Easily manage non-digitalised clients under MTD for Income Tax, with ApariPro

MTD for Income Tax means quarterly updates and end of period submissions for sole traders and landlords earning above a certain threshold (£50,000 in 2026, £30,000 in 2027, and £20,000 in 2028).

For firms in the UK, the compliance workload isn't just about in-house processes, it's about client readiness.

Many firms still support a significant number of clients who aren't set up to keep digital records on a day-to-day basis. Some are comfortable with spreadsheets, while others rely on paper, bank statements, or simple notes. Yet the firm remains responsible for getting accurate data in on time.

Non-digitalised clients pose a challenge

When clients aren’t digitally enabled, the quarterly reporting cycle can quickly become admin heavy, for example you may spend time:

- Chasing information across multiple channels.
- Re-formatting and re-keying data to make it submission ready.
- Managing incomplete records and late responses.
- Dealing with increased pressure on teams, as deadlines repeat every quarter.

Over time, this reduces visibility, increases manual effort, and makes it harder to deliver a consistent service across a large client base.

Why traditional bookkeeping tools don’t work for every client

Full bookkeeping platforms are a strong fit for some clients, but they’re not the right answer for everyone.

For clients with simpler affairs, limited time, or low digital confidence, bookkeeping software can feel like an extra job. That often leads to:

- Low adoption or partial usage.
- Ongoing support requests and training needs.
- More time spent correcting data than reviewing it.
- A return to manual workarounds as deadlines approach.

The outcome is familiar: your firm needs a practical way to collect clean, usable information without forcing every client into a full bookkeeping process.

A practical approach: CCH iFirm MTD for Income Tax and ApariPro

CCH iFirm MTD for Income Tax supports your authorised agent submissions to HMRC and remains the system of record for compliance.

ApariPro is an AI-powered data capture software that gives non-digitalised clients a simple way to submit their income and expense information each quarter, without positioning it as bookkeeping software.

The outcome is a clear, controlled workflow:

- Clients submit their data in a straightforward format.
- Accountants review and make any required adjustments.
- Either the clients submit quarterly updates via ApariPro or the accountant can submit via CCH iFirm MTD for Income Tax quarterly.
- The accountant then uses CCH iFirm for the final declaration.

How AppariPro works with CCH iFirm MTD for Income Tax

How it works in practice

1. Invite the client to submit their quarterly data.

ApariPro provides a simple client-facing route for capturing the information you need, aligned to quarterly reporting and your firm's branding.

2. Client submits income and expense details.

Designed for clients who are not using full bookkeeping software. The focus is on ease and completion, not features.

3. Accountant reviews the submission.

Your team checks the figures, queries anything missing, and finalises the information before submission.

4. Submit quarterly updates.

Submissions are made by the client through ApariPro, or the accountant can do this in CCH iFirm MTD for Income Tax. CCH iFirm remains your compliance system of record.

Key benefits for firms

- **Reduce admin effort across quarterly cycles.**

Less chasing, fewer formats to reconcile, and a clearer workflow for non-digitalised clients.

- **Improve completeness and consistency of client data.**

Standardised submission makes review easier and reduces last minute rework.

- **Keep teams focused on review, not rekeying.**

More time spent on professional oversight and less on manual handling.

- **Maintain control of the compliance process.**

You review before anything is submitted, and CCH iFirm remains at the centre of authorised submissions.

- **Scale MTD readiness across a mixed client base.**

One approach for bookkeeping clients and a practical route for those who aren't.

Key benefits for clients

- **A simple way to meet quarterly requirements.**

Clients can provide information without having to learn a new complex software platform.

- **Less disruption to how they work today.**

A practical step towards MTD compliance that fits lower complexity needs.

- **Clarity on what is required each quarter.**

Clear prompts and a structured submission process can reduce confusion and delays.

- **Confidence that the firm is overseeing submissions.**

Clients submit the information, and the accountant reviews before HMRC

Next steps

BOOK A DEMO →

to see how ApariPro works alongside CCH iFirm MTD for Income Tax, and how it can support non-digitalised clients through quarterly reporting.

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