Supporting your MTD for ITSA cycle

taxcalc®

1 Identify affected clients

Sole-traders and landlords
- £50k turnover from April 2026
- £30k turnover from April 2027

TaxCalc Practice Manager (Report Manager)

2 Select the most appropriate digital record keeping solution

- ✓ Spreadsheets
- ✓ Bookkeeping
- ✗ Manual cashbook

TaxCalc Spreadsheet Templates & Bookkeeping Connect

3 Track MTD Reporting Periods

Tax quarters
Jul 5, Oct 5, Jan 5, Apr 5

OR

Calendar quarters
Jun 30, Sep 30, Dec 31, Mar 31

TaxCalc Practice Manager

4 Request Information

Transactional update

NOT

Management accounts

TaxCalc Communications Centre

5 File quarterly updates

1 month filing deadline

TaxCalc Business Filer *In development*

6 Prepare and file end of year returns

31st January filing deadline

TaxCalc Tax Return Production

7 Obtain client approval digitally

Client and agent declaration for end of year returns

TaxCalc eSign Centre

8 Document entire process

Stored securely in the cloud for easy access and retrieval

TaxCalc Document Manager