ERRINGTON LANGER PINNER
CHARTERED ACCOUNTANTS

Making Tax Digital readiness checklist

For sole traders and landlords: who it applies to, when, and how to prepare

Checklist, 2026/27

Making Tax Digital for Income Tax adds digital records and quarterly updates to the yearly tax return. Use this checklist to get ready.

Does it apply to you?

From	Applies if your qualifying income is over
6 April 2026	£50,000
6 April 2027	£30,000
6 April 2028	£20,000

Qualifying income is your combined self-employment and property turnover before expenses, not your profit. It is measured using the tax return for an earlier year, so check with us.

Getting ready

- [ ] Work out your qualifying income from your latest tax return
- [ ] Choose HMRC-recognised software (we can recommend one that suits you)
- [ ] Move your records into the software from the start of the tax year
- [ ] Connect your business bank account to the software if you can
- [ ] Keep separate records for each business and each property business
- [ ] Decide whether you will send the updates yourself or ask us to do it
- [ ] Sign up for Making Tax Digital with HMRC, or let us sign you up

Your deadlines (standard quarters)

Quarter	Update due
6 April to 5 July	7 August
6 July to 5 October	7 November
6 October to 5 January	7 February
6 January to 5 April	7 May
Tax return and any tax due	31 January after the tax year

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General information for the 2026/27 tax year, not advice for your circumstances. Please talk to us before acting. Registered to carry on audit work in the UK and regulated for a range of investment business activities by the Institute of Chartered Accountants in England and Wales.

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