Access Tax 2026.10 Release Notes

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 2026.10 Release Update

Version 2026.10 released November

The latest enhancements to Access Tax give practices firm-wide control over which client identifiers are blanked on printed and exported returns, add a Status History report to track every return's progress, make it simpler to hand a user seat to someone new, and resolve a number of printing, reporting and validation issues.

New Features

Status History Report: Access Tax now records every change to a tax return's status, including who made the change, when, and whether it came from a screen, the API, an import or ATO lodgment. Users with the new View Status History permission can open the Status History tab under Reports > Audit Log to see how each return moved through its statuses and how long it stayed in each one.

- **Filter and export:** Results can be filtered by date range, client, return and status, and exported to PDF or CSV.
- **Client Visibility:** Users only see history for clients they can already see in their client list. This respects connected practices, private clients and the View Other Clients permission, including in exports.
- **Starts from 6 November 2026:** History is recorded from 6 November 2026 onward. Earlier status changes are not backfilled.

Practice-Controlled Blank Identifiers: Practices can now set a practice-wide standard for which client identifiers are blanked out on printed and exported tax returns. Previously, blank identifiers could only be set by each user in My Profile. Administrators can choose any of TFN, Name, ABN, Address, Bank Account Details and Other Identifiers in the new Blank Identifiers section under Practice Settings > Printing. A new Edit Blank Identifiers permission (Tax Return group in Groups/Permissions) determines who must follow the standard. Users set to Deny follow the practice standard. Users set to Allow continue to manage their own settings in My Profile.

- **Enforced Privacy:** Users which have the permission set see the Blank Identifiers section in My Profile locked, with a message explaining that their practice manages these settings.
- **One Setting for Every Office:** For firms using the connected Practices capability, a standard set at head office applies to every connected office automatically. Any office can set its own standard to override it.
- **Audit Trail:** Changes to the practice standard are recorded in the practice Audit Log, showing who made the change, when, and what changed.

- **No Change Until You Turn It On:** All users start on Allow, so existing output stays the same until an administrator sets a standard and updates permissions.

Replace Practice User: Administrators can change an existing user licence to someone else in one step from Practice Settings > Users > Edit Practice User > Replace User. Enter the new person's email, review what will happen and confirm. The new user receives the departing user's groups (including Administrator), permission settings, Partner/Manager/Staff roles, agents, client assignments and private-client access. The departing user is made inactive rather than removed, so their history is kept.

- **Works at the Licence Limit:** The number of licences in use does not change, so a practice at its licence limit, or with only one licence, can still hand over a seat.
- **Single-Administrator Practices:** A practice whose only Administrator is leaving no longer needs to contact Support to hand over the role.
- **Fully Audited:** Each replacement is recorded in the Audit Log report.

Issues Resolved

Review - Declaration - Total Tax Withheld label: The ELS Declaration on the Review screen labelled a figure "Total Tax Instalments", but instalments are never populated in that box. The label now reads "Total Tax Withheld", which describes the amount shown and matches the wording used on the IITR estimates.

Report Builder - Month and quarter filters for activity statements: The Months and Quarters options under Tax Periods in Report Builder now filter BAS/IAS Monthly and Quarterly reports as expected. For example, ticking July returns only the July monthly statements, matching the periods listed under "Applied filters". Report Builder also runs in the background, so large reports across connected practices are far less likely to time out. Excel exports can contain up to Excel's maximum of 1,048,576 rows.

Amendments - CMN.ATO.IITR.730507 on returns first prepared before the A2 update: Amending a return originally lodged in August 2026 could raise CMN.ATO.IITR.730507, even though the residency fields on screen appeared empty. Residency dates entered before the July A2 change were kept in hidden fields and still sent to the ATO, but the A2 "months eligible" calculation could not see them. These amendments now validate correctly using the residency dates.

Tax Estimate Report - Wrong amount displayed after lodgment for Working Holiday Makers: For non-resident Working Holiday Makers, the Tax Estimate report and the return's summary figures could show an incorrect tax amount after lodgment, because the WHM adjustment was applied twice when the lodged return was recalculated. The figures now match the amount lodged.

Managed Funds - TFN printed with commas: On the 2026 Managed Funds print and export, the TFN box showed the number with thousands separators (for example "60,000,006"). It now prints in the standard TFN format.

Managed Funds - Capital gains dropped from Item 18: On individual returns with two or more managed fund worksheets and no CGT worksheet, a capital gain on any fund other than the last could be left out of Item 18 when the last fund had no capital gain. All managed fund capital gains are now included in Item 18.

Practice Users - Re-adding a removed or inactive user: Re-adding a previously removed or inactive user from Practice Settings > Users failed with "Failed to update practice user". These users can now be re-added, and their existing record and group membership are restored.

Tax Returns - Return stuck on "Loading Tax Return details": Clicking a return a second time while it was still opening from the client list could leave a blank page showing "Loading Tax Return details ..." that never cleared. Returns now open once, regardless of repeated clicks.

My Profile - Slow to open: My Profile could take up to 15 seconds to open while it waited on a background check. The dialog now opens without waiting for that check.

Printing - Main business activity description cut off: On Trust, Partnership and AMIT prints (FY2025 and FY2026), a long Item 1 "Description of main business activity" was cut off after about 76 characters. The full description now prints.

Printing - Item 10 Interest split across pages: On Individual returns, the Item 10 Interest heading and bank account panels could be split across a page break. Each panel now stays together on one page.

Help Menu - Updated links: The User Manual and Quick Start Guide links in the Help (?) panel now open the current Help Centre articles, and the label now reads "Quick Start Guide".

Audit Log - CSV Export: Names containing non-English characters, such as accents, now display correctly when the Audit Log is exported to CSV and opened in Excel. If an export fails, the message now shows the actual error.

Security

Ongoing security and performance updates have been applied.