

Making Tax Digital Compliance Checklist

The 2026 Professional Guide for Businesses &
Landlords

EVALUATE • IDENTIFY • COMPLY

INTRODUCTION

Making Tax Digital is a cornerstone of the modern UK tax system. This checklist provides clarity against professional benchmarks, helping you identify risks and ensure your business remains fully compliant.

Digital Records

Transactions must be captured in digital format at point of entry to ensure accuracy and visibility.

Compatible Software

Use of HMRC-approved platforms is mandatory for data preservation and direct digital submission.

Digital Links

Data must flow between software products without manual copying, ensuring end-to-end integrity.

Compliance Audit Checklist

1 Record Integrity

- Every income invoice is generated within digital software.
- Expenditure is tracked digitally via receipt scanning or bank feeds.
- Digital records are maintained for the full 6-year statutory period.

2 Software & Integration

- My software appears on the HMRC list of compatible MTD products.
- Bank statements are imported automatically via a secure digital feed.

**Manual typing between systems is no longer compliant.*

Critical Risk Factors

× **Spreadsheet Silos**

Isolated data requires manual bridging.

× **Manual Data Entry**

Direct typing into portals is prohibited.

× **Broken Digital Links**

Manual copying between software products.

Our Services

✓ **Software Migration**

Moving data from paper or old systems.

✓ **Digital Link Audits**

Certifying your workflow is compliant.

✓ **Ongoing Tax Planning**

Quarterly reviews of your position.

Secure Your Compliance

01383 852681

www.almondvale.com

info@almondvale.com

ALMONDVALE ACCOUNTANCY LTD • CHARTERED CERTIFIED ACCOUNTANTS
78 PORTERFIELD, COMRIE, DUNFERMLINE, FIFE, KY12 9XG