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New Features

2026 Summary Reports: New summary reports have been introduced, giving practitioners a consolidated overview of key figures without needing to open the full return. Summary reports are now available for the Individual Tax Return (IITR), Partnership Tax Return (PTR), Trust Tax Return (TRT), and Company Tax Return (CTR), with the SMSF Annual Return report to follow shortly.

- **Faster Review:** Quickly check key figures across a return without navigating through every schedule and worksheet.
- **Client-Ready Overview:** Useful for client discussions or internal sign-off before lodgment.

Foreign Property Worksheet Transfer: Access Tax now supports the transfer of property details entered in the Foreign Property Worksheet directly into the Foreign Rent panels of the Foreign Income Schedule, removing the need to manually re-enter property descriptions, country codes, exchange rates, and rental income and expenses. Transferred values can still be manually overtyped where required.

Automated Date Calculations – Individual Tax Return: Access Tax now automatically calculates several date-based figures on the Individual Tax Return that previously required manual counting: part-year residency months eligible for the tax-free threshold (A2), Medicare levy exemption days (M1), and Medicare levy surcharge days not liable (M2). All calculated values remain fully overridable if a different figure is required.

Changes

- **All forms, schedules and declarations updated to the latest ATO SBR Specifications:** Individual Income Tax Return (IITR) 2026 Package V1.5, including re-introduction of INCDTLS T7/T8 validation.
- **Attribution Managed Investment Trust (AMIT) Return** updated to support the Reportable Tax Position schedule indicator introduced in the ATO's 2026 TRTAMI specification.

Issues Resolved

- Fixed an issue where transferring dividend income from a Company Tax Return to an Individual Tax Return could cause an error and prevent the Individual return from opening.
- Fixed an issue where item 22 (attributed foreign income) was being double-counted in item 24 of the 2024 and 2025 Partnership Tax Return.
- Fixed a display issue where Label K in the Trust income schedule was misaligned with the adjoining column in printed copies.

- Fixed an issue where entering certain beneficiaries with multi-line addresses at item 58 of the Trust Tax Return caused "Failed to validate SBR data" and "Failed to convert PDF" errors.
- Fixed an issue where lodgment error messages containing double quotes prevented the error details icon from opening in the Client List.
- Fixed an issue where running Report Builder across connected practices could return no results for certain tax form statuses, such as Submitted or Lodgment Failed.
- Fixed an issue where Business worksheets could be lost from Partnership Tax Returns during rollover in rare cases.
- Fixed an issue where removing a user from a practice displayed a "Provisioning error" message in User Management even though the removal had completed successfully.
- Fixed an issue where the session expiry screen displayed 0 minutes instead of the timeout configured in My Profile.
- Fixed an issue where non-individual client types, such as companies, were incorrectly assigned a gender of Male.

Security

- Enhanced the API reliability for external system connections, including new endpoints for tax return status updates and optional inclusion of soft-deleted items in Client and Tax Return list results.
- Ongoing security and performance updates have been applied.