Intuit HelpIntuit

How taxpayers can use Intuit Link to send requested documents

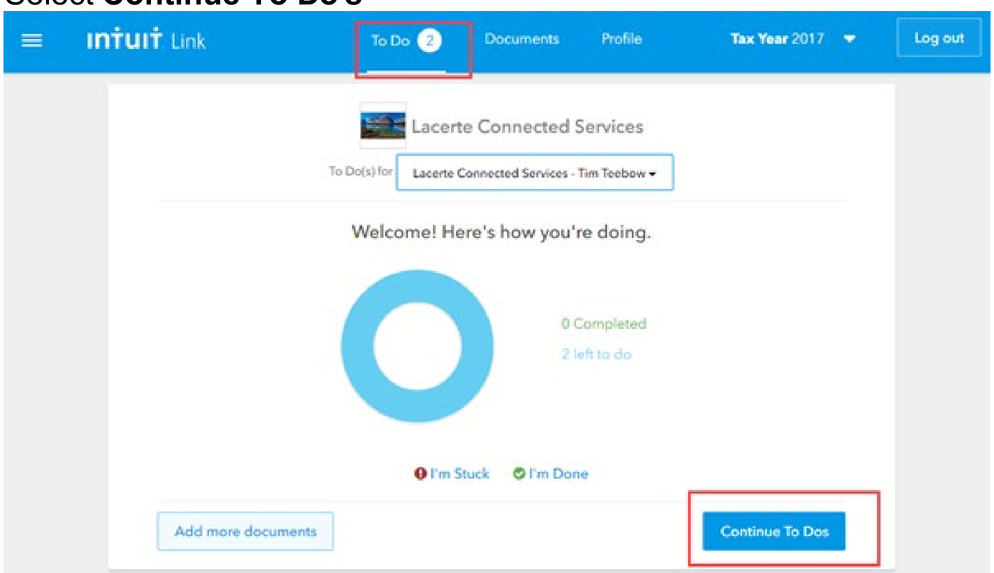
by Intuit• Updated 9 months ago

Taxpayers, or clients, can upload documents from their computers or download documents from their banks or payroll providers. Down below we will discuss how you, the taxpayer, can use Intuit Link to communicate with your tax preparer.

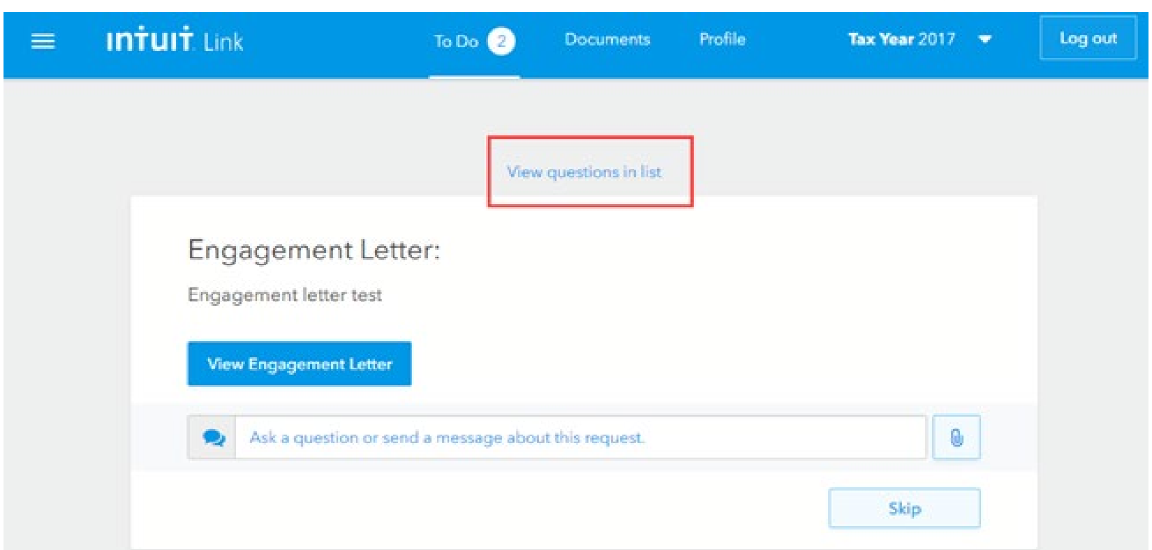
The maximum size of a file that can be uploaded to Intuit Link is 30 MB.

How to respond and add documents to tax preparer questions in Intuit Link

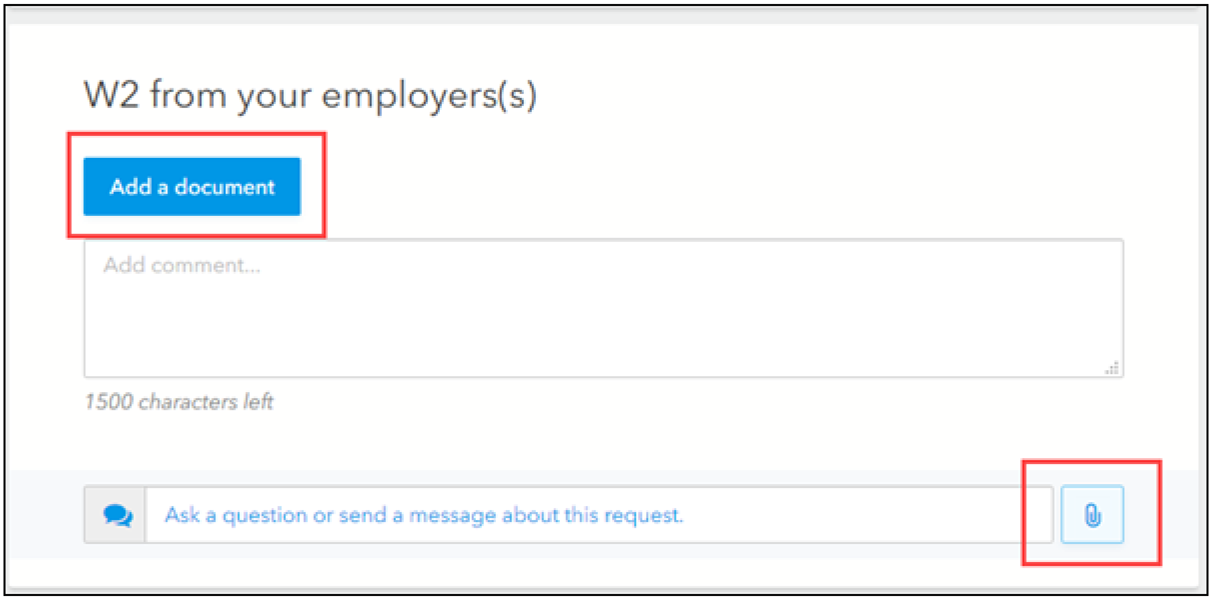
1. Select the **To Do** tab.
2. Select **Continue To Do's**



3. Select **View questions in list** to see all questions on the same page.



4. Click the **paper clip** or **Add a Document**.



5. Select **Upload It** to upload a document from your computer.
6. Browse to the folder where the document is saved, select the document, and click **Open**.
    - To upload multiple documents in response to one question from the accountant, hold down the **Crtl** key on your keyboard and click the files that need to be uploaded. Then click **Open**.
        - Alternatively, you can upload one file at a time to a single question by clicking the paper clip, selecting one document to upload, and then repeating this process.
7. The site will then scan the file for viruses. When the scan is complete the question will have a green check mark showing the question is complete and the document will be attached.

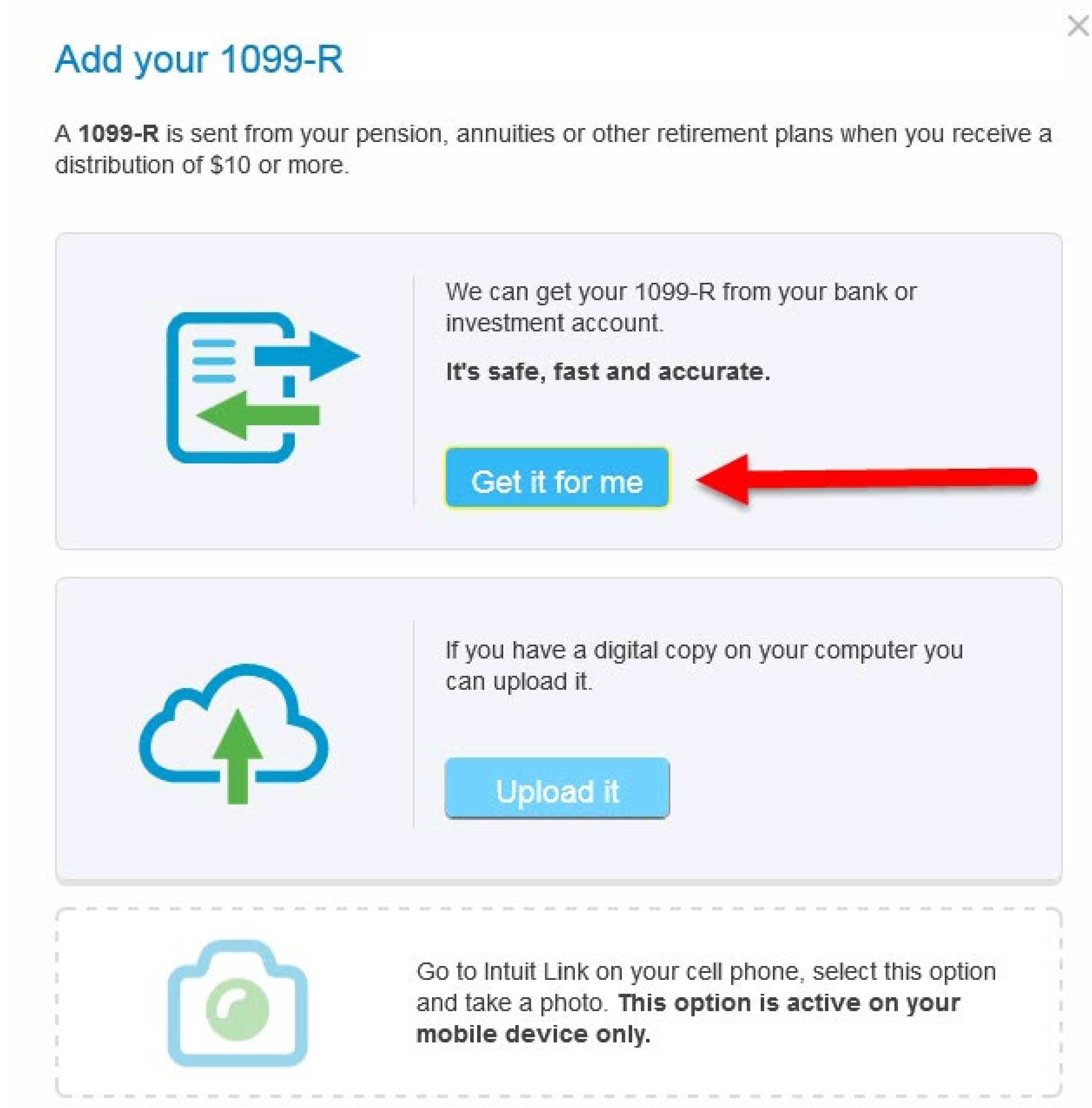
How you can use the Get it for me option to respond to document requests.

You can use the **Get it for me** option to download documents from their bank or payroll provider websites.

- **Get it for me** only appears if the question description contains the following words: W2, 1099-INT, 1099-DIV, 1099-R, 1099-Misc, 1099-B, or 1098.

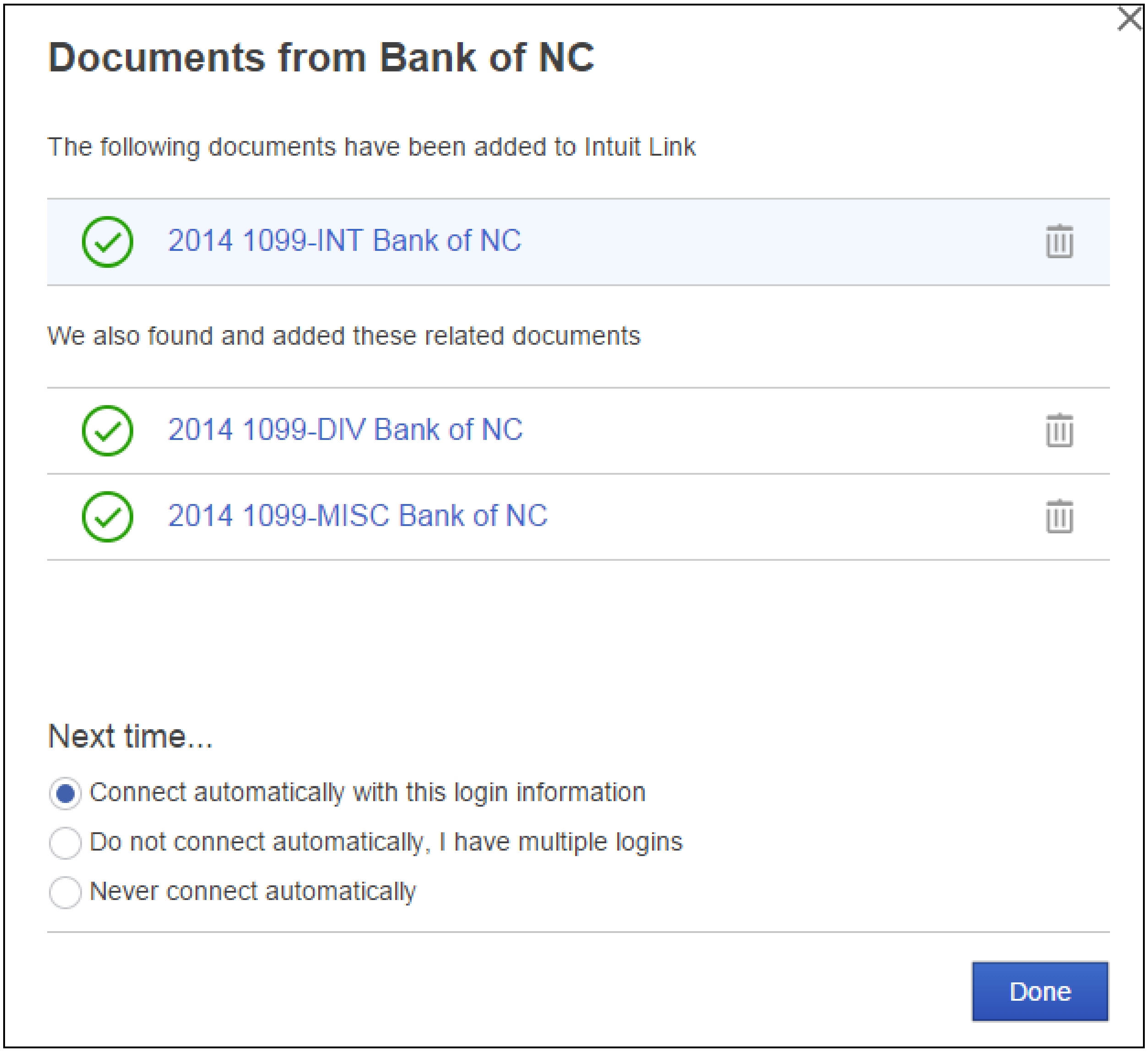
How to download documents from a financial institution (1098, 1099, etc…)

1. Click the **To Do** tab.
2. Locate the request that you need to upload a document for and press **Add A Document**.
3. Select **Get it for me**.

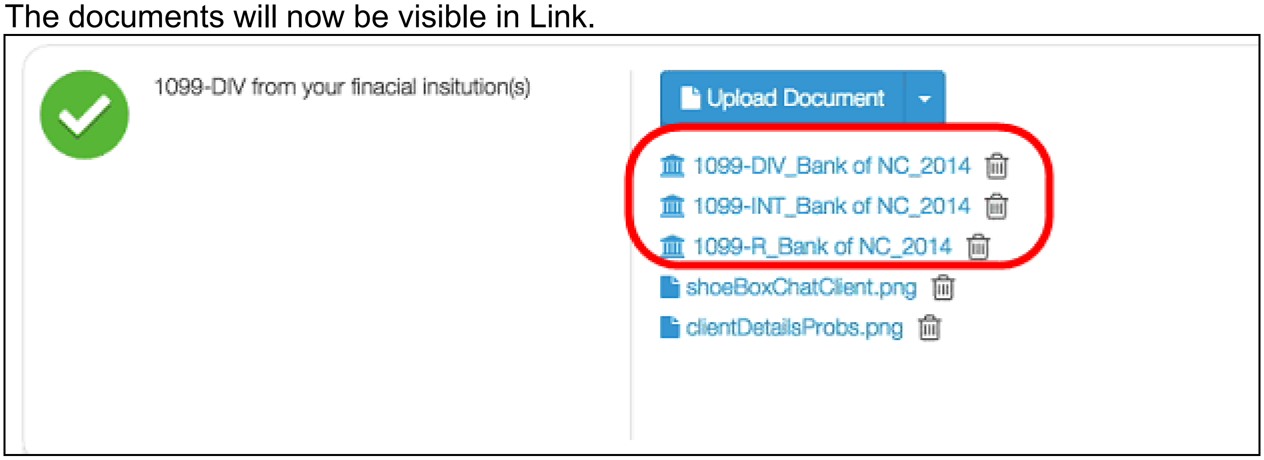


4. Type the name of the bank or investment account in the search field.
5. Enter your login credentials for your financial institution.

6. Intuit Link will detect the document you are wanting to download and any related documents.
    - Intuit **can't** access documents **without taxpayer permission**.



7. Select how you want to connect to your financial institution the next time you connect.
    a. Select **Connect automatically with this login information** if you would like the web browser to save your login id and password.
    b. Select **Do not connect automatically, I have multiple logins** or **Never connect automatically** if you don't want the web browser to save your login information.
8. To download the document(s) to Link, click **Done**.
    - Click the trash can icon next to the documents you don't want to download.
9. The documents will now be visible in Link.



How to download W-2's from a payroll provider

We support the following payroll vendors: ADP and Intuit Payroll Services

1. Click on the **To Do** tab.
2. Locate the W-2 Request item and press **Add A Document**.
3. Click **Get it for me**.
4. Enter the employer's EIN and click **Continue**.
5. Enter the **SSN**, **Box 'D' Control Number**, and **Box '1' Amount**.
6. Click **Get my W-2** and click **Done**.
    - Intuit **can't** access documents **without taxpayer permission**.

Troubleshooting uploading documents

If you encounter problems uploading documents such as a continuously spinning wheel or an error triggers while uploading documents, clear your browser's cache and try the operation again.

For steps on clearing the browsers cache, see How to resolve ProConnect Tax browser errors .

Supported browsers:

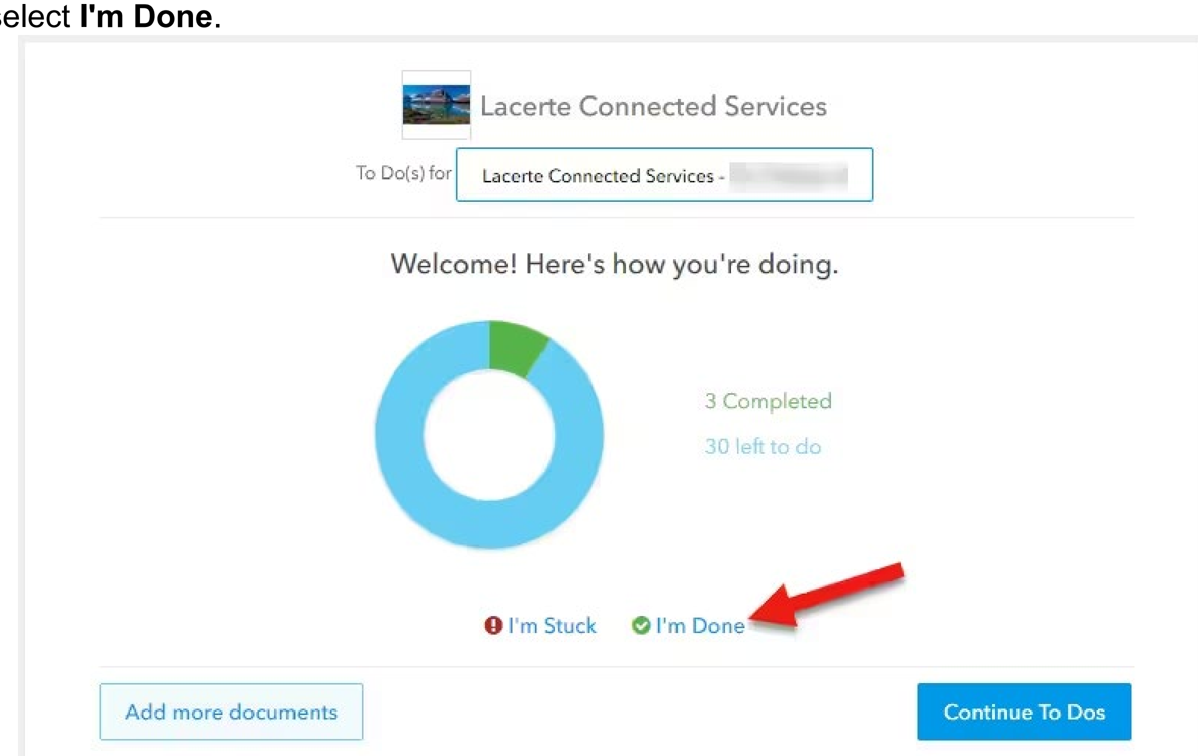
- Google Chrome (newest version): Recommended
- Mozilla Firefox (newest version): Recommended
- Safari (newest version)
- Internet Explorer 11+

How do I notify my accountant that I am done or need help in Intuit Link?

You can notify your accountant when you complete the checklist, or if you're stuck and need help.

To notify the accountant when when the checklist is completed:

1. Sign in to Intuit Link site for taxpayers.
2. Select the **To Do** tab.
3. To notify your accountant that you're done answering questions and uploading documents, select **I'm Done**.

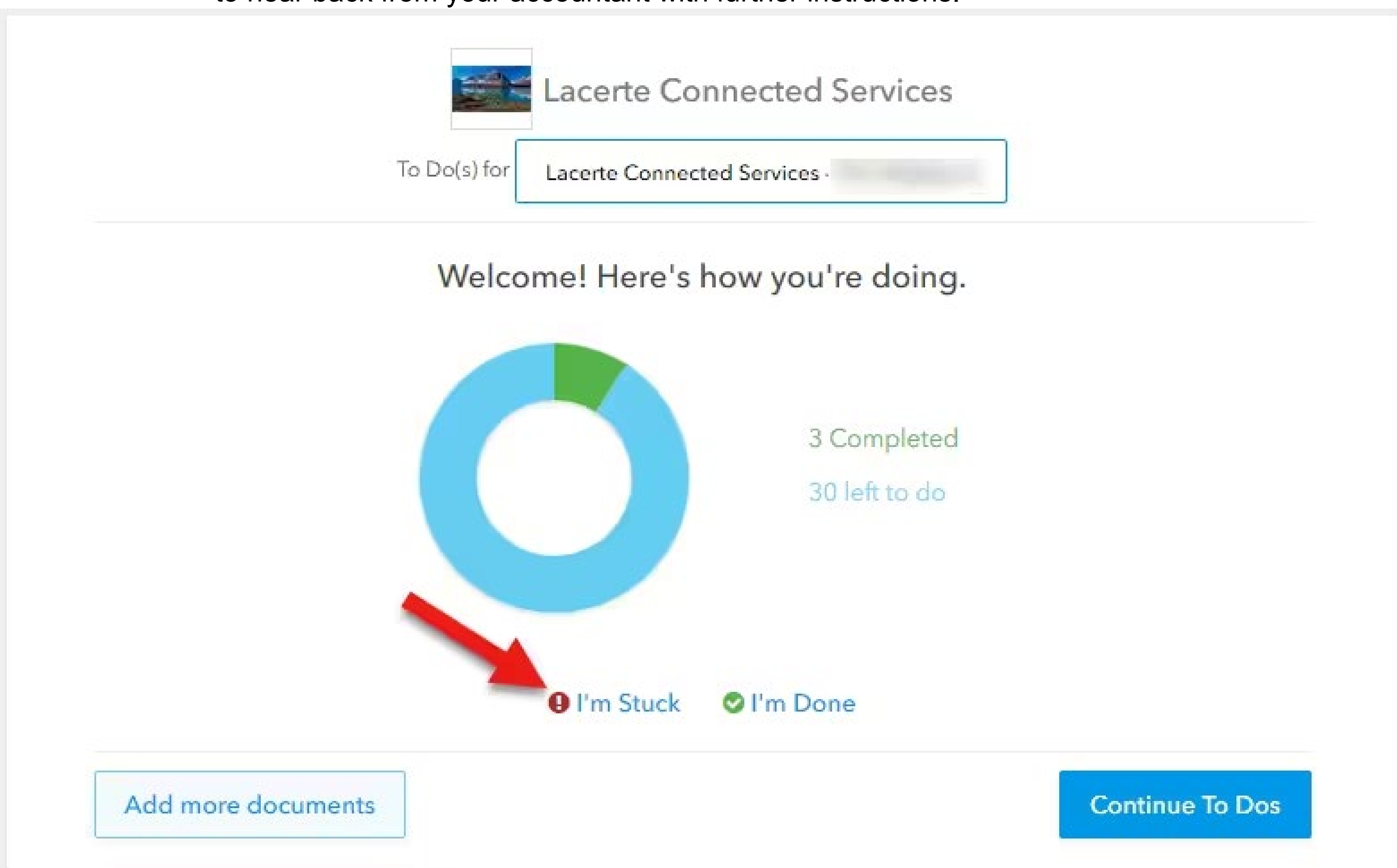


After selecting **I'm Done**, the following will occur:

1. The default email program will then open a new email message with the subject of "I'm Done," so taxpayer can send an email to the preparer if they choose to. If the new email doesn't open with the preferred email program, make the preferred email program the default in Windows.
2. The preparer's **Activity Feed** on the Accountants Intuit Link portal will be updated to show that the taxpayer has completed their task.

To notify the accountant that you need help:

1. Sign in to Intuit Link site for taxpayers.
2. Select the **To Do** tab.
3. To notify your accountant that you're done answering questions and uploading documents, select **I'm Stuck**.
    - This will alert the accountant that you need help in Intuit Link. Now, you just need to wait to hear back from your accountant with further instructions.



After selecting **I'm Stuck**, the following will occur:

1. The default email program will then open a new email message with the subject of "I'm Stuck," so taxpayer can send an email to the preparer if they choose to. If the new email message doesn't open with the preferred email program, make the preferred email program the default in Windows.
2. The preparer's **Activity Feed** on the Accountants Intuit Link portal will be updated to show that the taxpayer is stuck and needs assistance.

Canceling the alert

You can clear the alert at any point by clicking on the **Cancel Alert** button. This will revert back to the **I'm Done** and **I'm Stuck** selections.