

Released February 2023.

### Changes

- **My Profile screen.**
  - Added Autofill Declaration Date option. When selected this will populate the Tax Agent Declaration Date with that day's date. Only when this field is blank.
  - Added Bank Details for Blank Identifiers options.
- **PleaseSign - E-Signature export option now has the option to send the Tax Return copies directly to the recipient or to the PleaseSign account as a draft for further review.**
- **Permissions – Partner, Manager and Staff Roles have been created and separated from the permissions Group. This will allow you to choose any permission group you decide whilst also being able to allocate any Role to the staff member (for selection on the Client Record for Partner / Manager / Staff.)**
- **Edit Tax Form Detail screen – Postal address on this screen will override the contact priority, ONLY when Fee from Refund option has been checked.**
- **Removed the 'rounding' amounts from the CGT summary listing.**
- **Return Report Builder – Updated the Taxable Income column field to show Negative or Positive amounts with brackets as visual clues.**
- **Return Report Builder – Updated the Tax Estimate column field to show Refund or Payable amounts with brackets as visual clues.**
- **The functionality where previous data changes from prior year would automatically populate the current year tax return, e.g., Change of address or change of name has been removed. This must be completed manually where applicable.**

### Minor Defects

- **Resolved the issue where there were multiple attached Practices and the Status filter on the main screen was appearing as duplicated.**
- **Resolved the issue where some clients were getting; HandiTax Cloud Error: "String reference not set to an instance of a String. Parameter name: s" error when opening ATO Reports > Income Tax Clients page.**
- **Resolved the issue where some validation errors were not displayed at the front end but getting rejected by the ATO.**

- Resolved an error when adding more than 3 new users consecutively.
- Resolved an issue whereby transferred data from HandiLedger may not have saved into the tax return.

## **Security**

- Continuous security updates applied