

# MTD FOR ITSA PREP CHECKLIST FOR ACCOUNTING FIRMS

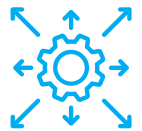


Everything you need to review, prepare, and action before April 2026 .



## UNDERSTAND THE SCOPE

Make sure your team is clear on what's changing and who is affected.



- ☐ Know which clients fall under MTD for ITSA (self-employed & landlords earning over £50k)
- ☐ Understand HMRC's quarterly update and End of Period Statement (EOPS) requirements
- ☐ Confirm compliance timeline: starts April 2026 for affected clients
- ☐ Keep track of phased implementation (e.g. £30k–£50k threshold in future)

## SEGMENT & ASSESS YOUR CLIENT BASE

Get visibility on the volume and complexity of your MTD-affected clients.



- ☐ Identify all clients impacted by MTD for ITSA
- ☐ Segment clients by income threshold, type (landlord/self-employed), and digital readiness
- ☐ Flag high-risk clients (poor records, late filers, paper-based)
- ☐ Assess current bookkeeping frequency and accuracy for these clients

## GET YOUR TECH IN PLACE

Ensure you have the right tools for digital recordkeeping and submissions.



- ☐ Choose or review MTD-compatible software (HMRC-recognised)
- ☐ Map current client software usage – who's on what platform
- ☐ Plan migrations for clients using unsupported tools or spreadsheets

- ☐ Test integrations and ensure software is ready for quarterly submissions
- ☐ Set up agent services account for MTD if not already done

## PREPARE INTERNAL WORKFLOWS

Align your team, systems, and processes for a smooth transition.



- ☐ Define MTD responsibilities across the team
- ☐ Build quarterly submission timelines into your calendar
- ☐ Adjust workflows to capture and check data in real time
- ☐ Identify internal training needs on new software/processes
- ☐ Set up client reminders and automations for record submissions
- ☐ Decide how you'll handle clients who won't go digital (e.g. exemptions)

## TRAIN & EDUCATE YOUR CLIENTS

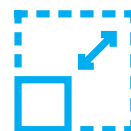
Clients may not understand what MTD means or what they need to do.



- ☐ Create simple explainer materials for MTD for ITSA
- ☐ Send communications to affected clients (email templates, guides)
- ☐ Run webinars or info sessions for high-volume/complex clients
- ☐ Offer early migration support to get clients digital now
- ☐ Set expectations for new processes (bookkeeping frequency, data formats)

## SCALE YOUR CAPACITY

MTD means more work, so be realistic about internal bandwidth.



- ☐ Forecast additional workload from quarterly submissions
- ☐ Identify where you may need support: bookkeeping, tax review, client management
- ☐ Consider outsourcing MTD-related prep to avoid staff overload
- ☐ Build a contingency plan for peak periods and late filers
- ☐ Explore automation for reminders, checklists, and workflows

## TRACK PROGRESS & STAY UPDATED

Keep your MTD plan moving and stay aligned with HMRC changes.



- ☐ Assign an MTD lead or coordinator internally
- ☐ Create a shared dashboard or tracker for client onboarding and migration
- ☐ Subscribe to HMRC and software provider updates
- ☐ Regularly review and refine your MTD strategy
- ☐ Conduct internal MTD readiness reviews every quarter

### BONUS TIP: START WITH LOW-HANGING FRUIT

Not all clients will be ready at the same pace.

Begin with those already using cloud accounting tools as it builds momentum fast.

### YOU'RE DONE WHEN...

- ✓ Your clients are segmented and informed
- ✓ Your team is trained and workflows are updated
- ✓ Your software is integrated and tested
- ✓ Your quarterly timelines are mapped
- ✓ You're confident about compliance without overloading your team

## WANT TO MAKE YOUR MTD JOURNEY SMOOTHER?

Outsource your MTD prep to QX.

Trusted by 350+ UK accounting firms.

 +44 208 146 0808  [qxas@qxglobalgroup.com](mailto:qxas@qxglobalgroup.com)