

## MAKING TAX DIGITAL (MTD) ACCOUNTING OPTIONS FOR CLIENTS

Current system	Action required to comply with MTD	MTD compliant options
<b>Manual records</b>	Look to change to MTD compliant software package or spreadsheet and bridging software	Move to MTD compliant software where submission can be made direct from software: <ul style="list-style-type: none"> <li>• Xero, Quickbooks, Sage Cloud (see separate details on pricing structure)</li> </ul> Use spreadsheet (template can be provided) and purchase bridging software for MTD submission Continue with manual records and accountant to transfer onto MTD compliant system
<b>Excel spreadsheet</b>	Look to change to MTD compliant software or consider using bridging software	Move to MTD compliant software where submission can be made direct from software: <ul style="list-style-type: none"> <li>• Xero, Quickbooks, Sage Cloud (see separate details on pricing structure)</li> </ul> Continue to use spreadsheet (some adaption may be required) and purchase bridging software for MTD submission
<b>Sage 50</b>	Look to change to MTD compliant record keeping or consider using bridging software	Move to MTD compliant software where submission can be made direct from software: <ul style="list-style-type: none"> <li>• Xero, Quickbooks, Sage Cloud (see separate details on pricing structure)</li> </ul> Continue to use Sage 50, export data into Excel spreadsheet (template can be provided) and purchase bridging software for MTD submission (need to consider that support from Sage may be discontinued)
<b>Bespoke software package</b>	Check with software provider to see if it will be MTD ready by 1 April 2019	
	<ul style="list-style-type: none"> <li>• If it will be compliant no further action required</li> <li>• If it will not be compliant look to change to MTD compliant software or consider bridging software</li> </ul>	Move to MTD compliant software where submission can be made direct from software: <ul style="list-style-type: none"> <li>• Xero, Quickbooks, Sage Cloud (see separate details on pricing structure)</li> </ul> Continue to use software and export data into Excel spreadsheet (template can be provided) and purchase bridging software for MTD submission
<b>Cloud based accounting package</b>	Check HMRC list of MTD compliant software (Xero, Quickbooks and Sage Cloud have confirmed they will be compliant)	
	<ul style="list-style-type: none"> <li>• If it will be compliant no further action required</li> <li>• If it will not be compliant look to change to MTD compliant software or consider bridging software</li> </ul>	Move to MTD compliant software where submission can be made direct from software: <ul style="list-style-type: none"> <li>• Xero, Quickbooks, Sage Cloud (see separate details on pricing structure)</li> </ul> Continue to use software and export data into Excel spreadsheet (template can be provided) and purchase bridging software for MTD submission