

Access Evo Analytics for Accountants

Release Notes – Prior to September 2025
AUS Tax Analytics

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What's New!

The Evo Analytics & Copilot **AUS Tax solution for Accountants** aims to bring all relevant tax detail across all available Form Types, Activity Statements and Schedules. Tax information is combined with client centric details so comprehensive analysis can be achieved, whether it be to pinpoint a specific scenario for an individual client, or a general cohort of clients based on a common situation.

Access Evo Analytics for Accountants delivers actionable insights through two main approaches:

1. **Dashboards & Insights** – presenting high-level metrics that can be explored further by drilling down into detailed data, offering full clarity on how top-level figures are built.
2. **AI-powered Copilot** – fully integrated into Access Evo, Copilot uses natural language queries across all available Tax data. With its growing list of “Skills,” including the Analytics Skill, users can ask questions and instantly explore their data without needing technical expertise.

When combined with this **Tax data analysis**, both internal practice data and external data sources such as **ATO and IRD resources**, **Evo Docs**, and even **direct document import analysis**, Evo provides a powerful single point of entry into your entire data ecosystem.

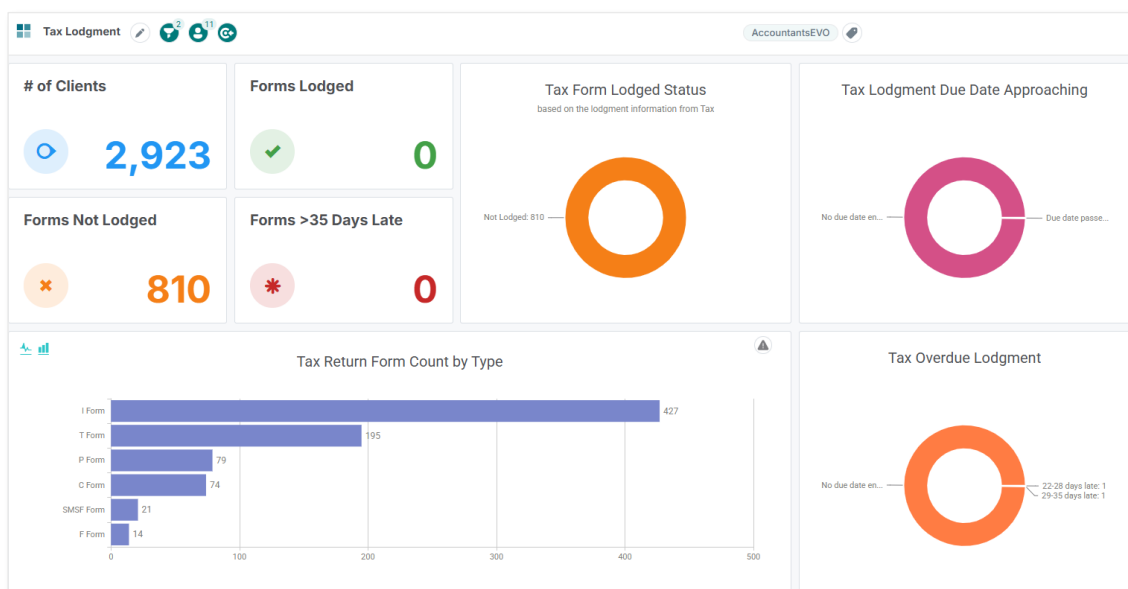
AUS Tax Access Evo Analytics Dashboards and Insights

There are three dashboards, each representing a key set of Tax data. Each dashboard comprises a series of Insights, providing various perspectives and interpretations of the

underlying data. Dashboards have filter available to refine result, these filters differ between dashboards but filter for **Tax Year** is consistent and defaults to the current Tax Year. Individual Insights offer interactive features, with key interactions enabling **Drill Down** and **Show Data** capabilities that present detailed information based on the selected measure. The drill-down views are generally presented in table format and include additional filtering options, depending on the data displayed. Drill down filters the underlying format by what is selected on the top-level Insight. Show data simply gives access to the underlying format but without filtering the data.

Tax Lodgement (AU)

The Tax Lodgement dashboard shows Insights providing detailed information regarding the lodgement status of income tax returns and activity statements. There are currently no Insights providing details of values from within the returns, e.g. deductions, rental income etc.



Filters

To allow users to restrict or drill down more closely into the data, there are several filters provided that will change the data being displayed.

The filters provided are:

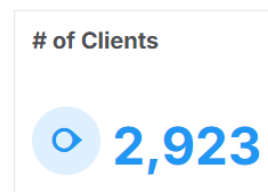
- **Lodged Status** - this gives the user the ability to select either Lodged or Not Lodged forms.
- **Client Name** - this allows the user to show one or more clients and the forms that those selected clients have.
- **Form Type** - the ability to show specific forms. This could be any or all income tax returns or activity statements.
- **Start Date & End Date** - changes the Insights to the specific dates selected to match the form period start or end dates
- **Partner/Manager/Staff** - three different filters that can be set to show forms for one or many partners, managers or staff assigned to the forms.

Tax Lodgement Insights

The following is a list of Insights used on the Tax Lodgement dashboard. The Chart Insights have **Drill Down** and **Show Other** functionality built in to gain quick access to detail information based on the top-level Insight shown.

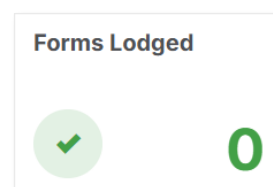
of Clients

Number of Clients that a Tax Return (Form) attached, based on the dashboard filter selections.



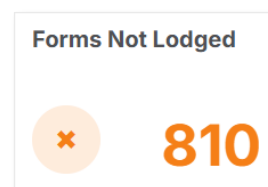
Forms Lodged

Number of Tax Returns (Forms) that have been lodged, based on the dashboard filter selections.



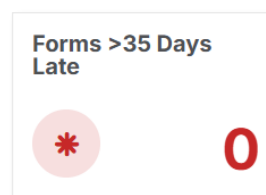
Forms Not Lodged

Number of Tax Returns (Forms) still to be lodged, based on the dashboard filter selections.



Forms > 35 Days Late

Number of Tax Returns (Forms) that are late by 35 days or more, based on the dashboard filter selections.



Tax Form Lodged Status

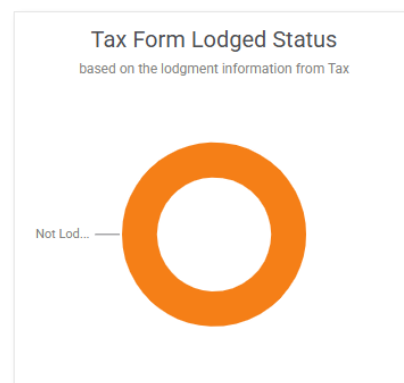
This donut chart shows the total number of forms separating lodged and not lodged returns.

Drill Down

- Pie – Tax Form Detailed Status
- Table – Form Lodgement Details

Show Data

- Pie – Tax Form Detailed Status
- Table – Form Lodgement Details



Tax Lodgment Due Date Approaching

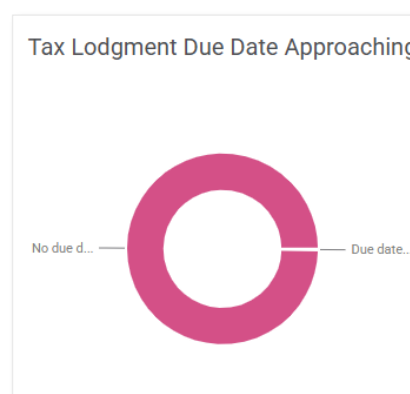
This donut chart shows the returns in categories for due date. The intent of this chart is to show which returns have with a due date upcoming in the following categories: 0-7 days, 8-14 days, 15-20 days, 21-28 days, 29-35 days, > 35 days, Due date passed or not applicable.

Drill Down

- Table –Lodgment Due date Approaching

Show Data

- Table –Lodgment Due date Approaching



Tax Overdue Lodgment

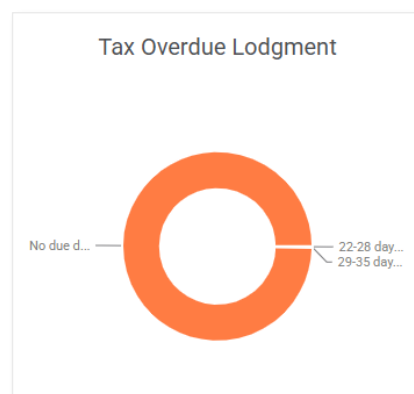
This donut chart displays returns in overdue categories. The categories are the same as outlined in the Due Date Approaching insight. It shows which returns are late for lodgment and how late each return is.

Drill Down

- Table – Lodgement Overdue

Show Data

- Table – Lodgement Overdue



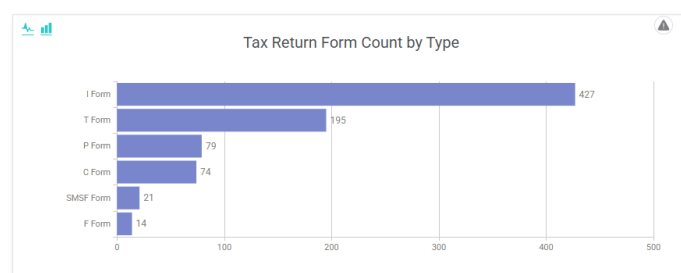
Tax Return Form Count by Type

This bar chart shows the total number of returns breaking them down by different form types.

- Pie – Tax Form Detailed Status
- Table – Form Lodgement Details

Show Data

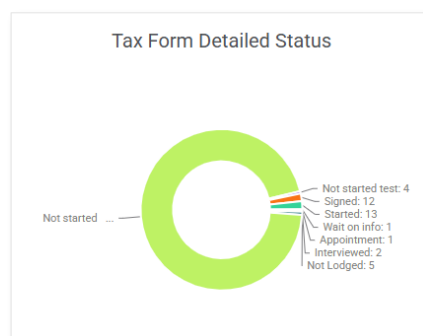
- Pie – Tax Form Detailed Status
- Table – Form Lodgement Details



Tax Lodgment Insights for Drill Down and Show Data options

Further detail can be accessed from top-level chart Insights on the dashboard. Selecting a component of a chart and choosing the three dot (ellipse) button on the top right of a chart will provide these options. **Drill Down** retains the context of what has been selected on the chart, **Show Data** simply accesses the detail format but does not apply the additional filtering.

The **Tax Forms Details Status** pie chart shows the total number of returns broken down by their current status.



The **Tax Form Lodgment Details** format lists returns by client and shows key pieces of information from the form. It also shows the Partner and manager assigned to the return.

Client Name	Tax year	Status	Form type	Due Date	Period Start Date	Period End Date	Partner	Manager
Bean Roasters Pty Ltd	2025	Not started	I Form		01/07/2024	30/06/2025	SIMON	SUNNY
04102022	2025	Not started	P Form		01/07/2024	30/06/2025		
AAA Company	2025	Not started	C Form		01/07/2024	30/06/2025		
AAEP2858 AAC-Indy	2025	Not started	I Form		01/07/2024	30/06/2025		
AAEP-5671 The Trust of Testing	2025	Not started	P Form		01/07/2024	30/06/2025		
AAEP-5754 NonInd with ABN	2025	Not started	C Form		01/07/2024	30/06/2025		
Abber Pty Ltd	2025	Not started	T Form		01/07/2024	30/06/2025	LUCINDA.TILLMAN	
Abbey Wilson	2025	Not started	I Form		01/07/2024	30/06/2025	LUCINDA.TILLMAN	

The **Tax Lodgment Due Date Approaching** format lists returns approaching their due date by client along with key pieces of information from the form. The Approaching Due field highlights the category the lodgment due date fits in.

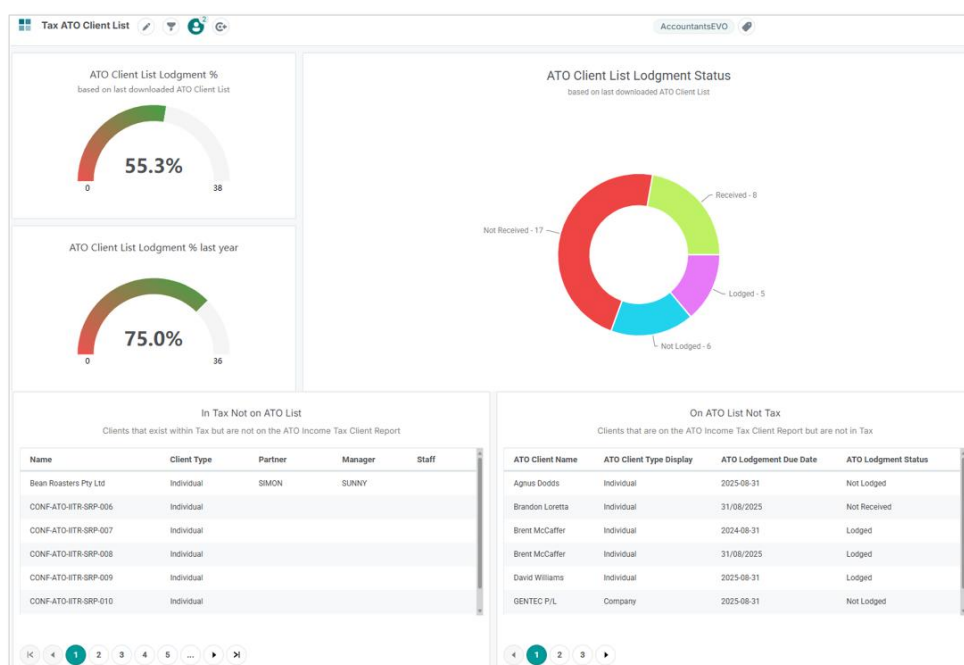
Client Name	Tax year	Due Date	Status	Partner	Manager	Staff	Form Type	Approaching Due
Bean Roasters Pty Ltd	2025		Not started	SIMON	SUNNY		I Form	No due date entered
04102022	2025		Not started				P Form	No due date entered
AAA Company	2025		Not started				C Form	No due date entered
AAEP2858 AAC-Indy	2025		Not started				I Form	No due date entered
AAEP-5671 The Trust of Testing	2025		Not started				P Form	No due date entered
AAEP-5754 NonInd with ABN	2025		Not started				C Form	No due date entered
Abber Pty Ltd	2025		Not started	LUCINDA.TILLMAN			T Form	No due date entered
Abbey Wilson	2025		Not started	LUCINDA.TILLMAN			I Form	No due date entered

The **Tax Overdue Lodgment** format lists overdue returns by client along with key pieces of information from the form. The Due Category field highlights the category the lodgment due date fits in.

Client name	Tax year	Due Date	Status	Partner	Manager	Staff	Due Category
Bean Roasters Pty Ltd	2025		Not started	SIMON	SUNNY		No due date entered
04102022	2025		Not started				No due date entered
AAA Company	2025		Not started				No due date entered
AAEP2858 AAC-Indy	2025		Not started				No due date entered
AAEP-5671 The Trust of Testing	2025		Not started				No due date entered
AAEP-5754 NonInd with ABN	2025		Not started				No due date entered
Abber Pty Ltd	2025		Not started	LUCINDA.TILLMAN			No due date entered
Abbey Wilson	2025		Not started	LUCINDA.TILLMAN			No due date entered

Tax ATO Client List (AU)

The Tax ATO Client List dashboard shows Insights based around the ATO client list that agents download. This is also known as the ITCRPT.



Filters

To allow users to restrict or drill down more closely into the data, there are several filters provided that will change the data being displayed.

The filters provided are:

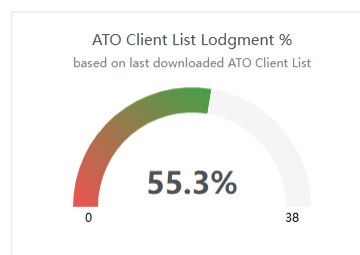
- **Tax Agent Number** - this gives the user the ability to select a specific or multiple Tax Agent numbers.
- **Partner/Manager** - two different filters that can be set to show forms for one or many partners or managers assigned to the forms.

Tax ATO Client List Insights

The following is a list of Insights used on the Tax ATO Client dashboard. The Chart Insights have **Drill Down** and **Show Other** functionality built in to gain quick access to detail information based on the top-level Insight shown.

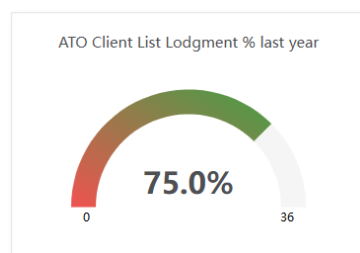
ATO Client List Lodgment %

This Insight will show a percentage of any return on the client list that has a status of "Received" against any return that has a status of "Received" or "Not Received" ie excluding returns not required. It will show forms only for the **current** year.



ATO Client List Lodgment % Last Year

This Insight will show a percentage of any return on the client list that has a status of "Received" against any return that has a status of "Received" or "Not Received" ie excluding returns not required. It will show forms only for the **previous** tax year.



Forms Not Lodged

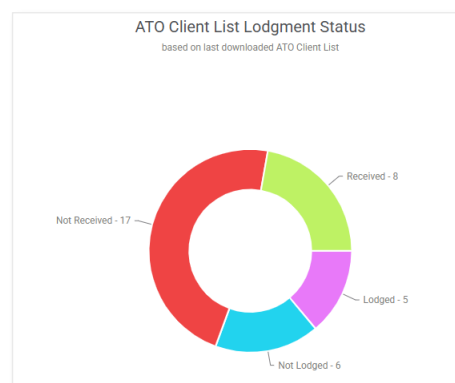
This donut chart shows all of the returns listed on the client list by status. These will be Lodged, Not Lodged, Return Not Necessary and Not Required returns.

Drill Down

- Table – Tax ACL Lodgment

Show Data

- Table – Tax ACL Lodgment



In Tax Not on ATO List

This Table format compares the TFN of the clients in Tax matches the TFN with the clients on the ATO list. Where a matching TFN cannot be found, the clients will be listed in the report.

It will only check for current year clients on the ATO list and for active clients in Tax.

In Tax Not on ATO List
Clients that exist within Tax but are not on the ATO Income Tax Client Report

Name	Client Type	Partner	Manager	Staff
Bean Roasters Pty Ltd	Individual	SIMON	SUNNY	
CONF-ATO-IITR-SRP-006	Individual			
CONF-ATO-IITR-SRP-007	Individual			
CONF-ATO-IITR-SRP-008	Individual			
CONF-ATO-IITR-SRP-009	Individual			
CONF-ATO-IITR-SRP-010	Individual			

On ATO List Not Tax

This Table format compares the TFN of clients on the ATO list and matches to an existing return in Tax. It will check the ATO list for the current year with the current year income tax returns.

On ATO List Not Tax
Clients that are on the ATO Income Tax Client Report but are not in Tax

ATO Client Name	ATO Client Type Display	ATO Lodgement Due Date	ATO Lodgment Status
Agnus Dodds	Individual	2025-08-31	Not Lodged
Brandon Loretta	Individual	31/08/2025	Not Received
Brent McCaffer	Individual	2024-08-31	Lodged
Brent McCaffer	Individual	31/08/2025	Lodged
David Williams	Individual	2025-08-31	Lodged
GENTEC P/L	Company	2025-08-31	Not Lodged

Tax ATO Client List Insights for Drill Down and Show Data options

Further detail can be accessed from top-level chart Insights on the dashboard. Selecting a component of a chart and choosing the three dot (ellipse) button on the top right of a chart will provide these options. **Drill Down** retains the context of what has been

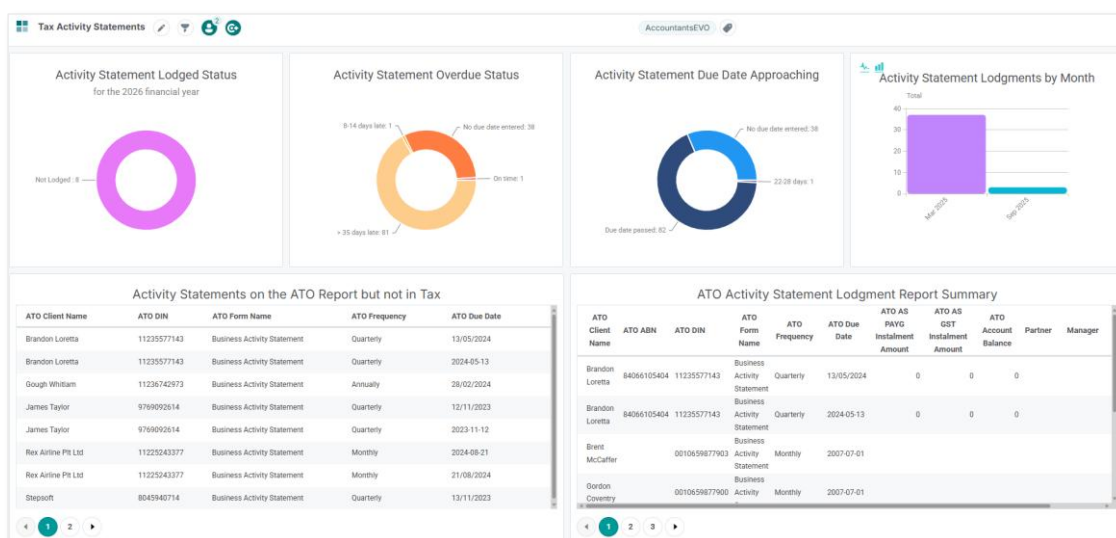
selected on the chart, **Show Data** simply accesses the detail format but does not apply the additional filtering.

The **ATO Client List Details** table format shows a list of clients and the returns at exist with the ATO. Its show the Client type, Due Date and ATO Lodgement Status.

ATO Client Name	ATO Client Type Display	ATO Lodgement Due Date	ATO Lodgment Status
Agnus Dodds	Individual	2025-08-31	Not Lodged
Brandon Loretta	Individual	2025-08-31	Not Received
Brandon Loretta	Individual	31/08/2025	Not Received
Brent McCaffer	Individual	2024-08-31	Lodged
Brent McCaffer	Individual	31/08/2025	Lodged
David Williams	Individual	2025-08-31	Lodged
GENTEC P/L	Company	2025-08-31	Not Lodged
Gordon Coventry	Individual	2024-08-31	
Gordon Coventry	Individual	31/08/2025	
Gough Whitlam	Individual	2025-08-31	Received

Tax Activity Statements (AU)

The Tax Activity Statement dashboard shows Insights focuses on statuses and dates associated with Activity Statements. All chart Insights have Drill Down and Show Data options to get to the detail supporting top-level measures.



Filters

To allow users to restrict or drill down more closely into the data, there are several filters provided that will change the data being displayed.

The filters provided are:

- **Due Date** - multiple selection options to do with the Tax Return Due Date.
- **Partner/Manager** - two different filters that can be set to show forms for one or many partners or managers assigned to the forms.
- **Period End** - multiple selection options to do with the Tax Return Period End Date.
- **Status** - option to select any number of Tax Return Statuses to refine the data shown.

Tax Activity Statement Insights

The following is a list of Insights used on the Tax Activity Statement dashboard. The Chart Insights have **Drill Down** and **Show Other** functionality built in to gain quick access to detail information based on the top-level Insight shown.

Activity Statement Lodged Status

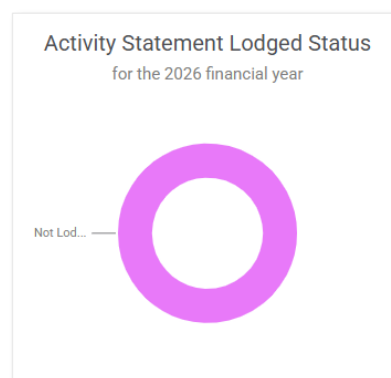
This donut chart shows the ratio between Lodged and Not Lodged Activity Statements. By default, it shows forms for the future tax year, that is, when the current income tax year is 2025 the activity statements that are included will be those created in the 2026 tax year.

Drill Down

- Table - Tax Activity Statement Lodgment Details
- Pie - Tax Activity Statement Lodgment by Status

Show Data

- Table - Tax Activity Statement Lodgment Report Summary
- Table - Tax Activity Statement Lodgment Details
- Pie - Tax Activity Statement Lodgment by Status



Activity Statement Overdue Status

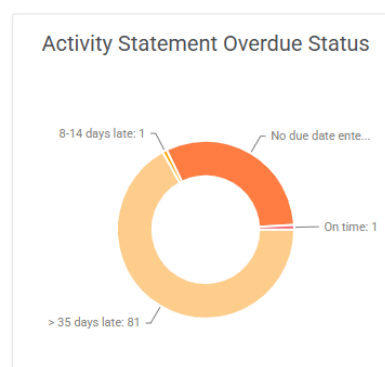
This donut chart shows a breakdown of Activity Statements that are overdue and by how long, grouping them into specific categories. These categories are: 0-7 days, 8-14 days, 15-20 days, 21-28 days, 29-35 days, > 35 days, No Due Date entered.

Drill Down

- Table – Tax Activity Statements Overdue

Show Data

- Table – Tax Activity Statements Overdue



Activity Statement Due Date Approaching

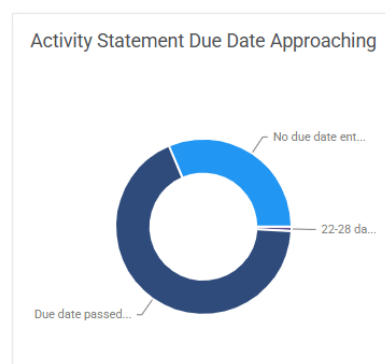
This donut chart shows a breakdown of Activity Statements that are due and when they are due, grouping them into specific categories. These categories are: 0-7 days, 8-14 days, 15-20 days, 21-28 days, 29-35 days, > 35 days, No Due Date entered.

Drill Down

- Table – Tax Activity Statement Due Date Approaching

Show Data

- Table – Tax Activity Statement Due Date Approaching



Activity Statement Lodgement by Month

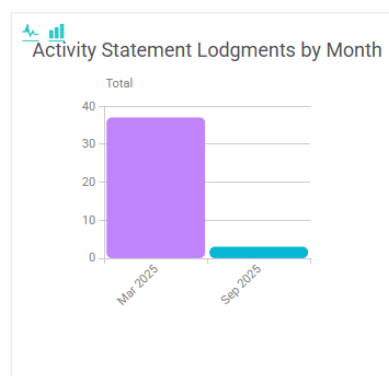
This column chart shows a breakdown of Activity Statements that have been lodged by the month they were lodged in.

Drill Down

- Table – Tax Activity Statement Lodgment by Month

Show Data

- Table – Tax Activity Statement Lodgment by Month



Activity Statement on the ATO Report but not in Tax

This table format list the Activity Statements that exist on the ATO report but have not yet been created in the Tax product.

ATO Client Name	ATO DIN	ATO Form Name	ATO Frequency	ATO Due Date
Brandon Loretta	11235577143	Business Activity Statement	Quarterly	13/05/2024
Brandon Loretta	11235577143	Business Activity Statement	Quarterly	2024-05-13
Gough Whitlam	11236742973	Business Activity Statement	Annually	28/02/2024
James Taylor	9769092614	Business Activity Statement	Quarterly	12/11/2023
James Taylor	9769092614	Business Activity Statement	Quarterly	2023-11-12
Rex Airline Pit Ltd	11225243377	Business Activity Statement	Monthly	2024-08-21
Rex Airline Pit Ltd	11225243377	Business Activity Statement	Monthly	21/08/2024
Stepsoft	8045940714	Business Activity Statement	Quarterly	13/11/2023

ATO Activity Statement Lodgment Report Summary

This table format list the Activity Statements that exist on the ATO report.

ATO Client Name	ATO ABN	ATO DIN	ATO Form Name	ATO Frequency	ATO Due Date	ATO AS PAYG Instalment Amount	ATO AS GST Instalment Amount	ATO Account Balance
Brandon Loretta	84066105404	11235577143	Business Activity Statement	Quarterly	13/05/2024	0	0	0
Brandon Loretta	84066105404	11235577143	Business Activity Statement	Quarterly	2024-05-13	0	0	0
Brent McCaffler		0010659877903	Business Activity Statement	Monthly	2007-07-01			
Gordon Coventry		0010659877900	Business Activity Statement	Monthly	2007-07-01			

Tax Activity Statement Insights for Drill Down and Show Data options

Further detail can be accessed from top-level chart Insights on the dashboard. Selecting a component of a chart and choosing the three dot (ellipse) button on the top right of a chart will provide these options. **Drill Down** retains the context of what has been

selected on the chart, **Show Data** simply accesses the detail format but does not apply the additional filtering.

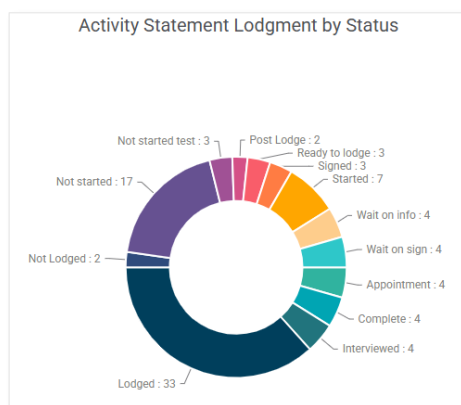
The **ATO Activity Statement Lodgment Summary** table format shows a list of clients and the returns at exist with the ATO.

ATO Activity Statement Lodgment Report Summary											
ATO Client Name	ATO ABN	ATO DIN	ATO Form Name	ATO Frequency	ATO Due Date	ATO AS PAYG Instalment Amount	ATO AS GST Instalment Amount	ATO Account Balance	Partner	Manager	ATO Registered Agent Number
Brandon Loretta	84066105404	11235577143	Business Activity Statement	Quarterly	13/05/2024	0	0	0			25309586
Brandon Loretta	84066105404	11235577143	Business Activity Statement	Quarterly	2024-05-13	0	0	0			25309586
Brent McCaffer		0010659877903	Business Activity Statement	Monthly	2007-07-01						
Gordon Coventry		0010659877900	Business Activity Statement	Monthly	2007-07-01						
Gough Whittam	22089771835	11236742973	Business Activity Statement	Annually	2024-02-28	0	500	60500	SMSF Partner	SMSF Manager	25309586
Gough Whittam	22089771835	11236742973	Business Activity Statement	Annually	28/02/2024	0	500	60500			25309586

The **Activity Statement Lodgment Detail** table format shows a list of clients and the returns for the selected tax year. It shows the return status, the lodgment date if lodged and which Partner and Manager have been assigned to the return.

Activity Statement Lodgment Table							
Client Reference	Client Name	DIN	Status	Due Date	Lodgment Date	Partner	Manager
ABCP0001	ABCD Pty Ltd		Wait on info	21/11/2024			
ABCP0001	ABCD Pty Ltd		Post Lodge	21/08/2024	12/03/2025		
ABCP0001	ABCD Pty Ltd		Lodged	21/10/2024	12/03/2025		
ABCP0001	ABCD Pty Ltd		Lodged	21/09/2024	12/03/2025		
ABCP0001	ABCD Pty Ltd		Complete	21/07/2024	12/03/2025		
ABCD0002	ABCD Superfund		Lodged	28/02/2025	12/09/2025		
ABCD0002	ABCD Superfund		Lodged	25/11/2024	12/03/2025		

The **Activity Statement Lodgment by Status** donut chart shows a breakdown of returns by their current statuses based on the selected tax year and other selected insight filters.



The **Activity Statement Overdue** table format shows a list of clients and the returns that are overdue along with a series of fields with additional information which include the Partner and Manager assigned to the return.

Activity Statements Overdue								
Client Reference ↑	Client Name	Due Date	Period end date	DIN	Status	Partner	Manager	Due Category
00014803	Hortens PTY	25/08/2008	30/06/2006	10659877906	Not started			> 35 days late
00099601	Gordon Coventry	25/08/2008	30/06/2006	10659877900	Not started			> 35 days late
137	CARMAN		30/06/2017	11234813678	Example	Company Partner	Company Manager	No due date entered
138	ANNATO		30/06/2017	9647672864	Example	Company Partner	Company Manager	No due date entered
139	GENTEC		30/06/2017	11238412533	Example	Company Partner	Company Manager	No due date entered
140	ACJEST		30/06/2017	11217104250	Example	Company Partner	Company Manager	No due date entered
141	ADRENALAN		30/06/2017	11236742973	Example	SMSF Partner	SMSF Manager	No due date entered

The **Activity Statement Lodgment Details** table format shows a list of clients and the returns that have been lodged. It includes the lodged status and the lodgment date.

Activity Statement Lodgment Details					
Client Reference	Client Name	DIN	Status	Lodgment Date ↑	Period End Date
ABCP0001	ABCD Pty Ltd		Complete	12/03/2025	31/07/2024
ABCP0001	ABCD Pty Ltd		Lodged	12/03/2025	30/09/2024
ABCP0001	ABCD Pty Ltd		Lodged	12/03/2025	31/10/2024
ABCP0001	ABCD Pty Ltd		Post Lodge	12/03/2025	31/08/2024
ABCD0002	ABCD Superfund		Lodged	12/03/2025	30/09/2024
ABCD0001	ABCD Trust		Lodged	12/03/2025	30/09/2024
BRAN0002	Brandon Investment Trust		Lodged	12/03/2025	30/09/2024