporting to Excel, particularly for practices with large numbers of tax forms.
- Fixed worksheet PDF exports to correctly display Other Attachments content when the Include Blank Items option is enabled.

Security

- Enhanced validation processing to support improved concurrent request handling.
- Ongoing security and performance updates have been applied.