

MTD Income Tax readiness

UK | Checked 12 October 2026 | XnMark

Business: _____ Review date: _____

☐ Confirm qualifying income

Check the relevant tax year, income sources and mandatory start.

Owner: _____ Evidence / next action: _____

☐ Check exemption criteria

Retain the official assessment or application outcome where relevant.

Owner: _____ Evidence / next action: _____

☐ Map your income sources

List self-employment and property businesses and other return income.

Owner: _____ Evidence / next action: _____

☐ Compare software features

Confirm records, updates, annual return, periods and agent support.

Owner: _____ Evidence / next action: _____

☐ Agree the records process

Capture the amount, date and category; resolve missing information.

Owner: _____ Evidence / next action: _____

☐ Assign submission owners

Confirm who checks totals, files updates and retains confirmation.

Owner: _____ Evidence / next action: _____

☐ Enter reporting deadlines

Use the selected update periods; plan preparation before filing.

Owner: _____ Evidence / next action: _____

☐ Prepare the annual return

Assign year-end adjustments, other income checks and final review.

Owner: _____ Evidence / next action: _____

This working record does not certify legal compliance or create an exemption.

Check current HMRC rules and your circumstances with HMRC or your tax agent.

Official sources: HMRC eligibility, software, records and quarterly-update guidance.

gov.uk/government/collections/making-tax-digital-for-income-tax

Full source references: xnmark.com/insights-making-tax-digital-income-tax-uk-2026/