



Your 30-day MTD action plan

A structured guide to preparing for Making Tax Digital (MTD) ahead of April 2026, outlining the key steps, timelines and considerations for firms and businesses.

Purpose of this guide

Making Tax Digital represents a fundamental change in how tax data is recorded, reviewed and submitted.

This guide is designed to:

- Clarify what MTD requires and when it applies
- Outline what needs to be addressed before April 2026
- Highlight the systems, records and working practices that benefit from early alignment
- Explain the operational and commercial advantages of early adoption

It is structured as a 30-day action plan to help firms and businesses organise preparation in a clear, manageable way.

1. MTD in 5 minutes (quick recap)

Making Tax Digital (MTD) for Income Tax changes how sole traders and landlords keep records and report income to HMRC.

Under MTD for Income Tax:

- Businesses must keep digital records of income and expenses
- Quarterly updates must be submitted to HMRC using MTD-compatible software
- A digital link must exist from records through to submission
- An end-of-period statement and final declaration will replace the traditional Self Assessment process

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2. What actually needs to be done before April 2026

Not everything needs fixing at once. Focus on what must be in place.

Priority actions:

- Identify which clients will be in scope for MTD IT
- Confirm how records are currently kept (spreadsheets, software, paper)
- Decide which system will be your single source of truth
- Make sure there is a compliant digital link to HMRC
- Set expectations with clients about quarterly submissions

If these aren't clear, April 2026 will feel chaotic, no matter how good your software is.

3. Systems, records & habits to fix now

In many cases, MTD-related issues arise from existing processes rather than the software itself.

Systems to review

- Are you using multiple tools that don't talk to each other?
- Are spreadsheets still being manually adjusted at the last step?
- Is MTD reporting bolted on instead of built in?

Records to clean up

- Inconsistent chart of accounts
- Missing or delayed transaction entries
- Poor categorisation that creates rework later

Habits to change

- Monthly (or quarterly) reviews instead of year-end fixes
- Real-time data checks, not last-minute corrections
- Clear ownership: who updates, who reviews, who submits

Addressing these areas early reduces future rework and improves consistency.

4. The 30-day MTD action plan

The following actions should be completed within a 30-day preparation period to establish a solid foundation for MTD compliance.

Key actions to complete

- Identify clients or businesses that will fall within the MTD Income Tax scope
- Review current record-keeping methods and assess digital readiness
- Select MTD-compatible software and confirm how data will flow to HMRC
- Standardise categories, reporting structures and review processes
- Establish clear responsibilities for data entry, review and submission
- Test the process using sample or live data to confirm end-to-end compliance
- Document the agreed workflow to ensure consistency across future periods

Completing these steps within a defined timeframe helps ensure MTD requirements are embedded into routine operations rather than treated as a one-off exercise.

5. Cost & time savings of early adoption

Early adoption of MTD allows work to be distributed more evenly throughout the year.

Time savings

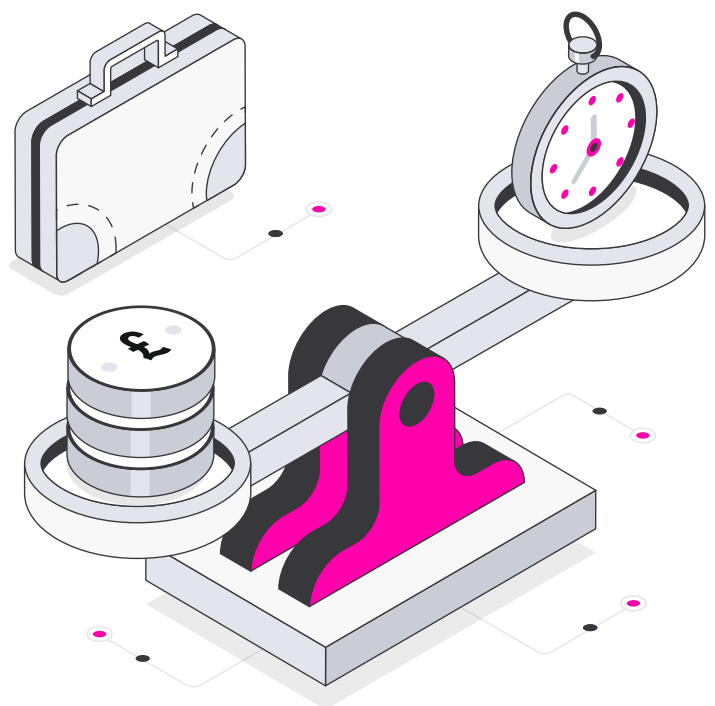
- Fewer year-end surprises
- Less manual data correction
- Faster quarterly submissions

Cost savings

- Reduced rework and write-offs
- Fewer client firefighting calls
- More predictable workloads

Commercial upside

- Stronger advisory conversations
- Better visibility for clients
- A more scalable firm



Firms that prepare in advance are better placed to manage workloads and client expectations.

Role of technology in early adoption

Technology underpins every stage of MTD compliance. From maintaining digital records to ensuring a compliant submission journey, systems must support accuracy, consistency and clear data flow to HMRC.

Selecting and implementing the right software early allows firms to standardise processes, reduce reliance on manual workarounds and embed quarterly reporting into routine operations. When technology is aligned before April 2026, compliance becomes part of normal workflow rather than a last-minute adjustment.

Conclusion

Preparing for MTD is not simply about meeting a deadline, it is about building systems and processes that support ongoing, in-year compliance.

Nomi is an MTD-compatible and HMRC-recognised all-in-one cloud accounting software designed specifically for UK accounting and bookkeeping practices. The cloud-based suite includes bookkeeping, VAT, payroll, final accounts, corporation tax, self-assessment, partnership tax, practice management, company secretarial and CRM, all within a single platform.

By enabling quick client setup, maintaining compliant digital links and managing MTD requirements alongside year-end work within one system, Nomi helps firms streamline workflows, improve consistency and reduce duplication. For practices preparing for April 2026, this integrated approach supports more efficient and scalable ways of working.



 020 3021 2326

 support@nomi.co.uk

 www.nomi.co.uk