

HMRC-led MTD sign up: Illustrative checking step screens

Step 1 – this screen will appear when accessing the records in the Agent Services Account (ASA) for a client who has been signed up for MTD by HMRC. Individual sole trader and/or property businesses can be ceased or added as needed (see steps 1A – 1D), or if all information is up to date the ‘confirm and continue’ button should be clicked (see step 2).

Variations of this page design:

Sole trader and UK property

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Check HMRC records only list your active businesses

You now have quarterly deadlines for your sole trader and/or property businesses listed here.

Making sure this page is correct will help avoid both missing deadlines for your active businesses and having deadlines for an income source you may have closed down or sold.

If necessary, you must:

- add any businesses that are missing
- cease any that you no longer get income from

Your active businesses

Sole trader businesses

You're self-employed if you run your own business as an individual and work for yourself. This is also known as being a 'sole trader'. If you work through a limited company, you're not a sole trader.

Gardening design

Cease

Business name

Dex Ev@ns Gardener

Business state

Active

Freelance illustrator

Cease

Business name

Dex Evans Design

Business state

Active

Add a sole trader business

Property businesses

If you get income from one or more properties in the UK, you have a UK property business. If the property is outside the UK, you have a foreign property business. For example: letting houses, flats or holiday homes either on a long or short term basis.

UK property

Cease

Business state

Active

Add foreign property business

Confirm HMRC records only list your active businesses

This page only needs to list all your active sole trader and property income sources. Any other business details that are not right, misspelt or out of date, can be amended at a later date.

Confirm and continue

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Sole trader and ceased UK property

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Ceased

You have ceased a business

View your [ceased businesses](#).

Check HMRC records only list your active businesses

You now have quarterly deadlines for your sole trader and/or property businesses listed here.

Making sure this page is correct will help avoid both missing deadlines for your active businesses and having deadlines for an income source you may have closed down or sold.

If necessary, you must:

- add any businesses that are missing
- cease any that you no longer get income from

Your active businesses

Sole trader businesses

You're self-employed if you run your own business as an individual and work for yourself. This is also known as being a 'sole trader'. If you work through a limited company, you're not a sole trader.

Gardening design

Cease

Business name

Dex Evi@ns Gardener

Business state

Active

[Add a sole trader business](#)

Property businesses

If you get income from one or more properties in the UK, you have a UK property business. If the property is abroad, you have a foreign property business. For example: letting houses, flats or holiday homes either on a long or short term basis.

[Add property business](#)

[Add foreign property business](#)

Your ceased businesses

One or more businesses have been ceased.

[View all ceased businesses](#)

Confirm HMRC records only list your active businesses

This page only needs to list all your active sole trader and property income sources. Any other business details that are not right, misspelt or out of date, can be amended at a later date.

Confirm and continue

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Note: the 'Completion' screen does not display when a user ceases a business. Instead, confirmation the income source is ceased is displayed at the top of this page and in the 'Your ceased businesses' section [this section only displays if a user ceases one or more businesses during the journey]

Step 1B – if a new sole trade is added the following screen will show as acknowledgement.

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Added
Sole trader business added
[View your sole trader businesses.](#)

Check HMRC records only list your active businesses

You now have quarterly deadlines for your sole trader and/or property businesses listed here.

Making sure this page is correct will help avoid both missing deadlines for your active businesses and having deadlines for an income source you may have closed down or sold.

If necessary, you must:

- add any businesses that are missing
- cease any that you no longer get income from

Your active businesses

Sole trader businesses

You're self-employed if you run your own business as an individual and work for yourself. This is also known as being a 'sole trader'. If you work through a limited company, you're not a sole trader.

Gardening design	Cease
Business name	Dex Evi@ns Gardener
Business state	Active

[Add a sole trader business](#)

Property businesses

If you get income from one or more properties in the UK, you have a UK property business. If the property is outside the UK, you have a foreign property business. For example: letting houses, flats or holiday homes either on a long or short term basis.

[Add property business](#)

Foreign property	Cease
Business state	Active

Confirm HMRC records only list your active businesses

This page only needs to list all your active sole trader and property income sources. Any other business details that are not right, misspelt or out of date, can be amended at a later date.

[Confirm and continue](#)

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Note: the 'Completion' screen does not display when a user adds a business. Confirmation the income source has been added is instead displayed at the top of this page and in the 'Your active businesses' section.

This does not mean that the new trade is within MTD straight away - instead, under the 'latency period' rules, the new trade first has to be reported on a tax return. If the taxpayer wants to bring the new trade into MTD earlier they will need to do this via a separate step in the PTA/BTA or their agent can do so via the ASA (see <https://www.gov.uk/guidance/use-making-tax-digital-for-income-tax/add-or-cease-income-sources>).

Step 1C – if a new UK property business is added the following screen will show as acknowledgement.

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Added
UK property business added
[View your UK property business](#)

Check HMRC records only list your active businesses

You now have quarterly deadlines for your sole trader and/or property businesses listed here.

Making sure this page is correct will help avoid both missing deadlines for your active businesses and having deadlines for an income source you may have closed down or sold.

If necessary, you must:

- add any businesses that are missing
- cease any that you no longer get income from

Your active businesses

Sole trader businesses

Gardening design	Cease
Business name	Dex Evi@ns Gardener
Business state	Active

[Add a sole trader business](#)

Property businesses

UK property	Cease
Business state	Active

[Add foreign property business](#)

Confirm HMRC records only list your active businesses

This page only needs to list all your active sole trader and property income sources. Any other business details that are not right, misspelt or out of date, can be amended at a later date.

[Confirm and continue](#)

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Note: the 'Completion' screen does not display when a user adds a property business. Confirmation the income source has been added is instead displayed at the top of this page and in the 'Your active businesses' section.

This does not mean that the new property business is within MTD straight away. Instead, under the 'latency period' rules, the new trade first has to be reported on a tax return. If the taxpayer wants to bring the new property business into MTD earlier they will need to do this via a separate step in the PTA/BTA or their agent can do so via the ASA (see <https://www.gov.uk/guidance/use-making-tax-digital-for-income-tax/add-or-cease-income-sources>).

Step 1D – if a new foreign property business is added the following screen will show as acknowledgement.

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Added
Foreign property business added
[View your foreign property business](#)

Check HMRC records only list your active businesses

You now have quarterly deadlines for your sole trader and/or property businesses listed here.

Making sure this page is correct will help avoid both missing deadlines for your active businesses and having deadlines for an income source you may have closed down or sold.

If necessary, you must:

- add any businesses that are missing
- cease any that you no longer get income from

Your active businesses

Sole trader businesses

Gardening design	Cease
Business name	Dex Evi@ms Gardener
Business state	Active

[Add a sole trader business](#)

Property businesses

[Add property business](#)

Foreign property	Cease
Business state	Active

Confirm HMRC records only list your active businesses

This page only needs to list all your active sole trader and property income sources. Any other business details that are not right, misspelt or out of date, can be amended at a later date.

[Confirm and continue](#)

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Note: the 'Completion' screen does not display when a user adds a property business. Confirmation the income source has been added is instead displayed at the top of this page and in the 'Your active businesses' section.

This does not mean that the new property business is within MTD straight away. Instead, under the 'latency period' rules, the new trade first has to be reported on a tax return. If the taxpayer wants to bring the new property business into MTD earlier they will need to do this via a separate step in the PTA/BTA or their agent can do so via the ASA (see <https://www.gov.uk/guidance/use-making-tax-digital-for-income-tax/add-or-cease-income-sources>).

Step 2 – once the check has been completed, and all required businesses ceased or added, the following confirmation screen will display:

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Have you checked that HMRC records only list your active businesses?

You can change any other business details at a later date.

☐

Yes
If the previous page only lists your active businesses then the check is complete

☐

No
Select this option if you have not checked the previous page

Continue

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Step 3 – Completion page

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Check complete

You have confirmed that HMRC records only list your active businesses

What to do next

You now need to provide HMRC a quarterly update for each of your active sole trader and property income sources.

To do this, you need to:

- get software that works with Making Tax Digital for Income Tax
- find out what is due and submit your quarterly update(s)

Getting software

To submit your quarterly updates, you or your agent must have software compatible with Making Tax Digital for Income Tax. There are both paid and free options to choose from.

[Find out about compatible software \(open in new tab\)](#)

Submitting your update(s)

In your account you can see which quarterly updates are due and what information you need to provide. Then you must use your compatible software to:

- create digital records of your property and sole trader income and expenses
- send your quarterly update(s) to HMRC

[Check your latest updates and deadlines](#)

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