



Intuit Link is a secure web-based portal that accountants can use to gather tax data from their clients. Your experience with Intuit Link is initiated by an email invitation from your Tax Preparer.

Table of contents:

- [How to change the email address you use for Intuit Link](#)
- [How to upload documents to your tax preparer](#)
- [Get my W-2](#)
- [Get my forms](#)
- [Get it from Google Drive](#)
- [From a desktop computer: Browse to upload a document your computer](#)
- [From a mobile device: Take a picture or Upload documents](#)
- [Bulk uploading taxpayer documents](#)
- [Troubleshooting uploading documents](#)
- [How can I reset my password if I forgot it?](#)

How to change the email address you use for Intuit Link:

- If you have not accepted the invite contact your preparer to issue a new invite under the correct email.
- You should **not** change the username as that is what ties the accountant/taxpayer relationship, only the email address should be changed.
- If your Link invitation has been sent to the incorrect email and you accepted it, you can change the notification email to receive emails on your preferred email by completing the following steps:
 1. Log into [Intuit Account Manager](#) with the email address that was invited to Intuit Link.
 2. Select **Sign in & Security**.
 3. Click on your email address to edit it
 4. Change the **Email address** to the correct one and enter the new email in **Confirm email address**.
 5. Click **Save**.

The next time you login you will still use the incorrect email, but any notifications or password resets will be sent to your correct email.

How to upload documents to your tax preparer:

You can upload documents from your computer, phone or tablet or download documents from your Financial Institutions and Payroll Provider.

To upload your documents:

1. Sign in to [Intuit Link](#)
2. Select the **Document Checklist**.
3. Select how you want to send your document.
4. Click **Share a document**

There are 4 ways to share documents with your Preparer:

Get my W-2:

W-2 from your Payroll Provider:

- ADP
- 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 employers EIN and then click **Continue**.
5. Enter the SSN, Box D control number, and Box 1 amount. Then click Get my W-2.
6. Click Done.

Please Note: Intuit cannot access documents without taxpayer permission.

Get my forms:

1099-INT, 1099-DIV, 1099-R, 1099-Misc, 1099-B, or 1098 from your financial institution

1. Once you have clicked Get it for me
2. Type the name of the bank or investment account in the search field.
3. Enter your login credentials for your financial institution. This will be the same user ID and password you use to login to your bank or investment account.
4. Intuit Link will detect the document you are wanting to download and any related documents.
5. Select how you want to connect to your financial institution the next time you connect.
6. Select **Connect automatically with this login information** if you would like the web browser to save you login id and password.
7. Select **Do not connect automatically, I have multiple logins** or **Never connect automatically** if you do not 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 do not want to download.
9. The documents will now be visible in Link.

Get it from Google Drive

1. Select **Get it from Google Drive**.
2. Sign in to your **Google Drive Account**.
3. If prompted to allow access, choose yes.
4. Browse to the documents, once selected press Select to upload it.

From a desktop computer: Browse to upload a document your computer

1. To upload a document that is saved to the computer, select the **Browse** button.
2. Browse to folder where the document is saved, select the document, and click **Open**.
 - o To upload multiple documents in response to one question from the accountant, hold down the **ctrl** 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 multiple times.
3. Select Done.

Maximize size of a file that can be uploaded to Link is 30 MB.

From a mobile device: Take a picture or Upload documents

Intuit Link makes it easy to send documents to your Preparer. You can upload documents by taking a picture directly from your phone.

The **Take Photo** option is only available when logging in using a mobile device such as a smartphone or tablet. There is no app to download.

Snap photo of a document and upload to the Tax Payer Link portal:

1. Open the browser on a mobile device and go to <https://prolink.intuit.com>
2. **Sign in.**
3. Enter your user ID and password to login.
4. Select **Document Checklist**.
5. Select the document name you need to upload, then **Share a document**.
6. Under **Take a photo or upload documents from your phone** select **Upload documents**.
7. Select **Take Photo or Video**.
8. Using your mobile devices camera take the photo, then select **Done**.

Bulk uploading taxpayer documents

1. On the Documents screen, click the **Browse** button.
2. In the next window, search for and select the files you'd like to upload.
 - Windows: To select multiple files on that are adjacent, use the **Shift** key and select the first and last file at the end of the entire range you wish select. Alternatively, to select multiple files not within a defined range, hold down the **Ctrl** key as you click on each file until all are selected.
 - Mac: To select multiple files that are adjacent, use the **Shift** key and select the first and last file at the end of the entire range you wish select. Alternatively, to select multiple files notwithin a defined range, hold down the **Command** key as you click on each file until all are selected.
3. Once all desired files are selected, click **Choose**.
4. Select the **Done** button at the bottom of the Upload Progress window once the button presents itself.
5. Once the files are uploaded, the tool will then match the files with any source documents your tax preparer requested. Any uploads the tool was unable to match will be bucketed as Unmatched Documents, which may later be assigned a document type by the tax preparer.

Troubleshooting uploading documents

If you encounter problems uploading documents such as continuous spinning wheel or an error occurs while uploading documents, clear the browsers cache and try the operation again.

Down below you will find links to instructions on how to clear cache/cookies for our supported browsers:

- [Google Chrome](#)
- [Mozilla Firefox](#)
- [Microsoft Edge](#)

How can I reset my password if I forgot it?

If you have forgotten your password, you can reset it by:

1. Go to [Intuit Account Manager](#)
2. Enter your email if prompted
3. instead of entering password, select **Sign in a different way**
4. Select to get a code via **Text** or **Email**
5. Enter your code to sign in
6. Once in the Intuit Account Overview page, select **Sign in & security**
7. Select Password
8. Enter your new password