

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 2025.7 Release Update**

### **Version 2025.7 released September 2025**

The latest enhancements to Access Tax focus on multi-user collaboration, enhanced reporting capabilities, and critical system improvements to support growing practice needs.

### **New Features**

**Multi-User Tax Return Access Notifications:** Access Tax now provides real-time notifications when multiple users are accessing the same tax return simultaneously. The system tracks user sessions and displays pop-up notifications to improve awareness and collaboration processes.

- **Enhanced User Awareness:** Alerts users when others are working on the same client file, elevating awareness of who is currently in the same return to support better coordination.
- **Enhanced Workflow:** Teams can coordinate more effectively with visibility into who is currently working on specific returns.
- **Session Management:** Automatic cleanup when sessions timeout prevents inaccurate online status indicators.

**Lodgable From Field Enhancement:** New "Lodgable From" field added across tax form records, main client list, and Report Builder to improve compliance tracking and lodgment management.

- **Compliance Tracking:** Better visibility into when returns become lodgable, supporting improved lodgment control by visually indicating when a return is eligible for lodgment.
- **Enhanced Reporting:** Report Builder integration enables custom reports including lodgment readiness status.
- **Future Enhancement:** We are planning to include the ability to control lodgment of returns based upon the lodgable from date in our October release.

**Summary Report for Individual Tax Return:** Development of comprehensive Individual Income Tax Return summary reporting with snapshot view of current income and PDF export functionality.

- **Client Communication:** Professional summary reports suitable for client presentations and record keeping.
- **Snapshot Overview:** Single-page view summarising all current income, expenses, deductions, and offsets in an easy-to-read format.
- **Time Savings:** Automated generation eliminates manual summary preparation.

### **Issues Resolved**

### **Tax Time 2025 Form and Printing Fixes:**

- Fixed Trust Tax Return Item 29 issue where default "N" value disappeared when entering zero amounts.
- Resolved Partnership Tax Return Item 54 organisation name printing issues with extended 400-character limit not displaying correctly on PDF exports.
- Corrected Individual Tax Return worksheet copy printing problems for Item 1 where formatting was not preserved properly.
- Resolved CMN.ATO.IITR.000234 validation error that occurred when entering zero values in specific fields.

### **System Functionality Improvements:**

- Updated the ATO hosted software link in Practice Settings to direct users to the current ATO Access Manager portal.
- Fixed incorrect Audit Log timestamps that were not accurately recording user actions.
- Enhanced the Income Tax Client Report due date capability to correctly update and revise due dates when multiple form types existed for the same client.
- Resolved Client Notes report to display the full text of notes across the report instead of restricting the view to the Name column.
- Fixed related reference information transfer issues to trust cover forms.
- Addressed ATO Reports processing issues which prevented firms displaying ATO downloaded reports.

### **Security**

- Ongoing security and performance updates have been applied.
- Enhanced session management security for multi-user access features.
- Updated authentication protocols for improved onboarding security.