

Access Evo Analytics for Accountants

Release Notes – 25 February 2026

AUS Tax Copilot Data Views & Analytics

What's New!

A new Analytics Dashboard and supporting Insights have been delivered in this release to support Fringe Benefit Tax (FBT) Returns. Additional Copilot Data Views are now available including 2 supporting FBT Return data.

New Dashboard and Insights

A Fringe Benefit Tax (FBT) Dashboard has been built to present measures and KPIs based on all FBT Returns available from source Tax products. There are 6 embedded Insights that can be accessed individually with drill through to a common detail Insight listing FBT Returns based on filters applied.

New Data Views

There have been **4** new views created to allow more information to be accessed through Evo Copilot. The following list summarizes each view, the detail section below shows what pieces of information are available from each Copilot data view.

Tax Losses Schedule

This view shows the detail from the Losses Schedule. It contains information for tax losses and capital losses incurred and carried forward to later years.

Company Dividend and Interest Paid Schedule

This view contains the details from the dividend and interest paid schedule from the company tax return. It includes details of the investors name, dividends paid and interest paid.

Fringe Benefits Tax Return Header

This view shows the details of the Fringe Benefits Tax (FBT) Return. It includes every item of the form.

Fringe Benefits Tax Return Detail

This view shows the details of the Fringe Benefits Tax (FBT) Return. It includes every item of the form.

Bug fixes

- For APS Tax, the other deductions for the PTR are wrong. This has been fixed in APS Tax
- In view Tax AU Super Fund Tax Fund Information Return. The Type of Fund field (FITR14) for the fund is currently showing a code. Fixed by updating the code to show the description.

AUS Tax FBT Dashboard & Insights

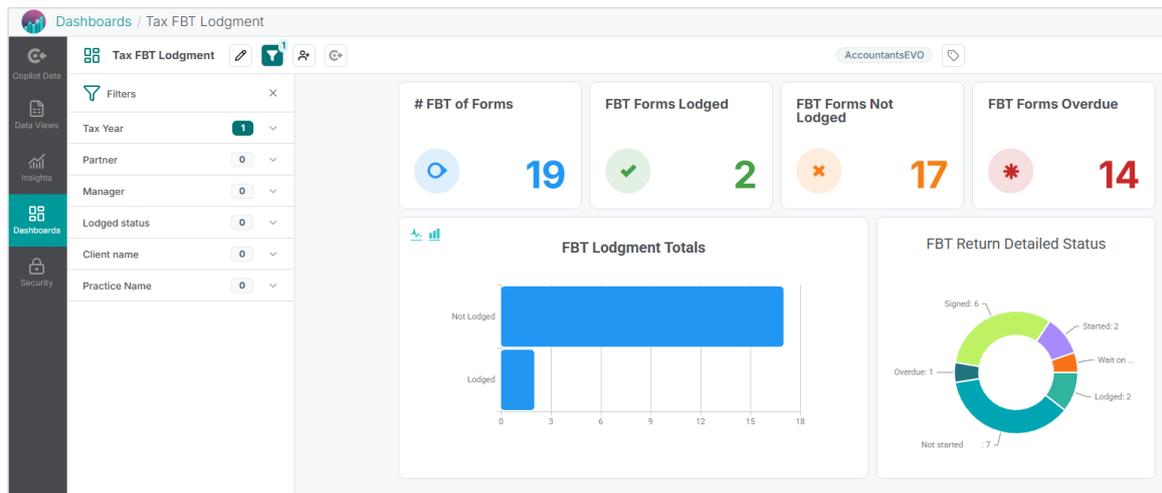
A Fringe Benefit Tax (FBT) Dashboard has been built to present measures and KPIs based on all FBT Returns available from source Tax products. There are 6 embedded Insights that can also be accessed individually with drill through to a common detail Insight listing FBT Returns based the on filters applied.

Dashboard Insights

- **# of Forms** - Total number of FBT Returns for the selected filter criteria.
- **Forms lodged** - Total number of FBT Returns that have been lodged.
- **Forms Not Lodged** - Total number of FBT Returns that have not been lodged.
- **Forms Overdue** - Total number of FBT Returns that are overdue to be lodged.
- **FBT Lodgment Total** - Chart showing the breakdown of Lodged and Not Lodged FBT Returns. Drill down available.
- **FBT Return Detailed Status** - Donut Chart showing the breakdown of FBT Return by Return Status. Drill down available.

Dashboard & Insight Filters

- Tax Year
- Partner
- Manager
- Lodge Status
- Client Name
- Practice Name



FBT Drill Down Detailed Insight

This Tabular Insight lists all FBT returns based on filters applied. Fields include **Client Reference, Client Name, Tax Year, Status, Partner, Manager, Due Date and Lodgment Date**. All fields can be used for Sorting.

FBT Form - Form Lodgment Details								
Client Reference	Client Name	Tax Year	Status	Partner	Manager	Due Date	Lodgment Date	
450	Fourth Individual	2025	Lodged	Individual Partner	Individual Manager	25/06/2025		
454	Eighth Individual	2025	Started	Admin Partner	Admin Manager	25/06/2025		
476	Trust D	2025	Started	Trust Partner	Trust Manager	25/06/2025		
636	Ashley Grant	2025	Signed	Individual Partner	Individual Manager	25/06/2025		
738	Future Year APS Tax Company	2025	Signed	Company Partner	Company Manager	25/06/2025		
740	Future Year APS Tax Partnership	2025	Signed	Partnership Partner	Partnership Manager	25/06/2025		
741	Future Year APS Tax Superfund	2025	Signed	Super Partner	Super Manager	25/06/2025		
742	Future Year APS Tax Trust	2025	Signed	Trust Partner	Trust Manager	25/06/2025		
743	Future Year APS Tax SMSF	2025	Signed	SMSF Partner	SMSF Manager	25/06/2025		
AAA0001	AAA Company	2025	Not started			25/06/2025		
DAWS0001	Jack Dawson	2025	Not started	SAM ADAMS	JOHN DOE	25/06/2025		
EVO 0001	EVOtest Co Limited	2025	Wait on info	William Ho	John Doe			
EVO 0003	EVOself Fund	2025	Lodged	Darren1 Hosie1	John Doe	25/06/2025	01/01/2026	
EVO 0005	EVOtest Smith	2025	Not started	William Ho	John Doe			
KPTY0001	K9 Pty Ltd	2025	Not started	John Williams	Melissa Truman	25/06/2025		

[Previous](#)
1
2
[Next](#)

AUS Tax Copilot Data View Detail

There have been **5** new views created to allow more information to be accessed through Evo Copilot. The following list summaries each view, the detail section below shows what pieces of information are available from each Copilot data view.

Tax Losses Schedule

Description

This view shows the detail from the Losses Schedule. It contains information for tax losses and capital losses incurred and carried forward to later years.

Available Fields & Data

Field Name	Detailed field description for Copilot
Ref	The reference number of the client
Name	The name of the client
Year	The year of the tax return
Partner	The partner with responsibility for the return
Manager	The manager with responsibility for the return
Agent	The agent responsible for the return
Connection name	The name of the practice
Tax losses c/f current year	The amount of losses from the current year that is available to be carried forward to later income years.
Tax losses c/f Y1	The amount of losses from last year that is available to be carried forward to later income years.

Tax losses c/f Y2	The amount of losses from two years ago that is available to be carried forward to later income years.
Tax losses c/f Y3	The amount of losses from three years ago that is available to be carried forward to later income years.
Tax losses c/f Y4	The amount of losses from four years ago that is available to be carried forward to later income years.
Tax losses c/f Y5	The amount of losses from five years or longer ago that is available to be carried forward to later income years.
Tax losses c/f total	The total amount of losses that is available to be carried forward to later income years.
Capital losses c/f current year	This is the value from the current year for the amount of net capital losses carried forward to later income years.
Capital losses c/f Y1	This is the value from last year for the amount of net capital losses carried forward to later income years.
Capital losses c/f Y2	This is the value from two years ago for the amount of net capital losses carried forward to later income years.
Capital losses c/f Y3	This is the value from three years ago for the amount of net capital losses carried forward to later income years.
Capital losses c/f Y4	This is the value from four years ago for the amount of net capital losses carried forward to later income years.

Capital losses c/f Y5	This is the value from five years or longer ago for the amount of net capital losses carried forward to later income years.
Capital losses c/f total	This is the value for the total amount of net capital losses carried forward to later income years.
Loss provisions apply	Indicator to determine if the reporting party is required to apply the current year loss provisions.
Majority owner test pass - Current year	Indicator to determine whether the reporting party has satisfied the continuity of majority ownership test in respect of a loss incurred in the current year
Majority owner test pass - Y1	Indicator to determine whether the reporting party has satisfied the continuity of majority ownership test in respect of a loss incurred last year
Majority owner test pass - Y2	Indicator to determine whether the reporting party has satisfied the continuity of majority ownership test in respect of a loss incurred two years ago
Majority owner test pass - Y3	Indicator to determine whether the reporting party has satisfied the continuity of majority ownership test in respect of a loss incurred three years ago
Majority owner test pass - Y4	Indicator to determine whether the reporting party has satisfied the continuity of majority ownership test in respect of a loss incurred four years ago
Majority owner test pass - Y5	Indicator to determine whether the reporting party has satisfied the continuity of majority

	ownership test in respect of a loss incurred, five or more years ago
Tax losses - ownership failed, continuity passed	The total amount of losses applied during the reporting period and claimed as a deduction where the reporting party has not met the majority ownership test but satisfied the business continuity test.
Capital losses - ownership failed, continuity passed	The total amount of net capital losses applied during the income year and claimed as a deduction where the entity has not met the majority ownership test but satisfied the business continuity test.
Tax losses c/f - bus. continuity passed	This is the amount of tax losses to be carried forward to later income years for which the business continuity test must be satisfied.
Capital losses c/f - bus. continuity passed	This is the amount of net capital losses carried forward to later income years for which the business continuity test must be satisfied.
Changeover occurred	Indicator to determine whether a changeover time has occurred. A changeover time is the time of a change in majority ownership or in the control of a company.
Satisfy s152-15	Indicator to determine if the reporting party satisfied the maximum net asset value test at the changeover time.
Unrealised let loss at changeover	Indicator to determine if the reporting party had an unrealised net loss at the changeover time.
Unrealised net loss	The calculated amount of unrealised net loss.
Super class losses c/f	This is the value, during the relevant period, for the amount of complying superannuation class

	tax losses that is carried forward to later income years.
Super class capital losses c/f	This is the value, during the relevant period, for the amount of complying superannuation net capital losses that is carried forward to later income years.
Current Year CFC losses.	The aggregated total of the losses for all eligible controlled foreign company's (CFC's) in respect of the head company's attribution interest for a statutory accounting period ending within the current income year.
CFC losses deducted.	The total of the head company's share of losses of CFCs, from prior income years, which have been claimed in the current income year
CFC losses carried forward.	The total amount of the head company's share of losses of CFCs that are available to be carried forward to later income years
Tax losses brought forward	The balance of tax losses brought forward from the prior income years.
Uplift of tax losses	This is the value, during the relevant period, for the tax losses uplift amount.
Net forgiven amount	The total net forgiven amount of debt applied to reduce tax losses (if any) incurred in years of income before the forgiveness year of income.
Tax loss incurred	The entity's tax loss incurred for the specified year disregarding net exempt income and excess franking offsets.
Tax loss from excess franking	The amount of tax loss from the conversion of excess franking offsets.

Net exempt income	The amount of net exempt income to be taken into account in calculating the entity's tax loss or carried forward tax loss.
Losses forgone	The amount of tax losses that have been forgone by the entity.
Tax losses deducted	The amount of losses deducted
Losses transferred out	The amount of tax losses transferred out by the company to group companies under Subdivision 170-A of the ITAA 1997.
Total tax losses c/f	Total tax losses carried forward to later income years

Company Dividend and Interest Paid Schedule

Description

This view contains the details from the dividend and interest paid schedule from the company tax return. It includes details of the investors name, dividends paid and interest paid.

Available Fields & Data

Field Name	Detailed field description for Copilot
Ref	The reference number of the client
Name	The name of the client
Year	The year of the tax return
Partner	The partner with responsibility for the return
Manager	The manager with responsibility for the return

Agent	The agent responsible for the return
Connection name	The name of the practice
ABN	The ABN of the investor
Date of birth	The date of birth of the investor
Franking credit	The amount of the franking credit paid
Franked dividend	The franked dividend paid
Interest	The accumulated amount of interest paid within the reporting income year.
Investor type code	The type of investor code
	The type of investor code
Deceased indicator	Indicates that the person is deceased. Will show "true" if the person is deceased
Unfranked dividends CFI	Any unfranked dividend declared to be CFI
Unfranked dividends not CFI	Any unfranked dividend no declared to be CFI
Surname	The person's last name or surname. The name by which a family group is identified.
First name	The first name of the investor
Other names	The middle name of the investor
Position	This is the employment position title of an individual.
Non-individual name	The full name by which an organisation is known.
Investor name	The name of the investor

Fringe Benefits Tax Return Header

Description

It includes lodgment date, due date, partner and manager responsible for the return, status and lodged status

Available Fields & Data

Field Name	Detailed field description for Copilot
Agent Name	The name of the agent responsible for lodging the return
Approaching due	The category for returns that are not lodged but where the due date is approaching
Client name	The name of the client. When searching on this field use the "like" indicator
Client reference	The reference for the client. This field should always be shown when the name is being used unless specifically excluded.
Client Status	Shows whether the client is active or not
Client type	The type of client lodging the FBT form
Due category	Shows unlodged returns where the due date has passed
Due Date	The due date for lodgment of the FBT return
Lodged status	Shows whether the return is lodged or not lodged
Lodgment date	Shows the date the form was lodged. If this is blank the form is classified as not lodged
Manager	The name of the manager responsible for lodging the return

Partner	The name of the partner responsible for lodging the return
Payment Or Refund	The amount of payment or refund due for the FBT return
Period end date	The end date of the FBT year
Period start date	The start date of the FBT year
Practice Name	The name of the practice
Status	Shows the status of the FBT return. This is the status from the Tax system.
Tax Year	The year of the FBT return

Fringe Benefits Tax Return Detail

Description

This view shows the details of the Fringe Benefits Tax (FBT) Return. It includes every item of the form.

Available Fields & Data

Field Name	Detailed field description for Copilot
Ref	The reference number of the client
Name	The name of the client
Year	The year of the tax return
Partner	The partner with responsibility for the return
Manager	The manager with responsibility for the return
Agent	The agent responsible for the return

Connection name	The name of the practice
Amendment indicator	Indicator to identify whether the report contains original or amended data.
Amendment number	For an amended report, this identifies the sequence in which the amendment has been submitted in respect to any previous submissions for that report.
Amendment type	This code identifies the initiator of the amendment which is being lodged. 3 means ATO error and 4 means client error
Trustee senior partner	The trustee or senior partner name
Previous trustee senior partner	Name of the previous trustee or senior partner
Employer name	The name of the employer
Previous employer	The name of the previous employer
Business name	The full name by which an organisation is known.
Contact name	The name of the person who is the contact for the FBT return
Number of employees	Number of employees receiving fringe benefits during the FBT year period
Hours taken	This is the number of hours taken to complete the form
Future FBT returns	This indicates whether the entity will lodge Fringe Benefits Tax (FBT) returns in future years.
BSB number	The BSB number for the bank account
Account number	The account number of the bank account
Account name	The account name of the bank account

Type 1 aggregate	The type 1 aggregate fringe benefits amount.
Type 1 factored	The total type 1 amount that is included in the FBT payable amount. This is label A from item 14
Type 2 aggregate	The type 2 aggregate fringe benefits amount
Type 2 factored	The total type 2 amount that is included in the FBT payable amount. This is label B from item 14
Aggregate non exempt	The aggregate non-expemt amount. This is label C from item 14
FBT amount	The fringe benefits taxable amount from item 15.
FBT payable	The FBT tax payable from item 16
Aggregate non rebatable	This is the aggregate non rebatable amount from item 17.
Rebate amount	The amount of rebate from item 18
Payable less rebate	The tax payable by employers less any rebate received. On the form this is called Sub-total and this is the value from item 19
Instalment amounts	Total of any FBT instalment amounts previously reported on activity statements for the FBT year from item 20
Payment or credit	This is the payment due to the ATO from item 21 or the credit due to the client from item 22
Cars statutory number	This is the number of benefits provided to employees for car using the statutory formula
Cars statutory gross value	The gross taxable value of the fringe benefits provided prior to recipient's payments for cars using the statutory formula

Cars statutory employee contribution	Amount of recipient's payments (employee contributions) made towards cars using the statutory formula
Cars statutory taxable value	The taxable value of cars using the statutory formula.
Cars operating cost number	This is the number of benefits provided to employees for cars using the operating cost method
Cars operating cost gross value	Taxable value of the fringe benefits provided prior to recipient's payments for cars using the operating cost method
Cars operating cost employee contribution	Amount of recipient's payments (employee contributions) made towards cars using the operating cost method
Cars operating cost taxable value	The taxable value for cars using the operating cost method
Loans granted number	This is the number of benefits provided to employees for loans granted
Loans granted gross value	Taxable value of the fringe benefits provided prior to recipient's payments for loans granted
Loans granted reductions	This is the total amount by which benefits of that type have been reduced for loans granted
Loans granted taxable value	The taxable value for loans granted
Debt waiver gross value	Taxable value of the fringe benefits provided for debt waiver
Debt waiver taxable value	The taxable value for debt waiver

Expense gross value	Taxable value of the fringe benefits provided for expense payments
Expense employee contribution	Amount of recipient's payments for expense payments
Expense reductions	This is the total amount by which benefits of that type have been reduced for expense payments
Expense taxable value	The taxable value for expense payments
Housing number	This is the number of benefits provided for housing - units of accommodation provided
Housing gross value	Taxable value of the fringe benefits provided for housing - units of accommodation provided
Housing employee contribution	Amount of recipient's payments for housing - units of accommodation provided
Housing taxable value	The taxable value for housing - units of accommodation provided
LAFHA number	This is the number of benefits provided to employees for living away from home allowance (LAFHA)
LAFHA gross value	Taxable value of the fringe benefits provided for living away from home allowance (LAFHA)
LAFHA reductions	This is the total amount by which benefits of that type have been reduced for living away from home allowance (LAFHA)
LAFHA taxable value	The taxable value for living away from home allowance (LAFHA)
Board gross value	Taxable value of the fringe benefits provided for board

Board employee contributions	Amount of recipient's payments (employee contributions) made for board
Board reductions	This is the total amount by which benefits of that type have been reduced for board.
Board taxable value	The taxable value for board
Property gross value	Taxable value of the fringe benefits provided for property
Property employee contribution	Amount of recipient's payments (employee contributions) made for property
Property reductions	This is the total amount by which benefits of that type have been reduced for property
Property taxable value	The taxable value for property
Entertainment gross value	Taxable value of the fringe benefits provided for entertainment
Entertainment taxable value	The taxable value for entertainment
Other benefits gross value	Taxable value of the fringe benefits provided for other benefits
Other benefits employee contributions	Amount of recipient's payments (employee contributions) made for other benefits
Other benefits reductions	This is the total amount by which benefits of that type have been reduced for other benefits
Other benefits taxable value	The taxable value for other benefits

Car parking gross value	Taxable value of the fringe benefits provided for car parking
Car parking employee contribution	Amount of recipient's payments (employee contributions) made for car parking
Car parking taxable value	The taxable value for car parking
Meal entertainment gross value	Taxable value of the fringe benefits provided for meal entertainment
Meal entertainment taxable value	The taxable value for meal entertainment