

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 2026.3 Release Update

Version 2026.3 released March 2026

This release delivers the 2026 Fringe Benefits Tax return, the ability to transfer dividend and interest income between Individual Tax Returns, and targeted fixes to improve accuracy and stability across Access Tax.

New Features

Fringe Benefits Tax 2026 Return: The 2026 Fringe Benefits Tax (FBT) return is now available in Access Tax and has been registered with the ATO. Practitioners can create and prepare FBT returns ahead of the lodgment open date. Lodgment to the ATO will be available from 1 April 2026.

Individual Tax Return – Dividend and Interest Transfer: Access Tax now supports the ability to transfer dividend and interest income items from one Individual Tax Return (I Form) to another within Access Tax. When interest or dividends contains income details and has more than one account holder, an option will be presented to push those details to another Individual Tax Return. Transfers are directed to the highest sequenced return available for the receiving individual. If the receiving return has a status of 'Wait on Signing' or higher, the user will be alerted that the transfer cannot be completed.

- **Reduces Duplicate Entry:** Income shared between account holders can be pushed directly to the relevant return, removing the need to manually re-enter data across multiple Individual Tax Returns.
- **Status-Aware Transfers:** Built-in alerts notify the user when a receiving return is at a stage where transfers are not permitted, preventing data conflicts in returns already in the signing workflow.

Issues Resolved

- Fixed an issue where the Low-Income Tax Offset (LITO) was not correctly applied to earned income for minor taxpayers in the 2025 tax year.
- Fixed an issue where unused Foreign Income Tax Offsets were not correctly adjusting the Medicare levy calculation in Individual Income Tax Returns.
- Fixed an incorrect Medicare levy surcharge calculation for taxpayers with a part-year spouse.
- Fixed a validation error incorrectly displaying "The country name is invalid in the partner address details" when selecting certain countries (such as United States of America or British Virgin Islands) for non-resident beneficiaries in Partnership Tax Returns at Item 54 – Statement of Distribution.

- Expanded the Expense Category selection pop-up in the Rental Property Schedule to improve usability and reduce scrolling, applied to Rental ITR, Foreign Rental, and Rental NITR schedules from 2022 onwards.
- Fixed worksheet PDF exports to correctly display Other Attachments content when the Include Blank Items option is enabled.

Security

- Ongoing security and performance updates have been applied.