



GO DIGITAL CHECKLIST: ARE YOU READY FOR MTD 2026?



Tip: Tick off each item to see where you are ready and where you might need help. If anything is unchecked, consider booking a consultation – getting set up early means a stress-free 2026!

1. Income & Thresholds

I know if my business or rental income is above the £50k threshold for 2026.	<input type="checkbox"/>
I know the threshold will drop to £30k in 2027 and have planned ahead.	<input type="checkbox"/>
All sources of income (business + rental) are accounted for digitally.	<input type="checkbox"/>

2. Digital Record Keeping

All receipts, invoices, and rent statements are stored digitally.	<input type="checkbox"/>
Records are clearly organised and easy to access.	<input type="checkbox"/>
I have a consistent naming and filing system for digital records.	<input type="checkbox"/>

3. Software Setup

Dext is installed and ready to capture receipts.	<input type="checkbox"/>
QuickBooks is set up and linked to Dext.	<input type="checkbox"/>
Transactions are automatically categorised and logged.	<input type="checkbox"/>

4. Monthly Bookkeeping Routine

I review and reconcile my bookkeeping monthly.	<input type="checkbox"/>
Bank transactions are regularly checked and matched.	<input type="checkbox"/>
Any discrepancies or errors are resolved promptly.	<input type="checkbox"/>



GO DIGITAL CHECKLIST



5. Backup & Historical Records

Historical financial records are backed up digitally.

Paper records are scanned or stored safely for reference.

Data is secure and easily retrievable.

6. Next Steps & Support

I have a plan for ongoing MTD compliance.

I know how to get professional help if needed.

I have downloaded or printed any guides or templates I need.

How Ready Are You?

Once you've ticked your items, count up your total:

14–18 ticks → You're MTD-ready! 🎉

You're well organised and on track for a smooth 2026.

7–13 ticks → You're getting there.

A few small tweaks now will make next year much easier.

0–6 ticks → A little support will go a long way.

Starting early will save time, stress, and last-minute headaches.

Tip: Anything left unticked is a great place to start next.

Disclaimer:

This checklist is designed to help sole traders and landlords organise their digital records ahead of Making Tax Digital 2026. It provides general guidance only and is not a substitute for personalised tax or accounting advice. Individual circumstances vary, so please consult a qualified accountant or tax adviser if you're unsure about any steps.