

2026 MTD Readiness Checklist & Score

A free, practical self-check for UK sole traders — from NorthStar Logic

Making Tax Digital for Income Tax is here. Take this 2-minute check to see how ready you are — and exactly what to fix.

Your MTD Readiness Score

Tick each statement that is true for you:

- I keep digital records of my income & expenses
- I know my MTD quarterly deadlines
- I have selected MTD-compatible software
- I understand which expenses I can claim
- I know how much tax to set aside

Your score: 5/5 = **Ready** · 3–4/5 = **Needs Attention** · 0–2/5 = **Action Required**

1. Am I in scope?

- Add up your **gross** self-employment + property income.
- Over £50,000 → mandatory from **April 2026**.
- Over £30,000 → April 2027. Over £20,000 → April 2028.

2. Know your deadlines

- Q1 (to 5 Jul) → 7 Aug
- Q2 (to 5 Oct) → 7 Nov
- Q3 (to 5 Jan) → 7 Feb
- Q4 (to 5 Apr) → 7 May, plus a year-end final declaration.

3. Get your records digital

- Record every income & expense item: amount, date, category.
- Keep records for at least 5 years.
- A spreadsheet is fine — but it needs bridging software to file.

4. Set money aside

- Budget for Income Tax + Class 4 NI as you earn.
- Remember payments on account (31 Jan & 31 Jul).

Want the Complete System?

- ✓ Automated bookkeeping spreadsheet
- ✓ Quarterly MTD reporting dashboard
- ✓ Tax estimator (Income Tax + NI)
- ✓ Mileage calculator
- ✓ Home office calculator
- ✓ Step-by-step guides
- ✓ Instant download

£29 one-time payment · money-back guarantee · northstarlogic.co.uk

Free educational resource from NorthStar Logic · northstarlogic.co.uk · support@northstarlogic.co.uk. Not tax advice — consult an accountant. Tax figures sourced from gov.uk.