

Getting started with Intuit Link

What is Intuit Link?

Intuit Link is an online portal for you and your accountant to connect and share tax documents to complete your tax return. No more bulky tax packets or piles of paper. Now you can deliver your information simply and securely online.

Step 1

Access Intuit Link

To begin, open the invitation email from your accountant.


ACCEPT invitation or **SIGN IN** to access Intuit Link.

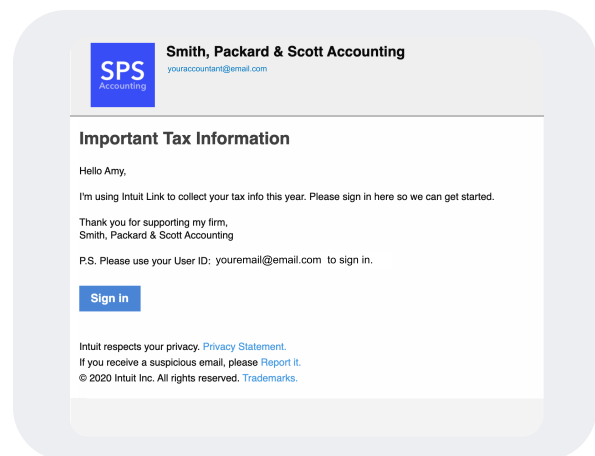
Returning users:

If you have used Intuit Link before or have an existing Intuit account **SIGN IN** (do not sign up) with your existing credentials.

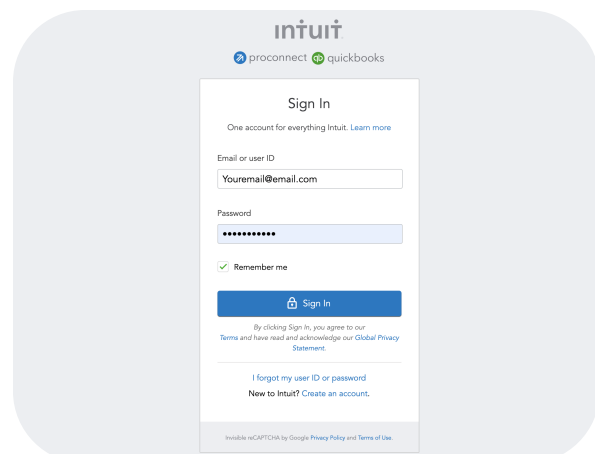
New users:

If this is your first time using Intuit Link **SIGN UP** using the **SAME** email address from your invitation.

 **Quick Tip:** Your sign in email and invitation email should be the same.



Sample email invitation to use Intuit Link from your accountant.

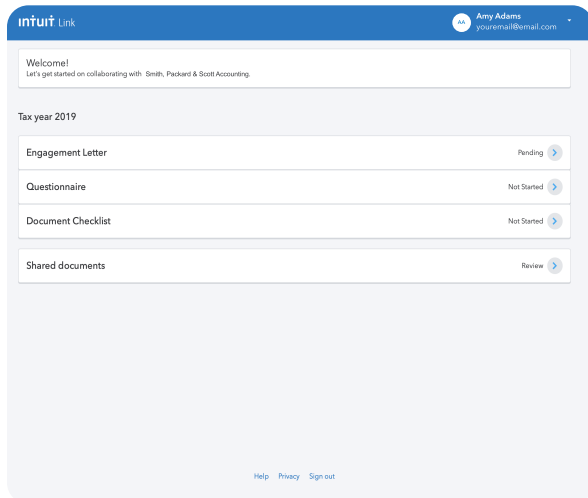


Sign in screen for Intuit Link.

Step 2

Understand your Intuit Link

Intuit Link is home to all your requests for key information related to your upcoming tax return including your engagement letter, questionnaire, document checklist and shared documents.



Intuit Link homepage.

Engagement letter

Read, review, and sign your terms of agreement with your accountant.

Questionnaire

Answer a set of questions your accountant needs to prepare your tax return.

Document checklist

Review and share the documents your accountant needs to complete your tax return.

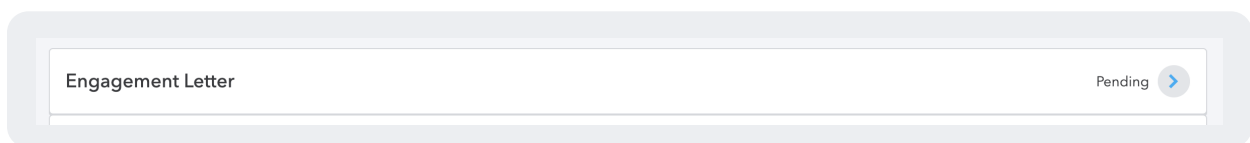
Shared documents

All your tax documents can be stored within Intuit Link.

Step 3

Share Info With Accountant

First step, sign your engagement letter.



Open the engagement letter, review the agreement, then type your name to **ACCEPT** agreement. Once you **ACCEPT**, your agreement will be sent back to your accountant for review and marked **DONE** on your Link homepage.

Next, complete the questionnaire.

Select a question from the list and type your answer in the respective field. **Save** your response to each question or mark **Does not apply** if the question doesn't apply to your tax situation.

The screenshot shows a questionnaire interface. At the top, it says 'Questionnaire' and 'Please review the following. If needed, you can skip and come back later when you have more information.' Below this is a question: 'What is your current address?'. There is a text input field with a placeholder 'Answer here'. To the right of the input field is a 'Does not apply' checkbox. At the bottom left, there is a 'Save' button and a 'Comments' section with a plus icon.

Sample question from Questionnaire.

Select **Comments** to leave a note and **Post** to share it with your accountant (optional).

Continue this for each question listed and **Submit** to send responses to your accountant.

Final step, share your documents.

Add to your employer and financial institutions to securely pull in your tax forms and quickly share them with your accountant. You can also drag and drop them into the dotted area or **Browse** to upload files from your device.

The screenshot shows the 'Document checklist' view in Intuit Link. At the top, it says 'Document checklist' and 'Your documents'. Below this is a section titled 'Let's import your tax documents.' with three options: 'Add your employer and we'll get your W-2', 'Select your banks and we'll get your tax forms', and 'Drag and drop or upload files from your device.' Below this is a list of 'Requested items' with checkboxes next to each item. At the bottom right, there is a 'Done' button.

Document checklist view with sample request.

The screenshot shows the 'Matching progress' view in Intuit Link. At the top, it says 'Great work!' and 'We found items matching your accountant's request.' Below this is a circular progress indicator and the text 'Matching in progress ...'. At the bottom, there is a list of 'Requested items' with checkboxes next to each item.

Matching uploaded documents with requested items.

Viola, Intuit Link will match selected files to your **Document checklist** and notify your accountant as your documents are matched.

Great job, your work here is done.