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.

tandem	
Important Tax Information	
Hello	
I'm using Intuit Link to collect your tax info this year. Please sign in here so we can get starte	ed.
Thank you for supporting my firm,	
P.S. Please use your User ID: youremail@email.com to sign in.	
Sign in	
Intuit respects your privacy. Privacy Statement.	
If you receive a suspicious email, please Report it.	
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Sample email invitation to use Intuit Link from your accountant.

New users:

-Q

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

เทรินเริ่	
🔕 proconnect 🔞 quickbooks	
Sign In	
One account for everything Intuit, Learn more	
Email or user ID	
Youremail@email.com	
Password	
✓ Remember me	
🔒 Sign In	
By clicking Sign In, you agree to our Terms and have read and acknowledge our Global Privacy Statement.	
I forgot my user ID or password	
New to Intuit? Create an account.	

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.

n tuit Link	Amy Adams youremail@email.com
Welcome!	
x year 2024	
Engagement Letter	Reading ()
Questionnaire	feetilation (3
Document Checklist	her thread ()
Shared documents	Brook 1
And Strong Spread	

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.

Engagement Letter

Pending >

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.

What is your current address?	
Answar hera	
Swe	
+ Comments	Does not ap

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.

Document checklist Your documents Review the checklist and select the appropriate files to upload. You can upload multiple fi	dea and nature to complete this form at anytene.	and the second se	ireat work! ching your accountant's request.	W2 Mar 4, 20 W2 Mar 4, 20
	Series processions of and performan forms.	109900xpell 10978.pell MOG377Epreg Upbled more	ing in progress	ن الله 4,20 الله 4,20 الله 4,20
Requested items		Requested items		
W-2 from Apple isc.	1099-MISC from other income sources.	Unmatched documents.	SSA-1099 from the Social Decu	
W-2 from Best Buy.	1099-Q from qualified education programs.	Unmatcheo documents. @	SSA-1099 from the Social Decu	rity Administration.
1099-INT interest income from your bank(s).	1099-8 from broker and barter exchange transactions.	W-2 from Apple Inc.	1099-MISC from other income	sources.
1099-DIV dividends and distributions from your financial institution(s).	K-1 from your partnenships.	W-2 from Best Buy.	1099-Q from qualified education	an programs.
1099-CDMP from your financial institution(s).	K-1 from your 5-corporation.	1099-INT interest income from your bank(s).	1099-B from broker and barter	exchange transactions.
W-2G from your gambling winnings.	K-1 from your trusts or estates.	1009-DIV dividends and distributions from your financial	K-1 from your partnerships.	
1099-R from your pension or retinement provider.	1098 from your bank or lender.			
	1099-G from the government.	1099-COMP from your financial institution(s).	K-1 from your S-corporation.	
RRB-1099 from the Railroad Retirement Board (RRB).		W-2G from your gambling winnings.	K-1 from your trusts or estates.	
RRB-1099 from the Railroad Retirement Board (RRB). SSA-1099 from the Social Decurity Administration.		1099-R from your pension or retirement provider.	1098 from your bank or lender.	
	Done	and the second s		

Document checklist view with sample request.

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.